Trinity Financial & Madison Park Development Corporation's Proposal for:

Crescent Parcel



Request for Proposals for Crescent Parcel
Submitted to: Boston Planning & Development Agency

TRINITY FINANCIAL

MPDC

Submitted By: Trinity Financial, Inc. and
Madison Park Development Corporation
c/o Trinity Financial, Inc.
75 Federal St., 4th Floor
Boston, MA 02110
Tel: (617) 720-8400
April 21, 2021

Crescent Parcel RFP Response[1]

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[1]Financial Submission is submitted under a seperate cover

[2]We have combined some sections called for in the RFP with others in order to consolidate our response as noted in the following footnotes. As requested, Tab K provides a listing/description of any lawsuits brought against the Proponent or any principals of the Proponents in courts situated within the United States within the past five years.

[3]Development & Design Concept includes Design Narrative

[4]Economic Development Strategy includes descriptions of Boston Residents Jobs Policy, Diversity and Inclusion Plan, and Good Jobs Strategy Plan

[5]The budgets called for among the required forms are included in the Financial Submission submitted under separate cover

Cresent Parcel



Tab A LETTER OF INTEREST

April 21, 2021

Ms. Teresa Polhemus, Executive Director/Secretary
Boston Planning & Development Agency
Municipal Protective Services Desk, First Floor
12 Channel Street
South Boston, MA 02210

Re: Trinity Financial and MPDC's Response to Boston Planning & Development Agency's RFP for Crescent Parcel

Dear Ms. Polhemus, BPDA Board, and Members of the Roxbury Community,

Trinity Financial ("Trinity") and Madison Park Development Corporation ("MPDC") are pleased to submit this proposal to redevelop the property at Crescent Parcel. We recognize that many in the community and the City have worked tirelessly over many years to put together a vision for that property's redevelopment. That vision is one where families of differing incomes live in dignity and quality housing together. It is a vision of a public realm that is vibrant, community-oriented, and preserves and enhances Roxbury's trees. It is a vision where opportunities and services are provided to increase the net worth of Roxbury residents and businesses; and a place where Boston residents, and particularly people of color and women, and the business they run, can have stable work with good wages and benefits, and meaningful business contracts in the course of building, operating, and maintaining the property. And finally, it is a vision of residents living comfortably in a place that consumes far less energy and relies on energy from renewable sources much more than energy from fossil fuels. We share this vision and have made it the foundation of our proposal.

Accordingly, we propose to develop at Crescent Parcel 177 housing units, over 12,000 square feet (sf) of community-oriented commercial space, a half-acre public park, and 83 below-grade parking spaces. The key components of our proposal are as follows:

1. 177 units that are affordable to households with incomes from 0 to 100% of the AMI, and beyond.

2. A new half-acre central green that preserves and enhances the existing mature trees at the Crescent site,

3. A bold new resources center – the Roxbury Real Estate Center – designed and seeded with more than $1M to help residents in the community increase their net worth and build wealth.

4. A credible strategy to employ people of color and women, and to contract with M/WBEs in the development, construction and permanent work in our development, based on the successful experience of MPDC and Trinity working in the Roxbury community.

5. A property that will be developed to Passive House and LEED Platinum design standards.

First, the 177 units of housing will be **affordable to households across the full income spectrum and provides 20% more affordable housing units than are called for in the Request for Proposals and 25% of the units will affordable to households with little or no income.**

- 36% of all rental units, or 62 units, will be rental apartments for households with incomes from 0% to 50% of the Area Median Income (AMI), and 29 of these units (17% of the total rental units) will be affordable to households with incomes at 30% of the AMI. A total of 25% of each building's total units, a total of 44 units will be supported by project-based subsidy, making them affordable to residents with incomes from 0 to 50% of the AMI.

- 44% of all rental units, or 76 units, will be for households with incomes from 51% to 80% of the AMI.

- 20% of all rental units, or 35 units, will be unrestricted units for higher incomes.

- In addition to the 173 rental units, there will be 4 homeownership units that will provide ownership opportunities for households, in two income categories, up to 80% of the AMI and up to 100% of the AMI.

Second, our proposal includes a **public realm plan that is organized around a new public park and the preservation and enhancement of Roxbury's trees**. The Trinity and MPDC plan for Crescent Parcel calls for the preservation of 34 existing trees on the Crescent Parcel site, including 26 mature, large caliper trees, along with the incorporation of 52 new trees. In addition to our land¬scape architect, our team includes a certified arborist who has studied the existing trees on the site and produced a draft tree inventory report. The arborist will work with our team and the community throughout the planning and design process to protect the existing trees and mitigate loss of mature urban canopy to the greatest extent possible. A new half-acre central public park will provide a green, landscaped amenity to the Crescent Parcel residents and the general public at a prominent location in Roxbury. This new civic open space aspires to be interactive, inspired by art and culture, flexible, inclusive and accessible to many communities. It will be a hub of activity for community events and collaboration. It will be a playful, public lounge, bringing people together and inviting visitors to make the space their own. Public amenities, including lounge seating, picnic spaces, a misting fountain and reflective water feature. This park will be further enhanced and activated by providing space for local entrepreneurs to operate food trucks that will provide desired goods to the community.

Thirdly, our proposal includes ground floor commercial space for community-based organizations focused on **creating access and equity for residents of Roxbury**. . A portion of the ground floor of the Tremont Street Building will house the Roxbury Real Estate Center, a resource center to help Roxbury residents and businesses increase their net worth. This Center will provide homebuying assistance (supplementing MPDC's already established homebuying assistance program), small business technical and managerial assistance, and workforce development and mentoring support for members of the community interested in careers in real estate development. The opportunity to invest in the develop¬ment and/or own a part of the development for as little as $5,000 will also be available to residents of the Roxbury community. Trinity and MPDC will provide seed money to fund Wealth Enhancement Coordinators who will provide assistance in these areas. In the Melnea Cass Building, Tenacity, a youth-development organization focused on creating equitable access to educational and fitness opportuni¬ties in underserved communities, will occupy the ground floor.

Fourth, our proposal includes a **comprehensive economic development strategy to employ people of color and contract with the businesses they own and operate.** Trinity and MPDC's commitment to diversifying participation in the real estate industry is longstanding and evident in the makeup of our organizations. Trinity is equally owned by a Black man (Patrick Lee) and a White man (James Keefe); it is a 50/50 partnership; and 72% of Trinity's development staff are either people of color or women. MPDC is a Commonwealth of Massachusetts Supplier Diversity Office Certified M/WBE, minority owned nonprofit organization. MPDC's commitment to diversity is evident in their Board of Directors, which is made up 100% by people of color, and 58% by women. The CEO of MPDC, Leslie Reid, is a Black woman. She leads the organization day-to-day and holds responsibility for management of the affairs of MPDC and its affiliated organizations. Additionally, more than 68% of MPDC's current staff are either Black, Hispanic, or Asian and 60% are women.

Beyond this, we have assembled a diverse team of consultants. Our architect, DHK Architects, is a MBE; our landscape architect, DMLA, is a WBE; our transportation consultant and civil engineer, Nitsch Engineering, is a WBE; our lead counsel, Deirdre Robinson (Robinson & Cole), is a woman; and our permitting attorney, McKenzie & Associates, is a MBE. Trinity Management is led by a Latina Chief Operating Officer and employs a diverse workforce, many of whom are Black, Latino, and Asian, allowing the company to provide management services that reduce or eliminate cultural and linguistic barriers.

We will be working with two General Contractor teams to build the proposed 2-building development and new park at Crescent Parcel. For one of the buildings, the General Contractor is a mentor/protégé arrangement between Dimeo Construction Company and Tara Construction, a Hispanic-Owned Business, certified SBA 8A Small Disadvantaged Business and Massachusetts Certified Minority Business. For the second building, the General Contractor is a Joint Venture between Dellbrook|JKS and Maven Construction, a M/WBE contractor.

In *Tab F: Economic Development Strategy* of our enclosed proposal, we include data showing that we have regularly met or exceeded the hiring and subcontracting goals for various of our Boston projects. To ensure that we beat expectations for our Crescent Parcel development, we have set forth a detailed plan for working with the community and the City on certain targeted initiatives. These will include outreach involving several community organizations, use of specialized training and education programs to train and support emerging small M/WBEs and prepare individuals for the workforce, strict hiring and subcontracting requirements that we will place in our contracts with our general contractors and their subcontractors, along with regular reporting and monitoring of results against these requirements, to name a few.

We project that there will be over 900 construction jobs for this development and more than 20 permanent jobs associated with the property management and commercial uses in the development. We are committed to meeting the Good Jobs Standards for the permanent property management jobs required on-site to manage the development once it is built.

Finally, we are proposing **Passive House and LEED Platinum design**. Our team is committed to designing and building this parcel to meet and exceed the City of Boston Article 37 LEED Silver certifiability requirements by achieving LEED BD+C: Multifamily Midrise v4 (LEED) certifiability at the Platinum level. In addition, the project will make the significant commitment of achieving Passive House certification under the PHIUS+ 2021 (PHIUS) rating system. As a Passive House development, our buildings will use at least 30% less energy than conventional properties. Greenhouse gas consumption levels will be significantly lower,

and indoor air quality will be much improved. The building will be designed to be responsive to the environment and will incorporate features and services that will allow occupants to shelter in place during periods of severe weather events and power outages until services can be restored. The proposed design seeks to create high-performing buildings that protect natural resources, enhances the health and safety of its occupants, and improves the fabric of the existing community. Our team includes well-recognized sustainability and passive house consultants, New Ecology, to help us achieve these results.

We believe we and the firms we have assembled for this effort constitute the right team to work with the community, City and State to refine this proposal and to implement the resulting plan. Below is a list of the members of the Trinity and MPDC development team and the name of the chief contact person for each firm.

Role	**Company**	**Chief Contact**
Co- Developers	Trinity Financial & Madison Park Development Corporation (W/MBE)	Patrick Lee & Leslie Reid
Design	DHK Architects (MBE) & Stantec, Inc.	Fernando Domenech & David Dixon
Civil Engineer	Nitsch Engineering (WBE)	Deb Danik
Traffic consultant	Nitsch Engineering (WBE)	Deb Danik
Landscape Architect	Deb Myers Landscape Architecture (WBE)	Deb Myers
Certified Arborist	Skyline Landscapes	Brendan McCarthy
Sustainability Consultants	New Ecology Inc.	Tom Chase
Environmental Engineer	McPhail Associates	Ambrose Donovan
General Contractor	Dimeo Construction Company and Tara Construction (MBE) Dellbrook | JKS and Maven Construction (M/WBE)	Stephen Rutledge & Pedro Pirez Andrew Baker & JC Burton
Permitting Counsel	McKenzie & Associates (MBE)	Joseph Feaster
Transaction Counsel	Robinson + Cole	Deirdre Robinson
Market Analyst	Byrne McKinney	Pam McKinney
Property Management	Trinity Management	Maribel Concepcion

Trinity and MPDC have a long history of working in partnership in the Roxbury community. In the 1990s, we together developed the 331 units at Orchard Gardens and in 2001, we again partnered to develop the 200 units of student and homeownership housing at Davenport Commons and Shawmut Estates.



For Crescent Parcel, Trinity and MPDC have agreed to again joint venture. Our individual and collective experience demonstrates our ability to not only deliver high quality, mixed-use developments in prominent locations, but to perform development in a way so the project fits cohesively into the existing community and serves as a catalyst. We are confident that Trinity and MPDC can realize the proposed plan.

Many of our team members have also worked extensively in Roxbury: DHK Architects designed the Whittier Street Health Center on Tremont Street, and also worked on the Dudley MBTA Station, Palladio Hall across the street on Dudley, 2101 Washington Street (the old Tropical Foods building), the Boston Water & Sewer Building, Orchard Gardens, Davenport Commons and Shawmut Estates, and 20 at LUMA. Stantec's Urban Places team has worked with the Roxbury community on numerous planning efforts, including Parcel 18, Madison Park, and a variety of other parcels along Melnea Cass. Our landscape architect, Dem Myers Landscape Architecture, has worked in the Roxbury community on the Dewitt Community Center, Bartlett Yards Master Plan, and 2147 Washington Street. New Ecology, our sustainability consultant, has extensive experience in Roxbury, having worked on multiple existing building ASHRAE audits and rehab planning for affordable co-op projects and multifamily rental projects owned by for-profit and non-profit developers in the neighborhood. Both of our general contractor teams have successfully completed similar-scale construction projects in Roxbury. Given the range of experience of our consultant team in the Roxbury community and familiarity with the site, we are well positioned to implement this plan in a coordinated fashion with other work that is already underway in the surrounding community.

Finally, we want to underscore that we believe we have put together a development that meets many

objectives and is also financially feasible. We have been conscientious about the design approach and realistic about costs. In additional, our financing plan contemplates sources of funds and amounts that are consistent with guidelines set by those funding sources, based on our extensive history developing mixed-use, mixed-income properties in locations much like Crescent Parcel.

As noted above, five key features of our plans for the Crescent parcel are as follows:

1. 177 units that are affordable to households with incomes from 0 to 100% of the AMI, and beyond.

2. A new half-acre central green that preserves and enhances the existing mature trees at the Crescent site,

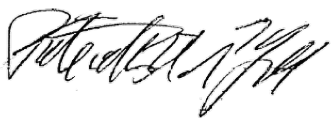
3. A bold new resource center – the Roxbury Real Estate Center – designed and seeded with more than $1M to help residents in the community increase their net worth and build wealth.

4. A credible strategy to employ people of color and women, and to contract with M/WBEs in the development, construction and permanent work in our development, based on the successful experience of MPDC and Trinity working in the Roxbury community.

5. A property that will be developed to Passive House and LEED Platinum design standards.

We would welcome the opportunity to work with the Roxbury community, the City and the State on the redevelopment of Crescent Parcel. We believe our team has the capacity, the commitment, the experience, and the ideas that can make the community's vision for Crescent Parcel a reality. Should you have any questions about this proposal, please don't hesitate to contact either one of us.

Sincerely,





Patrick Lee
Principal, Trinity Financial
(617) 720-8400

Leslie Reid
CEO, Madison Park Development Corporation
(617) 849-6240

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Madison Park Development Corporation

April 12, 2021

Mr. Ned Eames
Chief Executive Officer
Tenacity, Inc.
38 Everett Street
Boston, MA 02134

RE: Tenacity, Inc. - Crescent Parcel Raynor Building, Roxbury, MA

Dear Ned,

We are pleased to present the following proposal for Tenacity, Inc. in consideration of leasing their office space at the Crescent Parcel Raynor Building, Roxbury, MA according to the following terms and conditions:

Landlord:	Single purpose entity to be formed for the ownership of the building known as the Raynor Building located on the Crescent Parcel in Roxbury, MA in which Madison Park Development Corporation or an affiliate is the managing member.
Tenant:	Tenacity, Inc.
Premises:	Approximately 5,800 Usable Square Feet ("USF") to be verified upon construction completion of the Premises.
Term:	Five (5) years from Lease Commencement Date
Lease Commencement:	Upon delivery of the Premises
Base Rental Rate:	$12.00 PSF with 3% annual increases
Utilities:	Tenant shall be responsible for all utilities expenses servicing the Premises
Real Estate Tax/Common Area Operating Expenses:	Included in rent.

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Madison Park Development Corporation

Insurance:	Building insurance shall be at Landlord's expense. Tenant shall obtain insurance for the contents of the Premises and its operations therein.
Tenant Improvements:	Landlord shall deliver the premises as a warm lit shell and provide a Tenant Improvement allowance of $50.00 per SF.
Maintenance and Cleaning:	Tenant shall be responsible for all maintenance, repairs and cleaning of the Premises upon delivery of possession.
Brokerage:	Landlord and Tenant acknowledge that no broker was used in connection with this transaction.
Qualifying Conditions:	Neither party hereto shall be bound to the other unless or until a complete lease document is fully negotiated and executed by Landlord to Tenant. This non-binding proposal will remain open for your consideration for one month from the date of the proposal.

If the foregoing terms are acceptable, please sign in the appropriate area below and return a copy of this letter to our attention.

Best Regards,

Robert Pezzini

Robert Pezzini
Vice President of Real Estate

Cc: Leslie Reid
Ben Baldwin

AGREED TO AND ACCEPTED BY:

TENANT:

Ned Eames

Dated: 4/14/21

Ned Eames, Founder & CEO of Tenacity, Inc.
("A Duly Authorized Signatory")

184 Dudley Street, Suite 200, Roxbury, MA 02119
PHONE 617-541-3900 **FAX** 617-541-4900 **WEB** www.madison-park.org

Crescent Parcel



Tab B

SUBMISSION CHECKLIST

Submission Checklist

This checklist should be completed and included as part of the proposal submission. See Section 1 of the RFP for instructions on the number of copies and format of each submission requirement.

If items are not included, a written explanation of why they have been omitted should be included.

- [x] Submission Fee of $100.00
- [x] Development Submission
- [x] Design Submission
  - [x] Design Narrative
  - [x] Design Drawings
- [x] Financial Submission
  - [x] Formation documents
  - [x] Financial documents
  - [x] Financial submission workbook
  - [x] OneStop (Only required for submissions assuming affordable housing subsidy)
  - [x] Financial Narrative
  - [x] Price Proposal Form
  - [x] Preliminary market study
  - [x] Financing
- [x] Disclosures
  - [x] Disclosure Statement for Transaction with a Public Agency Concerning Real Property
  - [x] City of Boston & BPDA Disclosure Statement
  - [x] Certificate of Tax, Employment Security, and Contract Compliance
  - [x] HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility (Only required for submissions assuming affordable housing subsidy)
  - [x] MassDOT Form D
  - [x] MassDOT Form J: FHWA and MEPA Agreement
- [x] Submission Checklist (this form)

Crescent Parcel



Tab C

TEAM MEMBERS & EXPERIENCE

TEAM MEMBERS & EXPERIENCE

A TEAM SUITED FOR THE PROJECT:

Development of the Crescent Parcel will present a unique opportunity to create a new asset and north entry marquee to this lively Roxbury neighborhood. The proposal also takes care to leverage the present tree canopy while transforming the existing open green space into both a community and sustainable resource benefitting the people and local environment well into the future. Our proposal will create a development with mixed-income rental housing, retail and economic development uses and opportunities and a grand open greenspace in a way that they can thrive and support the larger district. The team that Trinity and MPDC have assembled to make real this vision is experienced, committed and capable. It includes the following firms:

Developer	-	Trinity Financial & Madison Park Development Corporation (MBE)
Design	-	DHK Architects (MBE) & Stantec, Inc.
Civil Engineer	-	Nitsch Engineering (WBE)
Traffic consultant	-	Nitsch Engineering (WBE)
Landscape Architect	-	Deb Myers Landscape Architect (WBE)
Certified Arborist	-	Skyline Landscapes
Sustainability Consultants	-	New Ecology Inc.
Environmental Engineer	-	McPhail Associates
General Contractor	-	Dimeo Construction Company and Tara Construction (MBE) Dellbrook | JKS and Maven Construction (M/WBE)
Permitting Counsel (Legal)	-	McKenzie & Associates (MBE)
Transaction Counsel (Legal)	-	Robinson + Cole
Market Analyst	-	Byrne McKinney
Property Management	-	Trinity Management

Additional information on all team members is included at the end of this section and further supplemented by firm bios and team member resumes in *Appendix C*.

Trinity is a 50% minority-owned 280-person development and management firm doing development throughout the Northeast, with headquarters in Boston and Manhattan. The company's development experience over the past 33 years includes nearly 9,500 units of housing and more than 600,000 square feet of retail and commercial space, costing more than $3.3 billion.

Madison Park Development Corporation (MPDC) is a minority business enterprise celebrating their 55th anniversary this year, and was founded in response to a displacement crisis in lower Roxbury. Starting off as a small activist group fighting back against displacement MPDC has grown to one of the state's largest community development corporations developing over 115,000 square feet of commercial space and over 1,600 units of affordable housing, 1,400 of which are located in the neighborhood of Roxbury.

These companies specialize in the kind of development called for at the Crescent Parcel. Indeed, Trinity and MPDC's plan for Crescent Parcel incorporates four development elements where the team has substantial experience. They are as follows:

- Roxbury development with a focus on positive community impacts
- Affordable/mixed-income, mixed-use rental housing development
- Sustainable and environmentally conscious design principles, and
- An attention and commitment to diversity in both the design & development team members, and opportunities created.

The following descriptions are a selection of projects from Trinity and MPDC's portfolio that further demonstrate our experience in these areas:

Trinity and MPDC Collaborations

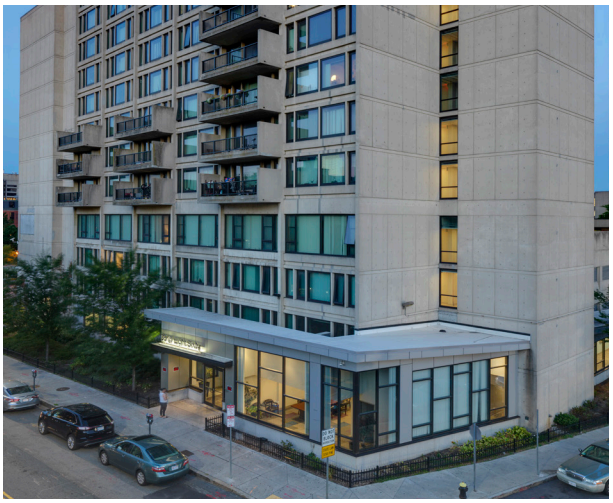
Orchard Gardens is a HOPE IV project that consists of 331 units of mixed-income rental housing on 15 acres of land in Roxbury. Trinity and MPDC completed the build out over three phases, the development includes a new park, six new streets, and new offices for the residential association and on-site property management team. The team included Trinity, Madison Park Development Corporation, and the Orchard Gardens Resident Association. Nine buildings, containing 126 rehabilitated units were acquired, 162 new townhouses were constructed, and the former Dearborn school building underwent a historic restoration and was converted into 42 units of housing along with offices for the management staff, the resident association and various social services activities. These housing units are affordable to households across six different income categories.



Davenport Commons & Shawmut Estates was a project completed by Trinity and MPDC in 2001 in Lower Roxbury. The 200-unit project consists of 125 units of housing that are leased to Northeastern University students and 75 units of homeownership housing that were sold to households with incomes in three different income categories. One category consisted of households with incomes up to 80% of the AMI, a second category consisted of households with incomes between 81% and 120% of the AMI, and the third category consisted of households with incomes between 121% and 175% of the AMI. Additionally, the development included 2,100 square feet of ground floor commercial space.



Trinity Relevant Experience



Northampton Square is a Trinity complex located in the South End/Lower Roxbury along Northampton Street and Harrison Avenue. Both the 12-story 860 Harrison Building and 29-story 35 Northampton Street building were renovated to provide 347 units of mixed-income rental housing, along with office space for several City of Boston Public Health Commission social service programs.



The Carruth is a mixed-income, mixed-housing development situated directly across the street from the MBTA Ashmont Station. The project contains 74 affordable rental apartments and 42 market rate condominiums all located in one building. This was an opportunity to provide quality housing for low-income families and increase the number of home ownership possibilities within the neighborhood, promoting housing and economic diversity. The construction of this project occurred simultaneously as the building of Ashmont Station and involved cooperation with the MBTA. Additionally, the ground level uses of the project have aided in the vibrancy of the active Peabody Square. Commercial uses such as cafes, restaurants, and banks sit along Dorchester Avenue to create places to engage in and to encourage street activity from the surrounding community.



Treadmark, or Ashmont Phase II, sits just across the street from its predecessor, the Carruth. Similarly, it is located next to the major transit node Ashmont T stop and contains 51 affordable apartment units and 32 for-sale condominiums, promoting a housing and income diversity all within one building. Also located along Dorchester Avenue, this project, houses a grocery store that will give residents of Treadmark, Carruth, and the Ashmont neighborhood overall another option for local retail and business. This combination of street-level retail adds to an active, existing commercial district which, along with a major public transportation node, promotes street activity and multiple modes of commuting.

Enso Flats in Brockton includes 113 rental apartments, located three blocks away from the Brockton MBTA Commuter Rail Station serving the Middleborough Line. Forty two of the 113 units are designated as artist-oriented units that cater to the arts community that exits in the city. Additionally, the Gallery at Enso Flats hosts arts events curated by the artists in residence. This phase is in the heart of Downtown Brockton with the goal of creating affordable housing options for residents looking for greater access to public transport and proximity to the commercial and civic uses along Main Street.



Washington Village (Phases 1 -3) Will create 273 units of mixed-income housing, including replacement public housing, affordable housing, workforce housing and unrestricted market rate units. Designed by both WBE and MBE lead architects the first two phases (165 units), are complete while phase 3 (108 units), is under construction and anticipated to open this summer. Situated less than a mile from the Long Island Sounds, the former Washington Village site was flooded during hurricane Sandy leaving land and buildings heavily damaged. In response the new property was designed specifically with environmental impacts in mind and includes significant regrading to raise the buildings and public infrastructure up and out of the flood zone. Additionally, the development is designed and built to be LEED-ND and has a LEED Building Silver certification. When it comes to community impacts Washington Village goes beyond the brick and mortar providing services to the community as well. Built within the new development is the Norwalk Housing Authority's EnVision Resource Center providing after school educational, recreational and nutritional programs to elementary school children. Run by the Norwalk Housing Authority these services are available to residents and will have a long-term effect on the children, leading to better educational opportunities in life.



425 Grand Concourse is a 27-story, mixed-use, and mixed-income building located in the Bronx, N.Y. When completed, the project will consist of 277 units of housing affordable to households from 30% to 100% of the Area Median Income. In addition to the residential component, the project will also consist of a Supermarket, a Community Health Clinic, an Educational Facility and a Cultural Center. On-site resident amenities will include a fitness center, tenant lounge, community room, and an accessible roof deck. When completed 425 Grand Concourse will be one of the largest Passive Houses in North America and a major example of innovative and energy efficient development.



Orient Heights (Phases 1 – 3) In January of 2015, the Boston Housing Authority (BHA) selected Trinity Financial and East Boston CDC development team to work with the BHA and the Department of Housing and Community Development (DHCD) to finalize a redevelopment strategy for the State Public Housing site. The original Orient Heights Development was comprised of 331 units of state-funded public housing terraced into the steep hillside of this 15-acre site on the northern edge of the East Boston neighborhood. Phase One of this multi-phased redevelopment was completed in 2018 and made up 120 of the 331 replacement public housing units, in a mix 1- to 5- bedroom sizes. Phase two was comprised of 88 units and recently completed construction in 2020. Both Phases 1 and 2 have been design designed and constructed to meet high-sustainability standards. Phases 1 reached LEED Platinum Certifiability and Phase 2 met LEED Gold sustainability, providing not only beautiful homes serving some of the City's lowest income earning families in Boston, but also providing them with healthy homes surpassing today's standards. The third and final phase is anticipated to begin construction in 2021. All three phases leveraged the use of both public and private financing to bring significant investment to rebuild the housing along with the introduction of new indoor and outdoor community spaces including a new public park to be built as part of phases three. Similarly, each phase incorporates significant infrastructure improvements to the surrounding public roads; Waldemar Avenue, Vallar Road, and Faywood Avenue.



Washington Beech includes demolition of the existing 266 units and creation of 206 new rental units. The new site design reduced density to be more in keeping with the surrounding neighborhood. A variety of unit types replaced the existing institutional walk-ups including a low-rise elevator building, garden apartments, duplexes over flats, and townhouses. New roads were built so that all unit entries front on a street and residents can park nearby. A central green space with play facilities and park benches was also created for youth and adults in the community. Construction of Washington Beech occurred in two stages to accommodate the relocation and re-housing of existing residents. Washington Beech Phase One has been officially designated a Leadership in Energy and Environmental Design (LEED) GOLD site by the US Green Building Council, making it the first affordable housing development in Massachusetts to receive this distinguished designation. Prior to this award, only 87 units in the state held this award, at the time of the award Washington Beech Phase had more than doubled the number of LEED Gold units in the state of Massachusetts.





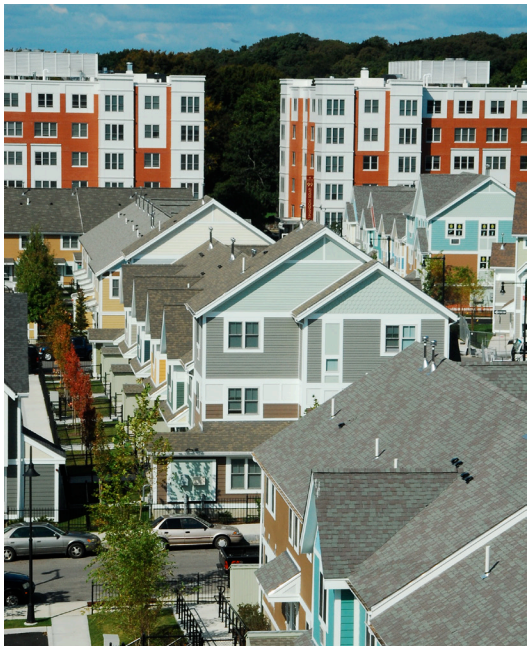
Van Dyke III is a 12-story, mixed-use, affordable housing project located in the Brownsville area of Brooklyn, N.Y. on the site of the Van Dyke Houses NYCHA development. The building is currently under construction. When completed, the project will consist of 180 units of housing affordable to households from 30% to 60% of the Area Median Income.





In addition to the residential component, the project will also consist of an Early Childhood Educational Center, a Community Health Clinic and a Wellness Center. On-site resident amenities will include a resident library, a computer lab, a fitness room, a tenant lounge, a community room, an accessible roof deck, tenant roof gardening plots, a package delivery room, and a ground floor outdoor recreational area.

Franklin Hill is a multi-family public housing development located in Dorchester, MA that was severely physically distressed and, arguably, one of the least safe developments in the Boston Housing Authority portfolio. The total development program called for the new construction of 157 replacement public housing rental units, 67 Section 8 project-based voucher rental units and 42 low-income housing tax credit only units for total of 266 rental units. The redevelopment plan reconfigured the site with a new street layout, resulting in more traditional city blocks and better integration with the neighboring community. Additionally, the new development offers a variety of housing types better suited for this diverse population. Residents are now able to choose from larger townhouse style units with individual backyards or the modern convenience of an elevated mid-rise building. The redeveloped property includes offices for on-site property management, community meeting space, and program space for both the Boys and Girls Clubs of Boston and the Greater Boston Food Bank.



MPDC Relevant Experience

Whittier Street CNI Redevelopment MPDC is a partner in the redevelopment of the current Whittier Street public housing community as part of the Choice Neighborhood Initiative (CNI). CNI is a HUD program for revitalizing traditional public housing and is similar to the one used to redevelop Orchard Park into Orchard Gardens in the late 1990s. For this redevelopment MPDC partnered with Preservation of Affordable Housing, Inc. the Boston Housing Authority to redevelop this public housing site. The Whittier Street public housing development will be redeveloped into a new mixed-income housing community and will include commercial space. The result will be approximately 300+ units located in 5 buildings on the current Whittier Street site.



Melnea Cass Apartments, expands the amount of affordable housing offered in Roxbury through the construction of a 4-story, 16-unit building at 40 Raynor Circle and new construction of a 5-story, 60-unit building at Melnea Cass Boulevard and Brooke Marshall Field. The project is developed in partnership with the Boston Housing Authority and Preservation of Affordable Housing, Inc., as part of the Choice Neighborhood Initiative, a HUD program that helps redevelop public housing. The units range from deeply affordable to market rate.



2451 Washington Street, Roxbury , offers opportunities for homeownership near the heart of Nubian Square. This development includes the construction of 16 mixed-income condominium units. These units consist of 1-bedroom, 2-bedroom, and 3-bedroom floor plans and feature contemporary designs.



Dewitt Center, is a 21,374 square foot building that serves as a community resource. It is located at 122 Dewitt Drive in the center of Madison Park Village. The facility includes a technology center, classrooms, a large multi-purpose recreation room, out-of-school program, wellness programs, management offices, and outdoor programming space. The Dewitt Center allows for expanded services and programs for Madison Park Village residents and the greater Lower Roxbury community.



9 Williams Street, phase 2 of the BPDA Parcel 10 designation is a rehab re-use project lead by MPDC conducted an adaptive reuse of the former Tropical Foods building in Nubian Square into mixed-income rental housing and ground floor retail space. The Project provides 30 units of high-quality housing with a range of rent levels for households of varying means, as well as 7,500 sf ground-floor retail.



207 Dudley Street Greenville Apartments includes 43 affordable, new construction homes and 2,715 square feet of ground-floor commercial space in two new, energy-efficient buildings. There are 31 one, two, and three-bedroom apartments in 207 Dudley Street and 12 two and three-bedroom stacked duplex units in 225 Dudley Street. Both buildings are handicap-accessible with energy-efficient features and appliances.



Madison Park Village Phases III & IV Includes 263 ground-up new construction homes, in the Roxbury neighborhood for family sizes ranging from 2 to 4 bedrooms. Madison Park IV won the coveted Housing and Neighborhood Design award from Boston Society of Architects and features townhouse style units with private backyards.



20 at Luma is a modern development made up of 20 affordable, new construction single-family homes. Each is equipped with "green features" including ENERGY STAR appliances, healthy building materials, photovoltaic solar panels for reduced heating and cooling costs, and efficient low-flow sinks and toilets.



The chart below summarizes and highlights a number of Trinity and MPDC's projects that embody the key elements called for in the Crescent Parcel RFP:

	Project Location (Roxbury Developments in Bold)	Units	TDC	Trinity & MPDC Partnerships	Mixed-Income Rental Housing	Home-ownership Housing	M/WBE Design & Development team	Focus on local economic benefits	Sustainable & Environmentally conscious design
Davenport Commons	**Roxbury, MA**	185	$50M	x		x	x	x	
Shawmut Estates	**Roxbury, MA**	15	$2M	x		x	x	x	
Orchard Gardens	**Roxbury, MA**	331		x			x		
35 Northampton	**Roxbury, MA**	245	$56M		x		x		
860 Harrison	**Roxbury, MA**	102	$35M		x		x		
Treadmark	Dorchester, MA	83	$45M		x	X		x	
Enso Flats in Brockton	Brockton, MA	113	$62M		x		x	x	
Appleton Mills	Lowell, MA	130	$64M		x			x	
425 Grand Concourse	Bronx NY, NY	277	$175M		x			x	x
Washington Village (Phase 1 – 3)	Norwalk, CT	273	$153M		x		x	x	x
Orient Heights (Phase 1 -3)	East Boston, MA	331	$194M				x		x
Washington Beech	Roslindale, MA	206	$100M					x	x
Van Dyke III	Brooklyn NY, NY	180	$101.M		x			x	x
Franklin Hill	Dorchester, MA	266	$95M			x		x	
Whittier Street CNI Redevelopment	**Roxbury, MA**	300	TBD		x			x	
9 Williams Street	**Roxbury, MA**	30	$19.9M		x			x	x
Dudley Greenville Apartments	**Roxbury, MA**	43	$17.5M		x			x	x
Madison Park Village Phases III & IV	**Roxbury, MA**	263	$113.9M		x				
2451 Washington St.	**Roxbury, MA**	16	$11.8M			x	x	x	x
Melnea Cass Apartments	**Roxbury, MA**	76	$39.9M		x		x		x
Smith House	**Roxbury, MA**	132	$59.9M				x		x
Haynes House	**Roxbury, MA**	131	$58.6M		x				x
Dewitt Center	**Roxbury, MA**	0	$10M				x	x	
20 at Luma	**Roxbury, MA**	20			x	x	x	x	

Trinity and MPDC have the experience to not only deliver high quality, mixed-use developments on challenging sites but to perform development in a way so the project fits cohesively into the existing community and serves as a catalyst. We are confident that Trinity and MPDC can realize the proposed plan.
The Trinity and MPDC team are adequately insured to undertake this project.

TRINITY AND MPDC PROJECT TEAM:

The Trinity and MPDC project management structure allows for the right staff with relevant talent and expertise to be assigned to each project we undertake. The Trinity and MPDC staff outlined below will manage the development of the Crescent Parcel.

Patrick Lee, one of the two principals of Trinity Financial, Inc., will oversee and support the redevelopment effort. One of the hallmark operating principles of Trinity is that one of the two owners is always intimately familiar with each project that the firm undertakes and is involved daily to provide his expertise and aid in major decisions. **Kenan Bigby**, managing Director of the Development Department is an alternate to the principal-in-charge, with authority to direct the development team. He will have oversight of and responsibility for the development effort. **Eva Erlich**, Vice President of Development, will oversee **Sienna DeSantis**, as Assistant Project Manager (she will be responsible for the day-to-day activities on the project).

Omalawa Musa of our Design and Construction department and **Bruce Polishook**, Senior Construction Manager, will provide oversight of the architect and engineering consultants and will oversee the selected general contractor. These six key project staff will be supported by other staff in the Trinity organization that specialize in certain areas, including our finance and accounting staff, our asset management and property management staff, our insurance and risk management staff, our IT staff, our internal legal team, and our marketing, administrative and support staff. A brief bio for each of the six Trinity personnel that will be principally responsible for the Crescent Parcel development is provided below.



Patrick Lee, Principal-in-Charge, is one of the two principals and founding partners of Trinity Financial, Inc. In addition to managing Trinity Financial with his partner in the business, Jim Keefe, Mr. Lee is involved in several civic activities, including serving on the Board of Overseers for the Boys and Girls Club of Boston and the Board of Trustees for Wellesley College. Mr. Lee holds a Bachelor's degree from Harvard University and is an MIT-trained City Planner.



Kenan Bigby, Managing Director of Development, joined Trinity Financial in 2001 and has personally managed several complicated developments for the company over the course of his 17 years with the company. These include the 266-unit mixed-income Franklin Hill redevelopment here in Boston, Massachusetts, the 299-unit mixed-income development in Newport, Rhode Island, 297 units of development in New Haven, CT, and 320-units of development in New York City. As Managing Director of the company's Development staff, he is now responsible for and is leading a staff of 8 development management professionals in our Boston and Manhattan offices. Mr. Bigby holds a Bachelor's degree from the University of Pennsylvania.



Eva Erlich, Vice President of Development, has been with Trinity since 2010 and has completed several of the company's transactions in Boston, including work on the final phase of the 332-unit redevelopment of the City of Boston's Specialty and Rehabilitation Campus in Mattapan and the 347-unit occupied rehab development at Northampton Square on the Lower Roxbury/South End line of Boston, MA. Ms. Erlich is also overseeing the 331-unit Orient Heights redevelopment in East Boston. Ms. Erlich holds a Bachelor's degree in Metropolitan Studies and a Master's degree in Urban Planning from New York University.



Sienna DeSantis, Assistant Project Manager, joined the Trinity team in 2015 and over her nearly 6 years with the company has worked with other development staff on the financial closing for the 83-unit Treadmark development in Boston, MA and 60-unit 60 King development in Providence, RI. Additionally, her portfolio consists of the 331-unit Orient Heights public housing redevelopment, in the East Boston, assisting project development from permitting and resource allocation through to closing and construction. Additionally, she's worked on the 273-unit Washington Village mixed-income development in Norwalk, CT assisting in bringing all three phases through design development, closing, construction and lease-up. Ms. DeSantis further assists with internal projects, including early site due diligence and prospecting. She holds a Bachelors of Economics from Syracuse University.



Omalawa Abdullah-Musa, LEED AP BD+C, Design and Construction Manager, joined Trinity in 2017 and provides design and construction oversight for the New York office. Omalawa brings over 20 years of experience in the architectural field, which includes a focus on the development of mixed-use affordable housing projects in the metropolitan New York area. He is currently working on the Brookfield Commons redevelopment Masterplan and its Phase 2 and Phase 3 projects in White Plains NY, which is targeted to have approx. 850 units and 5 new residential buildings upon completion. As a LEED accredited professional, he strives to achieve sustainability measures and energy efficiency on all projects. His experience encompasses the building types of multi-unit residential developments, healthcare, educational facilities, and community facilities. Prior to joining Trinity, Mr. Musa worked at several New York based architectural firms where he was responsible for the management and coordination of all phases of complex new construction and renovation projects. Omalawa graduated with a Bachelor of Architecture degree from CCNY School of Architecture, and his first job out of school was with the NYCHA design department, where he worked on West Brighton Plaza Seniors gut renovation and several accessibility interior renovations.



Bruce Polishook, Senior Construction Manager, Mr. Polishook has over forty years of experience in the construction industry and is the former owner and President of CWC Builders, Inc. The CWC portfolio is comprised of building developments of large apartment building projects consisting of both new construction as well as both occupied renovations and Historic renovations of various building types. As head of CWC, Bruce oversaw all operational aspects of the company, including negotiation and bids for new work, owner/architect/contractor relations, subcontractor management, and field activities. CWC's development projects involved community organizations, affirmative action and resident participation in the process, especially in the preconstruction phase where owners, architects and tenant participation were key in developing the appropriate scope, products and schedule.

MADISON PARK DEVELOPMENT CORPORATION (MPDC) PROJECT TEAM:

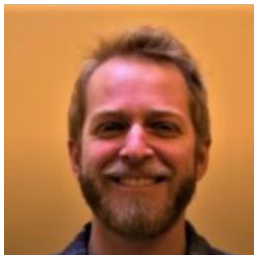
Leslie Reid, CEO of Madison Park Development Corporation, will employ her extensive development experience to provide support and guidance for the Real Estate and Project Management team. **Bob Pezzini**, VP of Real Estate, is the most direct authority responsible for overseeing project development on the MPDC side of the partnership. Bob will supervise **Ben Baldwin**, Project Manager, who will manage the routine coordination between project participants through predevelopment and construction phases. **Katrina Conrad** brings her wealth of relationships with local residents and contractors to her role as Workforce Development Manager, ensuring that MPDC projects meet and exceed local, minority, and women hiring requirements. This structure has proven successful over MPDC's recent real estate development history. Additionally, this team will be supported by MPDC's Finance and Asset Management Departments. Brief bios are provided below for the key staff members responsible for development at Crescent Parcel.



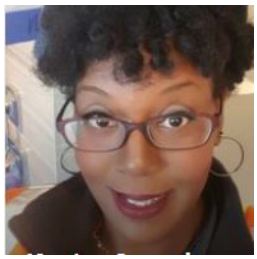
Leslie Reid, Chief Executive Officer, became the CEO of MPDC in 2019. Prior to that she had been MPDC's VP of Programs and brings over 20 years of prior experience in real estate and community development. Leslie's extensive resume includes direct development experience at multiple Boston CDCs, as well as a background as a Loan Officer at the Massachusetts Housing Partnership Fund. In addition, Leslie sits on multiple nonprofit and public boards and commissions in the Boston area.



Bob Pezzini, Vice President of Real Estate, came to MPDC in 2020, most recently from Wells Fargo asset management and client relationship management for their portfolio of multifamily residential developments. Bob also has many years of experience in asset management and project management on the developer side in Boston, Rhode Island, Washington D.C. and Maryland. Bob holds a Masters of Business Administration from the University of Maryland and BS in architecture from The Catholic University of America.



Ben Baldwin, Project Manager, has served with MPDC since 2018 and prior to that was Project and Operations Manager at the Dudley Street Neighborhood Initiative's community land trust housing portfolio. At MPDC he has overseen the construction of 76 units of mixed income rental housing at Melnea Cass Apartments and the renovation of 131 units of mixed income rental housing at Haynes House. Ben holds a Master's degree in Urban Planning and Policy from Tufts University and a Bachelor's Degree from Oberlin College.



Katrina Conrad, Workforce Development Manager, has been with MPDC for over a decade. She is chiefly responsible for ensuring MPDC's real estate projects surpass their hiring goals for MBE and WBE entities as well as connecting local residents to jobs and contractors via her many Job Fairs. Katrina holds certificates in Diversity & Inclusion from Cornell University and Construction Management from Wentworth University.

Trinity and MPDC have carefully chosen a comprised group of firms and individuals with extensive residential and commercial development experience, including urban in-fill revitalization and green and sustainable building design. All have collaborated on multiple projects. Members of the Team are as follows:

DESIGN TEAM:

The design will be led by **DHK Architects** and **Stantec**. DHK will be lead on building design while Stantec will take on the master planning for the overall parcel and work closely with the landscape architect, and certified arborist on the proposed open space and grand plaza within the public realm.

DHK Architects is a certified Minority Business Enterprise (MBE), award-winning Boston-based architecture, planning and interior design firm. Their experience includes design of multi-family housing for private developers, public facilities for state and municipal clients, and community facilities for non-profit clients. Much of this work has involved the preservation of historic buildings that contribute to the lasting civic value of our cities. With a staff of 25 professionals the company is able to provide a depth of experience and resources to meet any design challenge within their practice areas, including programming, existing facility assessment, master planning, urban design, building design, space planning, project management and construction administration and owner's project management (OPM) services. DHK has worked with both Trinity and MPDC in the past including the before mentioned Roxbury based properties Davenport Commons, Shawmut Estates, and 9 Williams.

Fernando J. Domenech, FAIA, LEED AP, will serve as Principal-in-Charge, representing DHK in the design of the Crescent Parcel. Domenech received his Master of Architecture degree from the Graduate School of Design, Harvard University in 1974. He has worked since 1971 with various architectural firms in both Boston and Puerto Rico, and is a Registered Architect in Massachusetts, New York, Rhode Island, Puerto Rico, Connecticut, District of Columbia, Pennsylvania and Ohio. He was elected recently to the College of Fellows of the AIA.

Senior Project Architect, Toshihiko Taketomo, has over 40 years of experience planning and architectural project development, design and management. He received his Master in Architecture from the Graduate School of Design, Harvard University in 1975. He is LEED certified and a registered architect in both Massachusetts and New York. Over his career he has been a Principal, Vice President, and design leader at various architectural firms and has worked on major institutional academic, cultural, commercial, residential and, and government projects--many of which have received multiple national and international design awards.

Stantec Inc., is an international design and engineering firm with projects shaping major cities around the world for nearly 70 years. Stantec's Urban Places have provided master planning services for numerous mixed-use and mixed-income developments across the Boston region, including the One Charlestown development in Charlestown, Northland's Needham Street development in Newton, and the 75 Morrissey development in Dorchester. Additionally, this planning team has worked with the Roxbury community numerous times in the past to plan for Parcel 18, Madison Park, and a variety of other parcels along Melnea Cass. In fact, Stantec's Urban Places have planned or designed over 20,000 units of mixed-income housing across the country over the past two decades.

With a focus on the public realm design and master plan at Crescent Parcel **David Dixon**, FAICP will serve as Principal-in-Charge working collaboratively with DHK to lead the design team. David has a Master of

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Senior Project Architect, Toshihiko Taketomo, has over 40 years of experience planning and architectural project development, design and management. He received his Master in Architecture from the Graduate School of Design, Harvard University in 1975. He is LEED certified and a registered architect in both Massachusetts and New York. Over his career he has been a Principal, Vice President, and design leader at various architectural firms and has worked on major institutional academic, cultural, commercial, residential and, and government projects--many of which have received multiple national and international design awards.

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Urban Design from Harvard University and a Master of Architecture from University of Pennsylvania. David will be supported by **Jeff Sauser, Project Manager** boasting master planning experience in the northeast including Exchange South End Redevelopment in Boston, MA. Jeff has a Master of Architecture and City and Regional Planning from Georgia Institute of Technology.

Deb Myers Landscape Architecture, a WBE will be led by Principal and Founder **Deb Myers, ASLA**. With nearly 20 years of personal experience, Deb has extensive knowledge of what it takes to develop strategic and beautiful landscapes no matter the foot print or site constraints. As a registered landscape architect, Deb has a broad range of experience including permitting, site design, and construction documentation and administration. With projects spanning over the metro Boston area Deb has been lead designer and project manager for several Boston projects, including Boston Collegiate Charter School in Dorchester, and has worked specifically in the Roxbury neighborhood including Dewitt Community Center, Bartlett Yards Master Plan and 2147 Washington Street. Deb also has familiarity working with the Trinity and MPDC team having worked on projects referenced above including Orient Heights, and Enso Flats. Supporting Deb as Senior Associate will be **Jeffrey Thoma, RLA**. Jeffrey's technical experience and creativity has contributed to the successful management and completion of a broad spectrum of projects in the northeast, from institutional campus master planning and design to urban streetscapes and parks to signature residential landscapes, and include recent projects such as the award-winning Newbridge on the Charles Integrational Community; and the new Commonwealth Honors College residential complex at UMass Amherst.

Brendan McCarthy a certified arborist from **Skyline Landscapes**, will be an integral part of the selected design team as we take care to preserve the existing tree canopy at Crescent Parcel. Brendan is both a founding partner and lead arborist at Skyline. Prior to co-founding the company Brendan spent nine year at the Arnold Arboretum preserving the thousands of mature trees there. Brendan is also well versed in tree preservation during construction.

New Ecology Inc., will serve as the Project's Sustainability Consultant. In this role, New Ecology will oversee the team's effort to obtain LEED-ND status and to ensure compliance with Enterprise's Green Communities standards. New Ecology has extensive experience in Roxbury, having worked on multiple existing building ASHRAE audits and rehab planning for affordable co-op projects and multifamily rental projects owned by other for-profit and non-profit developers in the neighborhood. New Ecology is also doing resilience planning with MPDC and The Neighborhood Developers. Current work features multiple new construction affordable multifamily projects in Roxbury including 250 Centre Street and the Mildred Hailey public housing redevelopment both affordable housing mixed-income developments, 1599 Columbus Avenue, 387 Dudley Street.

Trinity and MPDC will contract directly New Ecology for their services. **Tom Chase Senior Project Manager, LEED BD+C + Homes, CPHC**, will represent New Ecology for the Crescent Parcel. New Ecology's work is to bring the benefits of sustainable development to the community level, with a concerted emphasis on underserved populations. A mission-driven non-profit, who seek to address global environmental equity issue by making the built environment more efficient, healthy, durable, and resilient. Nationally recognized, for their work on renewable energy, educational facilities, local infrastructure, and multi-family residential development New Ecology's work consistently results in vibrant environments with positive effects on the people who live work and play in these places.

ADDITIONAL PROMINENT TEAM MEMBERS:

Robinson + Cole, will be lead counsel providing corporate and financing legal services, in addition to **McKenzie & Associates** who will provide counsel related to permitting, zoning and local approvals. Trinity and MPDC will contract directly with both firms and be responsible for all oversight of the team members. **Dierdre Robinson** from Robinson and Cole, and **Joseph Feaster** from Mackenzie & Associates will serve as Lead Counsel for Crescent Parcel.

McPhail Associates, LLC will be responsible for all environmental engineering services including geo-technical and geo-environmental services. McPhail has ample experience working in the neighborhood including recent work on over ten projects located in Roxbury including 225 Center Street, Academy Homes, Brook Avenue, and Dudley Triangle Development, to name a few. Trinity and MPDC will contract directly with McPhail Engineering and be responsible for all oversight of the team members. **Ambrose Donovan, LSP**, will serve as Principal-in-Charge for this project.

Nitsch Engineering a WBE engineering firm will be responsible for both Traffic and Civil engineering services for Crescent parcel. Nitsch will bring a keen perspective to Traffic and Civil given their experience right next-door at Whittier Place (200 units), and earlier project at 225 Center Street (103 units) in Jackson Square. Trinity and MPDC will contract directly with Nitsch Engineering and be responsible for all oversight of the team members. **Deborah Danik, PE, Deputy Director of Civil Engineering**, will serve as Principal-in-Charge for this project.

Trinity Management, LLC will be responsible for property management services. Trinity and MPDC will contract directly with Trinity Management and be responsible for all oversight of the management company. **Maribel Concepcion**, CEO of Trinity Management, will serve as Principal-in-Charge for Crescent Parcel.

Byrne McKinney & Associates, Inc., will consult Trinity and MPDC providing the team with Market Study analysis of the local and broader Boston rental market. The Byrne McKinney team also worked on the Whittier Place development project and is apt to inform the development team on market conditions throughout the pre-development and development stages for Crescent. Additionally, Byrne McKinney has worked/is working on other nearby sites in Roxbury including Rio Grande, Harrison Supply/Parcel 8, P-3, and the Piano Factory, all multi-family residential developments in the immediate vicinity. Trinity and MPDC will contract directly with Byrne McKinney & Associates, and be responsible for all oversight of their consulting. **Pam McKinney, MAI** of Byrne McKinney & Associates, will serve as Principal-in-Charge for Crescent Parcel.

Dimeo Construction Company has teamed up with MBE/SBA **Tara Construction, Inc.**, for the Tremont Street Building. This partnership has been forged between the two organizations based upon a 30+ year history in the construction industry. With a focus on local, women and minority participation the two firms will provide general contracting and construction estimating services for Crescent Parcel. Dimeo Trinity and MPDC have history working collectively in Roxbury all having been involved in the development and construction of Davenport Commons & Shawmut Estates featured earlier in this section. In addition, Dimeo has worked more recently in Boston on Trinity's Northampton Square project building/preserving over 347 units of affordable housing in two buildings. Trinity will contract directly with Dimeo Construction Company and Tara Construction, Inc., and be responsible for all oversight of their work. **Steven Rutledge** of Dimeo and **Pedro Pirez** of Tara will serve as Principals-in-Charge for Crescent.

Similarly, **Dellbrook | JKS** will partner with **Maven Construction**, a W&MBE firm, forming a joint venture for the Melnea Cass Building. We feel strongly that this joint venture, will provide the project and neigh-

borhood with an experienced and engaged construction partner for pre-construction and contracting services. Both Dell¬brook | JKS and Maven Construction have significant experience with multifamily construction and a record of successful similar projects within the city of Boston. Dellbrook | JKS constructed Melnea Cass Apartments, Haynes House, Smith House, and Madison Park IV with MPCD, demonstrating their depth of knowledge working in the Neighborhood of Roxbury and existing site conditions. **Andrew Baker** of Dellbrook and **Joccole "JC" Burton** of Maven will serve as Principals-in-Charge for Crescent.

Below is a list of References for the Trinity and MPDC team:

Boston Housing Authority
Name: Kate Bennett
Title: Administrator
Address: 52 Chauncy Street Boston MA 02111
Email: kate.bennett@bostonhousing.org
Phone: 617-913-2427

MassHousing
Name: Mark Teden
Title: Vice President
Address: One Beacon Street Boston MA 02108
Email: MTeden@masshousing.com
Phone: 617-854-1243

Orchard Gardens Resident Association
Name: Valarie Shelley
Title: President
Email: val.shelley19@gmail.com
Phone: 617-905-5816

TD Bank N.A.
Name: Thomas McColgan
Title: Vice President, Commercial Real Estate
Address: 203 Trumbull Street, Hartford, CT 06103
Email: Thomas.McColgan@td.com
Phone: 860-757-5242

Name: Nathan Bondini
Title: Vice President, Commercial Real Estate
Address: 203 Trumbull Street, Hartford, CT 06103
Email: Nathan.Bondini@td.com
Phone: 860-757-5236

As noted above, detailed biographical information on several of the consultants that are part of the Trinity team along with team member resumes are included as *Appendix C.*

Crescent Parcel



Tab D

DEVELOPMENT & DESIGN CONCEPT

DEVELOPMENT & DESIGN CONCEPT

The Crescent Parcel introduces a unique opportunity to enhance and build upon the strengths of the Roxbury community by redefining this prominent parcel. Trinity and MPDC's proposal for the Crescent Parcel includes the transformation of the vacant and underutilized site into a mixed-income residential development with ground floor commercial and community space and significant public realm improvements, that collectively will serve as an anchor for Roxbury and respond to goals set forth by the community, the Roxbury Strategic Master Plan Oversight Committee, BPDA, DND, and other stakeholders and established through PLAN: Nubian Square, the Roxbury Strategic Master Plan, and Dudley Vison processes.

We have assembled a capable and experienced team to undertake this significant project. Our vision for the Crescent Parcel features five distinguishing factors:

- A Mixed-Use Program to Enhance and Complement the Surrounding Neighborhood
- Mixed-Income Housing for a Broad Range of Incomes
- Preservation and Enhancement of Roxbury's Trees
- A Vibrant & Community-Oriented Public Realm Plan
- A Modern & Sustainable Design

This section describes in detail our plan for these five key components of our development and design proposal, as well as our plan for implementing the program and design that is set forth.

A MIXED-USE PROGRAM TO ENHANCE & COMPLEMENT THE SURROUNDING NEIGHBORHOOD

We are proposing to revitalize the currently vacant Crescent Parcel with mixed-income housing, an active ground floor featuring community-oriented uses, public open space, and underground parking.

Mixed-Income Housing

Our plan for the Crescent Parcel includes 177 units of housing in two buildings (the Tremont Street Building and the Melnea Cass Building) that will serve a broad range of incomes, as further described later in this section.

Community-Oriented Space

The ground floor of both the Tremont Street Building and the Melnea Cass Building will contain commercial space which will be utilized for community-oriented programs. The Tremont Street Building will contain approximately 7,123 SF of ground floor commercial space, of which 3,000 SF will be used for the **Roxbury Real Estate Center** – a resource center to help Roxbury residents and business increase their net worth. It will provide homeownership assistance, small business assistance, and workforce development and mentoring support for members of the community interested in careers in real estate development. The Melnea Cass Building will include approximately 4,985 SF of ground floor commercial space for Tenacity, a youth-development organization focused on creating equitable access to educational and fitness opportunities in underserved communities. These uses are further described in *Tab G: Development Without Displacement*.

Public Open Space & Amenities

Our plan provides a half-acre central public open space at the intersection of Tremont Street and Melnea Cass. This new civic space aspires to be interactive, inspired by art and culture, flexible, inclusive and accessible to many communities. It will be a hub of activity for community events and collaboration. It will be a playful, public lounge, bringing people together and inviting visitors to make the space their own. Public amenities, including lounge seating, picnic spaces, a misting fountain and reflective water feature. The preservation of existing trees, combined with the proposed new trees and shrubs, and the water feature will be key elements for mitigating the heat island effect. This park will be further enhanced and activated by providing space for local food trucks to set up.

In addition to the central open space, there is a "community plaza" created along Tremont where the building steps back from the street. This plaza has plantings and seating centered around an existing preserved Honey Locust and is in close proximity to the residential and commercial space entrances.

The preservation of existing mature trees and of the existing tree canopies is a significant element in the developed open green space design and building placement in our proposal. There are impressive clusters of trees at both the intersection of Tremont Street and Ruggles, at Tremont Street and Melnea Cass Boulevard and lining the edge of Melena Cass Boulevard. These trees contribute greatly to Climate Ready Boston goals (stormwater management, carbon sequestration and reduction of heat island effect.



Melnea Cass street view from new public park looking east

It is also worth noting that additional open spaces will be provided for the residents of Crescent Parcel. The Tremont Street Building will feature a landscaped outdoor resident lounge located on the 10th floor roof. This roof space will serve as location for residents to congregate and enjoy the fresh air while also doubling as a green roof combating the concentration of heat that this parcel and neighborhood is known to experience.

Parking

Our plan includes 83 below-grade parking spaces. This allows for on-site parking that does not intrude in the public realm, and also recognizes the transit-oriented nature of this site given its proximity to Ruggles T, Nubian Square, and various public bus routes. Access to parking has been consolidated to minimize curb cuts interrupting pedestrian movement in and around the site and to maximize active street frontage.

HOUSING FOR A BROAD RANGE OF INCOMES

Our plan for Crescent Parcel provides housing for all. We are proposing to develop 177 units of housing in total between the two proposed buildings that will serve a broad range of incomes:

- 36% of all rental units, or 62 units, will be rental apartments for households with incomes from 0% to 50% of the Area Median Income (AMI), and 29 of these units (17% of the total rental units) will be affordable to households with incomes at 30% of the AMI. A total of 25% of each building's total units, a total of 44 units will be supported by project-based subsidy, making them affordable to residents with incomes from 0 to 50% of the AMI.

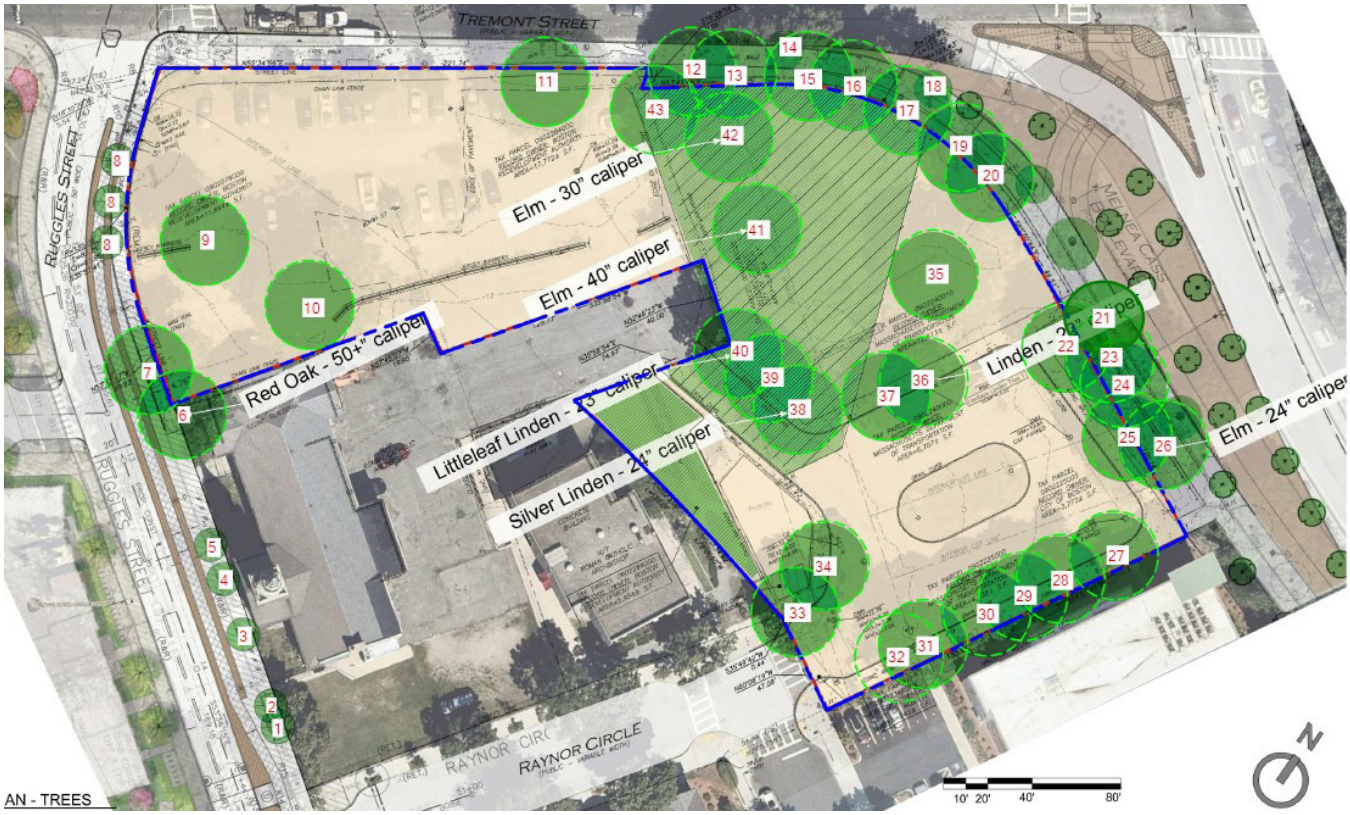
- 44% of all rental units, or 76 units, will be for households with incomes from 51% to 80% of the AMI.

- 20% of all rental units, or 35 units, will be unrestricted market-rate units.

- In addition to the 174 rental units, there will be 4 homeownership units in the Melnea Cass Building, 2 of which will be for households up to 80% of the AMI and 2 of which will be for households up to 100% of the AMI.

The redevelopment of the Crescent Parcel creates an opportunity to address some of the housing challenges our City faces, and our proposal provides ***20% more affordable units than are called for in the RFP.***

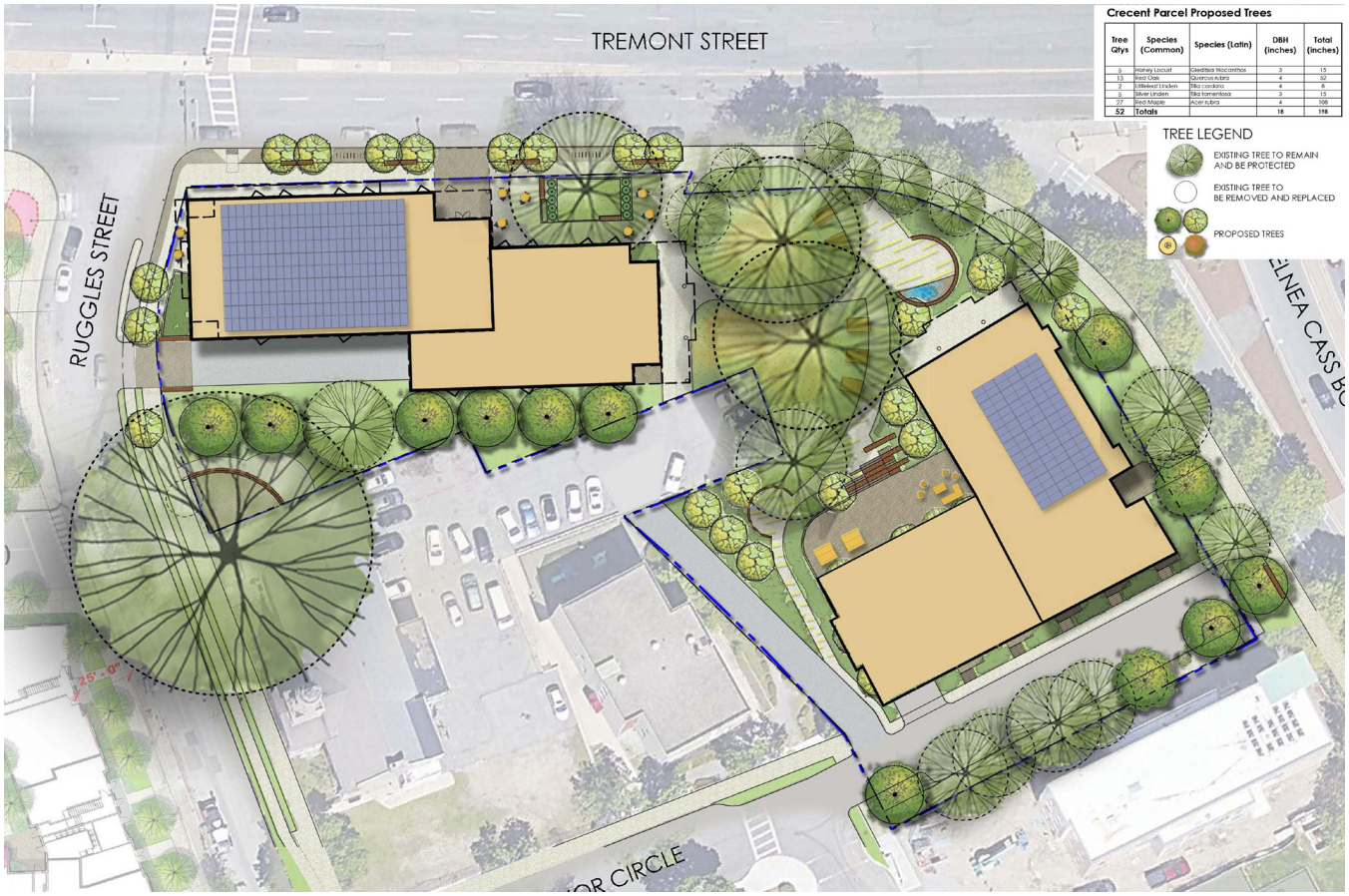
Trinity and MPDC are experienced developers of mixed-income developments in the City of Boston. We have built thousands of housing units for people of all incomes and economic backgrounds in communities across the City and region. Our team has the capacity and the experience to ensure that the proposed mixed-income program at Crescent Parcel can successfully be created and sustained.



Existing tree site plan as provided in RFP

To ensure preservation of the existing vegetation is properly informed, we have engaged a certified arborist, Brendan McCarthy of Skyline Landscapes, Inc. Brendan is both a founding partner and lead arborist at Skyline. Prior to co-founding the company Mr. McCarthy spent nine years at the Arnold Arboretum, in Boston preserving the thousands of mature trees there. Brendan is also well versed in the importance of tree preservation during construction and the complexities that come along with such an endeavor. Brendon's most immediate task upon joining the Trinity and MPDC team was to visit the Crescent Parcel site and prepare an initial Tree Inventory and Assessment Report to inform our site organization strategy. As a certified arborist, Brendan's assessment identifies characteristics and conditions of each tree located on or near the parcel. Information in the report includes tree species, relative age, diameter at breast height (DBH), and the species tolerance for construction. This data was then used to determine a recommended tree protection zone for each arbor.

Based on the findings of the report, our plan for Crescent Parcel calls for the preservation of 34 trees, including 26 mature, large caliper trees, along with the incorporation of 52 new trees. Building placement and setbacks have been carefully studied to maintain sustainable distance from the trees and their root zones, particularly those that are prominent such as Tree 11 shown in the diagram above, which enjoys its own designated open space protecting its substantial DBH of 50 inches. To the south of Tree 11 there is a generous building set back along Tremont Street of approximately 40 ft. from curb to building edge. The building design strategy is oriented around the open green space, making it a site plan that is architecturally intentional from the public realm at ground level up to the roofline Our team is committed to maintaining the trees in accordance with City of Boston requirements.



Trinity & MPDC site plan rendering showing persevered trees and proposed new trees

The landscape elements in our proposed plan have been designed by Deb Myers of Deb Myers Landscape Architecture (WBE). As mentioned in *Tab C: Team Member's Experience*, Deb has a long history working on large scale projects such as this in the City of Boston with recent experience directly in Roxbury includ-ing the Dewitt Community Center, Bartlett Yards Master Plan, and 2147 Washington Street. The landscape plan for Crescent Parcel acts as an environmental filter and provides relief from the heat and intensity of the built environment. One of the primary objectives of the landscape design will not only be the preser-vation of the majority of existing trees on the site (a total of 586 caliper inches), but also the planting of over 50 new trees as shown in the figure above, in support of the RFP and Climate Ready goals. Our design also serves to enhance the trees' viability and create a unique and healthy ecosystem at the core of this development. In addition to building a healthy soil mass, a specific operations plan will be put in place to encourage a healthy understory for migratory birds, butterflies, and urban life. The trees provide a natural organization of the space to safely transition pedestrians through the site and open spaces, and invite visi-tors to stop and stay a while enjoying the shade on a hot summer day, or find a comfortable and safe place to engage in outdoor recreation.

A VIBRANT & COMMUNITY-ORIENTED PUBLIC REALM PLAN

The street level treatment of our development and design plan is strongly supportive of the public realm and of community creation and enhancement. A significant portion of the proposed project's street level uses are oriented to community functions, both along the edges of the main arteries – Tremont and Mel-nea Cass – as well as through the site. Internal connections from the surrounding streets to the park are

also provided. The design provides a strong link for the pedestrian to the street level of the buildings along the edges of the site. The circulation network outlined in the drawings show the multiple paths that the scheme provides for the public, all of them connect with the community-oriented uses at the ground floor of the two buildings.



Tremont Street Building, view looking north east down Tremont Street

Sustainable and resilient landscape guidelines for the project are consistent with the City of Boston's Complete Streets guidelines, the design includes accessible surfaces for all ages and abilities, wide sidewalks, safety and comfort, healthy trees and native / drought tolerant plants. The public realm will also include permeable surfaces to reduce stormwater management infrastructure and areas for bike share.

Conceived as an airy and continuous extension of the streetscape, the civic lobby at Tremont Street is organized by a cohesive landscape experience that begins along Tremont Street and continues along both Ruggles Street and toward the Melnea Cass Boulevard intersection.



Elm Grove located at the intersection of Tremont Street and Melnea Cass Boulevard

At the pivotal intersection of Tremont Street and Melnea Cass Boulevard, we envision the creation of Elm Grove as a gateway open space leading into the heart of Nubian Square. The newly imagined civic space – organized around the preservation of a series of majestic Elm Trees. This sculpted park offers a seam weaving thru the park space to connect the Ruggles Street Corridor and the heart of Nubian Square. The park will safely transition pedestrians through the parcel from the street level while offering urban places to sit year-round. the circulation links multiple levels of public space with functional amenities. The landscape integrates both inside and out, ensuring intuitive and fluid public movements into and through the site. This creates a 3-dimensional expression that will be visibly active throughout the development – imparting an animated sense of place that unifies the transition between exterior and interior experience.



Street view from new public park looking west

Another key site feature, which integrates the Melnea Cass Building with the open space, is the introduction of the "porch" concept. Whether coming from Raynor Circle or Melnea Cass Boulevard, residents and visitors are invited into the building along an active sidewalk and to a cascading staircase/amphitheater overlooking the surrounding Elm Grove canopy. The stairs are unique urban spaces – a transition from semipublic to exterior public space. They are activated with art, signage, and amenities. They offer the public an elevated perspective from which to overlook the preserved Melnea Cass trees.

Collectively, these components will create a new, vibrant public realm experience for people to enjoy and will be a catalyst for additional investment and activation of other sites and buildings in the surrounding neighborhood.

A MODERN & SUSTAINABLE DESIGN

Our design and engineering team, led by DHK Architects and Stantec, has developed a site plan and design for the Crescent Parcel that 1) is responsive to the urban design guidelines set forth in the RFP and established through the various neighborhood planning efforts and engagement processes, particularly with respect to tree preservation; 2) is contextual with the surrounding uses; 3) contributes to the identity and rich history of Roxbury; and 4) will set a significant benchmark for sustainable design in this neighborhood by being a Passive House development and LEED Platinum. The Design Drawings are included in *Appendix A: Design Materials* of this submission.

Site

The Crescent Parcel is located at one of Boston's most prominent locations. The development of this currently vacant site will be a critical part of the continued resurgence of Nubian Square. The Trinity and

MPDC proposed plan will provide much needed housing and community spaces and will also serve as a landmark on the corner of Ruggles Street, leading into the heart of the neighborhood in and around Nubian Square. The Tremont Street Building will be complementary to the proposed development at the former Whittier Street public housing site – the so-called Whittier Choice Phase 3 – and will be help to establish the missing edges to the east side of Tremont street in this part of the City. With the redevelopment of this site, and with the exception of Parcel 3, the edge of Tremont Street will now be defined by buildings stretching all the way from Melnea Cass to the Reggie Lewis athletic facility on Malcolm X Boulevard, and beyond along the Roxbury Community College.

Program

The project encompasses approximately 264,500 GSF of development, including both buildings. The square footage of the various components of the project is:

CRESCENT PARECEL STATS BREAKDOWN		GSF	Residence + Circulation	# Units	1BR	2BR	3BR	Lobby, etc.	B.O.H	Community / Amenity	Parking	Total FAR SQFT
Tremont Street Building	Basement 2	16636							2017		14305	0
	Basement 1	16636							651		15672	0
	Floor 1 (Street level)	11134	834					1710	1565	6108	917	10955
	Floor 2	14291	13974	13	4	8	1	116	202			14113
	Floor 3	14443	14126	13	4	8	1	116	202			14265
	Floor 4	14443	14126	13	4	8	1	116	202			14265
	Floor 5	14247	13930	13	4	8	1	116	202			14069
	Floor 6	14175	13858	13	4	8	1	116	202			13997
	Floor 7	13629	13312	13	7	4	2	116	202			13451
	Floor 8	13629	13312	13	7	4	2	116	202			13451
	Floor 9	13361	13044	12	3	8	1	116	202			13183
	Floor 10	13365	13047	12	3	8	1	116	202			13186
	Floor 11	7957	6711	6	3	2	1	116	115	1015		7778
	Total	**177948**	**130271**	**121**	**43**	**66**	**12**	**2870**	**6163**	**7123**	**30894**	142712
					35.5%	**54.5%**	**9.9%**					
Melnea Cass Building	Basement	12027							1607		10420	0
	Floor 1 (Street level)	10624	3818	4			4	1590		4985		10456
	Floor 2	12808	12359	8	3	4	1		231			12640
	Floor 3	12958	12509	11	4	6	1		449			12790
	Floor 4	12958	12509	11	4	6	1		449			12790
	Floor 5	12699	12250	11	4	6	1		449			12531
	Floor 6	12565	12116	11	4	6	1		449			12397
	Total	**86639**	**65561**	**56**	**19**	**28**	**9**	**1590**	**3634**	**4985**	**10420**	73604
					33.9%	**50.0%**	**16.1%**					

	Number of Stories	Total GSF	RES + Circ	# Units	1 BR	2 BR	3 BR	Lobby. Ect.	B.O.H.	Community	Parking	#	Total FAR
Tremont Street	11	177948	130271	121	43	66	12	2870	6163	7123	30894	56	142712
Melnea Cass	6	86639	65561	56	19	28	9	1590	3634	4985	10420	27	73604
TOTAL	**NA**	**264587**	**195832**	**177**	**62**	**94**	**21**	**4460**	**9797**	**12108**	**41314**	**83**	**216316**
			Unit Type %		**35.0%**	**53.1%**	**11.9%**	Site SQFT					72750
								FAR Calculation					2.97

Tremont Street Building and Melnea Cass Building program chart

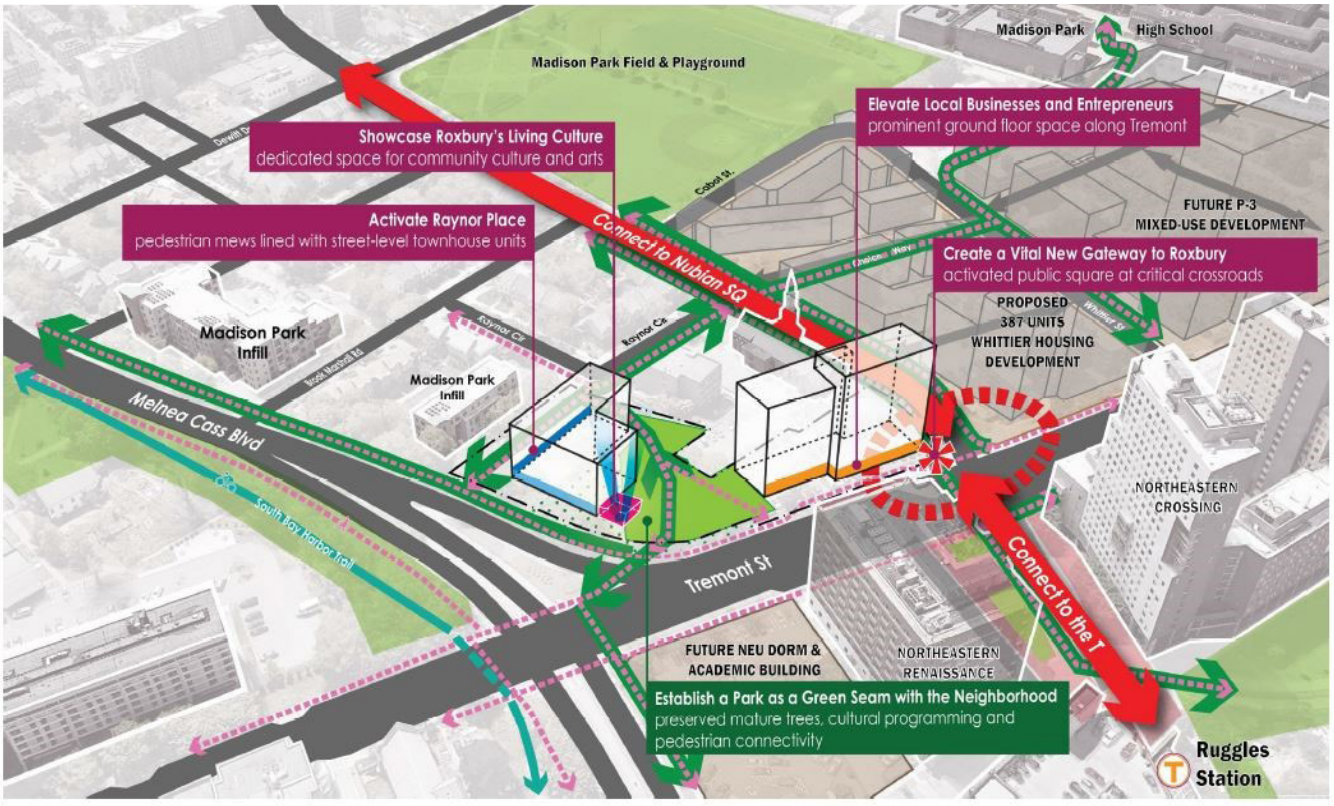
Site Organization

The site design focuses on the park at the intersection of Melnea Cass Boulevard and Tremont Street. The two proposed buildings line the edges of Melnea Cass and Tremont streets respectively, and at the same time define the edges of the central green park space. The smaller of the two buildings, the Melnea Cass Building, located along Melnea Cass and Raynor Circle, provides 56 units on six floors, with 4,985 SF of commercial community space at street level and facing into the park. The second building, the Tremont Street Building, occupies the corner of Tremont and Ruggles streets. It provides 121 units on 11 floors. Street level is occupied by 7,123 SF of commercial community space, broken down into

two sectors – one on the corner of Ruggles street and the other facing the park, establishing a dialogue across the park between the community spaces in each building. The Melnea Cass Building has two segments, one of which is setback from Tremont street to create a hardscape that gradually extends into the landscape of the central park. A significant effort has been made to save and protect a majority of the large mature trees that exist on the site today.

Site Circulation

The two building residential entrances have been placed such that they are accessible from Tremont Street and Melnea Cass Boulevard and are part of the public realm. Additionally, the Melnea Cass Building can also be accessed from Raynor Circle, where we have maintained vehicle access for the residents of the 60-unit that is across Raynor Circle from the project site, and provided for emergency vehicles that may need to service that building. We have also made accommodations for vehicles to continue to access the Archdiocese's parking lot from Raynor Circle. Direct access to the ground floor community spaces in each building is available from the sidewalk, in addition to interior entries accessed through the residential lobbies in each building. Automobile access to the below grade parking is available from Ruggles Street for the Tremont Street Building, and from Raynor Circle for the Melnea Cass Building. Service access to each building is similarly provided. The Tremont Street Building, being larger, has its own service and loading area set back from the public right of way on Ruggles Street.



Site circulation plan connecting to surrounding urban environment

Building Placement and Scale

The buildings' placement, as demonstrated by the site plan, align with both Melnea Cass and Tremont Street, opening the corner for the park. The Melnea Cass Building is located on the northeast corner of the site, along Raynor Circle running parallel to the recently completed MPDC residential property at 40

Raynor Circle. This L-shaped building creates a dynamic edge with Melnea Cass to the east. The other side of the L faces 40 Raynor Circle defines a more intimate residential environment. The southern façade of the Melnea Cass building utilizes individual entrances and front stoops marching along the length of the buildings to complement the context across the street at 40 Raynor. We envision that this strip of Raynor will result in a of sorts, with a driving lane, running towards Melnea Cass, establishing as dialogue between the two building that face each other. We have developed a series of "maisonettes" along this face of the Melnea Cass Building, two-story units with internal vertical circulation. At 6 stories high, the Melnea Cass Building is of a scale that mediates between the more intimate scale of Madison Park Village and the larger scale of Tremont Street.

The Tremont Street Building, located on the southwest edge of the site, at the corner of Ruggles and Tremont, sits across from International Village dorms of Northeastern University. That is a cluster of buildings that range from 6 to 20 stories tall, and set-up a different scale along Tremont. Similarly, the proposed re-development of the Whittier Street housing site – Whitter Choice 3 – to the south side of the Crescent Parcel along Tremont, an 11-story building, establishes a grander urban scale. Our proposed building is 120 feet tall, consisting of 11 floors at this end of the site. The building runs on a north-south axis from this corner towards the park. The edge of the building sits roughly 10 feet from the sidewalk at the Ruggles Street corner as it marches along Tremont and sets back another 25 feet approximately two-thirds beyond Ruggles. This setback creates a public plaza centered around the preserved Tree #11, and is adjacent to the building entrance. This leg of the building steps down to 10-stories and begins to cascade down as it gets closer to the park, gradually coming down and culminating in a six-story element facing the new park. Thus, the faces of both proposed buildings, as they look into the park, are the same height and scale.



Tremont Street Building view looking at Tremont Street / Melnea Cass Boulevard intersection

Building Massing and Architectural Features

Our approach to the building massing is to establish a transition from the tall elements to the lower ones, gradually moving from the larger scale of Tremont Street to the smaller, more residential scale surrounding the new park and Madison Park Village. The Tremont Street Building gradually steps down from 11 floors to 10, and cascades down to a 6-story scale at its "nose." This aligns with the height of the Melnea Cass Building (6 stories) and the scale surrounding that portion of the site.

Massing and architecture go hand in hand. Our design uses massing gestures to bring down the scale of both buildings to a more intimate one that captures the essence of residential architecture. Our proposed architecture for each of the two buildings is designed to respond to the surrounding context.

The Tremont Street Building is highly articulated along its various facades. It is organized vertically into three bands, which are defined by a more regular organization of the fenestration. In addition to the fenestration, the horizontal order of the building is set by the use of different materials – glass at street level, masonry from thereon until the 10 floor, and metal panels at the top floors. The lower band of the building is made up of the street level and second floors (first residential). The street level is dedicated to commercial spaces for community-oriented uses and for the residential lobby and associated functions. It is mostly glazed and substantially transparent. The second floor is marked by a flat façade. Along the Tremont Street facade, two sets of bay windows, three levels tall, are arranged across the front of the building. They are spaced such as to echo the stepping gesture seen in the massing. The two datums of bay windows are separated by a band on the sixth floor. This band, by the way, echoes a similar one along the top of the six-story Melnea Cass Building. The upper floors of the building, above the second set of bay windows, are topped with a metal cladding. A vertical stripe of metal panels highlights the corner where the building steps back and provides visual clues to the residential entrance. The building corners are made a feature of the design and provide a great opportunity for vistas from those units. There is a sprinkling of colored metal panels provided throughout the building, used to mark various points across the façade, in harmony with some of the architectural gestures across the street at International Village. Along the Roxbury (east) side of the building, the organization of the façade is similar but not exact. Here the bays are located on the lower floors only and flattened out on the upper datum. The sixth-story band along this side of the building is clad in metal, creating a more dramatic break between datums along the façade. At the Ruggles end of the building, we have designed a façade intended to engage the street. This side is highlighted by a bay window that runs from the 3rd floor all the way to the 10th floor. At the other end of the building, the north façade that faces the park, the building has been scaled down to six stories. This end too is highlighted by a bay window. Of note is the treatment of the upper floors of each segment of the building, which are cut back to create balconies of sorts, helping to break down the scale of the building.

The Melnea Cass Building is a 6-story, L-shaped building. The design of this building is intended to have character and architectural language consistent with the Tremont Street Building. The building, mostly a similar color of brick as the Tremont Street building, uses some of the same devices and architectural language. It also has horizontal bands – a lower datum, a middle of sorts, and a top, although perhaps "quieter" one. The base of the building is defined by the glazed community spaces that face Melnea Cass and the park at the western end of the building. The second floor, while residential, is also somewhat quiet too. Above this, three-story bays define the next three levels, up to the fifth floor. Level six is once again flatter and quieter. Along the Raynor Circle mews, two-story dwelling units – maisonettes of sorts – are defined by individual entrances and stoops, articulated above by bays windows. At each end of the building, a larger bay window, similar to the one at the Tremont Street Building, provides a more defined front to the building.



Melnea Cass Building street view looking at Raynor Circle

Both buildings are true to the nature of the program. The street level is fairly transparent in both buildings, and oriented to community uses. We expect that these spaces actively engage with the park. The floors above street level display an arrangement of elements – windows of various sizes, bays, flat bays, panels, colored panels – that, while variegated, have an order to them. There is a limited palette of window sizes, generally in 2-foot wide increments, and orderly arrangement of the fenestration, sometimes displaced such as to create some movement across the façade. Consistently, every time a corner is turned along the massing, a special corner window is provided. This feature, in addition to being an asset to the individual dwelling units, helps to highlight the reduction of the building scale throughout the various sides of each building.

Anticipated Subsurface Conditions

Based upon our Geotechnical Engineer, McPhail Associates, experience at surrounding sites, the anticipated subsurface conditions underlying the project site consist of fill material extending to depths of 10 to 15 feet below ground surface overlying a marine sand deposit that extends to depths of 20 to 30 feet below ground surface. Beneath the marine sand deposit, we anticipate a marine clay deposit that extends to depths of about 100 to 110 feet below-ground surface overlying glacial till and bedrock. Groundwater is anticipated at a depth of about 10 feet below ground surface.

Tremont Street Building Foundations

The Tremont Street Building includes two levels of below-grade parking resulting in an excavation extending to a depth of about 25 to 30 feet below ground surface. Foundation support is anticipated to consist of a combination of spread footings and/or a mat foundation bearing on the marine sand and/or clay

deposits. An under drained slab-on-grade is anticipated for the lowest level slab. Perimeter foundation walls will be waterproofed. Foundation construction will be completed within a steel sheet-pile cofferdam which will be utilized to create a groundwater cut-off to mitigate the potential for groundwater impacts in the surrounding area. Construction dewatering will be managed within the cofferdam by means of localized sumping.

Melnea Cass Building Foundations

The Melnea Cass Building includes one level of below-grade parking resulting in an excavation extending to a depth of about 10 to 15 feet below ground surface. Foundation support is anticipated to consist of a combination of spread footing and/or a mat foundation bearing on the marine sand deposit. A waterproofed slab-on-grade is anticipated for the lowest level slab. Perimeter foundation walls will also be waterproofed. Foundation construction will be completed within a steel sheet-pile cofferdam which will be utilized to create a groundwater cut-off to mitigate the potential for groundwater impacts in the surrounding area. Construction dewatering will be managed within the cofferdam by means of localized sumping.

Sustainable Design

The Crescent Parcel buildings will be designed with health and sustainability at the forefront. In addition to facing an affordable housing crisis, Roxbury is also vulnerable to the effects of climate change, including extreme heat, and stormwater flooding. Given this context, BPDA and community stakeholders have recognized that the need to minimize the adverse impacts of climate change and poor health on Roxbury's vulnerable residents is as critical as the need to provide high quality, healthy homes where residents can thrive. The Trinity and MPDC team are equally committed to these objectives and recognize that green and healthy building design strategies and high-performance building components present an opportunity to address health, well-being, energy savings, and environmental impacts simultaneously. This mixed-use development will be a tangible representation of these goals and an example of how a sustainable approach can achieve all of these community benefits with innovative design, even under challenging financial constraints.

The Crescent Parcel buildings will meet and exceed City of Boston Article 37 LEED Silver certifiability requirements by achieving LEED BD+C: Multifamily Midrise v4 (LEED) certifiability at the Platinum level. In addition, the project will make the significant commitment of achieving Passive House certification under the PHIUS+ 2021 (PHIUS) rating system.

The LEED certifiability program will serve as a framework for the construction of a high-performing building that conserves natural resources, enhances the health, safety, and comfort of occupants, and improves the fabric of the surrounding community. As detailed in LEED checklist attached at the end of this narrative section, the project team is targeting a point total of 82 for the Crescent project. This far exceeds the required minimum total of 50 points, which reflects the team's commitment to sustainable design for the project. As revisions to Article 37 are proposed and adopted, the project will stay current with updates to the City's sustainable design requirements.

Beyond the mandatory LEED requirements, the development team envisions that the building will be designed to meet the PHIUS+ 2021 and proposes an all-electric building (with the exception of a fossil fuel-fired emergency generator) in keeping with the spirit of the net zero carbon performance (Carbon Neutral Boston 2050 commitment) building goals. Should regulatory guidance change to allow consideration of non-fossil fuel fired life safety backup systems, this remaining fossil-fuel use on site may be eliminated.

The central focus of the PHIUS certification will be the emphasis on an air-tight building envelope with high thermal integrity. The design will utilize high thermal resistance value insulation in the exterior wall cavities and as a continuous later, as appropriate to meet energy performance goals, with the added benefit that the high-performance assembly will help to mitigate unwanted heat loss or gain. Structural thermal break materials will be used to minimize thermal bridging at various connections. Maintaining this thermal integrity in an air-sealed building is critical to avoid condensation of humid indoor air on cold surfaces, and with it the potential of mold growth. Best available air-sealing technology will be used to seal the exterior building envelope and to provide effective unit compartmentalization in order to meet stringent blower door testing inspections. High-performance thermally broken, insulated, and sound-attenuating UPVC windows with low U-values and Solar Heat Gain Coefficients will be installed. These components will create a comfortable, healthy and energy efficient building that far exceeds the current Stretch Energy Code requirements and provides an avenue to reduce energy consumption far enough to employ all-electric systems efficiently. This design will allow the project to potentially become a carbon-neutral building by the 2050 City deadline and anticipates proposed future Stretch Energy Code updates.

Centralized energy recovery ventilators (ERVs) will be specified to maintain a healthy indoor air quality while minimizing energy expenditure. The fresh incoming air will be filtered through powerful MERV 13 filtration within the ERVs that will be able to filter most asthma triggering pollutants typically found in outside air in this community such as PM2.5, pollen, mold, and bacteria. This fresh air will be delivered directly into every habitable space in the building. In addition to providing the aforementioned air quality benefits, these units will reduce the amount of energy needed to operate the building by retaining and reusing the energy in exhausted heated and cooled air. The building will utilize an energy management system, enabling the property management team to not only monitor and regulate the HVAC system remotely, but to make sure it is running at the optimal level. Along with the deployment of electric stoves, the interior load of potentially harmful chemicals and combustion by-products is greatly minimized with ERVs and furthers the health benefits, particularly for residents with pulmonary disease or those sensitive to air-borne allergens.

Continuing a mission to minimize adverse health impacts to the building's residents, the team will only specify building materials that minimize off-gassing of potentially harmful chemicals, specifically finish materials, cabinetry, adhesives, paints and sealants. A project-wide non-smoking policy will be implemented as well.

A variable refrigerant flow (VRF) air source heat pump system is proposed to provide energy efficient heating and cooling throughout the building without a need for a central boiler or other fossil-fuel based heating system. These systems provide heating and cooling by exchanging energy with the ambient air and are among the most efficient options available to multifamily buildings today. This VRF system will be a "3-pipe" type to enable energy exchange prior to engaging the compressor equipment and further reduce energy consumption and providing heating and cooling capacity simultaneously to equipment on the same loop, giving residents increased control over temperatures particularly in the shoulder seasons of the spring and fall. The VRF system has the added benefit of limiting penetrations through the building envelope, which provides a significant noise, air quality, and thermal comfort benefit to the apartments given the proximity to the train line and large traffic corridors. The development team expects the green building consultant and commissioning agent to closely monitor the installation of building components during the construction phase to ensure that subcontractors are adhering to best practices and proper operation of all equipment.

We aim to comply with the City of Boston's Climate Resiliency Checklist measures, based on building features noted below and with future efforts. We are including a preliminary draft of the checklist at the end of this narrative section. The checklist will be further developed with the architects and engineers during the schematic and design development stages of the project, once all building systems and energy modeling components are known.

To increase the Crescent project's performance during prolonged power outages, the project team will provide a resilient source of emergency power for critical electric loads in addition to the emergency loads required by code. The generator(s) and/or battery systems will be sized to also accommodate domestic water pumps, reduced elevator service, building security and access control, and space conditioning for a limited number of resilience hubs within the building, as well as the building wide internet system and limited plug loads, mainly in the resident services suite, but also in the apartments to provide power for charging batteries, or operating critical medical equipment.

To mitigate urban heat island impacts, the site will be landscaped with plantings, a water feature, high reflectivity paving materials, and the roof will be a high reflectivity material. to provide passive resilience to residents during extreme heat events, the Passive House envelope will minimize extreme temperature impacts, even during power outages and with windows open for ventilation.

Other sustainable measures include specification of water-conserving plumbing fixtures, leak detection sensors, low-flow showerheads, faucet aerators, and low-flush toilets in order to reduce water usage. Storm water retaining green roofs are also proposed to reduce heat island effect. High-efficacy LED lighting fixtures, and Energy Star appliances will be installed throughout the building. Solar shades, daylight sensors, occupancy sensors, and bi-level lighting will provide maximum lighting efficiency, utilizing daylight when optimal and using electricity only when needed. The buildings will be fully sprinklered with a fire alarm system equipped with smoke, heat, and carbon monoxide detectors.

Once the buildings are complete and operational, energy and water performance will be tracked on an ongoing basis in with the aid of the green building consultant New Ecology, in the WegoWise building utility use tracking system. This ongoing service will enable the property management team to monitor the performance of the property on a weather normalized basis to help ensure that the projected energy and water performance is achieved and then maintained. The use of WegoWise will enable the management team to monitor and share the performance of this mixed-use building with City staff and others committed to the development of environmentally sustainable and energy efficient affordable housing.

Throughout design, the Project team will work with the MassSave utility rebate program administrators and any other relevant utility rebate and incentive programs to maximize the benefit of energy savings opportunities.

In support of the City of Boston's commitment to Carbon Neutrality by 2050 and its 2019 Climate Action Plan Update, a Zero Carbon Building Assessment will be provided as part of the Article 37 submission for design review by the IGBC. The intent of the Zero Carbon Building Assessment will be to study effective alternative solutions for reducing carbon emissions. The Zero Carbon Building design will consider a Passive House level of performance envelope design, all electric building systems that are already included in the basis of design, and potential for on- and off-site renewable energy generation.

The Proponent will provide the Zero Carbon Building Assessment for each building with a first and life cycle

cost analysis (LCCA) of design alternatives studied. The team will continue to refine the upcoming study during subsequent stages of the design process and will provide the full study results including capital and operating cost information and the life cycle cost analysis in early-stage design. The results of that study will inform the team's decision making.

A preliminary rooftop solar PV system feasibility analysis will be conducted for the Project. The first step in the analysis will be to identify the appropriate and available building roof area(s) for PV systems. The analysis will include the federal tax incentive and the state Solar Massachusetts Renewable Target (SMART) program incentives as applicable. Both buildings will be constructed to be solar-ready, meaning that (i) the roof structure will be capable of supporting such a system, (ii) a pathway for conduit routing will be identified, and (iii) space in the main switchgear will be provided for a future PV breaker, all so that solar PV could be installed at a later date.

Free Building-Wide WiFi Access

As the past year has shown, a critical factor in community health measures to fight a pandemic without medical tools is social distancing (along with mask wearing, testing, contact tracing and isolation). A strict social distancing protocol forces working, schooling, as well as tele-medicine from home. The Trinity MPDC team has recognized that meaningful internet access can substantially contribute to a community's physical and economic wellbeing.

We are planning to install a "hotel-type" building-wide WiFi service throughout the residential portion of the building, including lobby, amenity spaces, and back-of-house areas to allow for a WiFi coverage that can be shared between building staff and residents. A bandwidth capacity that will allow all residents and staff not only to access the internet, but most critically to live-stream with multiple devices simultaneously will be provided through a central hub with building head-end equipment. The team is considering a capacity of approximately one Gb/s.

A head-end equipment with central and back-up routers and switches will be located in a data room at cellar level. All residential areas will then be wired for (CAT6) and equipped with WiFi "points" within the corridor ceilings. The corridor walls, made of gypsum wallboard, allow the signal to reach the entire floor plate.

IMPLEMENTATION PLAN

The Trinity and MPDC team is well suited to undertake the bold vision for Crescent Parcel that has been described in this section, and we are committed to doing so in a timely manner and through a collaborative process with the community and City.

Permitting & Approvals

Trinity and MPDC have a well-documented track record of permitting complicated mixed-use developments in Roxbury, as well as throughout many communities across the City.

Our approach to planning and designing all our projects – regardless of scale and location – is built upon community outreach and consensus building. Trinity and MPDC have already met with many key stakeholders in the Roxbury community to discuss our plan for Crescent Parcel, as further described in Tab H: Community Benefits. If designated, we will work with this community and the City during the public ap-

provals process and we are committed to working to resolve any issues or concerns that may arise as the project moves forward and in any stage of development.

Working closely with the BPDA, the City, the Commonwealth of Massachusetts, the elected officials, and other community stakeholders, Trinity and MPDC will navigate the permitting process adeptly, completing all of its major permits, including Massachusetts Environmental Protection Act's (MEPA) process and the City's zoning and Article 80 review within 12 months from the date of tentative designation.

The following is a list of permits and regulatory approvals that are anticipated to be required for the redevelopment of Crescent Parcel:

AGENCY	PERMIT/APPROVAL
Federal	
National Environmental Policy Act (NEPA)	NEPA Categorical Exclusion (if required)
Environmental Protection Agency (EPA)	Notice of Intent National Pollution Discharge Elimination System (NPDES) and Stormwater Pollution Prevention Plan- Owner and Contractor
State	
Executive Office of Environmental Affairs, MEPA Office	MEPA Review
Massachusetts Department of Environmental Protection	Notice of Construction/Demolition & Air Source Registration (boilers/Generator)
DEP Division of Air Quality Control	Fossil Fuel Equipment Approval (if required for gas/oil boilers and generators)
Mass Water Resources Authority	Construction Dewatering Permit 9
Massachusetts Historical Commission	Project Notification Form
City	
Boston Civic Design Commission	BCDC Approval
Boston Fair Housing Commission	Affirmative Fair Marketing Plan
Boston Fire Department	Fire Alarm/Sprinkler Systems
Boston Inspectional Services	Building Permit
City of Boston Interagency Green Building Committee	Article 37 sign off
Boston Parks Commission	
City of Boston Public Improvement Commission	Discontinuances, License Maintenance and Indemnification Agreement/Specific Repairs to Public Rights of Way/Temporary Earth Support/ Canopies and Awnings
Boston Public Safety Commission Committee on Licensing	Flammable Fuel Storage License
City of Boston Public Works Department	Street/Sidewalk Occupancy Permits/Street Opening Permits

Boston Redevelopment Authority	Zoning Relief/Article 80 Review/Article 80 Design Sign-off/Article 37/Cooperation Agreement/Affordable Housing Agreement/Boston
Boston Redevelopment Authority (cont.)	Residents Construction Employment Agreement/Taking plans for vertical discontinuances (if necessary)/Certificate of Compliance
Boston Transportation Department	Construction Management Plan/ Transporta- tion Access Plan Agreement
Boston Water and Sewer Commission	Site plan approval and Utility Connection Permits/Sewer Connection BRP WP Compliance Certification

Zoning Relief

Our team has approached the scale of the proposed buildings to fit into the surrounding fabric of Roxbury and Nubian Square. The Crescent Parcel is part of the Roxbury Neighborhood zoning district and multi-family residential sub-district under Article 50 and is also within a U-district and Boulevard Planning District.

Our plan for the Crescent Parcel largely meets the zoning requirements of the U-district and the design guidelines set forth in the RFP. The site is designed to meet the 3.0 FAR requirement allowed under the RFP, as well as the 120-foot maximum height guideline set forth in the RFP. The areas in which our proposed development plan will require relief are as follows:

- Parking. Given the site's proximity to public transportation, we are proposing a .47 parking ratio, whereas the zoning calls for a 1:1 parking ratio for market rate units and .7 ratio for affordable units. We believe that the transit-oriented nature of this site will work with our proposed parking count and ratio.

- Yard setbacks. The zoning calls for 20-foot front yard and rear yard setbacks; our proposed design has 15 foot and 3-foot setbacks, respectively. This allows for more activation within the public realm, which is a key feature of our design for this site.

The Trinity team is experienced in navigating the City of Boston's zoning relief process and will work with the BPDA to determine which vehicle is most appropriate for the Crescent Parcel.

Attached to this section is the zoning chart for our proposed plan.

Schedule

Trinity and MPDC will begin the pre-development tasks including permitting, due diligence, advancing plans and specs, and securing financial commitments immediately following BPDA's tentative designation award.

Our proposal requires additional funding from City and State sources that will need to be applied for and pursued. Our schedule contemplates meeting the requirements of Tentative Designation status within a one-year period such that we will be able to receive Final Designation upon completion of that year. We are currently contemplating that our plan for Crescent Parcel will be developed in two phases, with each of the two buildings being constructed as a separate phase.

DEVELOPMENT SCHEDULE			2021						2022										2023										2024				2025				2026			
TASK	*START*	*END*	Q3			Q4			Q1			Q2			Q3			Q4				Q2			Q3			Q4												
Tentative Designation	Jul-21	Jul-21																																					
Community Listening Sessi	Aug-21	Sep-21																																					
File Letter of Intent	Oct-21	Oct-21																																					
Article 80 Approvals Proces	Oct-21	Mar-22																																					
Schematic Design	Oct-21	Jan-22																																					
Secure Financing (Phase 1)	Dec-21	Jun-22																																					
Negotiate Ground Lease	Jan-22	Jun-22																																					
Design Development	Jan-22	Jun-22																																					
Construction Documents	Jun-22	Sep-22																																					
Final Designation	Jul-22	Jul-22																																					
Constructon Pricing (Phase	Sep-22	Oct-22																																					
Financial Closing (Phase 1)	Dec-22	Dec-22																																					
Construction (Phase 1)	Jan-23	Dec-24																																					
Construction Pricing (Phase	Jan-24	Feb-24																																					
Secure Financing (Phase 2)	Oct-23	Apr-24																																					
Financial Closing (Phase 2)	Jul-24	Jul-24																																					
Construction (Phase 2)	Aug-24	Jul-26																																					

LEED BD+C: Multifamily Midrise v4 - LEED v4

Scorecard

Location: **Crescent Parcel, Boston, MA , USA**

Note: The information on this tab is READ-ONLY. To edit this information, see the Credit Category tabs.

Integrative Process		**Preliminary**	Y	2 of 2	M	*0*	**Verified**	0
IPc	**Integrative Process**			2 of 2		*0*		
Location and Transportation		**Preliminary**	Y	15 of 15	M	*0*	**Verified**	0
LTp	Floodplain Avoidance			Required				Not Verified
Performance Path								
LTc	LEED for Neighborhood Development			0 of 15		*0*		
Prescriptive Path								
LTc	Site Selection			8 of 8		*0*		
LTc	Compact Development			3 of 3		*0*		
LTc	Community Resources			2 of 2		*0*		
LTc	Access to Transit			2 of 2		*0*		
Sustainable Sites		**Preliminary**	Y	5 of 7	M	*2*	**Verified**	0
SSp	Construction Activity Pollution Prevention			Required				Not Verified
SSp	No Invasive Plants			Required				Not Verified
SSc	Heat Island Reduction			2 of 2		*0*		
SSc	Rainwater Management			1 of 3		*2*		
SSc	Nontoxic Pest Control			2 of 2		*0*		
Water Efficiency		**Preliminary**	Y	6 of 12	M	*2*	**Verified**	0
WEp	Water Metering			Required				Not Verified
Performance Path								
WEc	Total Water Use			6 of 12		*2*		
Prescriptive Path								
WEc	Indoor Water Use			0 of 6		*0*		
WEc	Outdoor Water Use			0 of 4		*0*		
Energy and Atmosphere		**Preliminary**	Y	33 of 37	M	*0*	**Verified**	31.5
EAp	Minimum Energy Performance			Required				Not Verified
EAp	Energy Metering			Required				Not Verified
EAp	Education of the Homeowner, Tenant or Building Manager			Required				Not Verified
EAc	Annual Energy Use			30 of 30		*0*		31.5
EAc	Efficient Hot Water Distribution System			2 of 5		*0*		
EAc	Advanced Utility Tracking			1 of 2		*0*		
Materials and Resources		**Preliminary**	Y	3 of 9	M	*0*	**Verified**	0
MRp	Certified Tropical Wood			Required				Not Verified
MRp	Durability Management			Required				Not Verified
MRc	Durability Management Verification			1 of 1		*0*		
MRc	Environmentally Preferable Products			0 of 5		*0*		
MRc	Construction Waste Management			2 of 3		*0*		
Indoor Environmental Quality		**Preliminary**	Y	13 of 18	M	*5*	**Verified**	0
EQp	Ventilation			Required				Not Verified
EQp	Combustion Venting			Required				Not Verified
EQp	Garage Pollutant Protection			Required				Not Verified
EQp	Radon-Resistant Construction			Required				Not Verified
EQp	Air Filtering			Required				Not Verified
EQp	Environmental Tobacco Smoke			Required				Not Verified

EQp	Compartmentalization	Required		Not Verified
EQc	Enhanced Ventilation	3 of 3	*0*	
EQc	Contaminant Control	1 of 2	*1*	
EQc	Balancing of Heating and Cooling Distribution Systems	3 of 3	*0*	
EQc	Enhanced Compartmentalization	0 of 3	*3*	
EQc	Combustion Venting	2 of 2	*0*	
EQc	Enhanced Garage Pollutant Protection	1 of 1	*0*	
EQc	Low-Emitting Products	2 of 3	*1*	
EQc	No Environmental Tobacco Smoke	1 of 1	*0*	



Innovation	**Preliminary**	Y	2 of 6	M	*0*	**Verified**	0

INp	Preliminary Rating	Required		Not Verified
INc	Innovation	1 of 5	*0*	
INc	LEED Accredited Professional	1 of 1	*0*	



Regional Priority	**Preliminary**	Y	3 of 4	M	*0*	**Verified**	0

RPc	Regional Priority	3 of 4 *0*

Point Floors	
The project earned at least 8 points total in Location and Transportation and Energy and Atmosphere	Yes
The project earned at least 3 points in Water Efficiency	No
The project earned at least 3 points in Indoor Environmental Quality	No

Total	**Preliminary**	Y	82 of 110	M	9	**Verified**	31.5

Certification Thresholds Certified: 40-49, Silver: 50-59, Gold: 60-79, Platinum: 80-110

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Climate Resiliency Checklist

NOT FOR FILING

NOTE: Project filings should be prepared and submitted using the online Climate Resiliency Checklist.

A.1 - Project Information

Project Name:	Crescent Parcel RFP (Building A)			
Project Address:	Melnea Cass Boulevard and Tremont Street			
Project Address Additional:				
Filing Type (*select*)	*Initial (PNF, EPNF, NPC or other substantial filing)*			
Filing Contact	*Tom Chase*	*New Ecology, Inc.*	*chase@newecology.org*	*617-557-1700*
Is MEPA approval required	*TBD*		*April 20, 2021*	

A.3 - Project Team

Owner / Developer:	Trinity Financial & Madison Park Development Corp
Architect:	DHK Architects, Inc.
Engineer:	TBD
Sustainability / LEED:	New Ecology, Inc.
Permitting:	TBD
Construction Management:	TBD

A.3 - Project Description and Design Conditions

List the principal Building Uses:	Residential
List the First Floor Uses:	Community, Lobby, Back-of-House
List any Critical Site Infrastructure and or Building Uses:	None

Site and Building:

Site Area:	*72,750 SF*	Building Area:	*177,948 SF*
Building Height:	*120 Ft*	Building Height:	*11 Stories*
Existing Site Elevation – Low:	*30 Ft BCB*	Existing Site Elevation – High:	*30 Ft BCB*
Proposed Site Elevation – Low:	*30 Ft BCB*	Proposed Site Elevation – High:	*30 Ft BCB*
Proposed First Floor Elevation:	*30 Ft BCB*	Below grade levels:	*2 Stories*

Article 37 Green Building:

LEED Version - Rating System :	BD+C: Multifamily Midrise v4	LEED Certification:	*No*
Proposed LEED rating:	*Platinum*	Proposed LEED point score:	*82 Pts.*

Building Envelope

When reporting R values, differentiate between R discontinuous and R continuous. For example, use "R13" to show R13 discontinuous and use R10c.i. to show R10 continuous. When reporting U value, report total assembly U value including supports and structural elements.

Roof:	*TBD (R)*	Exposed Floor:	*TBD (R)*
Foundation Wall:	*TBD (R)*	Slab Edge (at or below grade):	*TBD (R)*

Vertical Above-grade Assemblies (%'s are of total vertical area and together should total 100%):

Area of Opaque Curtain Wall & Spandrel Assembly:	*TBD (%)*	Wall & Spandrel Assembly Value:	*TBD (U)*
Area of Framed & Insulated / Standard Wall:	*TBD (%)*	Wall Value	*TBD (R)*
Area of Vision Window:	*TBD %*	Window Glazing Assembly Value:	*TBD (U)*
		Window Glazing SHGC:	*TBD (SHGC)*
Area of Doors:	*TBD %*	Door Assembly Value:	*TBD (U)*

Energy Loads and Performance

For this filing – describe how energy loads & performance were determined	*Project has committed to design, build, and certify under the PHIUS+ 2021 passive house green building certification standard, representing best-in-class performance an efficiency, in excess of MA Stretch Code performance requirements.*		
Annual Electric:	*TBD (kWh)*	Peak Electric:	*TBD (kW)*
Annual Heating:	*TBD (MMbtu/hr)*	Peak Heating:	*TBD (MMbtu)*
Annual Cooling:	*(Tons/hr)*	Peak Cooling:	*TBD (Tons)*
Energy Use - Below ASHRAE 90.1 - 2013:	*TBD %*	Have the local utilities reviewed the building energy performance?:	*No*
Energy Use - Below Mass. Code:	*TBD %*	Energy Use Intensity:	*TBD (kBtu/SF)*

Back-up / Emergency Power System

Electrical Generation Output:	*TBD (kW)*	Number of Power Units:	*TBD*
System Type:	*TBD (kW)*	Fuel Source:	*TBD*

Emergency and Critical System Loads (in the event of a service interruption)

Electric:	*TBD (kW)*	Heating:	*TBD (MMbtu/hr)*
		Cooling:	*TBD (Tons/hr)*

B – Greenhouse Gas Reduction and Net Zero / Net Positive Carbon Building Performance

Reducing GHG emissions is critical to avoiding more extreme climate change conditions. To achieve the City's goal of carbon neutrality by 2050 new buildings performance will need to progressively improve to net carbon zero and positive.

B.1 – GHG Emissions - Design Conditions

For this Filing - Annual Building GHG Emissions: *TBD (Tons)*

For this filing - describe how building energy performance has been integrated into project planning, design, and engineering and any supporting analysis or modeling:

As a PHIUS+ 2021 project, energy performance will be modeled iteratively and through integrated project planning, to ensure all performance goals are met.

Describe building specific passive energy efficiency measures including orientation, massing, envelop, and systems:

Orientation, massing, envelope, and systems will all be optimized for PHIUS+ 2021 performance.

Describe building specific active energy efficiency measures including equipment, controls, fixtures, and systems:

All systems will be designed to operate at maximum efficiency, through controls, sizing, and maintenance planning.

Describe building specific load reduction strategies including on-site renewable, clean, and energy storage systems:

The primary load reduction strategies are a PHIUS+ 2021 compliant envelope and mechanical systems. Project will incorporate solar PV as available roof space allows.

Describe any area or district scale emission reduction strategies including renewable energy, central energy plants, distributed energy systems, and smart grid infrastructure:

Building loads are expected to be too low to support a district scale energy system, but smart grid and distributed battery storage capacity will be explored in design.

Describe any energy efficiency assistance or support provided or to be provided to the project:

Project is expected to utilize any and all available utility rebates.

B.2 - GHG Reduction - Adaptation Strategies

Describe how the building and its systems will evolve to further reduce GHG emissions and achieve annual carbon net zero and net positive performance (e.g. added efficiency measures, renewable energy, energy storage, etc.) and the timeline for meeting that goal (by 2050):

Building systems will be all electric, with some on-site solar PV likely. Additional carbon reduction opportunities could come from off-site renewable resources and through the purchase of renewable energy credits.

C - Extreme Heat Events

Annual average temperature in Boston increased by about 2˚F in the past hundred years and will continue to rise due to climate change. By the end of the century, the average annual temperature could be 56° (compared to 46° now) and the number of days above 90° (currently about 10 a year) could rise to 90.

C.1 – Extreme Heat - Design Conditions

Temperature Range - Low:	*7 Deg.*	Temperature Range - High:	*91 Deg.*
Annual Heating Degree Days:	5659	Annual Cooling Degree Days	899

What Extreme Heat Event characteristics will be / have been used for project planning

Days - Above 90°:	*11 #*	Days – Above 100°:	*3 #*
Number of Heatwaves / Year:	*3 #*	Average Duration of Heatwave (Days):	*3 #*

Describe all building and site measures to reduce heat-island effect at the site and in the surrounding area:

Building roofs will use high SRI roofing and paving products, as will paving at grade. Site will retain some existing trees, add new trees, and will be landscaped extensively.

C.2 - Extreme Heat – Adaptation Strategies

Describe how the building and its systems will be adapted to efficiently manage future higher average temperatures, higher extreme temperatures, additional annual heatwaves, and longer heatwaves:

The building's PHIUS+ 2021 envelope will be designed to passively withstand higher temperatures while protecting residents inside.

Describe all mechanical and non-mechanical strategies that will support building functionality and use during extended interruptions of utility services and infrastructure including proposed and future adaptations:

The PHIUS+ 2021 envelope is the most important component supporting building functionality during extended interruptions of service at this project.

D - Extreme Precipitation Events

From 1958 to 2010, there was a 70 percent increase in the amount of precipitation that fell on the days with the heaviest precipitation. Currently, the 10-Year, 24-Hour Design Storm precipitation level is 5.25". There is a significant probability that this will increase to at least 6" by the end of the century. Additionally, fewer, larger storms are likely to be accompanied by more frequent droughts.

D.1 – Extreme Precipitation - Design Conditions

10 Year, 24 Hour Design Storm:	*0.89 In.*

Describe all building and site measures for reducing storm water run-off:

Storm water will be collected from storm drains from roofs, and at grade, and infiltration will be provided to accommodate City of Boston requirements.

D.2 - Extreme Precipitation - Adaptation Strategies

Describe how site and building systems will be adapted to efficiently accommodate future more significant rain events (e.g. rainwater harvesting, on-site storm water retention, bio swales, green roofs):

In addition to extensive site landscaping, additional measures to mitigate significant rain events will be explored during design.

E – Sea Level Rise and Storms

Under any plausible greenhouse gas emissions scenario, sea levels in Boston will continue to rise throughout the century. This will increase the number of buildings in Boston susceptible to coastal flooding and the likely frequency of flooding for those already in the floodplain.

Is any portion of the site in a FEMA SFHA?	*No*	What Zone:	N/A
		Current FEMA SFHA Zone Base Flood Elevation:	*N/A*

Is any portion of the site in a BPDA Sea Level Rise - Flood Hazard Area? Use the online BPDA SLR-FHA Mapping Tool to assess the susceptibility of the project site.	*No*

If you answered YES to either of the above questions, please complete the following questions.
Otherwise you have completed the questionnaire; thank you!

E.1 – Sea Level Rise and Storms – Design Conditions

Proposed projects should identify immediate and future adaptation strategies for managing the flooding scenario represented on the BPDA Sea Level Rise - Flood Hazard Area (SLR-FHA) map, which depicts a modeled 1% annual chance coastal flood event with 40 inches of sea level rise (SLR). Use the online BPDA SLR-FHA Mapping Tool to identify the highest Sea Level Rise - Base Flood Elevation for the site. The Sea Level Rise - Design Flood Elevation is determined by adding either 24" of freeboard for critical facilities and infrastructure and any ground floor residential units OR 12" of freeboard for other buildings and uses.

Sea Level Rise - Base Flood Elevation:	*Ft BCB*		
Sea Level Rise - Design Flood Elevation:	*Ft BCB*	First Floor Elevation:	*Ft BCB*
Site Elevations at Building:	*Ft BCB*	Accessible Route Elevation:	*Ft BCB*

Describe site design strategies for adapting to sea level rise including building access during flood events, elevated site areas, hard and soft barriers, wave / velocity breaks, storm water systems, utility services, etc.:

Describe how the proposed Building Design Flood Elevation will be achieved including dry / wet flood proofing, critical systems protection, utility service protection, temporary flood barriers, waste and drain water back flow prevention, etc.:

Describe how occupants might shelter in place during a flooding event including any emergency power, water, and waste water provisions and the expected availability of any such measures:

Describe any strategies that would support rapid recovery after a weather event:

E.2 – Sea Level Rise and Storms – Adaptation Strategies

Describe future site design and or infrastructure adaptation strategies for responding to sea level rise including future elevating of site areas and access routes, barriers, wave / velocity breaks, storm water systems, utility services, etc.:

Describe future building adaptation strategies for raising the Sea Level Rise Design Flood Elevation and further protecting critical systems, including permanent and temporary measures:

A pdf and word version of the Climate Resiliency Checklist is provided for informational use and off-line preparation of a project submission. NOTE: Project filings should be prepared and submitted using the online Climate Resiliency Checklist.

For questions or comments about this checklist or Climate Change best practices, please contact: John.Dalzell@boston.gov

boston planning & development agency

Climate Resiliency Checklist

NOT FOR FILING

NOTE: Project filings should be prepared and submitted using the online Climate Resiliency Checklist.

A.1 - Project Information

Project Name:	Crescent Parcel RFP (Building B)			
Project Address:	Melnea Cass Boulevard and Tremont Street			
Project Address Additional:				
Filing Type (*select*)	*Initial (PNF, EPNF, NPC or other substantial filing)*			
Filing Contact	*Tom Chase*	*New Ecology, Inc.*	*chase@newecology.org*	*617-557-1700*
Is MEPA approval required	*TBD*		*April 20, 2021*	

A.3 - Project Team

Owner / Developer:	Trinity Financial & Madison Park Development Corp
Architect:	DHK Architects, Inc.
Engineer:	TBD
Sustainability / LEED:	New Ecology, Inc.
Permitting:	TBD
Construction Management:	TBD

A.3 - Project Description and Design Conditions

List the principal Building Uses:	Residential
List the First Floor Uses:	Community, Lobby, Back-of-House
List any Critical Site Infrastructure and or Building Uses:	None

Site and Building:

Site Area:	*72,750 SF*	Building Area:	*177,948 SF*
Building Height:	*67 Ft*	Building Height:	*6 Stories*
Existing Site Elevation – Low:	*30 Ft BCB*	Existing Site Elevation – High:	*30 Ft BCB*
Proposed Site Elevation – Low:	*30 Ft BCB*	Proposed Site Elevation – High:	*30 Ft BCB*
Proposed First Floor Elevation:	*30 Ft BCB*	Below grade levels:	*1 Stories*

Article 37 Green Building:

LEED Version - Rating System :	BD+C: Multifamily Midrise v4	LEED Certification:	*No*
Proposed LEED rating:	*Platinum*	Proposed LEED point score:	*82 Pts.*

Building Envelope

When reporting R values, differentiate between R discontinuous and R continuous. For example, use "R13" to show R13 discontinuous and use R10c.i. to show R10 continuous. When reporting U value, report total assembly U value including supports and structural elements.

Roof:	*TBD (R)*	Exposed Floor:	*TBD (R)*
Foundation Wall:	*TBD (R)*	Slab Edge (at or below grade):	*TBD (R)*

Vertical Above-grade Assemblies (%'s are of total vertical area and together should total 100%):

Area of Opaque Curtain Wall & Spandrel Assembly:	*TBD (%)*	Wall & Spandrel Assembly Value:	*TBD (U)*
Area of Framed & Insulated / Standard Wall:	*TBD (%)*	Wall Value	*TBD (R)*
Area of Vision Window:	*TBD %*	Window Glazing Assembly Value:	*TBD (U)*
		Window Glazing SHGC:	*TBD (SHGC)*
Area of Doors:	*TBD %*	Door Assembly Value:	*TBD (U)*

Energy Loads and Performance

For this filing – describe how energy loads & performance were determined	*Project has committed to design, build, and certify under the PHIUS+ 2021 passive house green building certification standard, representing best-in-class performance an efficiency, in excess of MA Stretch Code performance requirements.*		
Annual Electric:	*TBD (kWh)*	Peak Electric:	*TBD (kW)*
Annual Heating:	*TBD (MMbtu/hr)*	Peak Heating:	*TBD (MMbtu)*
Annual Cooling:	*(Tons/hr)*	Peak Cooling:	*TBD (Tons)*
Energy Use - Below ASHRAE 90.1 - 2013:	*TBD %*	Have the local utilities reviewed the building energy performance?:	*No*
Energy Use - Below Mass. Code:	*TBD %*	Energy Use Intensity:	*TBD (kBtu/SF)*

Back-up / Emergency Power System

Electrical Generation Output:	*TBD (kW)*	Number of Power Units:	*TBD*
System Type:	*TBD (kW)*	Fuel Source:	*TBD*

Emergency and Critical System Loads (in the event of a service interruption)

Electric:	*TBD (kW)*	Heating:	*TBD (MMbtu/hr)*
		Cooling:	*TBD (Tons/hr)*

B – Greenhouse Gas Reduction and Net Zero / Net Positive Carbon Building Performance

Reducing GHG emissions is critical to avoiding more extreme climate change conditions. To achieve the City's goal of carbon neutrality by 2050 new buildings performance will need to progressively improve to net carbon zero and positive.

B.1 – GHG Emissions - Design Conditions

For this Filing - Annual Building GHG Emissions: *TBD (Tons)*

For this filing - describe how building energy performance has been integrated into project planning, design, and engineering and any supporting analysis or modeling:

As a PHIUS+ 2021 project, energy performance will be modeled iteratively and through integrated project planning, to ensure all performance goals are met.

Describe building specific passive energy efficiency measures including orientation, massing, envelop, and systems:

Orientation, massing, envelope, and systems will all be optimized for PHIUS+ 2021 performance.

Describe building specific active energy efficiency measures including equipment, controls, fixtures, and systems:

All systems will be designed to operate at maximum efficiency, through controls, sizing, and maintenance planning.

Describe building specific load reduction strategies including on-site renewable, clean, and energy storage systems:

The primary load reduction strategies are a PHIUS+ 2021 compliant envelope and mechanical systems. Project will incorporate solar PV as available roof space allows.

Describe any area or district scale emission reduction strategies including renewable energy, central energy plants, distributed energy systems, and smart grid infrastructure:

Building loads are expected to be too low to support a district scale energy system, but smart grid and distributed battery storage capacity will be explored in design.

Describe any energy efficiency assistance or support provided or to be provided to the project:

Project is expected to utilize any and all available utility rebates.

B.2 - GHG Reduction - Adaptation Strategies

Describe how the building and its systems will evolve to further reduce GHG emissions and achieve annual carbon net zero and net positive performance (e.g. added efficiency measures, renewable energy, energy storage, etc.) and the timeline for meeting that goal (by 2050):

Building systems will be all electric, with some on-site solar PV likely. Additional carbon reduction opportunities could come from off-site renewable resources and through the purchase of renewable energy credits.

C - Extreme Heat Events

Annual average temperature in Boston increased by about 2˚F in the past hundred years and will continue to rise due to climate change. By the end of the century, the average annual temperature could be 56° (compared to 46° now) and the number of days above 90° (currently about 10 a year) could rise to 90.

C.1 – Extreme Heat - Design Conditions

Temperature Range - Low:	*7 Deg.*	Temperature Range - High:	*91 Deg.*
Annual Heating Degree Days:	5659	Annual Cooling Degree Days	899

What Extreme Heat Event characteristics will be / have been used for project planning

Days - Above 90°:	*11 #*	Days – Above 100°:	*3 #*
Number of Heatwaves / Year:	*3 #*	Average Duration of Heatwave (Days):	*3 #*

Describe all building and site measures to reduce heat-island effect at the site and in the surrounding area:

Building roofs will use high SRI roofing and paving products, as will paving at grade. Site will retain some existing trees, add new trees, and will be landscaped extensively.

C.2 - Extreme Heat – Adaptation Strategies

Describe how the building and its systems will be adapted to efficiently manage future higher average temperatures, higher extreme temperatures, additional annual heatwaves, and longer heatwaves:

The building's PHIUS+ 2021 envelope will be designed to passively withstand higher temperatures while protecting residents inside.

Describe all mechanical and non-mechanical strategies that will support building functionality and use during extended interruptions of utility services and infrastructure including proposed and future adaptations:

The PHIUS+ 2021 envelope is the most important component supporting building functionality during extended interruptions of service at this project.

D - Extreme Precipitation Events

From 1958 to 2010, there was a 70 percent increase in the amount of precipitation that fell on the days with the heaviest precipitation. Currently, the 10-Year, 24-Hour Design Storm precipitation level is 5.25". There is a significant probability that this will increase to at least 6" by the end of the century. Additionally, fewer, larger storms are likely to be accompanied by more frequent droughts.

D.1 – Extreme Precipitation - Design Conditions

10 Year, 24 Hour Design Storm:	*0.89 In.*

Describe all building and site measures for reducing storm water run-off:

Storm water will be collected from storm drains from roofs, and at grade, and infiltration will be provided to accommodate City of Boston requirements.

D.2 - Extreme Precipitation - Adaptation Strategies

Describe how site and building systems will be adapted to efficiently accommodate future more significant rain events (e.g. rainwater harvesting, on-site storm water retention, bio swales, green roofs):

In addition to extensive site landscaping, additional measures to mitigate significant rain events will be explored during design.

E – Sea Level Rise and Storms

Under any plausible greenhouse gas emissions scenario, sea levels in Boston will continue to rise throughout the century. This will increase the number of buildings in Boston susceptible to coastal flooding and the likely frequency of flooding for those already in the floodplain.

Is any portion of the site in a FEMA SFHA?	*No*	What Zone:	N/A
		Current FEMA SFHA Zone Base Flood Elevation:	*N/A*

Is any portion of the site in a BPDA Sea Level Rise - Flood Hazard Area? Use the online BPDA SLR-FHA Mapping Tool to assess the susceptibility of the project site.	*No*

If you answered YES to either of the above questions, please complete the following questions.
Otherwise you have completed the questionnaire; thank you!

E.1 – Sea Level Rise and Storms – Design Conditions

Proposed projects should identify immediate and future adaptation strategies for managing the flooding scenario represented on the BPDA Sea Level Rise - Flood Hazard Area (SLR-FHA) map, which depicts a modeled 1% annual chance coastal flood event with 40 inches of sea level rise (SLR). Use the online BPDA SLR-FHA Mapping Tool to identify the highest Sea Level Rise - Base Flood Elevation for the site. The Sea Level Rise - Design Flood Elevation is determined by adding either 24" of freeboard for critical facilities and infrastructure and any ground floor residential units OR 12" of freeboard for other buildings and uses.

Sea Level Rise - Base Flood Elevation:	*Ft BCB*		
Sea Level Rise - Design Flood Elevation:	*Ft BCB*	First Floor Elevation:	*Ft BCB*
Site Elevations at Building:	*Ft BCB*	Accessible Route Elevation:	*Ft BCB*

Describe site design strategies for adapting to sea level rise including building access during flood events, elevated site areas, hard and soft barriers, wave / velocity breaks, storm water systems, utility services, etc.:

Describe how the proposed Building Design Flood Elevation will be achieved including dry / wet flood proofing, critical systems protection, utility service protection, temporary flood barriers, waste and drain water back flow prevention, etc.:

Describe how occupants might shelter in place during a flooding event including any emergency power, water, and waste water provisions and the expected availability of any such measures:

Describe any strategies that would support rapid recovery after a weather event:

E.2 – Sea Level Rise and Storms – Adaptation Strategies

Describe future site design and or infrastructure adaptation strategies for responding to sea level rise including future elevating of site areas and access routes, barriers, wave / velocity breaks, storm water systems, utility services, etc.:

Describe future building adaptation strategies for raising the Sea Level Rise Design Flood Elevation and further protecting critical systems, including permanent and temporary measures:

A pdf and word version of the Climate Resiliency Checklist is provided for informational use and off-line preparation of a project submission. NOTE: Project filings should be prepared and submitted using the online Climate Resiliency Checklist.

For questions or comments about this checklist or Climate Change best practices, please contact: John.Dalzell@boston.gov

ZONING CHART

DHK ARCHITECTS, INC.			
CRESCENT PARCEL RFP			
DRAFT Zoning Analysis DRAFT 4/16/21			
TABULATION OF ZONING REQUIREMENTS			
Item	Required or Allowed	Proposed	Compliance
	As of Right		
Zoning District	Roxbury Neighborhood District		
	Boulevard Planning District		
	Urban Renewal U District		
Uses			
Use 1st Floor		Community Services	
Use 1st Floor		Townhouse	
Use 1st Floor		Multi-Family	
Use 2nd Floor & above		Multi-Family	
Basement		Parking Garage	
Lot			
Min. Lot Area	177,000	72,750	
Min Lot Width	40'		
Min Lot Frontage	40'		
Floor Area Ratio, maximum	3.0	2.97	
Max Building Height	150'	120'	
Usable Open Space 200sf/DU	35,400	56,634	
Min Front Yard	20	15'	Relief Required
Min Side Yard	10	20'	
Min Rear Yard	20	3	Relief Required
Parking			
Community Services: 1/1000SF	12		
Parking Spaces - Residential	58		
Parking Spaces - Residential	119		
Parking Spaces - Residential	177		
Parking Spaces - Total	189	83	Relief Required
TABULATION OF BUILDOUT CHARACTERISTICS			
ITEM		PROPOSED	
BUILT AREAS, SF			
Community Services		12,108	
Residential		200,283	
Garage parking & mechanical		52,196	
Total Built Area		264,587	
PARKING			
Number of parking spaces		91	
UNIT DISTRIBUTION			
One Bedroom Units		62	
Two Bedroom Units		91	
Three Bedroom Units		24	
Total number of units		177	
BUILDING AND SITE			
Building Height: Building		120 ft./67.5 ft.	
Dwelling units/ net acre, proposed		106	
% of site surface occupied by		0%	
% of site open space		70%	
% of site occupied by building		30%	
Lot Area SF		29,159	
Number of stories		11 stories/6 stories	
Site Area, acres		1.7	
Site Area, sf		72,750	
Area, Building sf		264,587	
Garage parking & mechanical		48,271	
NET AREA for FAR, SF		216,316	

Crescent Parcel



Tab E

OPERATIONAL PLAN

OPERATIONAL PLAN

This Operational Plan defines the responsibilities of the property management team (and others, as described herein) for the Crescent Parcel.

This Operational Plan is intended to enable everyone who participates in the operation and administration of the property to do so effectively. However, we recognize that the plan may be revised once the property has opened, with the benefit of day-to-day experience at the site.

ROLES AND RESPONSIBILITIES

There will be a management agreement between the ownership entities of each of the two buildings that will be developed on Crescent Parcel (the "Owner") and Trinity Management, LLC ("Trinity Management" or "Agent") that will clearly define the responsibilities of both the Owner and the Agent. The management agreement will incorporate, by reference, a management plan and will set forth those responsibilities and obligations delegated to the Agent by the Owner. It also will identify the obligations the Agent must meet as established by applicable regulatory, municipal, state or federal agencies, laws and statutes.

The management agreement will outline the relationship between the Owner, lenders, investors, any applicable public agency, and Agent. It is the responsibility of the Agent to propose policy matters to the Owner (and other parties, as appropriate) before implementation, and to consult with the Owner on all issues where actions to be taken are not clearly defined by either the management plan or the management agreement. In all areas of expenditure that exceed those limits and instances imposed by any applicable public agency or financial stakeholders, the Agent must provide the Owner with an explanation of the expenditure, provide documentation that appropriate purchasing processes were followed, and obtain the Owner's approval before entering into any contract for such expenditure.

The Agent will be guided by the Owner's and applicable public agencies' (in the instance of restricted units) policies, philosophies and goals at all times. Whenever there is a conflict, the Agent will look to the Owner for direction. The Agent's Regional Director and/or Chief Operating Officer and the Property Manager will meet with the Owner on a monthly basis to review the operation of the property. The Property Manager is the senior person on site and reports to the Regional Director and/or Chief Operation Officer.

PERSONNEL POLICY AND STAFFING

EEO Policy

Trinity Management is an Equal Opportunity Employer and will not discriminate against any employee or applicant on the basis of race, color, creed, age, religion, sex, national or ethnic origin, ancestry, class, familial status, disability or handicap, legal source of income, military /veteran status, sexual orientation, or other basis prohibited by law. A copy of Trinity Management's complete Affirmative Action Plan is included in this Plan following this section.

Affirmative Action Policy, Plan, and Goals

Equal Opportunity Policy
It is the policy of Trinity Management to promote equal opportunity in all of its activities. It is Trinity Man-

agement's Policy not to discriminate against any applicant, employee, or provider of goods and

services on the basis of race, color, religion, national or ethnic origin, citizenship, ancestry, class, sex, sexual orientation, familial status, disability or handicap, military / veteran status, legal source of income, age or other basis prohibited by city, state or federal law.

Affirmative Action Policy

It is the policy of Trinity Management to take affirmative action in order to assure that persons who might not otherwise apply, especially minority groups, have a real opportunity to be considered for housing, employment, promotion, or to provide goods and services on a contract basis.

Affirmative Action Officer

The Affirmative Action Officer for Trinity Management is Maribel Concepcion. The Affirmative Action Officer is responsible for implementing the Affirmative Action Plan as herein described.

Affirmative Action Methods

Affirmative Action goals of Trinity Management are flexible according to site location and area demographics. The methods used to achieve specific goals are outlined as follows:

- Employees will be reviewed at least annually to identify those employees who can be targeted for training and promotion. Whenever possible, supervisory and management positions that become vacant will be filled by promotion.
- When a vacancy occurs, the Affirmative Action Goals and Methods available to meet them will be reviewed by Senior Management Staff with employment responsibility prior to any advertisement or posting.
- Transfer of employees to key positions will be utilized when the transfer will result in a promotion or better opportunity for skills development for the employee.
- Advertising in daily, weekly or monthly neighborhood periodicals or newspapers will be utilized as needed.
- Personnel recruitment assistance will be utilized when necessary to seek out the highest caliber candidate.
- All advertisement will include the language "An Equal Employment Opportunity Employer" or "Equal Opportunity Housing" as appropriate.
- All records will be kept of all vacancies and advertisements.

AFFIRMATIVE ACTION METHODS FOR GOODS AND SERVICES

As further described in *Tab F: Economic Development Strategy*, Trinity Management is committed to identifying and utilizing Minority Business Enterprises (MBE's) to provide goods and services. Our commitment exceeds any mandated goals of participation by employing the following methods:

- Identifying MBE's throughout the Commonwealth.
- Providing references for MBE's to other property management firms.
- Maintaining records for each minority business that provides goods or services to Trinity Management.

- Apportioning large contracts among vendors to allow for MBE and small disadvantaged firm participation.
- Compiling records for semi-annual performance reporting to officers of the company.

GRIEVANCES

If any employee or an applicant feels that discrimination has affected a decision relating to job opportunities or performance, the Affirmative Action Officer will review the facts, discuss the situation with the affected party and supervisor and will recommend a solution. The Affirmative Action Officer will maintain a written record of the incident.

STAFFING PLAN

In consideration of the proposed program for Crescent Parcel, we propose, at a minimum, the following staffing plan for the site:

Administrative

1 Full Time Property Manager
1 Full Time Assistant Property Manager

Maintenance

1 Full Time Maintenance Superintendent
1 Full Time Maintenance Technician

Trinity Management staff will perform as much of the routine day-to-day services as possible. Whenever necessary, and in accordance with the operating budget, Trinity Management will contract for certain services including landscaping and unit turnover. In addition, when a repair requires expertise beyond that of site staff, a contractor will be utilized.

As employees of Trinity Management, new persons filling these positions would be eligible for 3 weeks Paid Time Off (PTO). Benefits include medical insurance, dental insurance, FSA, long and short-term disability insurance, life insurance, participation in the company's 401K plan, and optional benefit programs. The Property Manager is the senior person on the site, reporting directly to the Regional Director and/ or Chief Operating Officer and responsible for the day-to-day administrative and operational activities.

The Property Manager is responsible for ensuring that all administrative and maintenance personnel perform their job-related tasks and that the residents comply with the terms of their Occupancy Agreements (Lease). The Property Manager is the person in charge of all other Trinity Management on-site personnel and will be the direct contact with external community organizations. The Regional Director and/or Chief Operating Officer is in direct contact with the Owner, and lender(s).

TRAINING

Trinity Management has an excellent tradition of employment and training programs and encourages employees to pursue self-development related courses through education assistance. Trinity Management's training and mentoring programs are further detailed in *Tab F: Economic Development Strategy*.

PROFESSIONAL AFFILIATIONS AND ACCREDITATIONS

Trinity Management strives to keep all employees up-to-date in all areas of property management including physical property management, financial management, social and marketing. Trinity Management is currently linked with several nationally recognized organizations that offer training for management agents including; National Apartment Association, The National Center for Housing Management, The Institute of Real Estate Management, MassHousing- Tenant Assistance Program, Rental Housing Association, Greater Boston Real Estate Board, Citizens Housing Planning Association, New England Affordable Housing Management Association, Elizabeth Moreland Tax Credit College, Nan McKay, National Affordable Housing Management Association, Community Associations Institute, National Association of Cooperative Housing, and Spectrum Seminars, Inc.

Trinity Management's employees have received many prestigious designations/certifications, such as, National Apartment Leasing Professional, Certified Community Manager, Accredited Resident Manager, Registered Cooperative Manager, Specialist in Housing Credit Management, Real Estate Salesperson, Certified Occupancy Specialist, and many more.

MARKETING AND LEASING

Over the past several years, Trinity Management has successfully marketed market-rate, mixed-income, and income restricted for-sale and rental housing. To further enhance its successful marketing and leasing program, Trinity Management has expanded its staff to include a Director of Marketing. Trinity Management will bring its full body of experience and the resources of its team to the planning, pre-marketing and leasing stages of the Crescent Parcel marketing program.

The Trinity team will comply with all Federal, State and local fair housing and civil rights laws. In carrying out its marketing program and tenant selection process, neither the Owner, nor its Agent, will discriminate based on race, color, creed, religion, sex, sexual orientation, national or ethnic origin, age, disability, handicap, ancestry, legal source of income, class or marital status, or any other basis prohibited by law. This applies to accepting and processing applications, selecting tenants from among eligible applicants of the waiting list, assigning units, and certifying and recertifying eligibility for assistance.

All marketing staff and all other persons involved in processing and/or handling applications will be trained in (1) procedures and policy matters, mindful of relevant federal, state and municipal orders, laws, and statutes dealing with civil rights and fair housing, (2) The marketing and tenant selection plans developed for Crescent Parcel, (3) applicable regulations governing the selection of applicants for this housing, including, but not limited to, Title VIII of the Civil Rights Act of 1968; Title VI of the Civil Rights Act of 1974; Executive Order 11063, November 29,1962; M.G.L. Chapter 151B; Executive Order 11246, September 9, 1965, the Fair Housing Amendments Act of 1988 and the Americans with Disabilities Act. In addition, the appropriate complaint procedures will be explained so that applicants may avail themselves of that process if they feel discrimination has occurred. Property management and marketing staff will receive training on the use and appropriate review of the paperwork and processing required in marketing the units.

The supervisory staff of Trinity Management will be responsible for administering all training required by this Plan. Those staff members include the Regional Director and/or Chief Operating Officer having direct responsibility for oversight of this community.

ADMINISTRATIVE & COMPLIANCE PROGRAM

Trinity Management has developed and implemented a strong and successful administrative program to ensure compliance with all applicable housing laws and regulatory agencies, preserve the value of the physical asset and enhance resident engagement and involvement.

These policies include, but are not limited to: rent collection, general rules and regulations, recertification or tenant status review following applicable regulatory requirements, move in and move out procedures and fiscal management. Policies are developed with significant resident input and regular communications to the general resident population.

The Property Manager is the senior person on the site, reporting directly to the Regional Director and responsible for the day-to-day administrative and operational activities. The Property Manager is responsible for ensuring that all administrative and maintenance personnel perform their job-related tasks in a professional and efficient manner and that the residents comply with the terms of their Occupancy Agreements (Lease). The Property Manager will also devote significant time and resources fostering successful relationships with all of the residents.

MAINTENANCE PROGRAM

Trinity Management provides professional maintenance services to all of its clients. As we serve a varied client base, the interests and goals of each client shape the operating policies for each property. Trinity Management's Risk and Safety Consultant works with the property team to achieve these goals by consistently applying the highest professional standards individualized to meet and exceed the varied needs of each community being served.

Trinity Management delivers maintenance services to its properties through a clearly defined routine, preventative, and emergency maintenance system. The system is made up of several components that ensure deficiencies are corrected, preventive measures are taken and improvements are pursued. In addition, the system is designed to guarantee prompt and efficient response to all resident maintenance requests. Trinity Management shall maintain a 24-hour response system, 365 days per year and will be responsible for communicating major emergencies to the Owner and any applicable public agencies, as necessary, immediately and in accordance with emergency communication protocols.

Deficiencies on the property are corrected through the work order procedure. The work order provides the maintenance staff with authorization to perform work on the property. Once a request for work has been entered into the computer, it is assigned a category, which defines the priority of the work and dictates how and when it will be dispatched for completion. Categorizing the workload offers many benefits to residents by ensuring that residents' maintenance issues are addressed promptly. In addition, the system allows for a continuous and accurate knowledge of the workload and what resources are available to meet the requirements of the workload. The work order system also allows the Regional Directors and/or Chief Operating Officer to provide our clients with accurate information about the maintenance of the property. This helps in the development of staffing and budgeting needs and allows clients to participate in and understand the needs of their property.

Many preventive measures are required on a property to ensure that the quality features of the buildings and the apartments are maintained. The approach of Trinity Management is to inspect and maintain

apartments on an annual basis and building systems according to the specific Preventive Maintenance Schedule that is uniquely designed for every property. A program is also established for janitorial and grounds work on every property. These schedules will be prepared prior to occupancy of Crescent Parcel. These are typically adjusted periodically and therefore are not part of the plan but are kept available in the management office.

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

The maintenance program for Crescent Parcel will be customized to ensure the proper upkeep, conditions and quality of the buildings, grounds, buildings systems and common areas. Systems and procedures shall include:

- Work Order System
- Preventative Maintenance
- Emergency Repairs and Response
- Inspections
- Quality Control
- Purchasing
- Inventory Control
- Unit Turnover
- Snow Removal
- Capital Improvements
- Fire Safety
- Ground management
- Utility Purchasing
- Risk Management

The components of the maintenance program will be discussed and reviewed periodically to ensure an accurate, comprehensive procedure.

REPORTING

To ensure clarity in communications and ensure that all related parties are aware of the operational status at the community, an extensive reporting system has been established internally at Trinity Management. In addition to the internal reporting requirements, administrative staff will provide all necessary data to the necessary regulatory agencies.

PROJECTED OPERATING EXPENSES

Trinity Management projects an initial year operating expense budget of approximately $1,903,000. These expenses include the full-time staff that will be dedicated to the property, as well as anticipated maintenance and repair costs, landscaping costs, real estate taxes, and other expenses necessary to successfully maintain the property, The operating expenses for the residential component of the building will be covered by the rent generated from the rental units. Tenants of the commercial space in the Tremont Street Building will be responsible for the operating expenses of their leased space. In the Melnea Cass Building,

the operating expenses for the commercial space, except for utilities, will be covered by the commercial tenant's rent; the tenant will be responsible for their utility costs.

Crescent Parcel



Tab F

ECONOMIC DEVELOPMENT STRATEGY

ECONOMIC DEVELOPMENT STRATEGY

Trinity and MPDC's commitment for the Crescent Parcel development is (1) to exceed the City of Boston's Resident Jobs Policy goals, (2) to maximize participation of people of color, women and M/WBEs throughout the life of the project with a comprehensive Diversity and Inclusion Plan, and (3) to meet the Good Jobs standards set forth in the proposal. To fulfill these commitments, our efforts will be focused in four key areas:

- Outreach for Workforce and Subcontractor Participation during construction and after,
- Education and Training, including business development support,
- Good Jobs, and
- Monitoring, reporting and accountability

Below we set forth not just our plans, i.e. what we intend to do, if selected. We also describe the decades-long experience of our companies in employing M/WBEs and hiring people of color and women in our development and management activities (and paying good wages). We have provided this information to evidence our historical track record and our longstanding commitment to these goals.

In this section we describe in detail our plans for the four focus areas noted above; but, let us first describe for you the level of diversity in our company and among the firms we have assembled for our Crescent Parcel development.

Trinity's staff is quite diverse and includes people of color and women in positions of significant authority. Trinity Financial, Inc. is equally owned and managed by a Black person (Patrick Lee) and a white person (Jim Keefe); it is a 50/50 partnership. More than 72% of Trinity's current personnel are either people of color (43%) and/or women (29%). The Trinity Principal that will be responsible for this development, Patrick Lee, and the company's Managing Director of Development, Kenan Bigby, are both people of color, and two of the company's Vice Presidents of Development, Abby Goldenfarb and Eva Erlich, are both women. Additional Trinity staff for this project include Omalawa Musa, Sienna DeSantis and Michael Hunter, all people of color.

MPDC is a Commonwealth of Massachusetts Supplier Diversity Office Certified M/WBE, minority owned nonprofit organization. MPDC's commitment to diversity is evident in their Board of Directors, which is made up 100% by people of color, and 58% by women. The CEO of MPDC, Leslie Reid, is a Black woman. She leads the organization day-to-day and holds responsibility for management of the affairs of MPDC and its affiliated organizations. Additionally, more than 68% of MPDC's current staff are either Black, Hispanic, or Asian and 60% are women.

The team of consultants that Trinity and MPDC have assembled for this project includes participation of M/WBE firms. Our architect, DHK Architects, is a MBE; our landscape architect, DMLA, is a WBE; our transportation consultant and civil engineer, Nitsch Engineering, is a WBE; our lead counsel, Deirdre Robinson (Robinson & Cole), is a woman; and our permitting attorney, McKenzie & Associates, is a MBE. Trinity Management is led by a Latina Chief Operating Officer and employs a diverse workforce, many of whom are Black, Latino, and Asian, allowing the company to provide management services that reduce or eliminate cultural and linguistic barriers.

We will be working with two General Contractor teams to build the proposed two building development and new park at Crescent Parcel. For the Tremont Street Building, the General Contractor is a mentor/protégé arrangement between Dimeo Construction Company and Tara Construction, a Hispanic-Owned Business, certified SBA 8A Small Disadvantaged Business and Massachusetts Certified Minority Business. Dimeo has a long history working in multi-family construction and is particularly skilled working with complex/con-strained site areas. Some of their work with Trinity includes the Washington Village Choice Neighborhoods redevelopment phases 1 -3, Orient Heights Phase 3, and Northampton Square and Davenport Commons – both of which are located less than a mile away from Crescent Parcel. Tara has a strong background in the multi-family and affordable housing market, and Dimeo and Tara have a 30+ year relationship in the construction industry. Tara will be supporting Dimeo's project management and supervisory staff, comple-menting Dimeo in every aspect of the project. Through their firsthand involvement, Tara Construction will experience the entire lifecycle of a large scale, logistically intricate project which will serve as an educa-tional platform to help them continue their already impressive growth in the Boston area market.

For the Melena Cass Building, the General Contractor is a Joint Venture between Dellbrook|JKS and Maven Construction, a M/WBE contractor. Dellbrook|JKS has significant general contractor experience in multifamily construction within Roxbury and the city of Boston. Recent examples include construction of Melnea Cass Apartments, Smith House, Madison Park II and IV – all of which were developed by MPDC. Maven Construction is a Boston-based Black- and woman-owned general contracting firm bringing decades of experience in multifamily construction. The joint venture will provide the Melnea Cass Building with a blended set of open shop and organized labor. Preconstruction and Construction Services will be a collaborative effort. The team will work together to provide estimating and scheduling services, and management and logistics plans. Dellbrook will provide hands-on mentoring to Maven through budget preparation and constructability reviews. The project team includes representatives from both companies at the levels of project management, engineering, and superintendents.

CONSTRUCTION PARTICIPATION RESULTS

The Trinity team has experience developing over 9,500 units of housing and more than 600,000 square feet of retail and commercial space throughout the Northeast and has consistently achieved or exceeded the hiring and employment goals set forth by the host municipality, including the City of Boston. **Over the past two decades, Trinity has exceeded our M/WBE subcontracting goals by an average of 120%, and our goals for employing residents, minorities, women, and Section 3 workers by an average of 126%.**

MPDC has developed over 1,400 units of housing and more than 115,000 square feet of retail and commercial space in Roxbury and has extensive experience complying with the Boston Residents Jobs Policy (BRJP). As part of its mission, MPDC has implemented targeted workforce development initiatives since 2014, focused on addressing the widely unmet BRJP. MPDC's construction Workforce Diversity initiative provides accessible pathways into living wage jobs for Boston Residents, with an emphasis for those residents living in Roxbury as further described in this section.

The charts below provide a sampling of hiring and subcontracting goals and outcomes for Trinity and MPDC projects in Boston:

Trinity Financial Project	Neighborhood	# of Units	Boston Resident Hours		Minority Hours		Women Hours		Section 3 New Hires	
			Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Treadmark (initial construction)	Dorchester	83	50%	68%	25%	62%	10%	9%	N/A	N/A
Orient Heights Phase 2	East Boston	88	50%	27.80%	25%	46.30%	10%	6.60%	30%	25%
Orient Heights Phase 1	East Boston	120	50%	34.20%	25%	38%	10%	5.50%	30%	25%
Boston East	East Boston	200	40%	22%	40%	43%	5%	3%	N/A	N/A
Harrison Tower (Northampton Square Ph 2)	Roxbury	102	50%	35%	25%	43%	10%	4%	N/A	N/A
Northampton Tower (Northampton Square Ph 1)	Roxbury	245	50%	37%	25%	41%	10%	4%	N/A	N/A
Franklin Hill Phase 2	Dorchester	152	N/A	N/A	30%	47%	10%	6%	30%	41%
Franklin Hill Phase 1	Dorchester	114	N/A	N/A	30%	44%	10%	3%	30%	36%
Washington Beech Phase 2	Roslindale	106	N/A	N/A	30%	42%	10%	6%	30%	37%
Washington Beech Phase 1	Roslindale	100	N/A	N/A	30%	44%	10%	6%	30%	43%
Orchard Gardens	Roxbury	331	50%	43%	25%	72%	10%	2%	N/A	N/A

Trinity Financial Project	Neighborhood	# of Units	Minority-Owned Business Participation		Women-Owned Business Participation	
			Goal	Actual	Goal	Actual
Treadmark (initial construction)	Dorcheser	83	15%	66%	5%	50%
Orient Heights Phase 2	East Boston	88	22.50%	36%	9%	8%
Orient Heights Phase 1	East Boston	120	22.50%	23%	9%	11%
Harrison Tower (Northampton Square Ph 2)	Roxbury	102	25%	65%	10%	0%
Northampton Tower (Northampton Square Ph 1)	Roxbury	245	25%	29%	10%	17%
Franklin Hill Phase 2	Dorchester	152	30%	29%	10%	18%
Franklin Hill Phase 1	Dorchester	114	30%	33%	10%	17%
Washington Beech Phase 2	Roslindale	106	30%	25%	10%	16%
Washington Beech Phase 1	Roslindale	100	30%	23%	10%	15%
Mattapan Heights Phase V	Mattapan	60	15%	33%	5%	30%
Davenport Commons (Student Rental)	Roxbury	125	15%	44%	5%	3%
Davenport Commons (Homeownership)	Roxbury	60	15%	32%	5%	15%
Shawmut Estates (Homeownership)	Roxbury	15	15%	50%	5%	10%

MPDC Project	Neighborhood	# of Units	Boston Resident Hours		Minority Hours		Women Hours		Section 3 New Hires	
			Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Madison Melnea (Under Construction)	Roxbury	76	51%	33%	51%	44%	12%	4%	N/A	N/A
Smith House	Roxbury	132	51%	77%	51%	46%	12%	8%	N/A	N/A
Dewitt Center	Roxbury	Community Resource Center	51%	55%	51%	23%	12%	2%	N/A	N/A
9 Williams	Roxbury	30	51%	63%	51%	42%	12%	5%	N/A	N/A
Madison Park III	Roxbury	120	51%	81%	51%	44%	12%	6%	N/A	N/A
Madison Park IV	Roxbury	143	51%	77%	51%	50%	12%	4%	N/A	N/A

In addition to the project specific achievements referenced above, for each of these properties there are examples of sustained success stories extending beyond the timeframe of the particular development, providing not only jobs but sustainable career opportunities from the pre-apprentice level to union participation and membership.

Trinity and MPDC will work closely with our General Contractor teams to enforce the Boston Residents Jobs Policy and ensure successful outcomes. Our General Contractor teams have developed a multi-prong approach to achieve a diverse and inclusive construction project at Crescent Parcel utilizing their extensive trade partner network, strong relationships with community organizations, and detailed record keeping.

OUTREACH FOR WORKFORCE & SUBCONTRACTING PARTICIPATION

The General Contractors estimate that this project will yield over 900 construction period jobs. We are also estimating that there will be at least 4 permanent full-time positions associated with the property management functions upon completion of construction, as well as approximately 17 permanent jobs for the 12,100 SF of ground floor commercial space in the two proposed buildings based on 1 employee per 700 SF, for an estimated total of approximately 21 permanent jobs. As described below, we will work closely with local organizations and community stakeholders in Roxbury and Nubian Square to maximize local, minority, and female participation.

Community Partnerships

Our team will leverage our strong relationships with various organizations to recruit MBE/WBE/DBE/VBE firms, as well as local workforce. This group includes, but is not limited to:

- Massachusetts Supplier Diversity Office (SDO)
- Massachusetts Minority Contractors Association (MMCA)
- National Association of Minority Contractors (NAMC)
- YouthBuild Boston Trade Partnership
- Operation Exit
- Boston Carpenters Apprenticeship Training
- Building Trade Training Directors Association of Massachusetts
- Building Pathways
- Boston Residents Jobs Policy Office
- Policy Group on Tradeswomen Issues
- Madison Park Vocational High School
- Various Resident and Neighborhood Associations
- Career Link and other employment programs in Greater Boston
- Casino Action Network

The Dimeo Construction Company/Tara Construction team and the Dellbrook/Maven Construction team will also collaborate with community leaders and local agencies to strengthen the effectiveness in meeting the MBE/WBE/DBE/VBE and local workforce hiring goals.

Construction Period



At the commencement of every project, Trinity and MPDC require their contractors, typically in partnership with a local organization(s), to widely advertise and host local job fairs prior to the start of construction. Subsequent outreach events are then scheduled during the ongoing construction period as well given the timeline of large-scale projects. These events inform the community of the project's construction status and solicit applications from residents for future job openings. Our team has worked with interested applicants to help them take advantage of these opportunities, including providing for OSHA-10 safety classes and other certifications, clarifying immigration status, and introducing them to Business Agents from the Building Trades as a first step in their gaining union membership. For individuals who are newer to the construction industry or in need of more skills training we also work to connect them with Pre-Apprentice programs such as YouthBuild and Building Pathways at an entry level. We will require our contractors and subcontractors to utilize appropriate apprenticeship programs when available.



MPDC has developed a Train 2 Trades program described later in this section. MPDC-hosted construction job fairs have become a great opportunity for local residents with and without construction experience to connect with general contractors and subcontractors seeking local residents on projects. MPDC's most recent job fair incorporated its own active construction projects, in addition to including contractors from the Melnea Hotel and Residences, Bartlett Station, and the Whittier Choice construction project. Over 200 neighborhood residences attended, 34 were hired relatively soon afterward, and 63 were enrolled in MDPC-sponsored OSHA-10 classes.

As part of the phased redevelopment of the Orient Heights housing community in East Boston, Trinity, and it's selected general contractor worked hand in hand with the Boston Housing Authority, local elected officials, and other stakeholders on outreach efforts to maximize participation of not only people of color and women, but also residents of the Orient Heights community. The team developed several approaches for sustained outreach and engagement:

- Monthly meetings were held with all stakeholders that focused on progress updates and hiring outreach. Residents were able to voice concerns and have questions answered. One example was a concern that residents who didn't have internet or cellular access learning of available opportunities, acquiring training, and vetting eligibility. As a result, the construction team established weekly office hours on site, taking walk-ins from residents and community members to speak with appropriate staff about these issues, leading to a number of hires

- For those that required additional training, OSHA classes were established and conducted on site by the construction team. Younger community members that were interested were connected to prominent apprenticeship programs in the City of Boston such as Building Pathways and Youth Build to gain skills needed to join the construction industry.

As demonstrated in the statistics provided earlier in this section, these outreach efforts and coordination with local and State partners have enabled the Orient Heights project to achieve high levels of minority, women, and local participation in the workforce and subcontracts.

Dimeo/Tara

The following is Dimeo and Tara's proposed approach for attracting and facilitating local participation of Boston residents, minorities, women, local businesses, suppliers and manufacturers and achieving the goals established by the City of Boston ordinances and Policies:

- Create materials (posters, flyers, mailings)
- Through our electronic walk-on application process, catalogue all applicants, including demographic information and skill level into a database and distribute to subcontractors and unions
- Partner and sponsor pre-apprenticeship programs
- Social media postings, webpage updates and use of traditional news sources
- Hold a community event to engage the local community and educate them on the project

A strong pool of workforce candidates in the pipeline is necessary to run a successful program. To reach as many local residents as possible, the construction team will reach out through traditional media and new age social media as well as mass flyer drops, direct mailings, and face to face interaction.

Dimeo and Tara will work in direct partnership with local organizations to harness their community relationships and engage in outreach efforts. Dimeo participates in a number of groups to increase diversity in the labor workforce including, the AGC MA BRJP "Best Practices Implementation Working Group," Policy Group on Tradeswomen Issues, Building Pathways, Building Futures, Northeast Center on Tradeswomen Equity, and Construction Workforce Initiative 2.

Collaboration with local schools allows the team to take an active role in facilitating relationships, sponsorships and supporting mentorship programs with local trade schools to capture young talent. They have partnered with Greater Lawrence Technical School on the Lowell Justice Center project and played a key role in supporting and sponsoring several Lowell Construction Job Fairs. Dimeo continues to actively work with Benjamin Franklin Institute of Technology and Madison Park Technical Vocational High School to support and sponsor their students on Dimeo projects and offer co-op opportunities.

Setting and communicating workforce goals with subcontractor partnerships occurs early and consistently throughout the project duration. Dimeo and Tara incorporates language into bid packages and the expectations are clear regarding workforce goals. Enforcement of contract goals with consequences for noncompliance is communicated and monitored closely by Dimeo and Tara. Subcontractors that bid the project are required to disclose their most recent relevant workforce data as part of their package for evaluation.

In addition to the workforce/resident goals, Dimeo and Tara have an established process in place to reach out to M/W/SLBE firms. In their extensive portfolio of projects, they have been able to compile a database of qualified M/WBE and SBE subcontractors across all divisions to bid work to.

The team's alliance with the Greater New England Minority Supplier Development Council enhances their efforts and business partnerships with the M/W/SLBE businesses and Dimeo and Tara take an active role in helping these companies be successful on our projects. On a day-to-day basis, Dimeo and Tara assist many aspiring M/W/SLBE-owned companies and provides guidance and training in completing documents/ forms and navigating the various state processes for obtaining certified status.

Dellbrook|JKS/Maven

Dellbrook|JKS/Maven Construction will be charged with the responsibility for the administration of the Melnea Cass Building M/WBE Outreach and Contracting Plan and these duties and responsibilities shall include:

- Outreach and engagement with M/WBE trade partners, and additional regional business and workforce development partners, project stakeholders, and the community at-large.
- A focused support of minority and women owned enterprises through the preconstruction process and pricing of the Crescent Parcel Project.
- Pre assessment and pre-qualification of certified M/WBE firms to identify those that are prepared for immediate contract opportunities as well as those needing additional assistance to reach that level of preparation for future contract opportunities.
- Providing needed assistance and necessary skill sets to minority and women owned firms through Dellbrook's Partner Accelerator program to increase their ability to compete successfully for contract opportunities
- Monitoring the Melnea Cass Building throughout its duration to measure and report the effectiveness of the engagement plan as well as the compliance of subcontractors for the BRJP.
- Providing contract, payment, and workforce utilization data to the development team and the City of Boston's BRJP office on a weekly or monthly basis to track project outcomes and ensure early identification of threats to achieving the expected outcomes.
- Bid package breakdown to create potential for greater participation from minority and women owned businesses.
- Pre-Bid conferences to give prime and subcontractors preliminary information about the project and to allow prime and subcontractors to meet and create the potential for collaboration on projects.
- Competitive bid process, which will require signature for documentation, tracking and participation of the MBE/WBE engagement plan.
- Requiring all trade partners disclose their workforce plan for the project during or prior to preconstruction
- Providing an upfront list of contract opportunities to be bid specifically by M/WBE firms.

With a continuous effort being made to capitalize on existing relationships as well as establishing new contacts found within the Roxbury community and Greater Boston area, Dellbrook|JKS/Maven Construction will encourage and support minority and women owned businesses to participate in the Melnea Cass Building throughout construction.

All trade partners, including minority and women owned businesses will be kept informed of changes to drawings, related scope of work and progress of current work by the Dellbrook|JKS/Maven Construction Preconstruction Team. The team is responsible for responding to all queries regarding scope changes and pricing in a timely manner as well as employing creative strategies to reduce barriers for minority contractors.

Outreach efforts to solicit M/WBE and other local firms will utilize a Strategic Partner Network (SPN) engagement, as well as local media, electronic and print, to market and promote contract business opportunities as well as traditional methods including telephone, email and in person follow-up. The team has located centers of influence within the Roxbury community, as well as Greater Boston, to ensure that subcontracting and supply opportunities are known to the business community. Some of the outreach partners will include the following:

- DCAMM Certified Office of Supplier Diversity
- City of Boston M/WBE Certified Business Directory
- Black Economic Council, MA (BECMA)
- Center for Women & Enterprise (CWE)
- Amplify Latinx
- Greater New England Minority Supplier Diversity Council (GNEMSDC)
- Mass Minority Contractors Association (MMCA)
- Builders of Color Coalition

Outreach efforts will be recorded and reported as requested by the development team and the City of Boston's BRJP Office.

Permanent Jobs



Our property management team, Trinity Management Company, is committed to a diverse workforce and creating opportunities for small businesses, disadvantaged businesses, minority-owned and women-owned business enterprises. Trinity Management's commitment to Affirmative Action and Equal Opportunity serves not only the best interests of our company, but also properties that we manage, and the communities in which we operate. Trinity Management's 245+ person workforce is 49% minority and 47% female. Women currently hold 7 out of the top 11 management positions. Trinity Management has been honored annually, since inception, by organizations such as MassHousing, for its achievement in consistently awarding millions of dollars annually to minority and women owned business enterprises.



Similar to the other communities in which Trinity Management manages properties, for Crescent Parcel, Trinity Management will work with local community groups, City agencies, and small business de-

velopment organizations to access contractor listings and vendor contacts. In addition, Trinity Management will solicit proposals from qualified small, disadvantaged, minority/women-owned businesses by creating master mailing list of local, minority, and women-owned contractors and suppliers that are used to disseminate bid opportunity fairly and consistently.

Preference would be given to businesses in the following order:

1. Businesses- Owners are Residents in the Roxbury Community
2. Businesses- Owners are Residents of Boston
3. Businesses- Over 50% of the Employees are Residents of Item 1-2 Above
4. Businesses- Owners are Residents of Suffolk County
5. Businesses- Owners are Residents of Massachusetts

It is currently anticipated that there will be at least four full-time property management positions for Crescent Parcel. Available positions may include, but will not be limited to Property Management Operations, such as:

- Administrative Staff
- Maintenance Staff

Trinity Management has a strong track record of hiring employees who are residents of the community in which the property is located. As described in the section below, Trinity Management provides training and mentoring for their employees and vendors.

EDUCATION & TRAINING

Trinity and MPDC are committed to promoting economic growth, stability, and diversity and will partner with local organizations to ensure that education and workforce development programming is successful.

Construction Period

As one of the state's founding community development corporations, Madison Park Development Corporation (MPDC) has been deeply rooted in the Roxbury neighborhood for nearly 55 years and has been a significant catalyst in the neighborhood's ongoing renaissance. MPDC's Construction Workforce Diversity Initiative has been ongoing since 2014 with a focus on connecting Boston residents to workforce opportunities in the construction industry. Consistently, MPDC carries a focus on those living in the Roxbury neighborhood. In addition to the workforce initiative, MPDC works to foster a vibrant ecosystem of local M/WBE contractors.



These efforts culminated in the launch of the Madison Train 2 Trades (MT2T) program at the end of 2019. This initiative was developed in partnership with Madison Park Technical Vocational High School (MPTVHS) and engages a team of local and M/WBE contractors who serve as training partners, providing direct instruction within their building trade to participants, while in turn gaining access to a burgeoning pipeline of qualified new workers. Participants also complete a range of introductory trainings and certifications, such as OSHA-10 and Basic Construction Plan Reading, based on the Core Curriculum model designed by the National Center for Construction Education and Research. Finally, participants have access to job readiness services, including resume development, mock interviews, professional communication workshops

and job application assistance. MPDC's goal for this new program is to recruit and train 100+ Greater Boston residents annually and prepare them for employment and/or apprenticeship opportunities.



In response to the ever-changing COVID-19 restrictions, MPDC has adapted its workforce programing and created an online platform for adult learners who are seeking opportunities to gain the basic skills needed for entry level positions within Boston's growing construction industry.

Participants will begin building their professional toolbox with accelerated online training and certifications necessary to enter the building trades industry, including OSHA-10 certification. In April 2021, program participants will be able to apply their online learning with corresponding in-person hands-on workshops hosted in/around Greater Boston (COVID-19 restrictions apply). Hands-on workshops are taught by local tradespeople and M/WBE contractors who are actively working to ensure that the Boston Resident Jobs Policy remains relevant today and going forward: 51% Boston Residents, 40% People of Color and 12% Women on all local construction projects.

Dimeo/Tara

Dimeo and Tara Construction have utilized the services of Nicole Richer from The Compliance Mentor Group (MASS), with its signature educational programs, and Building Pathways Pre-apprenticeship Program, to assist in hiring, education, and training efforts. Additionally, their ongoing alliance with the Greater New England Minority Supplier Development Council, who provide consulting and training of potential subcontractors, enhances their efforts and business partnerships with the M/WBE businesses. Dimeo and Tara maintain an active role in helping these companies be successful on partnered projects, Dimeo assists many aspiring M/WBE-owned companies and provides guidance and training in finding the correct documents on the State website, completing documents/forms, and navigating the various State processes for obtaining certified status.

As an active member of the ACE Mentor Program, (Architecture, Construction and Engineering), Dimeo has incorporated programs into many of their projects to introduce local students to possible careers in the construction industry. Mentoring by Dimeo's experienced staff is an invaluable way of preparing interested students to be tomorrow's construction professionals, gaining a perspective from those working in the industry. Dimeo and Tara also support mentorship programs with local trade schools to capture young talent. As previously mentioned, Dimeo has partnered with Greater Lawrence Technical School on the Lowell Justice Center project, and actively works with Benjamin Franklin Institute of Technology and Madison Park Technical Vocational High School to support and sponsor their students on Dimeo projects and offer co-op opportunities. The students discuss the same issues they would encounter if they worked in the industry. It is a practical "hands-on" view of how abstract concepts get transformed into the buildings that make up everyday construction reality.

Dellbrook|JKS/Maven

Dellbrook|JKS/Maven Construction's preconstruction team is responsible for addressing concerns and providing technical assistance specific to barriers that have excluded people of color and women on past projects, i.e. video meetings, follow up phone calls to support, assess and evaluate relationships.

Competitive bid prices will be solicited per advertisement, community postings, and phone calls to notify and remind qualified M/WBE contractors of the Melnea Cass Building opportunities.
Good faith negotiations between Dellbrook|JKS/Maven Construction and trade partners will commence as part of the preconstruction review process. No minority business enterprise or minority person will be rejected as unqualified without evidence based upon a thorough documented investigation of their capabilities and experience.

Dellbrook|JKS/Maven Construction will endeavor to alleviate barriers to inclusion and develop the skills of minority and women owned businesses. All trade partners will participate in the Dellbrook|JKS/Maven Construction Partner Accelerator Program and receive project specific learning and training on:

- PROCORE Project Management Software
- RFIs, Submittals, Specifications, ASI
- Construction Project Accounting
- Requisition process AIA billing, understanding change orders, completing lien waivers, worklist/punchlist
- Site safety: OSHA requirements, inspections and observations, fall protection, scaffolding
- Bidding and estimation

Additional resources, skill set and capacity building assistance will be provided as needed.

Selected responsive and qualified subcontractors will be invited to attend all pertinent meetings with the Dellbrook|JKS/Maven Construction project team. All project guidelines will be discussed with the subcontractors. Input from the subcontractors will be solicited and encouraged to ensure complete and proper channels of open communication and common understanding.

Permanent Jobs

Trinity Management will offer counseling to small local/minority/women-owned businesses that do not meet Trinity's vendor guidelines in an effort to assist them in developing competitive business practices and services. Mentoring smaller MBE/WBE/LBE firms enhances their ability to compete with larger more established firms for business in their service area. Trinity Management has experienced real results through the work of this mentoring program – at the Mission Main property in Mission Hill that Trinity Management manages, several new companies that were part of the mentoring program now provide services to this development, including a document translation service and a carpet cleaning service.

Trinity Management has an excellent tradition of employment and training programs. When a new employee starts, they are given an orientation on all the policies and procedures for the property. Trinity Management also provides various training opportunities for its employees. Property Managers and Assistant Property Managers attend regularly scheduled meetings with colleagues to discuss job-related topics of common interest. Guest lecturers conduct special seminars and workshops. Maintenance staff share in

roundtable discussions concerning maintenance delivery systems, preventive maintenance, landscaping and courses at educational institutions designed to enhance their technical skills. Trinity Management promotes staff participation in external workshops and seminars in areas such as violence prevention, intervention in substance abuse matters relating to residents, wellness programs for elders, and art programs for residents of all ages.

All personnel receive on-going training on the following topics:

Safety Meetings
First Aid
OSHA Requirements
Emergency Evacuation Procedures
Occupancy and Leasing Requirements
Legal Matters
Conducting Property Physical Inspections
Dealing with Loss
Fire Safety
Landscaping
Trainings on Operations Manual
Housing Law
Low-Income Housing Tax Credit Compliance
Building and Code Violations
Fair Housing Laws

Lastly, Trinity Management offers educational assistance to all employees to pursue job related courses that will complement their training and knowledge, allowing them to grow within the organization and to better serve the properties they oversee and the residents they serve.

GOOD JOBS

In reviewing the seven good jobs standards criteria set forth in the RFP with Trinity Management, our team feels confident that we would be successful in meeting the goals outlined for the permanent jobs.

Trinity Management manages two communities in Roxbury totaling nearly 700 units of housing. These two communities employ 21 property management professionals. The current average staffing statistics for these five properties are:

- 62% residents of Boston
- 50% persons of color
- 33% Women
- 100% Full Time with stabilized schedules
- Average wage: $25.30, as well as benefits including health insurance.

We believe that with the implementation of the outreach strategies outlined earlier in this section, Trinity Management will be able to achieve at least 51% of the permanent job work hours with Boston residents, people of color, and women employees at the Crescent Parcel development.

MONITORING, REPORTING, & ACCOUNTABILITY

Construction Period

Trinity and MPDC's decades-long experience has taught us that the key to any successful subcontracting and hiring program is monitoring, reporting and accountability. Accordingly, we deploy a rigorous and

stringent approach to meeting our goals. First, we work with City officials, community organizations, local businesses and residents to make sure we, our general contractor, management agent, tenants (if appropriate) and the aforementioned stakeholders all have a clear understanding of the goals and plans we will put in place to meet the goals. Second, we require that our general contractor include the agreed-upon subcontracting and hiring requirements in the bid requests issued to potential subcontractors and that these requirements ultimately be incorporated into the contracts with the successful bidders. Third, we require monthly reports before, after, and during construction from our partners on the status of and results from their efforts. During construction, we require that these reports be submitted with the monthly construction requisitions. Also during construction, Trinity and MPDC will staff the construction job with a full-time construction person responsible for overseeing construction, including monitoring compliance with the hiring and subcontracting requirements in the contracts. Finally, if the aforementioned monitoring and reporting indicates that the subcontracting and hiring contract requirements are not being met, then Trinity and MPDC personnel, including the Principal-in-Charge and CEO, if necessary, will meet with principals of the general contracting firm (and subs, if necessary) to agree on the corrective measures that will be taken.

Dimeo/Tara

Subcontractors are selected based on several factors, including pricing, past performance, Boston residents, and workforce goals as well as reputation and recommendation. Dimeo and Tara include workforce goals in their bid packages and subcontract agreements and requests the subcontractors identify their Project Manager, Hiring Manager and Certified Payroll contact before the work begins. As part of the initial kick off meeting with the subcontractors, Dimeo and Tara outline and emphasize project requirements, submission dates, and reporting workflow. Internal tracking spreadsheets are updated from monthly subcontractor payroll reports indicating hours worked for residents, minority, female, and other requirements as requested.

When construction begins, Dimeo and Tara's onsite management team will monitor a daily count in their daily report of each subcontractor's residents, minority, and female workforce. That data is then cross referenced with their certified payrolls sent in weekly. Dimeo and Tara submit monthly workforce utilization reports to the Owner and public agencies as required. As a regional construction manager, Dimeo has developed many great relationships over the years with various public and private workforce agencies. Additionally, working with the subcontractors, Dimeo and Tara compare their percentage complete on a monthly basis against the current workforce percentage and, if necessary, have the subcontractors develop a recovery plan to increase participation to ensure they meet the goals before they complete their scope of work.

Dimeo and Tara's project management and purchasing teams understand the need to meet and exceed the goals from each subcontractor across all tiers. Disclosure from subcontractors and notice of intent to use lower tier subs / sub-subcontractors is evaluated at bid time and during the scope review meetings. Subcontractors agree up front to meet the requirements and include the same workforce / subcontracting requirements in their lower tier contracts. They are also requested to provide a list of subcontractors they plan to utilize in order to meet the requirements per project and the project management team tracks this participation on an internal spreadsheet and on any specified reporting format as required by public or private agencies. The regular and consistent review of the information is critical to ensure compliance and successful participation. If a subcontractor is tracking below the anticipated goal, they are required to develop a corrective action plan identifying how they will increase participation to meet the goals and ultimately confirm their compliance.

If a subcontractor continues to not meet the M/W/SLBE requirements, Dimeo and Tara will hold a corrective action meeting and assist them with finding qualified M/W/SLBE contractors to correct any deficiencies in their plans.

If Dimeo and Tara find errors or non-compliance, they address the issue and/or take corrective action. Ultimately, Dimeo and Tara support the subcontractors in achieving the requirements and sometimes will call in the Business Agents for additional understanding and assistance.

Dellbrook|JKS/Maven

Dellbrook|JKS/Maven Construction are committed to the growth and development of minority and women owned business enterprises and to the expansion of resident, people of color, and women hiring in the construction industry. Continuing their track record of success in this regard, they will be held accountable for outcomes in meeting the goals of their contracting plan.

Dellbrook|JKS/Maven Construction will routinely monitor the Melnea Cass Building project to ensure that all contractual commitments are being met and that the residents, minority, and female workforce, are engaging with its learning and development programs. Dellbrook|JKS/Maven Construction will host meetings with selected contractors on a regular basis to address elements identified as critical to the success of the minority and women owned firm development. The team will measure and report the effectiveness of their engagement plan as well as the compliance of subcontractors to the BRJP. They will also provide contract, payment, and workforce utilization data to Madison Park and the City of Boston's BRJP office on a weekly or monthly basis to track project outcomes and ensure early identification of threats to achieving the expected outcomes.

All design packages will be made available online for trade partner pricing via our Bid Management Software (ISQFT.com), which is also used as a tool for tracking the participation of minority and women owned businesses. Hard copies will also be available for any trade partner who does not use online tools in their bid preparations.

During construction, periodic monitoring will take place to assure that not only legal and contractual responsibilities are being met, but that all trade partners have the support they need to be successful on the Crescent Parcel project.

All project guidelines will be discussed with the subcontractors. Input from the subcontractors will be solicited and encouraged to ensure complete and proper channels of open communication and common understanding.

Permanent Jobs

The Human Resources Department and the recruiting firms it engages are tasked with the responsibility of casting a wide net for all qualified candidates and it redoubles this effort to attract interest from a diverse pool of applicants. Given the diversity of Trinity Management's workforce, these efforts have been largely successful. In addition, in the case of all senior management and administrative positions, the two principals of the firm require a report in the case where few or no men and women of color are represented among the finalists for any position.

Crescent Parcel



Tab G

DEVELOPMENT WITHOUT DISPLACEMENT PLAN

DEVELOPMENT WITHOUT DISPLACEMENT STRATEGY

As Boston grows, there will be increasing pressure on real estate values in Roxbury, which could result in displacement and a changed character of Roxbury. Trinity and MPDC share these concerns and are committed to ensuring that the Crescent Parcel project is "development without displacement." Our strategy to assist current residents of Roxbury remain in their community in the future, afford housing, and find pathways to economic opportunity is set forth below. It includes seven elements.

First, our proposed plan provides housing for all incomes. For the rental housing, 36% of the units are for households with incomes below 50% of the Area Median Income (AMI), and nearly half of these units (47%) are affordable to households with incomes below 30% of the AMI. Another 44% of the units would be affordable to households with incomes between 51% and 80% of the AMI. The final 20% of the units would be unrestricted, market-rate units. This unit mix provides 20% more affordable units than are called for by the RFP. The units for low- and middle-income households would be deed restricted in perpetuity as affordable units for households within those income categories. Affordable Rental figures were derived from the United States Department of Housing and Development Area Median Income Ranges for the Boston-Cambridge-Quincy, MA-NH Metro FMR Area.

Second, 4 of these homes will be available for homeownership to middle income families. While the economics of the project prevent us from providing a larger number of such opportunities, these 4 homes reflect our belief that homeownership delivers the stability of wealth-building that can create enormous impact in preventing displacement.

Third, in providing 177 new units of housing on land that was previously vacant, the Trinity and MPDC plan will help to alleviate demand on the current housing stock, creating opportunities for residents to remain in Roxbury within proximity to assets such as public transportation, retail, and open space.

Fourth, our proposal includes units with sizes ranging from one to three-bedroom residences, ensuring that families of different sizes will be able to find a home at this new development. Indeed, 65% units will be apartments with two and three bedrooms.

Fifth, our proposal includes ground floor space for community-based organizations focused on creating access and equity for residents of Roxbury. In the Melnea Cass Building, Tenacity, a youth-development organization focused on creating equitable access to educational and fitness opportunities in underserved communities, will occupy the ground floor commercial space (Tenacity's Letter of Interest is attached to this section). In a portion of the ground floor of the Tremont Building, which will be called the Roxbury Real Estate Center, Trinity and MPDC will provide seed money to fund Wealth Enhancement Coordinators to help Roxbury residents and businesses increase their net worth. The services will include:

- Homeownership Assistance – The coordinator will serve as a resource for residents to facilitate Individual home ownership advisory services, home buyer education and mortgage assistance. This program will work in tandem with the Homebuyer program currently provided by MPDC.

- Small Business Assistance – The coordinator will serve as a resource to M/WBE and locally owned small businesses to achieve stability, create and retain jobs. The Coordinator will leverage existing relationships with Mass Growth Capital Corp. and the broader small business network to provide comprehensive services to support small business growth in Roxbury

- Workforce development and mentoring support for members of the community interested in careers in real estate development

- The opportunity to invest in the development and/or own a part of the development for as little as $5,000

And the final component of our plan for "development without displacement" is to work with the City's various departments, including Department of Neighborhood Development and the Boston Fair Housing Commission, and the community to determine if a "preference for families at risk of displacement" could be included in the resident selection plan for the units at this development. Trinity and MPDC were able to include a preference for applicants who were displaced while living in the South End urban renewal area between 1965 and 1979 in the Affirmative Fair Housing Marketing Plan for the homeownership housing units in our Davenport Commons development. While this isn't the exact concept that we are proposing for the Crescent Parcel, and there are of course no guaranties at this early stage, we are committed to trying incredibly hard to include a "preference for families at risk of displacement" in the resident selection plan for the units at our development. And as previously noted, we have a track record of achieving something not too dissimilar. In any event, our marketing for the housing in our development will include extensive outreach in the Roxbury community.

TRINITY AND MPDC'S DEVELOPMENT WITHOUT DISPLACEMENT TRACK RECORD

When Trinity and MPDC have acquired and redeveloped property, we have had an unwavering commitment to ensuring that none of our tenants are displaced as a result of our actions. The following are several examples of our work in this regard.

Trinity

Northampton Square, Boston MA

The Northampton Square Campus was originally built between 1969 and 1973 to house the Boston City Hospital School of Nursing. In 1996, the Boston Public Health Commission (BPHC) acquired the site and the two residential towers containing nearly 350 units of housing were providing affordably-priced (though not deed restricted) rental housing to low wage earners, many of whom work in the adjacent medical district. In 2010, the BPHC, recognizing the need to enter into a public/private partnership to access the capital required to preserve this property as an affordable housing asset, selected Trinity Financial through a public process to redevelop various components of the Northampton Square Campus in need of significant capital improvements.

After assessing the conditions of the existing buildings, Trinity and the BPHC collectively (with a great deal of resident input) determined that the redevelopment of the Campus would entail the substantial renovation of the two existing residential towers. The preservation of this affordable housing asset was further bolstered by the incorporation of affordable housing restrictions on 100% of the units as part of Trinity's work. Trinity worked closely with BPHC, the City, and the Commonwealth to structure the project in such a way that allowed existing residents to remain in place and not be displaced by the newly placed restrictions. As a result of this effort, rents are now guaranteed to never exceed the maximum allowable rents for the affordability tiers that now are in place for these 347 apartments. In addition, Trinity worked closely with its General Contractor, property management team, and other consultants to ensure that residents could remain in place during the renovation work and avoid displacement, both temporarily and permanently.

Mass Pike Towers, Boston MA

Trinity acquired and redeveloped Mass Pike Towers, a 200-unit affordable housing development in Boston's Chinatown neighborhood in 2000. At that time, the property was subject to Section 236 Rent Restrictions and held a Section 8 Project Based Contract for 40 units. In 2015, the 236 Rent Restrictions expired, technically allowing Trinity to significantly increase rents that would burden current households. Realizing that these potential rent increases may result in significant resident displacement, Trinity, in cooperation with the Cambridge Housing Authority, was able to obtain a second Section 8 Project Based Contract for 157 units. As a result, the vast majority of tenants at Mass Pike Towers experienced a rent decrease as opposed to an increase. Currently, 197 out of 200 units are now subsidized by Section 8 Contracts.

Countryside Village, Marlborough MA

In 1999, an affiliate of Trinity Financial, Inc. acquired and redeveloped Countryside Village, a 118-unit affordable housing project located in Marlborough, MA. When acquired, the project held a Section 8 Project Based Contract that provided rental subsidy to the majority of the households. Additionally, Countryside Village was subject to Section 236 Rent Restrictions that were set to expire in 2014. At that juncture, Trinity had the option to not renew the Section 8 Contract and convert the affordable development into market rate housing. To protect the residents from significant rent increases and eventual displacement, Trinity opted to renew the Section 8 Contract for an additional 20 years. The new contract provides an increased level of subsidy that contributes to the on-going upkeep of Countryside Village, but also ensures that residents will not be displaced due to insurmountable rent increases.

New Orchard Hill Estates, Oxford MA

New Orchard Hill Estates was acquired and redeveloped by an affiliate of Trinity Financial, Inc. in 1995. In 2019, the project faced the expiration of the 236 Rent Restrictions and Project Based Subsidies. If not remedied, the residents could have faced a large rent increase that would likely have resulted in tenant displacement. In preparation for these expiring events, Trinity devised a strategy that not only protected tenants from rent increases, but also provided additional subsidies to residents in need. By utilizing the Rental Assistance Demonstration ("RAD") program, Trinity was be able to introduce a brand-new Project Based Contract to New Orchard Hill Estates. This contract not only provides the property with much needed resources to properly address the development's capital needs, but at the same time, ensures that for many years to come no household will undergo a significant rent increase.

MPDC

Black Market & 2136 Washington Street

Black Market and Madison Park Development Corporation are partnering to purchase the building located at 2136 Washington Street with technical support from the City of Boston. The acquisition of this property is part of a broader vision of self-sufficiency for Roxbury, where local ownership directly blocks speculation and displacement and ensures future development that will focus on investments in businesses, art, and culture in our community. Property ownership represents a key strategy that results in sustainable economic development and builds equity that directly addresses the wealth gap in our community.

Christopher and Kai Grant are long-time residents and local entrepreneurs who have been leading the charge of infusing cultural energy into their community in hopes that a new crop of Entrepreneurs will emerge from the City of Boston's geographical center: Roxbury. The couple launched a business model, cooperative in nature, called Black Market in June 2017 with a mission to reignite the creative economy

in Nubian Square. Since its launch, over 350 hundred aspiring micro-business Founders and over 40,000 Supporters have cycled through Black Market's signature Marketplace and Public Art events in the Nubian Square commercial district. The couple's main goal has been to provide a launchpad for Artisans, Artists, and Activists inside the City of Boston's most struggling Main Streets defining Nubian Square as a destination.

The 1700 sq. Ft. space has been the District's hub for sharing ideas, cultural events, art creation, and exchange of goods driving the local ecosystem. It is considered by many to be a meeting ground and safe space for interactions that inspire the community to conjure up the big ideas that could potentially transform the surrounding Nubian Square neighborhoods and help close the $247,500 wealth gap.

Haynes House Renovation

With construction wrapping up in 2021, MPDC modernized and preserved the affordable rental homes at Haynes House, a 131-unit apartment building at Madison Park Village originally built in 1974 by Madison Park Development Corporation. The refinance, using the new Income Averaging approach to LIHTC, allowed the building to retain its higher income residents while accommodating additional very low-income residents. Modernization included renovating the building exterior, upgrading the building systems, improvements for the unit interiors, and the construction of handicapped units to meet the needs of current and future residents. Residents remained on site during the renovation process.

Smith House Renovation

Smith House is a 132 senior housing development at Ruggles and Shawmut Ave. in Roxbury. Originally built in 1973 by Madison Park Development Corporation, Smith House underwent a complete renovation in 2018. The renovation project included upgrading the building systems, modernizing the units, reconfiguring the common areas, and adding universal design features. Similar to Haynes House above, the refinance of Smith House preserved the property as an affordable rental property and protected the existing low- and moderate-income tenants.

9 Williams/Tropical Foods

This property is Phase 2 of BPDA's Parcel 10 that MPDC conducted an adaptive reuse of the former Tropical Foods building in Nubian Square into mixed-income rental housing and ground floor retail space. The Project provides 30 units of high-quality housing with a range of rent levels for households of varying means, as well as 7,500 sf ground-floor retail.

Phase 1 of BPDA's Parcel 10 by MPDC was the construction of a new building on Melnea Cass Blvd for Tropical Foods Market that increased the size and quality of their store from the original location at 9 Williams St. As a byproduct of this anti-displacement work for a local business, residents of Nubian Square now have access to an even greater selection of high-quality groceries from the larger scale Tropical Foods business.

St. Botolph Terrace

MPDC acquired St. Botolph Terrace in 2013 for refinance and rehabilitation. The building was built in 1899 with its last significant rehabilitation in 1981. The property includes 52 apartments units and one commercial space in a contiguous set of row-house buildings on Mass Ave. at St. Botolph Street in the South End. The building was fully occupied with all units supported by a Section 8 contract at acquisition. The financial restructuring allowed the building to extend its Section 8 HAP contract and all residents were able to remain in place over the course of renovation work.

PROJECTS WHERE CURRENT RESIDENTS HAVE RETURNED OR HAD THE OPPORTUNITY TO RETURN

Trinity and MPDC have undertaken numerous developments previously that have allowed residents to remain in their neighborhoods and return to housing that is newer, safer, and offering increased quality of life. We have accomplished these outcomes in various forms of development including public housing redevelopment, rehabilitation and re-use of commercial buildings, and infill on urban sites.

Trinity's history redeveloping public housing communities demonstrates a track record of this commitment. These examples include **Maverick Landing** and **Overlook Terrace at Orient Heights** in East Boston, **Orchard Gardens** in partnership with MPDC in Roxbury, **Franklin Hill** in Dorchester, **Washington Beech** in Roslindale, and **Newport Heights** in Newport, RI, accounting for nearly 2,000 units of housing. In each project, Trinity followed U.S Department of Housing and Development (HUD) Guidelines to create housing that was of better quality for the residents in each community. Phased development plans allowed demolition and replacement of housing to occur, allowing families the ability to find residences throughout the community or elsewhere in the city, with the guaranteed option to return to the new development. Once construction was completed, those same residents were granted priority when returning to their original community. Trinity, in these projects, typically created housing units exceeding what was replaced, giving newer families of various income backgrounds the opportunity to secure housing in the new development. Consequently, incumbent residents were able to stay in their neighborhoods, gain safer and healthier living conditions, and welcome new neighbors that added to the diversity and vitality of the community.

UTILIZATION OF VACANT BUILDINGS

Additionally, Trinity's history of development has aimed to convert vacant and underutilized buildings to create new housing that did not previously exist. For instance, with our Mattapan Heights and Foley Senior Residence development on River Street in Mattapan, we rehabilitated 8 historic vacant hospital buildings that were slated for demolition and built 3 new buildings to create 330 units of new mixed-income housing on 27 beautifully landscaped acres at the site of the former Boston Specialty & Rehabilitation Hospital campus in Mattapan. Trinity's Van Brodie Mill project rehabilitated a historic, vacant mill building in Lawrence into 102 units of mixed-income housing. This building was part of a larger effort in the Arlington Mills Overlay Smart Growth District to transform underutilized structures that were physically sound into housing to meet demands for numerous families. 60 King, a Trinity development that opened its doors in 2018, is a transformation of a defunct knife factory into 60 new affordable apartments for low and middle-income households in the Olneyville neighborhood of Providence, RI. Appleton Mills, one of many historic mills Downtown Lowell that had sat vacant for years, was revitalized into 130 units of affordable artist housing as part of a municipal plan to redevelopment the Hamilton Canal District into a neighborhood where families can now occupy and add to the activity of the urban commercial district.

URBAN INFILL ON VACANT SITES

Trinity Terrace, located in Dorchester, is 62 units of affordable housing on a site that was initially used as a dumping ground for refuse and was a detractor from the surrounding community.

Lucerne Gardens, another Trinity project in Dorchester, developed 21 vacant parcels of land into 45 units of mixed-income family housing within two and three family homes to fit the context of the neighborhood.

2451 Washington Street, built by MPDC in 2021, offers opportunities for homeownership near the heart

of Nubian Square. This development includes the construction of 16 mixed-income condominium units on what had been a vacant parcel. Due to its unique financing structure, MPDC was able to prioritize local residents at risk of displacement in marketing the for-sale units.

Melnea Cass Apartments represents an example of undoing previous eras of displacement. On what had been a healthy neighborhood prior to its demolition for the building of Melnea Cass Blvd. in the 1950s, MPDC in 2019 developed a mixed income 16-unit building at 40 Raynor Circle and a mixed income 60-unit building at Melnea Cass Boulevard and Brook Marshall Rd.

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Madison Park Development Corporation

April 12, 2021

Mr. Ned Eames
Chief Executive Officer
Tenacity, Inc.
38 Everett Street
Boston, MA 02134

RE: Tenacity, Inc. - Crescent Parcel Raynor Building, Roxbury, MA

Dear Ned,

We are pleased to present the following proposal for Tenacity, Inc. in consideration of leasing their office space at the Crescent Parcel Raynor Building, Roxbury, MA according to the following terms and conditions:

Landlord:	Single purpose entity to be formed for the ownership of the building known as the Raynor Building located on the Crescent Parcel in Roxbury, MA in which Madison Park Development Corporation or an affiliate is the managing member.
Tenant:	Tenacity, Inc.
Premises:	Approximately 5,800 Usable Square Feet ("USF") to be verified upon construction completion of the Premises.
Term:	Five (5) years from Lease Commencement Date
Lease Commencement:	Upon delivery of the Premises
Base Rental Rate:	$12.00 PSF with 3% annual increases
Utilities:	Tenant shall be responsible for all utilities expenses servicing the Premises
Real Estate Tax/Common Area Operating Expenses:	Included in rent.

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Madison Park Development Corporation

Insurance:	Building insurance shall be at Landlord's expense. Tenant shall obtain insurance for the contents of the Premises and its operations therein.
Tenant Improvements:	Landlord shall deliver the premises as a warm lit shell and provide a Tenant Improvement allowance of $50.00 per SF.
Maintenance and Cleaning:	Tenant shall be responsible for all maintenance, repairs and cleaning of the Premises upon delivery of possession.
Brokerage:	Landlord and Tenant acknowledge that no broker was used in connection with this transaction.
Qualifying Conditions:	Neither party hereto shall be bound to the other unless or until a complete lease document is fully negotiated and executed by Landlord to Tenant. This non-binding proposal will remain open for your consideration for one month from the date of the proposal.

If the foregoing terms are acceptable, please sign in the appropriate area below and return a copy of this letter to our attention.

Best Regards,

Robert Pezzini

Robert Pezzini
Vice President of Real Estate

Cc: Leslie Reid
Ben Baldwin

AGREED TO AND ACCEPTED BY:

TENANT:

Ned Eames

Dated: 4/14/21

Ned Eames, Founder & CEO of Tenacity, Inc.
("A Duly Authorized Signatory")

184 Dudley Street, Suite 200, Roxbury, MA 02119
PHONE 617-541-3900 **FAX** 617-541-4900 **WEB** www.madison-park.org

Crescent Parcel



Tab H

COMMUNITY BENEFITS

COMMUNITY BENEFITS

The Trinity and MPDC plan for Crescent Parcel includes numerous benefits:

- Housing for households across the spectrum of incomes (36% of the rental units for low income households from 0% to 50% of Area Median Income, 44% for middle income households from 51% to 80% of the AMI, and 20% for higher income households). The creation of a project that houses individuals and families at various income levels allows two goals to be met. First, current residents of Roxbury who are not able to find affordable housing will have the opportunity to remain in their community. Secondly, new residents, who will add to the vitality of the community by supporting local business and institutions, will be able to set down roots and establish an investment in Roxbury.

- Affordable homeownership housing so families can plant roots and build wealth and equity in Roxbury.

- A strategy for ensuring that the development helps families and businesses remain in Roxbury and does not contribute to displacement.

- The creation of a half-acre central public open space which will provide a green, landscaped amenity to the Crescent Parcel residents and the general public at a prominent location in Roxbury. This new civic open space aspires to be interactive, inspired by art and culture, flexible, inclusive and accessible to many communities. It will be a hub of activity for community events and collaboration. It will be a playful, public lounge, bringing people together and inviting visitors to make the space their own. Public amenities, including lounge seating, picnic spaces, a misting fountain and reflective water feature. This park will be further enhanced and activated by providing space for local food trucks to set up.

- A thoughtful plan and specialized team well positioned to achieve the community's goals for heat island reduction and the preservation of the existing tree canopy. In addition to our landscape architect, our team includes a certified arborist who has studied the existing trees on the site and produced a draft tree inventory report. The arborist will work with our team and the community throughout the planning and design process to protect the existing trees and mitigate loss of mature urban canopy to the greatest extent possible.

- A commitment to design and build this parcel to meet and exceed the City of Boston Article 37 LEED Silver certifiability requirements by achieving LEED BD+C: Multifamily Midrise v4 (LEED) certifiability at the Platinum level. In addition, the project will make the significant commitment of achieving Passive House certification under the PHIUS+ 2021 (PHIUS) rating system. As a Passive House development, our buildings will use at least 30% less energy than conventional properties. Greenhouse gas consumption levels will be significantly lower, and indoor air quality will be much improved. Beyond the mandatory LEED and Passive House requirements, team envisions that the building also proposes an all-electric design approach (with the exception of a fossil fuel-fired emergency generator) in keeping with the spirit of the net zero carbon performance (Carbon Neutral Boston 2050 commitment) building goals. After the building efficiency measures are incorporated, photovoltaics could be added to further assist in carbon reductions with the goal of achieving near zero energy use. Further, the building will be designed to be responsive to the environment and will incorporate features and services that will allow occupants to shelter in place during periods of severe weather events and power outages until services can be restored. The proposed design seeks to create high-performing buildings that protect natural resources, enhances the health and safety of its occupants, and improves the fabric of

the existing community. From enhanced water management strategies to use of public transpor ta-tion, the project will use the LEED certification as a path to achieve better buildings for a better Boston.

- A strategy for providing free WiFi access to all residents of the Crescent Parcel development. One of the biggest impacts of the COVID-19 global pandemic has been the need for social distancing, which resulted in working and learning from home. This greatly increased to need for broadband internet access, which is not always available or affordable for low income households. The Trinity MPDC team has recognized that meaningful internet access can substantially contribute to a community's physical and economic wellbeing. We are planning to install a building-wide WiFi service throughout the residential portion of the building, including lobby, amenity spaces, and back-of-house areas to allow for a WiFi coverage that can be shared between building staff and residents. A bandwidth capacity that will allow all residents (and staff) not only to access the internet, but most critically to live-stream with multiple devices simultaneously will be provided through a central hub with building head-end equipment.

- A tried and proven strategy for maximizing minority, women and local hiring and contracting in the construction and permanent phases of the development. This development will generate over 700 construction period jobs. We are also estimating that there will be 4 permanent full- time positions associated with the property management functions upon completion of construction, as well as new jobs created in association with the community-oriented uses envisioned for the ground floor commercial spaces in both the Tremont Building and the Melnea Cass Building.

- New office space for community-based organizations including Tenacity, a youth-development organization focused on creating equitable access to educational and fitness opportunities in underserved communities, and a resource office that will provide homeownership assistance and small business assistance for the Roxbury community.

COMMUNITY OUTREACH

Our team has reached out to a number of local organizations, community members, and other stakeholders in Nubian Square and the greater Roxbury neighborhood to discuss our proposal for the Crescent Parcel and solicit feedback. If selected, we are committed to continuing to engage with the community and public officials throughout all stages of development.

The following is a list of organizations and individuals that we have contacted or will contact:

- Madison Park Village Residents Associations
- Orchard Park Residents Association
- Andrea Swain, Boys & Girls Club
- Keith Motley, CEO, Urban League
- Robert George, Roxbury Main Streets
- Friends of Melnea Cass
- Tropical Foods
- Central Boston Elder Services
- Frederica Williams, Whittier Health Center
- Senator Sonia Chang Diaz

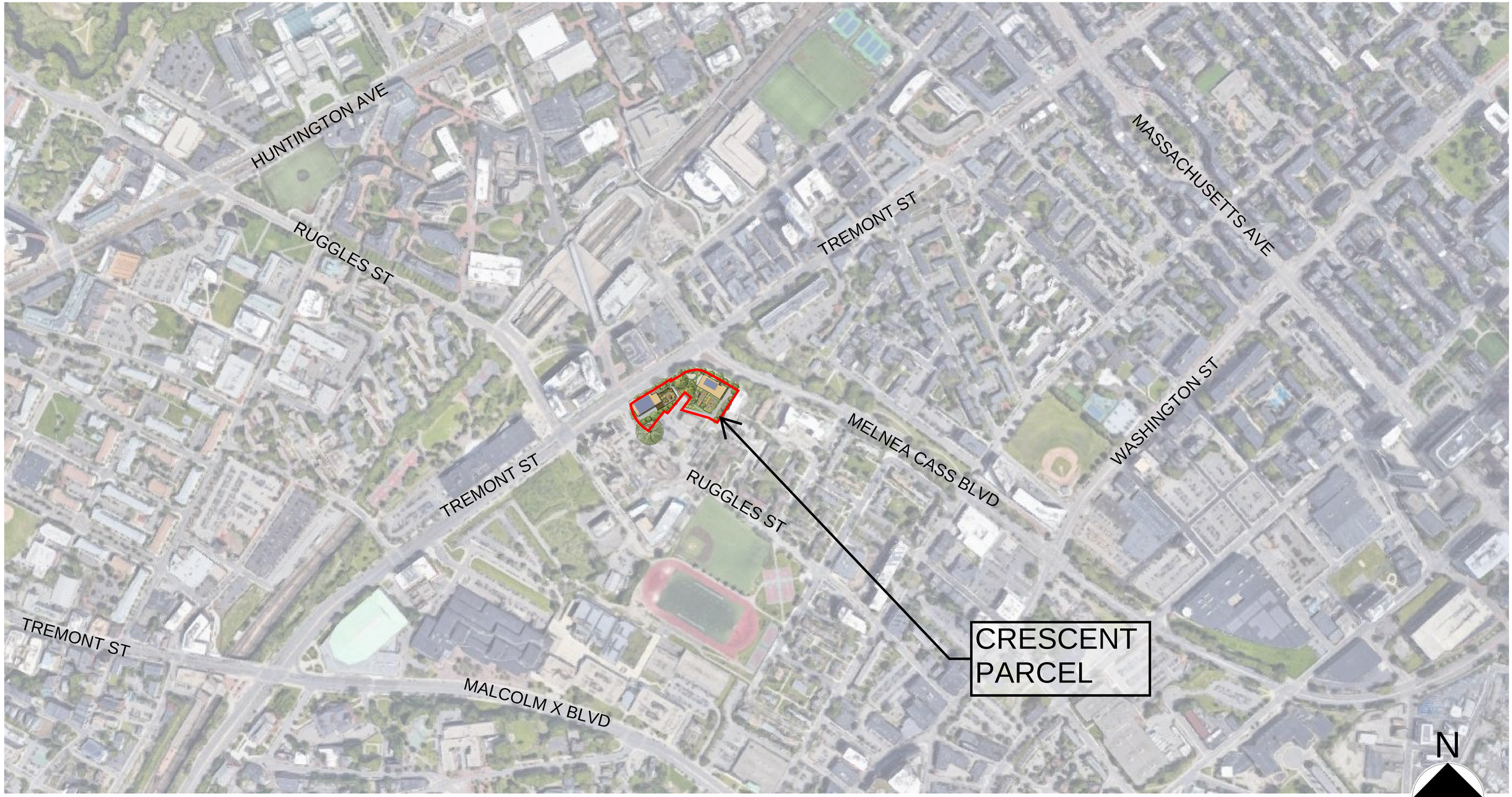
- Representative Chynah Tyler
- Representative Liz Miranda
- Representative Jon Santiago
- City Councilor and Acting Mayor Janey
- City Councilor Wu
- City Councilor Flaherty
- City Councilor George
- City Councilor Mejia
- Roxbury Strategic Master Plan Oversight Committee
- Northeastern University
- Whittier Street Residents/Stephanie Thomas
- Roxse
- United Neighbors of Lower Roxbury
- Roxbury Cultural District
- Black Market
- Haley House
- Richard Taylor

Crescent Parcel



Tab I

APPENDIX A: DESIGN MATERIALS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

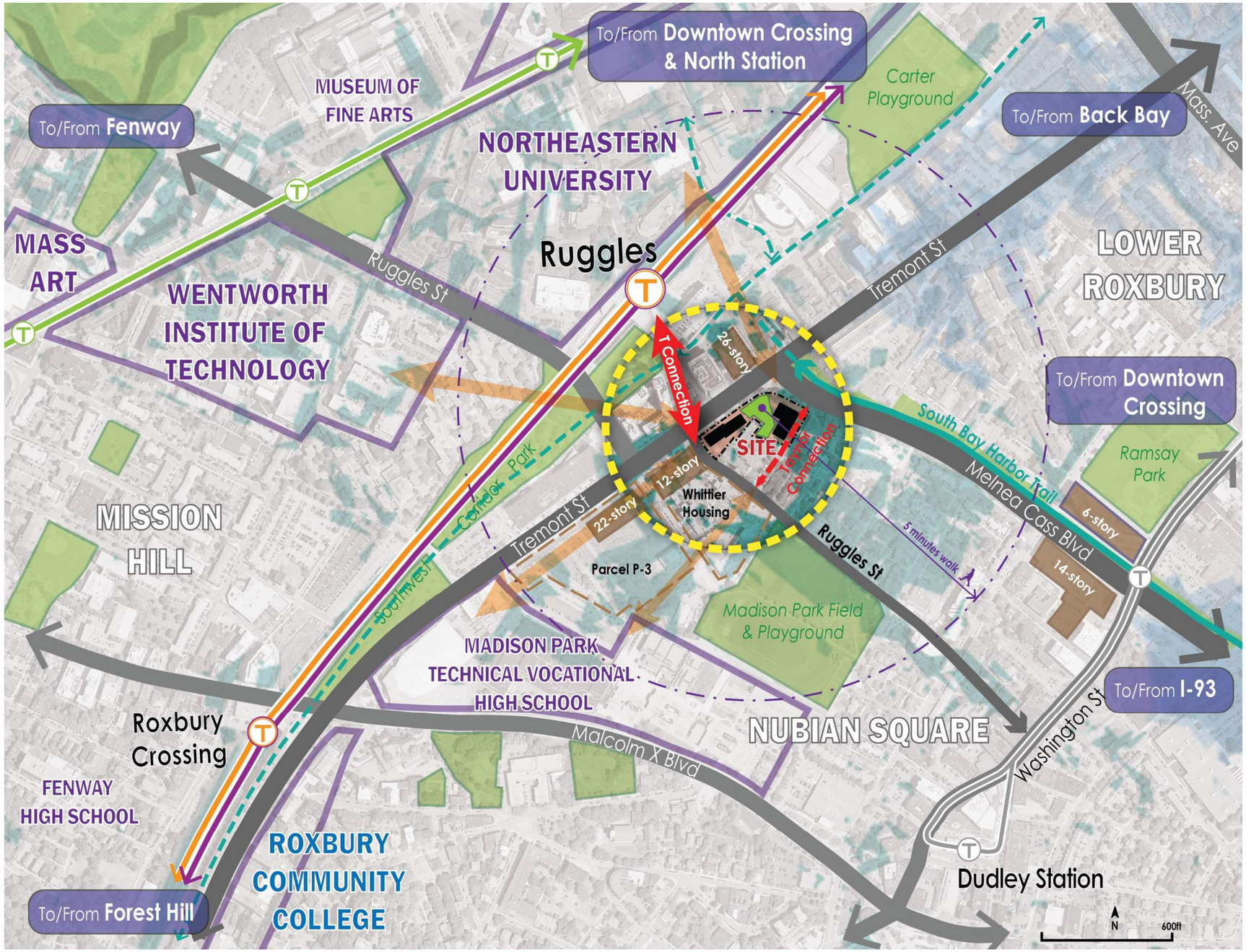
LOCATION PLAN

DATE: 04/21/21

SCALE: NOT TO SCALE

DHK ARCHITECTS

“The site in the context of the City and adjacent neighborhoods”



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

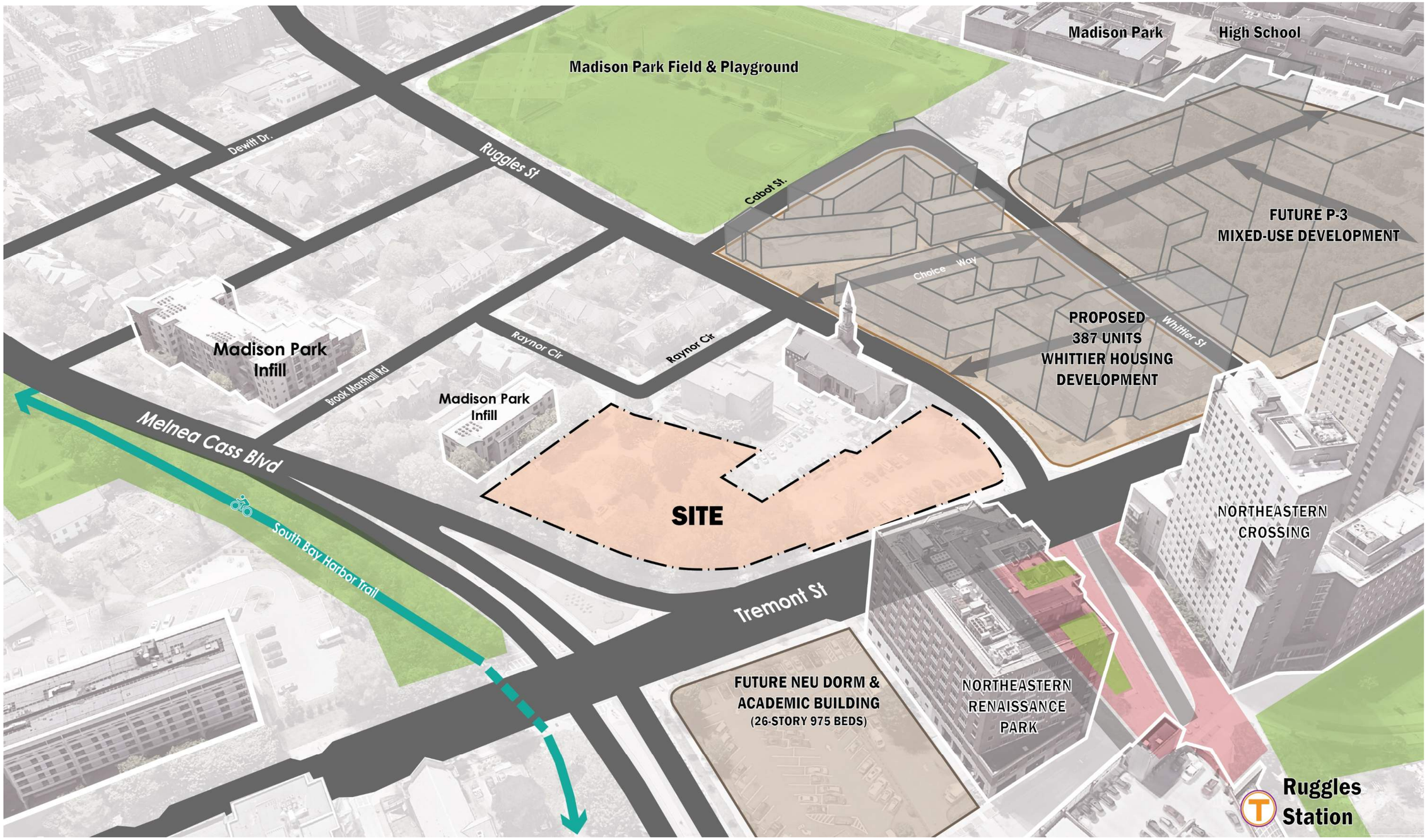
URBAN CONTEXT

DATE: 04/21/21

Stantec

DHK ARCHITECTS

“A parcel in the context of signficant transformation and opportunity”



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

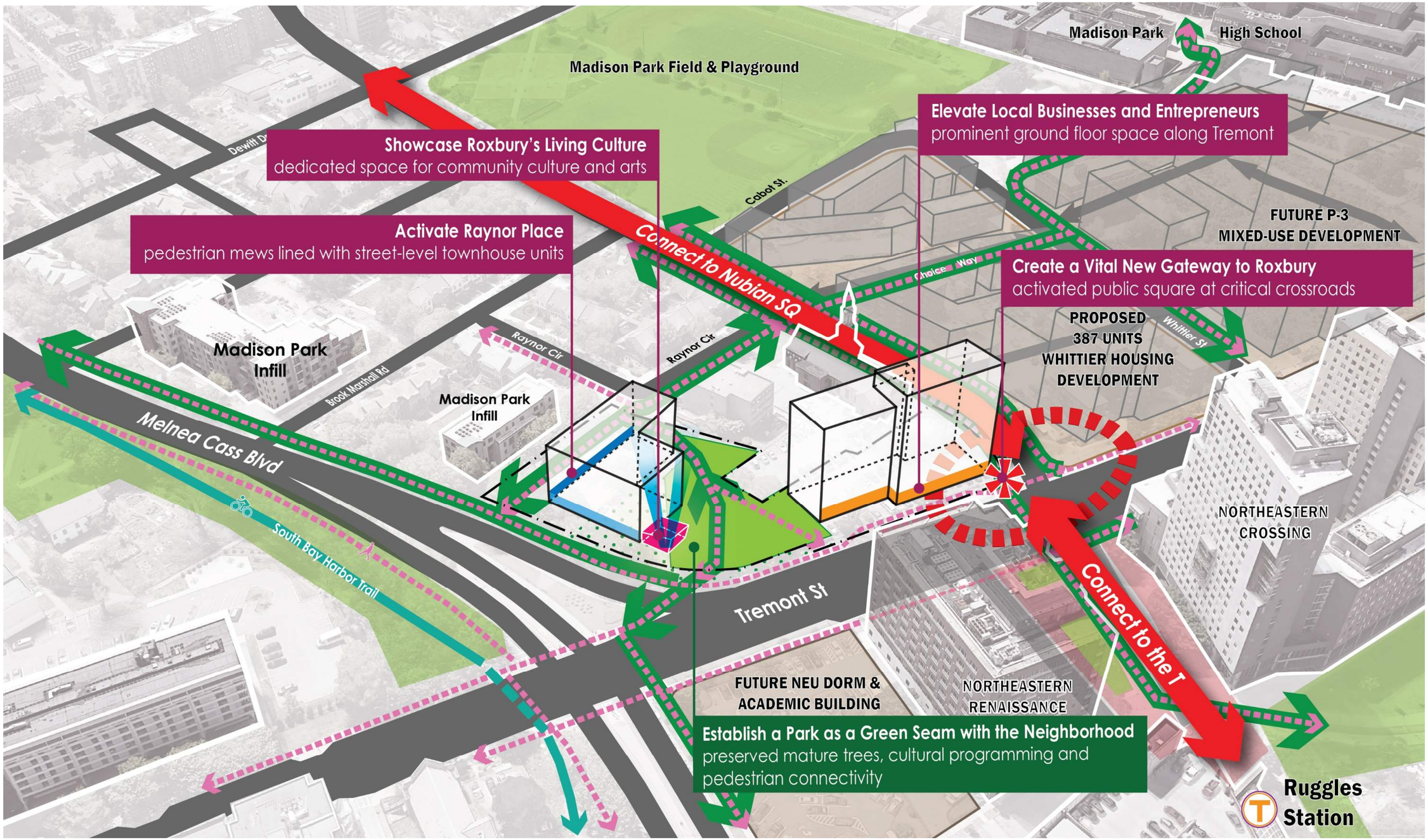
URBAN OPPORTUNITY

DATE: 04/21/21

Stantec

DHK ARCHITECTS

“Creating a seam and a stage”



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

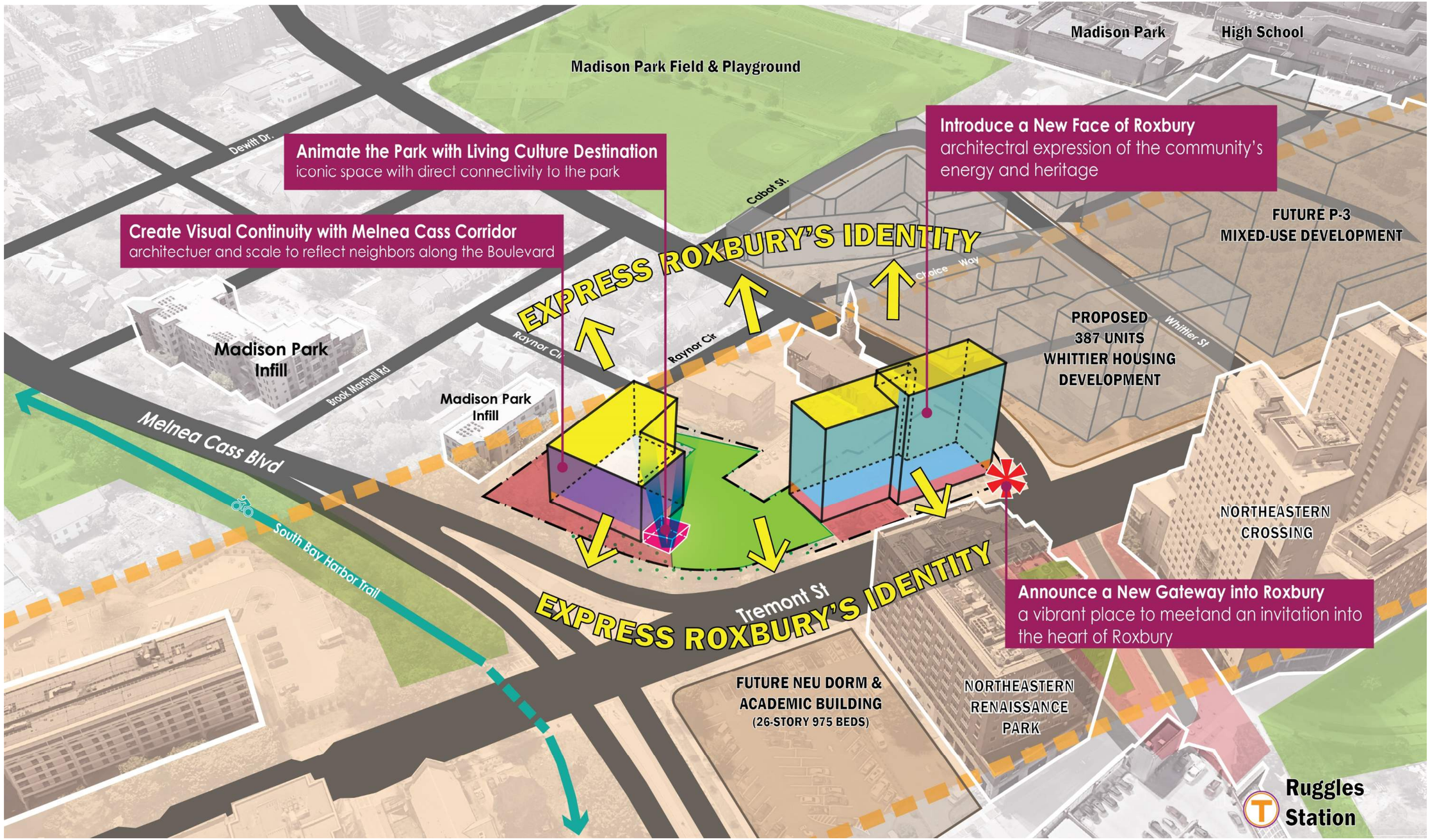
CONNECTING TO EXISTING
URBAN ENVIRONMENT

DATE: 04/21/21

Stantec

DHK
ARCHITECTS

“Buildings and open spaces that communicate and invite”



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

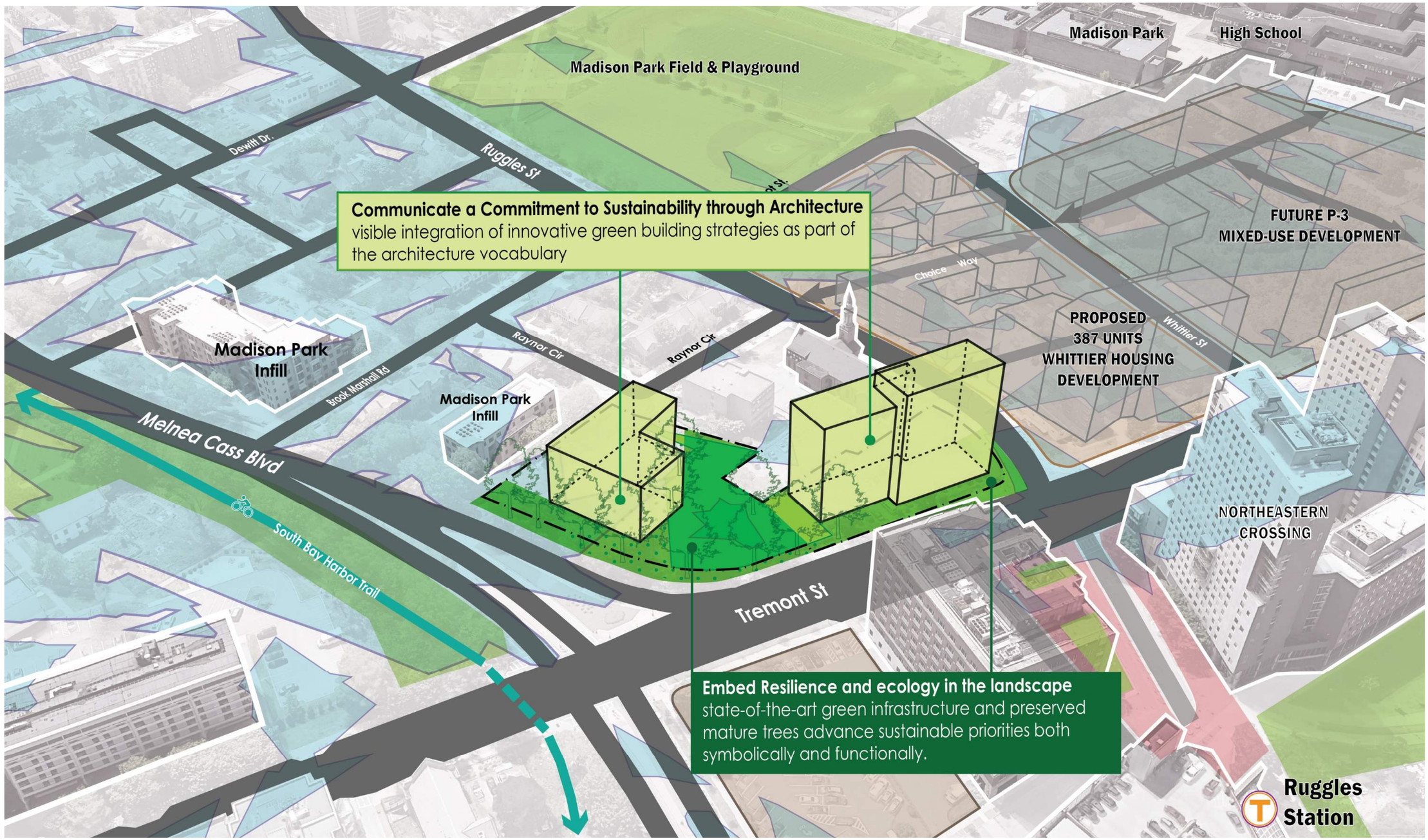
CONNECTING AND COMMUNICATING

DATE: 04/21/21

Stantec

DHK ARCHITECTS

“Building for a sustainable and resilient future”



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

SUSTAINABLE URBAN VISION

DATE: 04/21/21

Stantec

DHK ARCHITECTS

Crecent Parcel Tree Inventory

Tree #	Species (Common)	Species (Latin)	DBH (inches)	Tree Protection Radius (feet)
6	Red Oak	Quercus rubra	54	68
7	Red Oak	Quercus rubra	12	8
9	Honey Locust	Gleditsia triacanthos	20	13
10	Honey Locust	Gleditsia triacanthos	30	20
11	Honey Locust	Gleditsia triacanthos	50	33
12	London Plain	Platanus x acerifolia	11	11
13	Pin Oak	Quercus palustris	14	9
14	Pin Oak	Quercus palustris	17	11
15	London Plain	Platanus x acerifolia	12	12
16	Red Oak	Quercus rubra	20	13
17	Pin Oak	Quercus palustris	18	12
18	Pin Oak	Quercus palustris	10	7
19	London Plain	Platanus x acerifolia	15	15
20	Red Oak	Quercus rubra	19	13
21	Littleleaf Linden	Tilia cordata	20	20
22	Littleleaf Linden	Tilia cordata	22	22
23	Red Oak	Quercus rubra	16	11
24	Cottonwood	Populus deltoides	20	13
25	Littleleaf Linden	Tilia cordata	18	18
26	Cottonwood	Populus deltoides	24	16
27	Red Maple	Acer rubrum	3	3
28	Norway Maple	Acer platanoides	13	13
29	Silver Linden	Tilia tomentosa	19	19
30	Silver Linden	Tilia tomentosa	21	21
31	Silver Linden	Tilia tomentosa	18	18
32	Silver Linden	Tilia tomentosa	20	20
33	Silver Linden	Tilia tomentosa	20	20
34	Norway Maple	Acer platanoides	16	16
35	Tree of Heaven	Ailanthus altissima	36	36
36	Silver Linden	Tilia tomentosa	18	18
37	Norway Maple	Acer platanoides	9	6
38	Silver Linden	Tilia tomentosa	24	24
39	Norway Maple	Acer platanoides	16	16
40	Silver Linden	Tilia tomentosa	24	24
41	Elm	Ulmus sp.	40	40
42	Elm	Ulmus sp.	36	36
43	Elm	Ulmus sp.	14	14

TREE LEGEND

EXISTING TREE TO REMAIN AND BE PROTECTED

EXISTING TREE TO BE REMOVED AND REPLACED

TREMONT STREET

RUGGLES STREET

MELNEA CASS BOULEVARD

WEST STREET (TBD)

RAYNOR CIRCLE

25' - 0"

NORTH

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

EXISTING CONDITIONS TREE PLAN

DATE: 04/21/2021

SCALE: 0' 12.5' 25' 50' 100'

DMLA

DHK ARCHITECTS

Crecent Parcel Tree Removals

Tree #	Species (Common)	Species (Latin)	DBH (inches)
9	Honey Locust	Gleditsia triacanthos	20
22	Littleleaf Linden	Tilia cordata	22
25	Littleleaf Linden	Tilia cordata	18
33	Silver Linden	Tilia tomentosa	20
34	Norway Maple	Acer platanoides	16
35	Tree of Heaven	Ailanthus altissima	36
36	Silver Linden	Tilia tomentosa	18
37	Norway Maple	Acer platanoides	9
38	Silver Linden	Tilia tomentosa	24
	9 Total Trees	Total Caliper Inches	183

Crecent Parcel Proposed Trees

Tree Qtys	Species (Common)	Species (Latin)	DBH (inches)	Total (inches)
5	Honey Locust	Gleditsia triacanthos	3	15
13	Red Oak	Quercus rubra	4	52
2	Littleleaf Linden	Tilia cordata	4	8
5	Silver Linden	Tilia tomentosa	3	15
27	Red Maple	Acer rubra	4	108
52	**Totals**		**18**	**198**

TREE LEGEND

EXISTING TREE TO REMAIN AND BE PROTECTED

EXISTING TREE TO BE REMOVED AND REPLACED

PROPOSED TREES

TREMONT STREET

RUGGLES STREET

MELNEA CASS BOULEVARD

WEST STREET (TBD)

RAYNOR CIRCLE

25' - 0"

NORTH

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

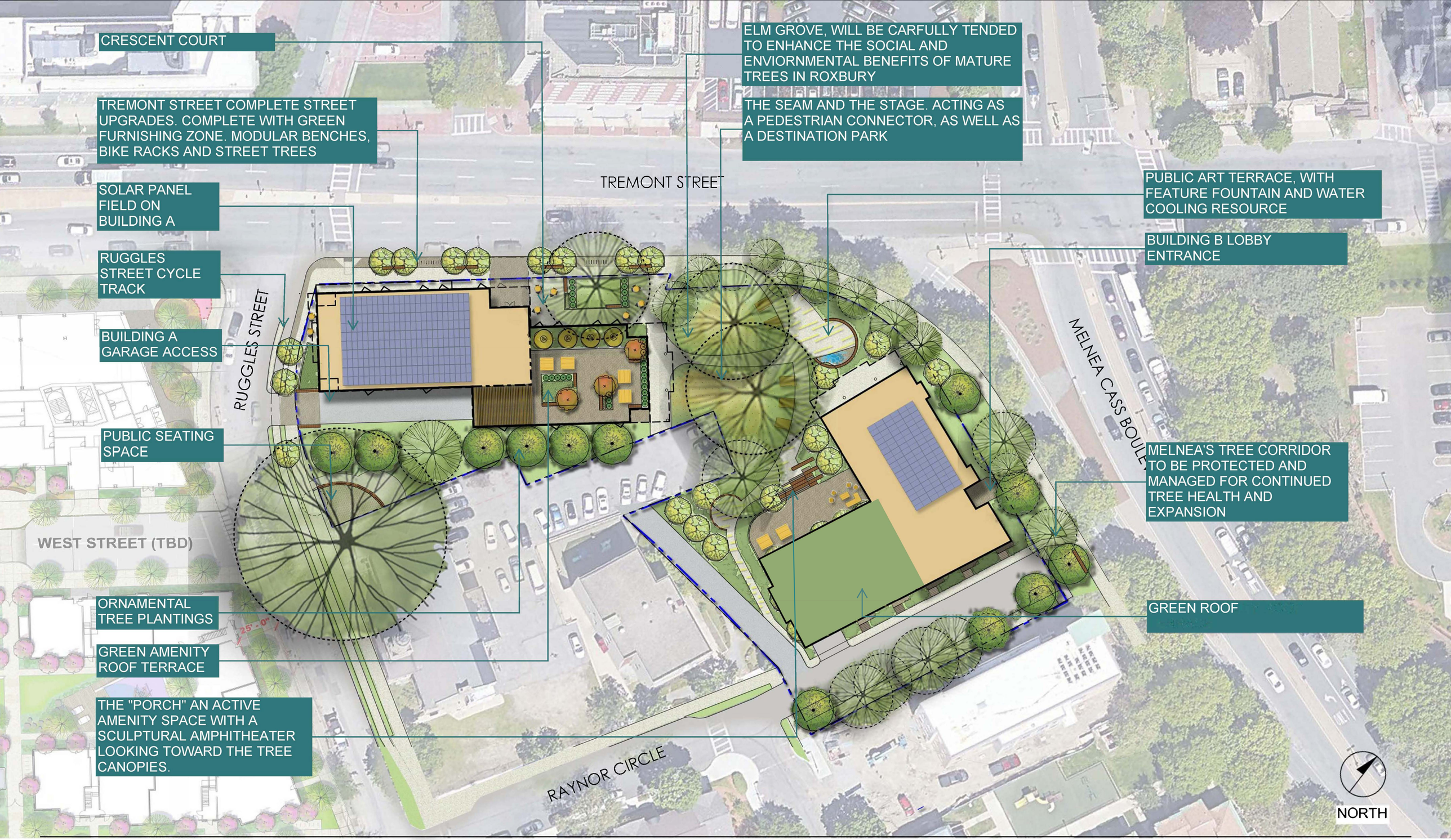
PROPOSED TREE PLAN

DATE: 04/21/2021

SCALE: 0' 12.5' 25' 50' 100'

DMLA

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

SITE PLAN RENDERING

DATE: 04/21/2021

SCALE: 0' 12.5' 25' 50' 100'

DMLA

DHK ARCHITECTS



















ELA

BOULEVARD

NORTH

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

COURTYARD ENLARGEMENT

DATE: 04/21/2021

SCALE: 0' 7.5' 15' 30' 60'

DMLA

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

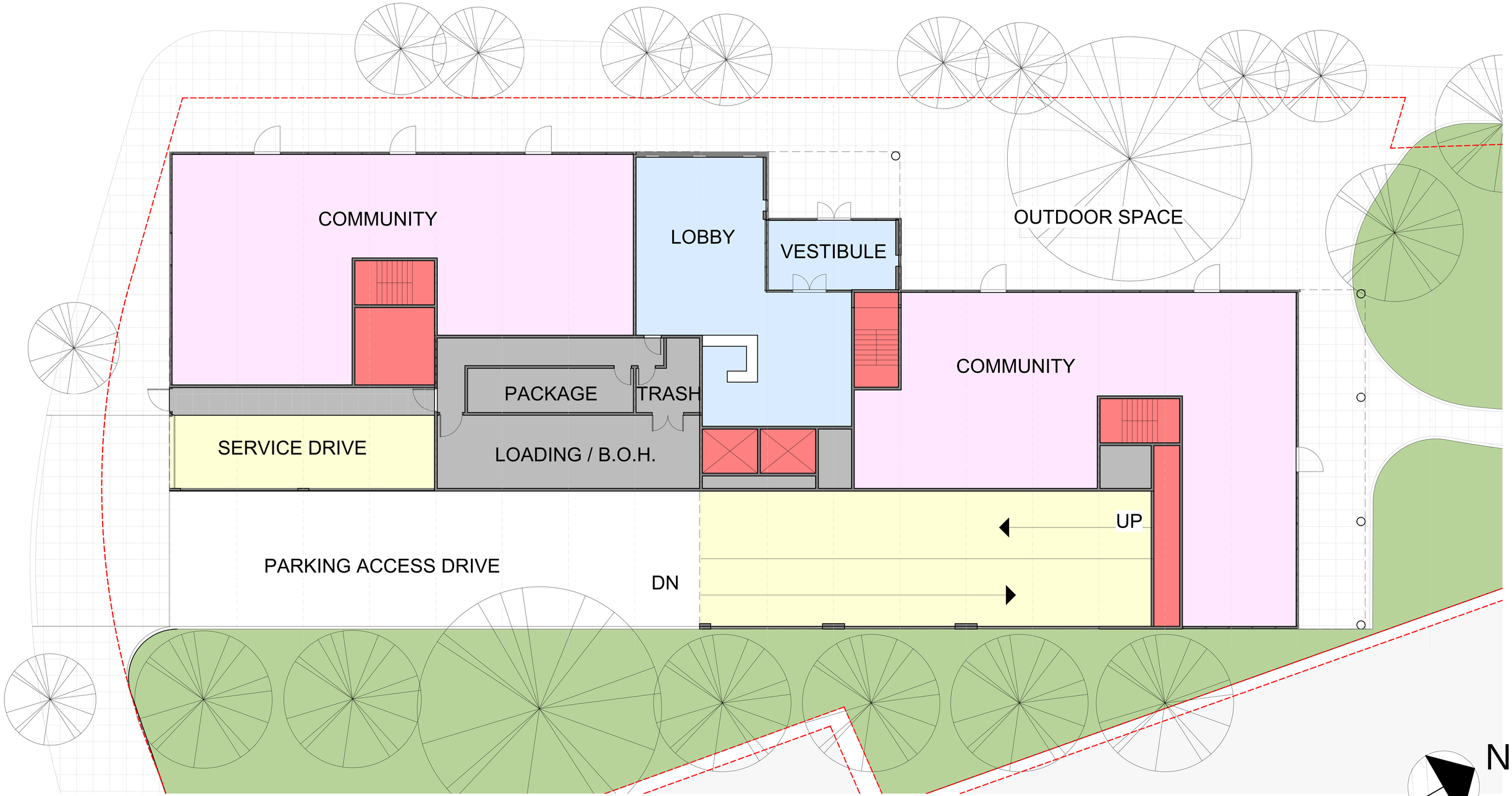
CRESCENT PARCEL

SITE PLAN

DATE: 04/21/21

SCALE: 0' 5' 10' 25' 50' 100'

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

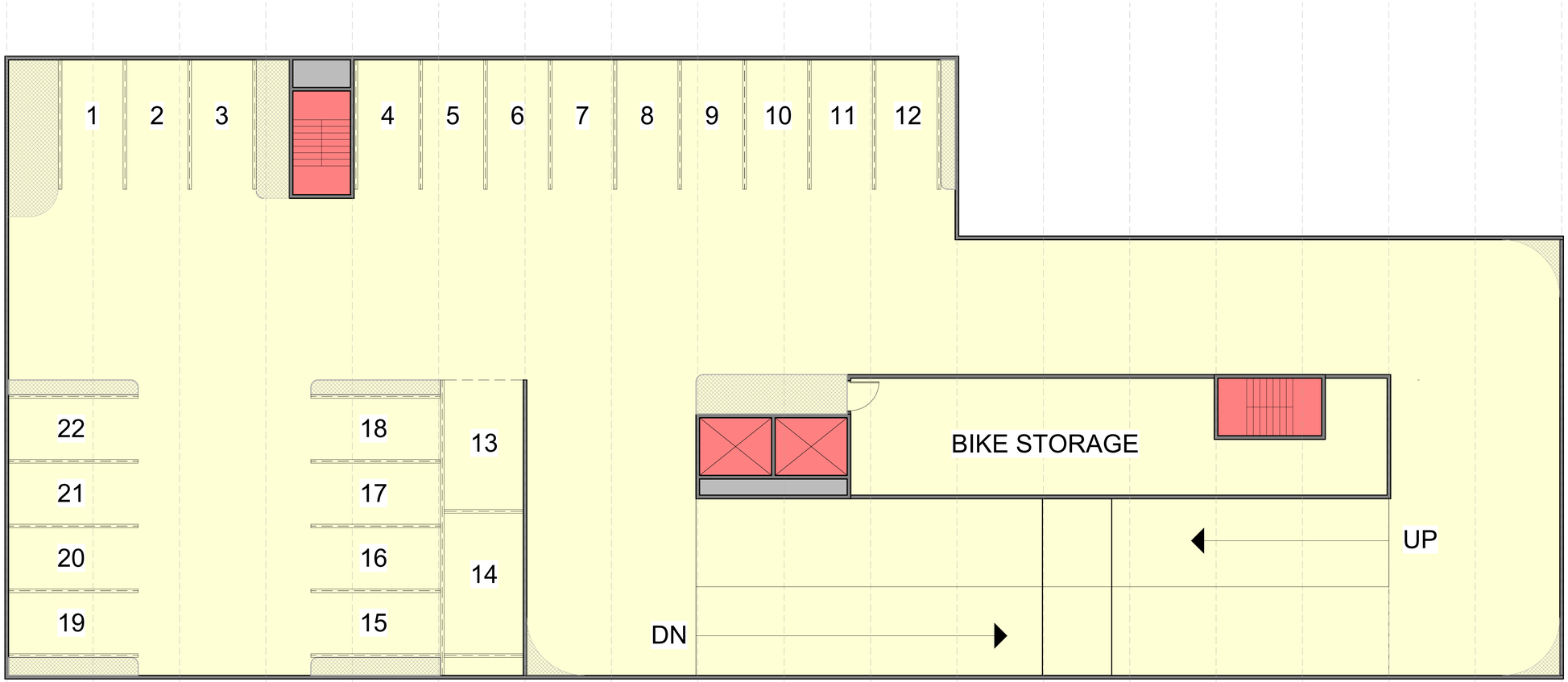
CRESCENT PARCEL

TREMONT BLDG - STREET LEVEL PLAN

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

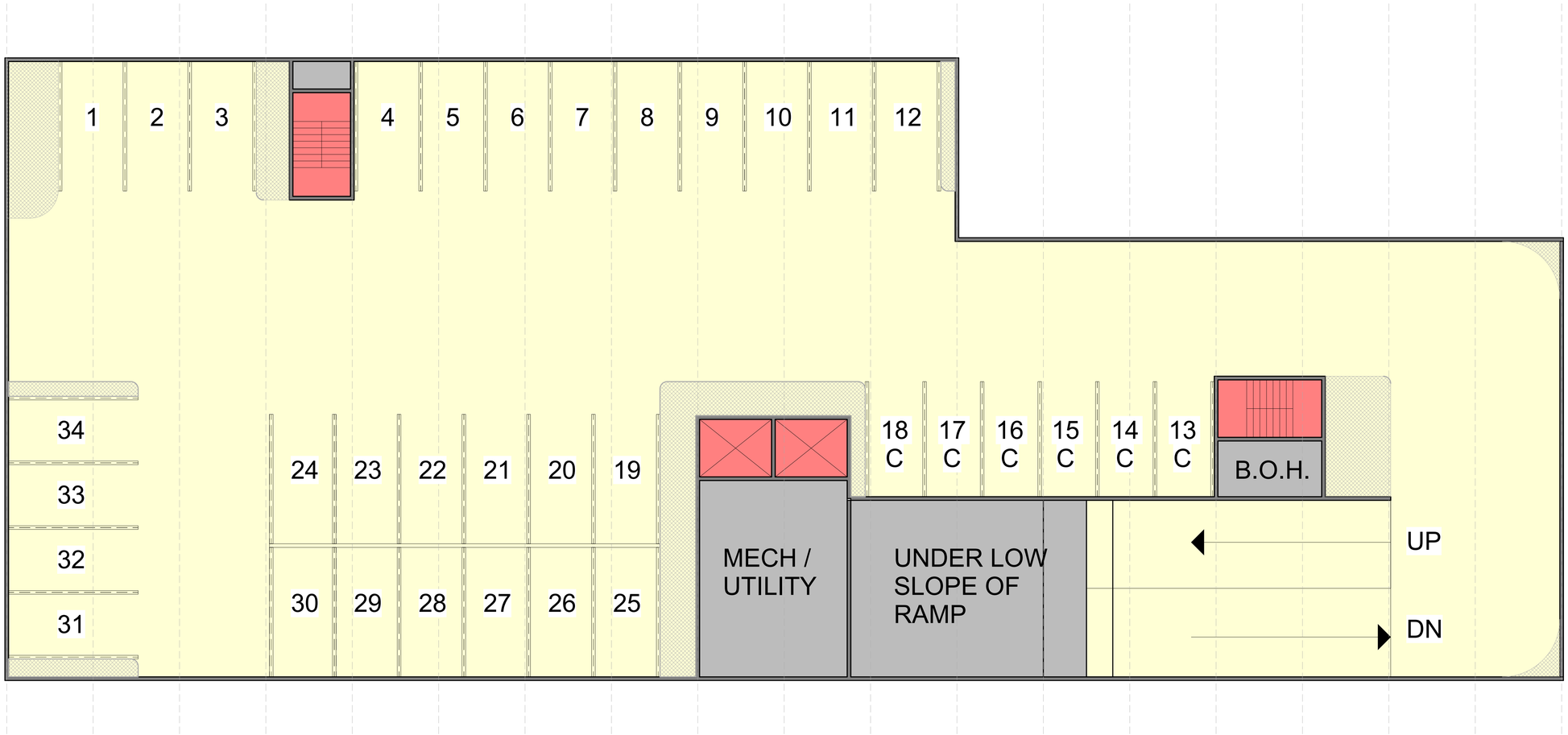
CRESCENT PARCEL

TREMONT BLDG - BASEMENT LEVEL 1 PLAN

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

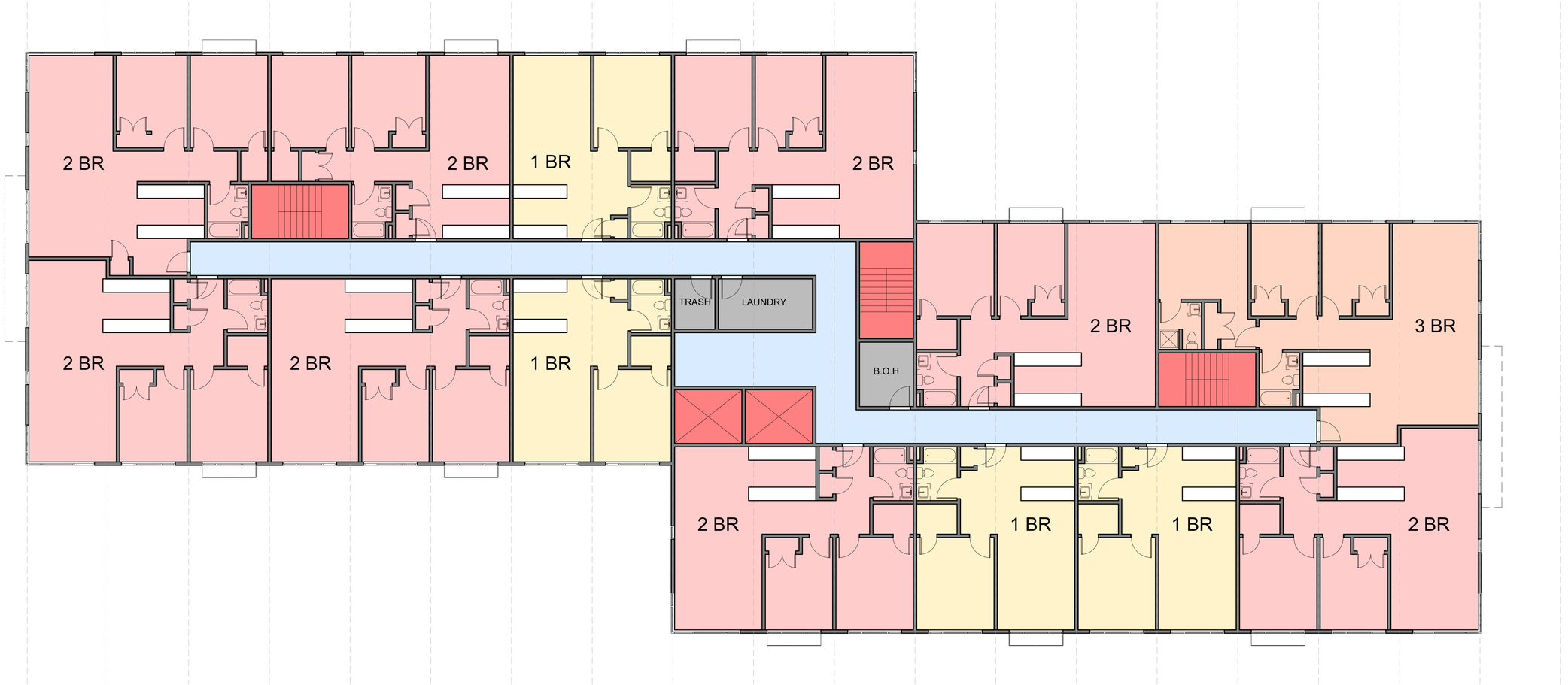
CRESCENT PARCEL

TREMONT BLDG - BASEMENT LEVEL 2 PLAN

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

TREMONT BLDG - LEVEL 2,
LEVELS 3 TO 6 SIMILAR

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

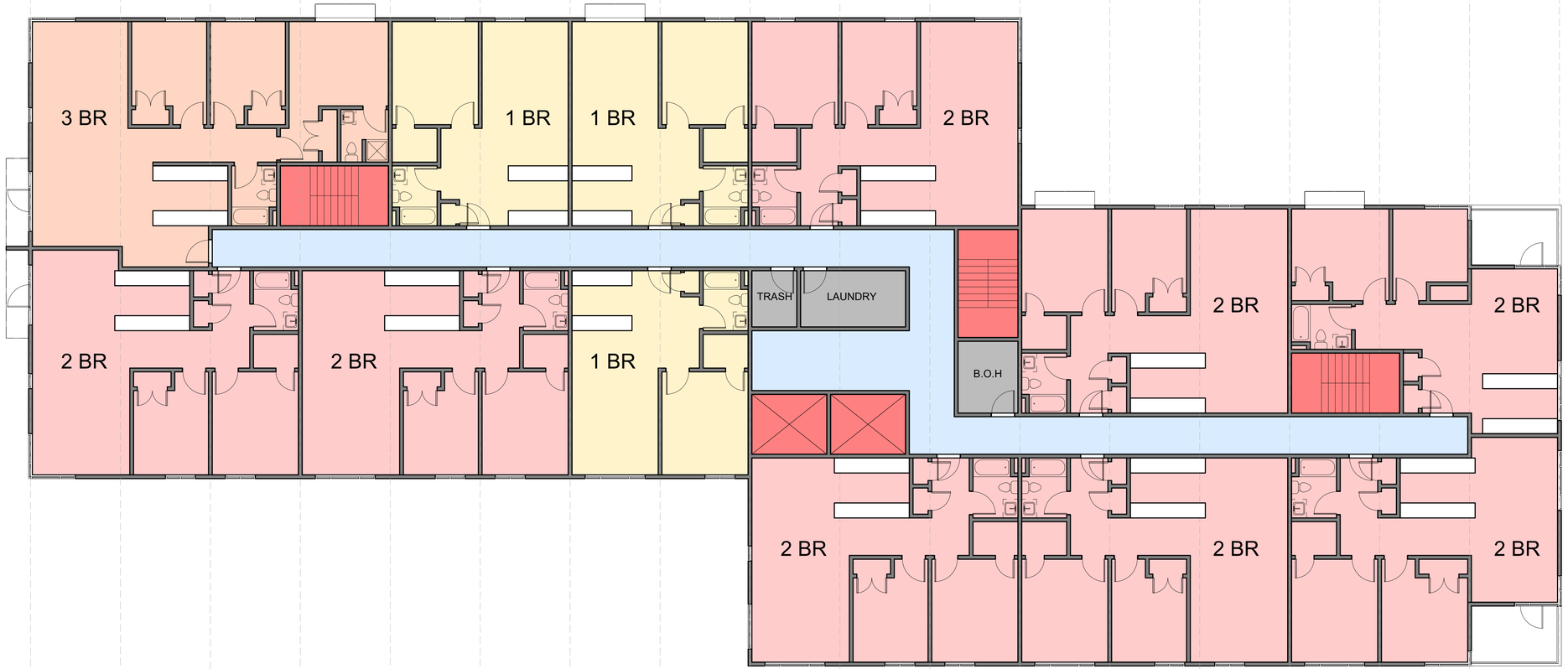
CRESCENT PARCEL

TREMONT BLDG - LEVEL 7,
LEVEL 8 SIMILAR

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

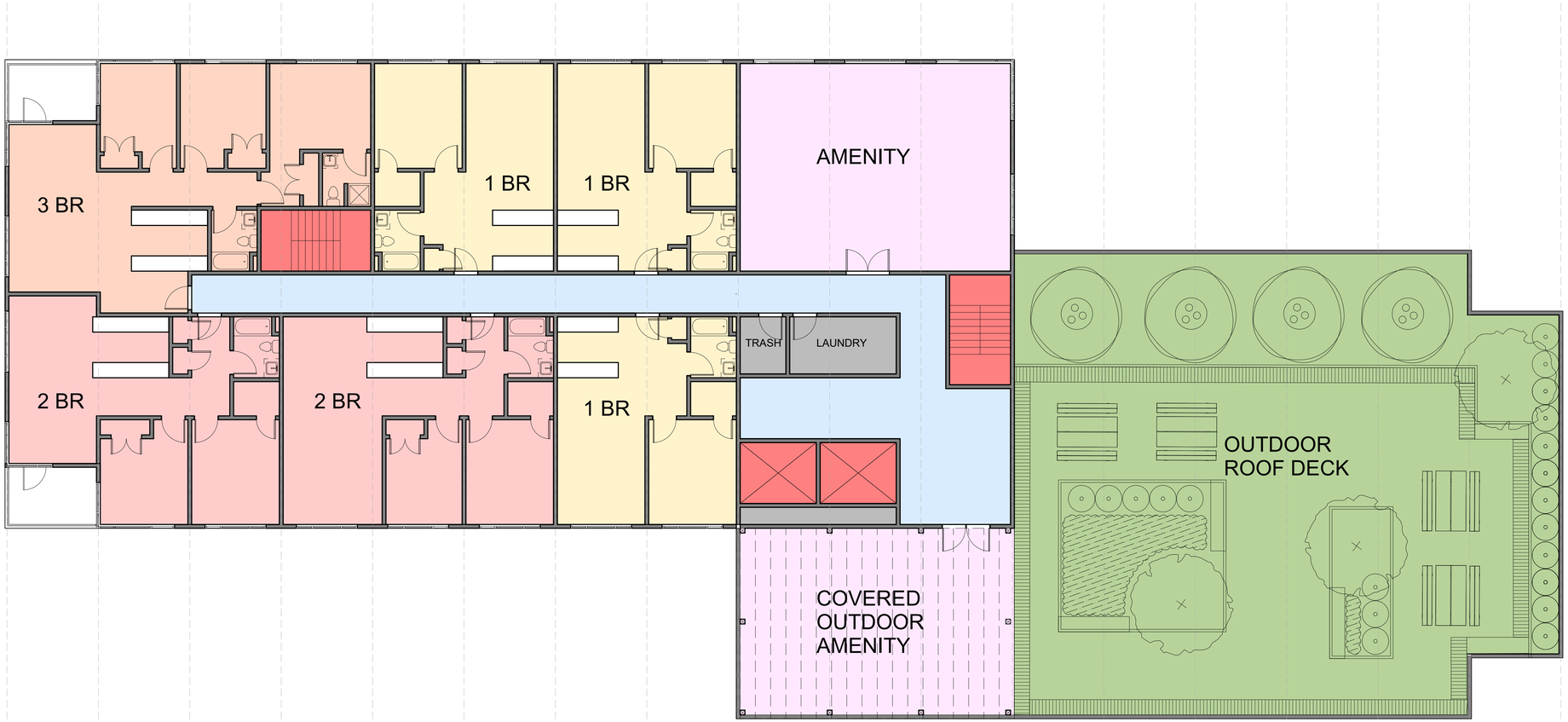
CRESCENT PARCEL

TREMONT BLDG - LEVEL 9,
LEVEL 10 SIMILAR

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

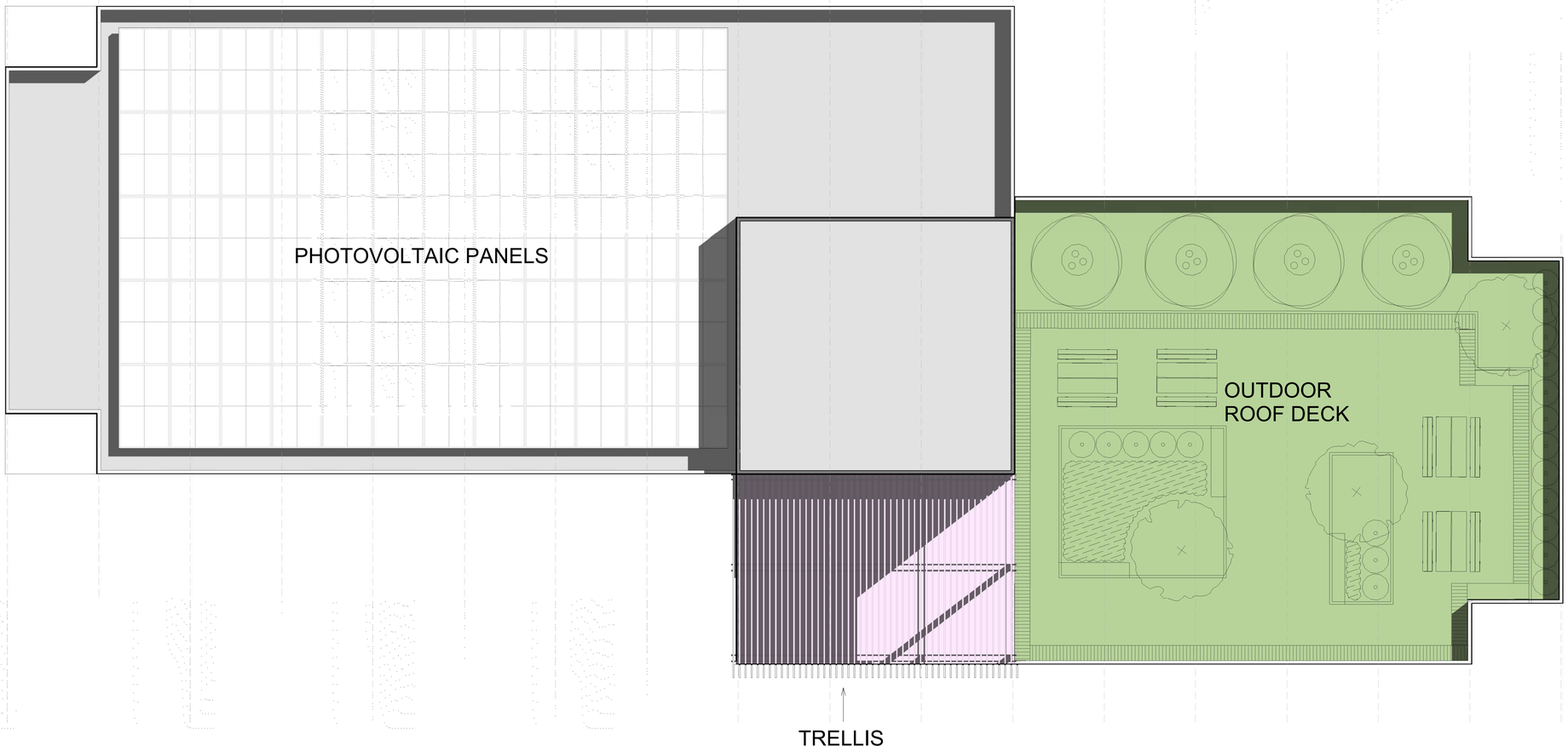
CRESCENT PARCEL

TREMONT BLDG - LEVEL 11
PLAN

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

TREMONT BLDG - ROOF PLAN

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

TREMONT BLDG - EAST ELEVATION

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

TREMONT BLDG - WEST ELEVATION

DATE: 04/21/21

DHK ARCHITECTS





TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

TREMONT BLDG - NORTH & SOUTH ELEVATION

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

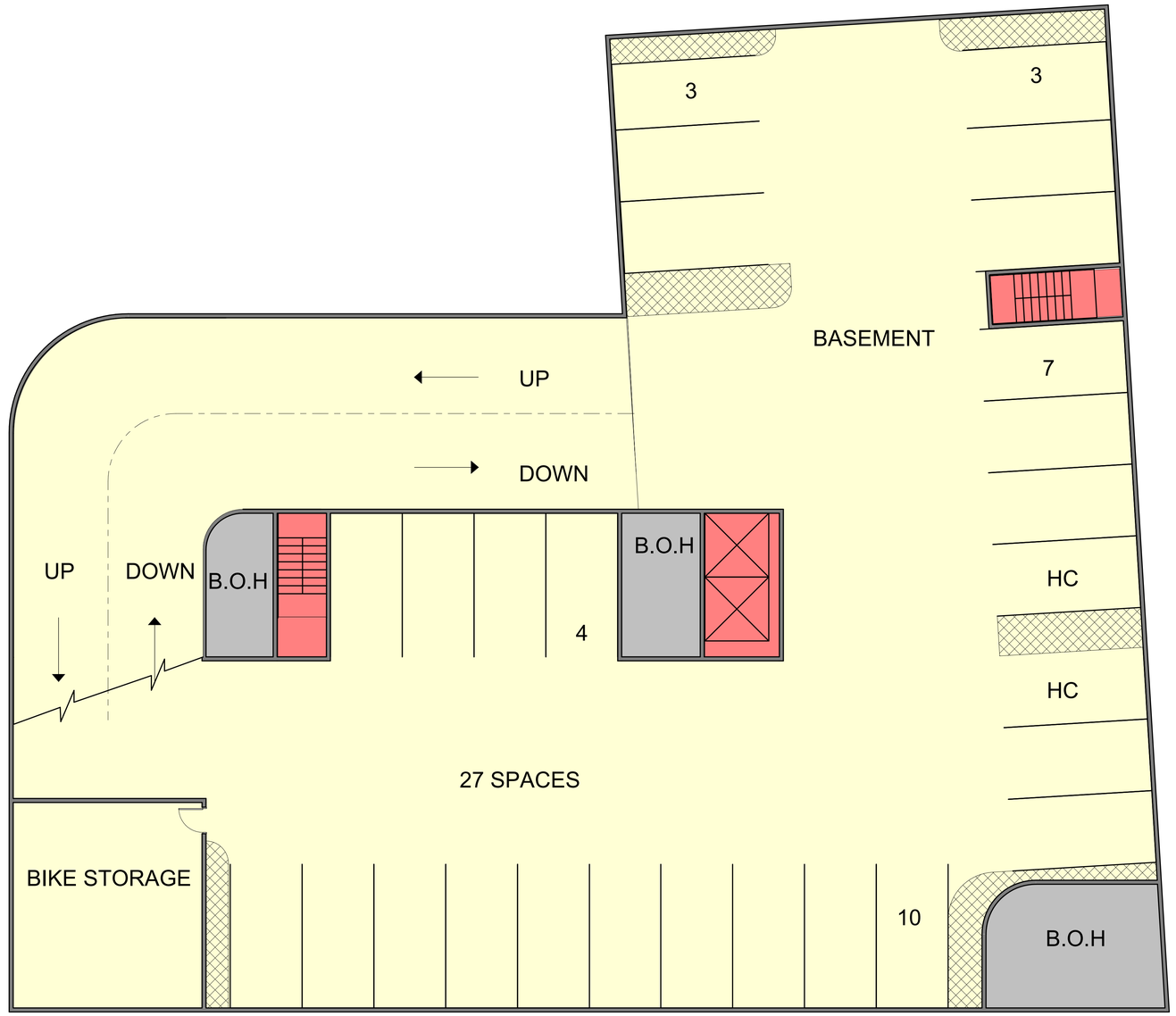
CRESCENT PARCEL

MELNEA CASS BLDG - STREET LEVEL

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG -
BASEMENT LEVEL

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG - LEVEL 2

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG -
TYPICAL LEVEL 3 TO 4

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

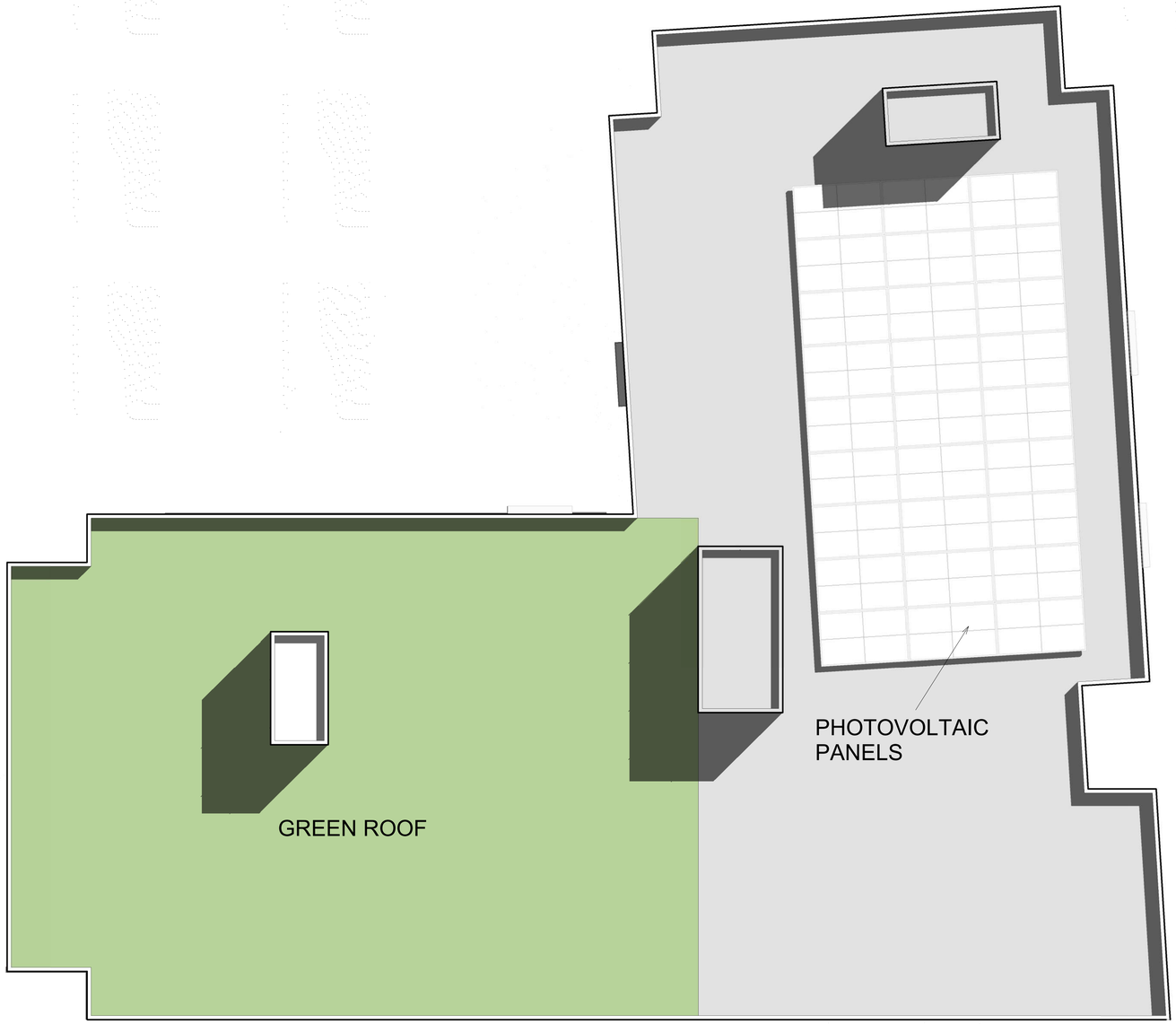
CRESCENT PARCEL

MELNEA CASS BLDG - LEVEL 5, LEVEL 6 SIMILAR

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



N

TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG - ROOF PLAN

DATE: 04/21/21

SCALE: 0' 4' 8' 16' 32'

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG -
EAST ELEVATION

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG -
NORTH ELEVATION

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG - SOUTH ELEVATION

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

MELNEA CASS BLDG - WEST ELEVATION

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET ELEVATION
TREMONT ST

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET ELEVATION
MELNEA CASS

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET ELEVATION
RAYNOR CIR

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET ELEVATION
RUGGLES ST

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

AERIAL FROM NORTHWEST

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

AERIAL FROM SOUTHEAST

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET VIEW FROM NEW
PUBLIC PARK LOOKING EAST

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET VIEW FROM NEW
PUBLIC PARK LOOKING WEST

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

ELEVATED VIEW LOOKING AT TREMONT ST / RUGGLES ST INTERSECTION

DATE: 04/21/21

DHK ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET VIEW LOOKING AT TREMONT ST
/ MELNEA CASS BLVD INTERSECTION

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET VIEW LOOKING AT
RAYNOR CIRCLE

DATE: 04/21/21

DHK
ARCHITECTS



TRINITY FINANCIAL

MPDC

CRESCENT PARCEL

STREET VIEW LOOKING NORTH
EAST DOWN TREMONT ST

DATE: 04/21/21

DHK
ARCHITECTS

Crescent Parcel



Tab J

APPENDIX B: REQUIRED FORMS & DISCLOSURES

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

INSTRUCTION SHEET

NOTE: The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

Section (1): Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

Section (2): Identify the type of transaction to which this Disclosure Statement pertains --such as a sale, purchase, lease, etc.

Section (3): Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

Section (4): Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

Section (5): Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

Section (6): List the names and addresses of **every** legal entity and **every** natural person that has or will have a **direct or indirect** beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

Section (7): Write "none" in the blank if none of the persons mentioned in Section 6 is employed by DCAMM. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM.

Section (8): The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

Section (9): Make sure that this Disclosure Statement is signed by the correct person. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate

Division of Capital Asset Management and Maintenance

One Ashburton Place, 15th Floor, Boston, MA 02108

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

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

(1) REAL PROPERTY: Crescent Parcel located at: 1130 Tremont Street, 175-177 Ruggles Street, 0 Tremont Street, and four adjacent parcels each known as 0 Melnea Cass Boulevard and 0 St. Francis de Sales Court, Roxbury MA 02119

(2) TYPE OF TRANSACTION, AGEEMENT, or DOCUMENT:

Ground Lease Agreement

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

Boston Redevelopment Authority d/b/a Boston Planning and Development Agency

(4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):

Trinity Financial, Inc. a Massachusetts Corporation

(5) ROLE OF DISCLOSING PARTY (Check appropriate role):

☐ Lessor/Landlord ☑ Lessee/Tenant

☐ Seller/Grantor ☐ Buyer/Grantee

☑ Other (Please describe): Developer

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

NAME	RESIDENCE
James G. Keefe 50% Shareholder	43 Roslin Street, Dorchester, MA 02124
Patrick A.T. Lee 50% Shareholder	1 Avery Street 25B, Boston, MA 02111

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

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

> *No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been*

filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arms length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

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

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

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

Trinity Financial, Inc.

PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

Rebecca H

4/21/21

AUTHORIZED SIGNATURE of DISCLOSING PARTY — DATE (MM / DD / YYYY)

Rebecca Hemenway, Vice President

PRINT NAME & TITLE of AUTHORIZED SIGNER

BPDA and CITY OF BOSTON DISCLOSURE STATEMENT

Any person submitting a development proposal to the BPDA and/or City of Boston must truthfully complete this statement and submit it prior to being designated for any project. (please attach extra sheets if necessary).

1. Do any of the principals owe the City of Boston and/or BPDA 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 and/or BPDA? If yes, in what capacity? (Please include name of agency or department and position held in that agency or department).

   No

3. Do any of the principals own any real estate in Boston? If yes, where and what type of property?

   Yes, property owned is attached herein in Exhibit A

4. 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 crimes?

   No

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

   No

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

By: Trinity Financial, Inc.
By: Rebecca Hemenway, Vice President

SIGNED under the penalty of perjury.

Date: 4/21/21

Signature: _____ Signature: _____

Address: c/o Trinity Financial, Inc. 75 Federal Street 4th Floor Boston MA 02110 Address: _____

Real Estate
in which
Patrick A.T. Lee and James G. Keefe
have an ownership interest

Name of Property Owner	Address	City, State	Ward and Parcel ID
Trinity Lucerne Limited Partnership	120 Lucerne Street	Boston, MA	14-03541000
Trinity Lucerne Limited Partnership	123 Lucerne Street	Boston, MA	14-03322000
Trinity Lucerne Limited Partnership	137-140 Lucerne Street	Boston, MA	14-03353000
Trinity Lucerne Limited Partnership	17 Frontenac Street	Boston, MA	14-03340000
Trinity Lucerne Limited Partnership	20 Frontenac Street	Boston, MA	14-03328000
Adams Orchard LPS	New Yeoman	Boston, MA	08-02190010
Adams Orchard LPS	Hampden	Boston, MA	08-02193010
Adams Orchard LPS	Eustis	Boston, MA	08-02193020
Adams Orchard LPS	Hampden	Boston, MA	08-02193030
Adams Orchard LPS	25 Ambrose	Boston, MA	08-02195020
Madison Trinity LPS	146 Eustis	Boston, MA	08-02192050
Madison Trinity LPS	122 Eustis	Boston, MA	08-02196010
Madison Trinity LPS	2 Wheatley	Boston, MA	08-02199010
Madison Trinity LPS	1 Wheatley	Boston, MA	08-02199020
Madison Trinity LPS	6 Shabezz	Boston, MA	08-02199030
Madison Trinity LPS	2 Shabezz	Boston, MA	08-02199040
Madison Trinity LPS	1 Shabezz	Boston, MA	08-02199050
Madison Trinity LPS	5 Shabezz	Boston, MA	08-02199060
Trinity Neponset LLC	4 River St	Boston, MA	17-04050000
Trinity River Street LP	90 River Street	Mattapan, MA	17-04030-000
Trinity River Street LP	River Street	Mattapan, MA	17-03850-000
Trinity Terrace L P	221 Washington Street	Boston, MA	14-01541000
Trinity Terrace L P	213 Washington St.	Boston, MA	14-01610000
Trinity Terrace L P	237 Washington St.	Boston, MA	14-01550100
Trinity Terrace L P	1 Trinity Terrace	Boston, MA	14-01594010
Trinity Terrace L P	12 Trinity Terrace	Boston, MA	14-01551060
Trinity Terrace L P	15 Trinity Terrace	Boston, MA	14-01551010
Trinity Terrace L P	19 Trinity Terrace	Boston, MA	14-01596010
Trinity Terrace L P	Carmen Street	Boston, MA	14-01581100
Trinity Terrace L P	Carmen Street	Boston, MA	14-01581050
Trinity Terrace L P	Carmen Street	Boston, MA	14-01581060
Trinity Terrace L P	Carmen Street	Boston, MA	14-01581070
Trinity Terrace L P	26 Norwell Street	Boston, MA	14-01589010
Trinity Terrace L P	29 Norwell Street	Boston, MA	14-01623010
Trinity Terrace L P	38 Norwell Street	Boston, MA	14-01585010
Trinity Terrace L P	44 Norwell Street	Boston, MA	14-01583010
Trinity Terrace L P	48 Norwell Street	Boston, MA	14-01581010
Trinity Terrace L P	53 Norwell Street	Boston, MA	14-01632010
James G. Keefe	43 Roslin Street	Boston, MA	17-04691000
New Mass Pike Towers LP	366 Tremont Street	Boston, MA	05-00270000
Trinity Foley LP	249 River Street	Mattapan, MA	18-00113100
Trinity Mattapan Heights Five LP	229A River Street	Mattapan, MA	121A Agreement
Trinity Mattapan Heights LP	209,219,221,225,247 River Stree	Mattapan, MA	121A Agreement
Trinity Mattapan Heights Three LP	223-227 River Street	Mattapan, MA	121A Agreement

CERTIFICATE OF TAX AND EMPLOYMENT SECURITY COMPLIANCE

Pursuant to Massachusetts General Laws Chapter 62C, §49A', and Chapter 151 A,

§ 1 9A(b)2, I Rebecca Hemenway,
(Name)

Vice President of Trinity Financial, Inc.
(Title) (Name of Bidder)

whose principal place of business is located at

75 Federal Street 4th Floor Boston MA 02110

do hereby certify that:

A. The above-named Bidder has made all required filings of state taxes, has paid all state taxes required under law, and has no outstanding obligation to the Commonwealth's Department of Revenue.
B. The above-named Bidder/Employer has complied with all laws of the Commonwealth relating to contributions and payments in lieu of contributions.

Signed under the penalties of perjury this 21 day of April 2021

(Signature)

Federal Identification Number: 04-3075721

By: Rebecca Hemenway

Title: Vice President

'No contract or other agreement for the purpose of providing goods, services or real estate to any... agencies (of the Commonwealth) shall be entered into, renewed or extended with any person unless such person certifies in writing under penalties of perjury, that he has complied with all laws of the Commonwealth relating to taxes.'

'No contract or other agreement for the purpose of providing... physical space to any agency or instrumentality of the Commonwealth shall be entered into, renewed or extended with any employer unless such employer certifies in writing under penalties of perjury, that said employer has complied with all laws of the Commonwealth relating to contributions and payments in lieu of contributions

APPENDIX D

HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility

U.S DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE

(If space on this form is inadequate for any requested information, it should be furnished on an attached page, which is referred to under the appropriate numbered item on the form.)

A. Developer and Land

1. Name and address of developer:

Trinity Financial, Inc. 75 Federal Street Boston MA 02110

2. The land on which the developer proposes to enter into a contract for, or understanding with respect to the purchase or lease of land from: Crescent Parcel located at: 1130 Tremont Street, 175-177 Ruggles Street, 0 Tremont Street, and four adjacent parcels each known as 0 Melnea Cass Boulevard and 0 St. Francis de Sales Court, Roxbury MA 02119

BOSTON REDEVELOPMENT AUTHORITY

(Name of Local Public Agency)

In: South End and Campus High School Urban Renewal Areas

(Name of Urban Renewal Area)

in the City of Boston, State of Massachusetts, is described as follows:

3. If the developer is not an individual doing business under his own name, the developer has the status indicated below and is organized or operating under the laws of:

- [x] A corporation.
- [ ] A nonprofit or charitable institution or corporation.
- [ ] A partnership known as
- [ ] A business association or joint venture known as
- [ ] A federal, State or Local Government or instrumentality thereof.
- [ ] Other (explain)

4. If the developer is not an individual or a government agency or instrumentality, give date of organization:
   June 8th, 1990

5. Names, addresses, title of position (if any), and nature and extent of the interest of the officers and principal member shareholders and investors of the developers, other than a government agency or instrumentality, are set forth as follows:

   a. If the developer is a corporation, the officers, directors or trustees, and each stockholder owning more than 10% of any class of stock.

   b. If the developer is a nonprofit or charitable institution or corporation, the members who constitute the board of trustees or board of directors or similar governing body.

   c. If the developer is a partnership, each partner, whether a general or limited partner, and either the percent of interest or a description of the character and extent of interest.

   d. If the developer is a business association or a joint venture, each participant and either the percent of interest or a description of the character and extent of interest.

   e. If the developer is some other entity, the officers, the members of the governing body, and each person having an interest of more than 10%.

NAME AND ADDRESS	POSITION, TITLE *(if any)* AND PERCENT OF INTEREST OR DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST
1. Patrick A.T. Lee 1 Avery St 25B Boston, MA 02111	1. Exec. Vice President and 50% Shareholder
2. James G. Keefe 43 Roslin ST. Dorchester, MA 02124	2. President and 50% Shareholder

6. Name, address and nature and extent of interest of each person or entity (not named in response to item 5) who has a beneficial interest in any of the shareholders or investors named in response to item 5 which gives such person or entity more than a computed 10% interest in the developer (for example, more than 20% of the stock in a corporation which holds 50% of the stock of the developer; or more than 50% of the stock in a corporation which hold 20% of the stock of the developer):

NAME AND ADDRESS	DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST
1. Patrick A.T. Lee	1. Exec. Vice President and 50% Shareholder
2. James G. Keefe	2. President and 50% Shareholder

7. Names (if not given above) of officers and directors or trustees of any corporation or firm listed under item 5 or item 6 above:

1. Patrick A.T. Lee 2. James G. Keefe
Rebecca Hemenway, Vice President

B. RESIDENTIAL REDEVELOPMENT OR REHABILITATION
(The developer is to furnish the following information, but only if land is to be redeveloped or rehabilitated in whole or in part for *residential* purposes.)

1. State the developer's estimates, exclusive of payment for the land, for:

   a. Total cost of any residential development..... $ $134M

   b. Cost per dwelling unit of any residential development..... $ $756,746

2. a. State the developer's estimate of the average monthly rental (if to be rented) or average sale price (if to be sold) for each type and size of dwelling unit involved in such development:

TYPE AND SIZE OF DWELLING UNIT	ESTIMATED AVERAGE MONTHLY RENTAL $	ESTIMATED AVERAGE SALE PRICE $
See Exhibit A	See Exhibit A	See Exhibit A

   b. State the utilities and parking facilities, if any, included in the foregoing estimates of rentals:

   c. State equipment, such as refrigerators, washing machines, air conditioners, if any, include in the foregoing estimates of sale prices:

CERTIFICATION

I (we)[1] Rebecca Hemanway certify that this Developer's Statement for Public Disclosure is true and correct to the best of my (our) knowledge and belief.

By: Trinity Financial, Inc.

Dated: 4/21/2021

Rebecca H

Signature

Vice President

Title

c/o Trinity Financial, Inc., 75 Federal Street 4th Floor Boston MA 02110

Address

Dated: _____

_____

Signature

_____

Title

_____

Address

1. If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY

1. Name and address of developer:

   Trinity Financial, Inc. 75 Federal Street 4th Floor Boston MA 02110

2. Is the developer a subsidiary of or affiliated with any other corporation or corporations or any other firm or firms?

   YES ✔ NO ✔

   If Yes, list such corporation or firm by name and address. Specify its relationship to the developer, and identify the officers and directors or trustees common to the developer such other corporation or firm.

   Trinity Management LLC 75 Federal Street 4th Floor Boston MA 02110 (same owners)

3. a. The financial condition of the developer as of December 31, 2019 is as reflected in the attached financial statement.
   (Financial Statement have been provided under separate cover.)
   NOTE: Attach to this statement a certified financial statement (of the corporation; for each partner in a partnership; or for the individual) showing the assets and the liabilities, including contingent liabilities, fully itemized in accordance with accepted accounting standards and based on a proper audit. (Financial statements for individuals do not need to be audited but they must be dated and signed by the applicant.) If the date of the certified financial statement precedes the date of this submission by more than six months, also attached an interim balance sheet not more than 60 days old.

   b. Name and address of auditor or public accountant who performed the audit on which said financial statement is based:

   CohnReznick LLP One Boston Place, Ste 500, Boston, MA 02108 Attn: Ronald Walker

4. If funds for the development of the land are to be obtained from the sources other than the developer's own funds, a statement of the developer's plan for financing the acquisition and development of the land:

   The funds to acquire the land and construct the proposed development will be a combination of private and public financing. The plan to acquire such funds includes applying for competitive public resources from Mass DHCD and the City of Boston's Department of Neighborhood development. Additionally we will work with the Bond Issuing Agency MassHousing Finance Agency to acquire the needed volume cap to support our tax exempt construction loan. Finally privet sources including Equity raised through the utilization of the 4% LIHTC , Construction Financing and Permanent Debt will be acquired through an institutional investor or tax credit syndicator and institutional construction lender.

5. Sources and amount of cash available to developer to meet equity requirements of the proposed undertaking:

   a. In banks:

NAME AND ADDRESS OF BANK	AMOUNT
	$

   To be sent under separate cover, included in the Developer's financial statement

   To be sent under separate cover, included in the Developer's financial statement

   b. By loans from affiliated or associated corporations or firms:

NAME AND ADDRESS OF SOURCE	AMOUNT
	$

   To be sent under separate cover, included in the Developer's financial statement

   c. By sale of readily salable assets:

DESCRIPTION	MARKET VALUE	MORTGAGES OR LIENS
	$	

   To be sent under separate cover, included in the Developer's financial statement

6. Names and addresses of bank references:

   TD Bank, NA Attn: Thomas McColgan 203 Trumbull St., Hartford, CT06103
   Bank of America ATTN: Elizabeth Grober 225 FRANKLIN ST., BOSTON, MA 02110

7. a. Has the developer or (if any) the parent corporation or any subsidiary or affiliated corporation of the developer or said parent corporation, or any of the developer's officers or principal members shareholders or investors, or other interested parties (as listed in the response to item 5, 6,and 7 of the Developer's Statement for Public Disclosure and referred to herein as "principals of the developer") been adjudged bankrupt, either voluntary or involuntary, within the past 10 years?

   YES [ ] NO [✓]

   If Yes, give date, place and under what name.

b. Has the developer or anyone referred to above as "principals of the developer" been indicted for or convicted of any felony within the past 10 years?
YES[ ] NO[✔]

If Yes, give for each case (1) date. (2) charge, (3) place, (4) court and (5) action taken. Attach any explanation deemed necessary.

8. a. Undertakings, comparable to the proposed development work which have been completed by the developer or any of the principals of the developer, including identification and brief description of each project and date of completion:

PROPERTY NAME AND ADDRESS	DESCRIPTION	DATE COMPLETED

See attached list

b. If the developer or any of the principals of developer has ever been an employee, in such supervisory capacity, for construction contractor or builder on undertaking comparable to the proposed redevelopment work, name of such employee, name and address of employer, title of position, and brief description of work.

N/A

9. Other federally aided urban renewal projects under Title I of the Housing Act of 1949, as amended, in which the developer or any of the principals of the developer is or has been the developer, or stockholder, officer, director or trustee or partner of such a developer:

N/A

10. If the developer or parent corporation, a subsidiary and affiliate or a principal of the developer is to participate in the development of the land as a construction contractor or builder:

    a. Name and address of such contractor or builder:

    b. Has such contractor or builder within the last 10 years ever failed to qualify as a responsible bidder, refused to enter into a contract after an award has been made, or failed to complete a construction or development contract?

    YES ☐ NO ☐

    If Yes explain:

    c. Total amount of construction or development work performed by such contractor or builder during the last three years: $_____

    General description of such work:

    d. Construction contracts or developments now being performed by such contractor or builder:

IDENTIFICATION OF CONTRACT OR DEVELOPMENT	LOCATION	AMOUNT $	DATE TO BE COMPLETED

    e. Outstanding construction-construction bids of such contractor or builder:

AWARDING AGENCY	AMOUNT $	DATE OPENED

11. Brief statement respecting experience, financial capacity and/or other resources available to such contractor or builder for the performance of the work involved in the development of the land:

12. Statements and other evidence of the developer's qualifications and financial responsibility (other than the financial statement referred to item 4a) are attached hereto and nearby made a part hereof as follows:

13. If the developer, any employee of the developer, or any party holding a financial interest in the developer or development is now a Boston Redevelopment Authority ("BRA") or City of Boston ("City") employee or has been at any time in the year preceding this date, please list the person's name, current position held, and financial interest in development entity, the BRA or City position, and if not currently employed by the BRA or City, the last date of employment with the BRA or City.

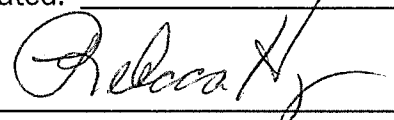
14. List the address(es) of all other properties that the owner(s) or principal(s) of the proposed project owns in the City of Boston.

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

CERTIFICATION

I (we)[1] Rebecca Hemenway, Vice President of Trinity Financial Inc. certify that this Developer's Statement of Qualifications and Financial Responsibility and the attached evidence of the developer's qualifications and financial responsibility, including financial statement are true and correct to the best of my (our) knowledge and belief.

Dated: 4/21/2021



Signature

Vice President, Trinity Financial Inc.

Title

75 Federal Street 4th Floor, Boston, MA 02110

Address

Dated: _____

_____

Signature

_____

Title

_____

Address

1. If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

Exhibit A to HUD Form 6004

2. a. State the developer's estimate of the average monthly rental (if to be rented) or average sale price (if to be sold) for each type and size of dwelling unit involved in such development:

	Average rent per unit
1BR – Rental	$1,730
2BR – Rental	$2,120
3BR- Rental	$2,478
	Average sales price
3BR - Homeownership	$298,115.00*

**Information is based on full project including Tremont Building and Melnea Cass Building (173 rental units and 4 homeownership units total)*

FORM D

Additional Massachusetts Required Certifications

Reference is herein made to a certain Request for Proposal dated January 27, 2021, issued by the Boston Redevelopment Authority, d/b/a the Boston Planning & Development Agency (the "BPDA"), relating to land owned by the BPDA, the City of Boston, and the Massachusetts Department of Transportation ("MassDOT"), known as the Crescent Parcel (together with all figures, appendices and forms and any addendum thereto, the "RFP"). Capitalized terms, unless otherwise defined herein, shall have the meanings assigned to such terms in the RFP. This Form D must be executed in full.

Chapter 66A (Confidentiality and Privacy)

The undersigned (the "Proponent") acknowledges that, during the response and selection process for the RFP and, if selected as the Selected Proponent, the Proponent's performance under the Ground Lease, the Proponent may acquire or obtain access to "personal data" and become a "holder" of such "personal data" (as defined in Chapter 66A of the Massachusetts General Laws ("Chapter 66A")) or other information deemed confidential by MassDOT. The Proponent shall comply with Chapter 66A and any applicable regulations promulgated thereunder relative to confidentiality and privacy.

Chapter 62C, Section 49A (Tax Compliance)

Pursuant to M.G.L. Chapter 62C, Section 49A, the Proponent hereby certifies (a) under the pains and penalties of perjury that the Proponent is in full compliance with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors and withholding and remitting child support and (b) to the best of its knowledge and belief, it has no outstanding payment or filing obligations to the Commonwealth of Massachusetts Department of Revenue.

Section 7 of Chapter 521, Acts of 1990 (Child Care Assistance)

Pursuant to Section 7 of Chapter 521, Acts of 1990, as amended by Chapter 329, Acts of 1991, and regulations issued pursuant thereto, 102 CMR 12.00, the Proponent certifies under the pains and penalties of perjury that the Proponent is in compliance with all laws of the Commonwealth of Massachusetts relating to child care assistance, and if the Proponent is a qualified employer having fifty (50) or more full

time employees, has established a dependent care assistance program, child care tuition assistance, or on-site or near site child care placement; or is an exempt employer.

Chapter 7, Section 22C (Northern Ireland Notice and Certification)

State agencies, state authorities, the House of Representatives or the state Senate may not procure goods or services from any person employing ten or more employees in an office or other facility located in Northern Ireland who fails to complete the certification required by M.G.L. c. 7, Section 22C. The Proponent certifies under the pains and penalties of perjury either that (check the applicable statement):

☑ the Proponent does not employ ten or more employees in an office or other facility in Northern Ireland;

OR

☐ the Proponent employs ten or more employees in an office or other facility located in Northern Ireland and further certifies that:

1. the Proponent does not discriminate in employment, compensation, or the terms, conditions and privileges of employment on account of religious or political belief, and

2. the Proponent promotes religious tolerance within the work place, and the eradication of any manifestations of religious and other illegal discrimination; and

3. the Proponent is not engaged in the manufacture, distribution or sale of firearms, munitions, including rubber or plastic bullets, tear gas, armored vehicles or military aircraft for use or deployment in any activity in Northern Ireland.

Conflict of Interest/Collusion Certification

The Proponent certifies under the pains and penalties of perjury that (a) no relationship exists between the Proponent and MassDOT or any officer, employee, or agent of MassDOT that constitutes unfair competition or a conflict of interest or that may be adverse to MassDOT; and (b) it has not acted in collusion

with any other Proponent or other entity doing business with MassDOT in a way that would constitute unfair competition or that may be adverse to MassDOT.

Massachusetts Executive Order 526

Consistent with MassDOT's policy to further the goals of the Executive Order 526, the Proponent shall not discriminate by segregation or otherwise against any person because of race, color, age, gender, ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, national origin, disability, veteran's status (including Vietnam-era veterans), or background in providing or refusing to provide any person or persons the use of or access to any facility including any and all services, privileges, accommodations, and activities of the Proponent. The Proponent shall not discriminate by segregation or otherwise against any employee or applicant for employment because of race, color, age, gender, ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, national origin, disability, veteran' s status (including Vietnam-era veterans), or background and shall undertake specific affirmative action in those areas identified by the MassDOT, from time to time, where utilization of transition plans, reports, goals, and timetables are necessary to ensure equal opportunity and to overcome the effect of past discrimination against specific groups. The Proponent agrees that in all matters related to the Property (as defined in the RFP), it will establish and develop civil rights policies and programs, consistent with those of the MassDOT, designed to prohibit discrimination, ensure equality of opportunity, and implement appropriate narrowly tailored affirmative action in all operations, particularly in the areas of employment and public access.

Other Certifications

The Proponent certifies under the pains and penalties of perjury that the Proponent has filed with the Secretary of the Commonwealth all certificates and annual reports required by law. The Proponent certifies under the pains and penalties of perjury that the Proponent is not presently debarred or suspended from providing goods and/or services to the Commonwealth, or any other applicable debarment or suspension provision under state law or any rules or regulations promulgated thereunder.

Signed under the pains and penalties of perjury on this 21 day of April, 2021 by the duly authorized Rebecca Hemwnway of the Proponent:

Name of Proponent: Trinity Financial, Inc.

Signature: 

Print Name: Rebecca Hemenway

Title: Vice President

Form J: FHWA and MEPA Agreement

Reference is herein made to a certain Request for Proposals, dated January 27, 2021, issued by the Boston Redevelopment Authority, d/b/a the Boston Planning & Development Agency (the "BPDA"), relating to land owned by the BPDA, the City of Boston, and the Massachusetts Department of Transportation ("MassDOT"), known as the Crescent Parcel (together with all figures, appendices and forms and any addendum thereto, the "RFP").Capitalized terms, unless otherwise defined herein, shall have the meanings assigned to such terms in the RFP.

In order to induce MassDOT to evaluate any Bid submitted to it by the undersigned (the "Proponent") pursuant to the RFP, the Proponent acknowledges and agrees that if it shall acquire the Crescent Parcel pursuant to the RFP (the "Proponent Property"), the Proponent agrees that any and all work, development or other activities thereon shall be subject to all applicable laws, rules and regulations. Without limiting the foregoing, the Proponent acknowledges and agrees that if any such work meets or exceeds a review threshold under the Federal Highway Administration ("FHWA") regulations, 23 CFR 710, Subpart D, to the extent applicable ("FHWA Regulations"), then prior to any "Change in Access Control or Other Use or Occupancy" as defined under the FHWA Regulations, the Proponent shall file or cause to be filed with the Division Office of FHWA in Cambridge, Massachusetts, all such documents as are required by FHWA Regulations in connection with such work. Notwithstanding the foregoing, as to any FHWA filings, the Proponent will be required to assist in the preparation of the filing documents and the actual filings to FHWA will be made by MassDOT.

With regard to the Massachusetts Environmental Policy Act, M.G.L. c. 30, § 61 through 62H and 301 CMR 11.00 et seq. ("MEPA"), the Proponent acknowledges and agrees that development on the Proponent Property may be subject to MEPA. Accordingly, prior to any "Commencement of Construction" as defined under the MEPA regulations, the Proponent shall file or cause to be filed with the MEPA Office at the Executive Office of Energy and Environmental Affairs ("EOEA") all such documents as may be required by the MEPA regulations in connection with such work. In any such filings, the Proponent shall disclose the fact that the Proponent Property has been leased from MassDOT. The Proponent acknowledges that the Agency Action, as defined in MEPA, will not be deemed to be complete unless and until the EOEA Secretary has determined that (i) no Environmental Impact Report is required; or (ii) a single or final Environmental Impact Report

is adequate and sixty (60) days have elapsed following publication of notice of the availability of the single or final Environmental Impact Report in the Environmental Monitor in accordance with 301 CMR 11.15(2).

The Proponent also agrees to provide to MassDOT evidence of the Proponent's compliance with all such laws, rules and regulations in connection with such work, including, without limitation, FHWA and/or MEPA requirements.

The Proponent acknowledges and agrees that any acquisition of the Proponent Property pursuant to the RFP will be made "as is", "where is" and "with all defects", as more particularly described in the RFP and the [Purchase and Sale Agreement]. As such, MassDOT has not given any assurances to the Proponent as to the nature, extent or scope of any permitted future development on the Proponent Property.

Accordingly, no decision or ruling from or relating to any FHWA review and/or MEPA review (or pursuant to any other applicable law, rule or regulation, including, without limitation, the Town of Sudbury Zoning Bylaw) shall affect any [Purchase Price] rendered, if applicable, for the Proponent Property, or entitle the Proponent to any credit or refund thereof.

This Agreement shall survive the delivery of the Deed to the Proponent Property and shall be binding upon the Proponent and its successors and assigns.

Executed as an instrument under seal as of April 21, 2021.

Name of Proponent: Trinity Financial, Inc.

Signature: Rebecca V

Print Name: Rebecca Hemenway

Title: Vice President

Date: 4/21/21

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

INSTRUCTION SHEET

NOTE: The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

Section (1): Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

Section (2): Identify the type of transaction to which this Disclosure Statement pertains --such as a sale, purchase, lease, etc.

Section (3): Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

Section (4): Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

Section (5): Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

Section (6): List the names and addresses of **every** legal entity and **every** natural person that has or will have a **direct or indirect** beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

Section (7): Write "none" in the blank if none of the persons mentioned in Section 6 is employed by DCAMM. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM.

Section (8): The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

Section (9): Make sure that this Disclosure Statement is signed by the correct person. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate

Division of Capital Asset Management and Maintenance

One Ashburton Place, 15th Floor, Boston, MA 02108

DocuSign Envelope ID: EB583AFC-B978-46C1-965C-37FDB35E163D

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

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

(1) REAL PROPERTY:
Crescent Parcel at Tremont St. and Melnea Cass Blvd.

(2) TYPE OF TRANSACTION, AGEEMENT, or DOCUMENT:
RFP Proposal

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:
Boston Planning and Development Agency

(4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):
Madison Park Development Corporation

(5) ROLE OF DISCLOSING PARTY (Check appropriate role):

☐ Lessor/Landlord ☐ Lessee/Tenant

☐ Seller/Grantor ☒ Buyer/Grantee

☒ Other (Please describe): Developer

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

NAME	RESIDENCE
See attached board list	

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

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

> *No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been*

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filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arms length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

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

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

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

Madison Park Development Corporation

PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

Bob Pezzini — 04/20/2021

AUTHORIZED SIGNATURE of DISCLOSING PARTY — DATE (MM / DD / YYYY)

Bob Pezzini, VP of Real Estate

PRINT NAME & TITLE of AUTHORIZED SIGNER

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MPDC Board of Directors

Name	Address	Title
Lisa Morishanti	97 Bourne St. Jamaica Plain, MA 02130	President
Ivelise Rivera	213 Eustis St. Roxbury, MA 02119	Vice President
Roger M. Carter	555 Columbus Ave. Unit 6 Boston, MA 02118	Treasurer
Nina Ruff	725 Shawmut Ave #301, Boston, MA 02119	Secretary
Elmer Freeman	10 Slocumb Rd. Jamaica Plain, MA 02130	Member
Sonrisa Haynes	5 Kerr Way, Roxbury, MA 02120	Member
Malik Aziz	23 Moultrie St. Dorchester, MA 02124	Member
Ayanna Hines	2693 Washington St. Roxbury, MA 02119	Member
Gloria Brooks	547 Adams St. #2, Dorchester, MA 02122	Member
Karleen P. Porcena	41 Maywood St. Boston, MA 02119	Member
Robert L. Terrell	4 Laurel St. Boston, MA 02119	Member

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BPDA and CITY OF BOSTON DISCLOSURE STATEMENT

Any person submitting a development proposal to the BPDA and/or City of Boston must truthfully complete this statement and submit it prior to being designated for any project. (please attach extra sheets if necessary).

1. Do any of the principals owe the City of Boston and/or BPDA 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 and/or BPDA? If yes, in what capacity? (Please include name of agency or department and position held in that agency or department).
   No

3. Do any of the principals own any real estate in Boston? If yes, where and what type of property?
   Yes. MPDC and Trinity Financial own residential and commercial real estate across Boston and beyond

4. 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 crimes?
   No

6. Have any of the principals been convicted of violating any law, code, ordinance regarding conditions of human habitation within the last three (3) years?
   No

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

SIGNED under the penalty of perjury.

Date: April 20, 2021

Signature: Leslie Reid Signature: Bob Pezzini

Address: _____ Address: _____

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CERTIFICATE OF TAX AND EMPLOYMENT SECURITY COMPLIANCE

Pursuant to Massachusetts General Laws Chapter 62C, §49A', and Chapter 151 A,

§ 1 9A(b)2, I Bob Pezzini,

(Name)

VP of Real Estate — Madison Park Development Corporation

(Title) (Name of Bidder)

whose principal place of business is located at

184 Dudley Street, Roxbury, MA 02119

do hereby certify that:

A. The above-named Bidder has made all required filings of state taxes, has paid all state taxes required under law, and has no outstanding obligation to the Commonwealth's Department of Revenue.
B. The above-named Bidder/Employer has complied with all laws of the Commonwealth relating to contributions and payments in lieu of contributions.

Signed under the penalties of perjury this 20 day of April 2021

Bob Pezzini
(Signature)

Federal Identification Number: 23-7164223

By: Bob Pezzini

Title: Authorized Signatory

'No contract or other agreement for the purpose of providing goods, services or real estate to any... agencies (of the Commonwealth) shall be entered into, renewed or extended with any person unless such person certifies in writing under penalties of perjury, that he has complied with all laws of the Commonwealth relating to taxes.'

'No contract or other agreement for the purpose of providing... physical space to any agency or instrumentality of the Commonwealth shall be entered into, renewed or extended with any employer unless such employer certifies in writing under penalties of perjury, that said employer has complied with all laws of the Commonwealth relating to contributions and payments in lieu of contributions

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APPENDIX D

HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility

U.S DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE

(If space on this form is inadequate for any requested information, it should be furnished on an attached page, which is referred to under the appropriate numbered item on the form.)

A. Developer and Land

1. Name and address of developer:
Madison Park Development Corporation. 184 Dudley Street, Roxbury, MA 02119

2. The land on which the developer proposes to enter into a contract for, or understanding with respect to the purchase or lease of land from: Crescent Parcel

BOSTON REDEVELOPMENT AUTHORITY

(Name of Local Public Agency)

South End and Campus High School Urban Renewal Areas

In:

(Name of Urban Renewal Area)

in the City of Boston, State of Massachusetts, is described as follows:

3. If the developer is not an individual doing business under his own name, the developer has the status indicated below and is organized or operating under the laws of:

- [ ] A corporation.
- [X] A nonprofit or charitable institution or corporation.
- [ ] A partnership known as
- [ ] A business association or joint venture known as
- [ ] A federal, State or Local Government or instrumentality thereof.
- [ ] Other (explain)

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4. If the developer is not an individual or a government agency or instrumentality, give date of organization:
   1970

5. Names, addresses, title of position (if any), and nature and extent of the interest of the officers and principal member shareholders and investors of the developers, other than a government agency or instrumentality, are set forth as follows:

   a. If the developer is a corporation, the officers, directors or trustees, and each stockholder owning more than 10% of any class of stock.

   b. If the developer is a nonprofit or charitable institution or corporation, the members who constitute the board of trustees or board of directors or similar governing body.

   c. If the developer is a partnership, each partner, whether a general or limited partner, and either the percent of interest or a description of the character and extent of interest.

   d. If the developer is a business association or a joint venture, each participant and either the percent of interest or a description of the character and extent of interest.

   e. If the developer is some other entity, the officers, the members of the governing body, and each person having an interest of more than 10%.

NAME AND ADDRESS	POSITION, TITLE *(if any)* AND PERCENT OF INTEREST OR DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST
See attached	See attached

6. Name, address and nature and extent of interest of each person or entity (not named in response to item 5) who has a beneficial interest in any of the shareholders or investors named in response to item 5 which gives such person or entity more than a computed 10% interest in the developer (for example, more than 20% of the stock in a corporation which holds 50% of the stock of the developer; or more than 50% of the stock in a corporation which hold 20% of the stock of the developer):

NAME AND ADDRESS	DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

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7. Names (if not given above) of officers and directors or trustees of any corporation or firm listed under item 5 or item 6 above:

See attached

B. RESIDENTIAL REDEVELOPMENT OR REHABILITATION

(The developer is to furnish the following information, but only if land is to be redeveloped or rehabilitated in whole or in part for *residential* purposes.)

1. State the developer's estimates, exclusive of payment for the land, for:

   a. Total cost of any residential development..... $ $34,253,753

   b. Cost per dwelling unit of any residential development..... $ $677,079

2. a. State the developer's estimate of the average monthly rental (if to be rented) or average sale price (if to be sold) for each type and size of dwelling unit involved in such development:

TYPE AND SIZE OF DWELLING UNIT	ESTIMATED AVERAGE MONTHLY RENTAL	ESTIMATED AVERAGE SALE PRICE
See attached	$ 1893	$ 298115

   b. State the utilities and parking facilities, if any, included in the foregoing estimates of rentals:

   See attached

   c. State equipment, such as refrigerators, washing machines, air conditioners, if any, include in the foregoing estimates of sale prices:

   TBD

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CERTIFICATION

I (we)[1] Leslie Reid and Bob Pezzini certify that this Developer's Statement for Public Disclosure is true and correct to the best of my (our) knowledge and belief.

Dated: 4/20/2021

Leslie Reid
Signature

CEO
Title

184 Dudley St. Roxbury, MA 02119
Address

Dated: 4/20/2021

Bob Pezzini
Signature

VP of Real Estate
Title

184 Dudley St. Roxbury, MA 02119
Address

1. If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

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U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY

1. Name and address of developer:
   Madison Park Development Corporation, 184 Dudley St. Roxbury, MA 02119

2. Is the developer a subsidiary of or affiliated with any other corporation or corporations or any other firm or firms?
   YES [X] NO [ ]

   If Yes, list such corporation or firm by name and address. Specify its relationship to the developer, and identify the officers and directors or trustees common to the developer such other corporation or firm.
   Lower Roxbury Community Corporation; Madison Park Economic Development; Madison Park Housing Corporation - all wholly owned by Madison Park Development Corporation with an address of 184 Dudley Street, Roxbury, MA

3. a. The financial condition of the developer as of unaudited 12/31, 2020 is as reflected in the attached financial statement.

   NOTE: Attach to this statement a certified financial statement (of the corporation; for each partner in a partnership; or for the individual) showing the assets and the liabilities, including contingent liabilities, fully itemized in accordance with accepted accounting standards and based on a proper audit. (Financial statements for individuals do not need to be audited but they must be dated and signed by the applicant.) If the date of the certified financial statement precedes the date of this submission by more than six months, also attached an interim balance sheet not more than 60 days old.

   b. Name and address of auditor or public accountant who performed the audit on which said financial statement is based:
   Cohn Reznick LLP, 1 Boston Place #500, Boston, MA 02108

4. If funds for the development of the land are to be obtained from the sources other than the developer's own funds, a statement of the developer's plan for financing the acquisition and development of the land:
   MPDC intends to use a combination of public and private funding sources for the development. MPDC will seek tax exempt bond financing and will apply to Massachusetts DHCD for LIHTC and soft loans and grants, and will apply to the City of Boston DND for affordable housing development subsidies. in ill submit a pro forma along with this form outlining the sources for the development.

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5. Sources and amount of cash available to developer to meet equity requirements of the proposed undertaking:

   a. In banks:

NAME AND ADDRESS OF BANK	AMOUNT
TBD	$

   b. By loans from affiliated or associated corporations or firms:

NAME AND ADDRESS OF SOURCE	AMOUNT
TBD	$

   c. By sale of readily salable assets:

DESCRIPTION	MARKET VALUE	MORTGAGES OR LIENS
	$	

6. Names and addresses of bank references:

   Peter Hollands, Boston Private, 10 Post Office Square Boston, MA 02109

7. a. Has the developer or (if any) the parent corporation or any subsidiary or affiliated corporation of the developer or said parent corporation, or any of the developer's officers or principal members shareholders or investors, or other interested parties (as listed in the response to item 5, 6,and 7 of the Developer's Statement for Public Disclosure and referred to herein as "principals of the developer") been adjudged bankrupt, either voluntary or involuntary, within the past 10 years?

   YES [ ] NO [X]

   If Yes, give date, place and under what name.

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b. Has the developer or anyone referred to above as "principals of the developer" been indicted for or convicted of any felony within the past 10 years?
YES [ ] NO [X]

If Yes, give for each case (1) date. (2) charge, (3) place, (4) court and (5) action taken. Attach any explanation deemed necessary.

8. a. Undertakings, comparable to the proposed development work which have been completed by the developer or any of the principals of the developer, including identification and brief description of each project and date of completion:

PROPERTY NAME AND ADDRESS	DESCRIPTION	DATE COMPLETED
See attached		

b. If the developer or any of the principals of developer has ever been an employee, in such supervisory capacity, for construction contractor or builder on undertaking comparable to the proposed redevelopment work, name of such employee, name and address of employer, title of position, and brief description of work.

N/A

9. Other federally aided urban renewal projects under Title I of the Housing Act of 1949, as amended, in which the developer or any of the principals of the developer is or has been the developer, or stockholder, officer, director or trustee or partner of such a developer:

Not to our actual knowledge

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10. If the developer or parent corporation, a subsidiary and affiliate or a principal of the developer is to participate in the development of the land as a construction contractor or builder:

a. Name and address of such contractor or builder:

N/A

b. Has such contractor or builder within the last 10 years ever failed to qualify as a responsible bidder, refused to enter into a contract after an award has been made, or failed to complete a construction or development contract?

YES ☐ NO ☐

If Yes explain:

N/A

c. Total amount of construction or development work performed by such contractor or builder during the last three years: $_____

General description of such work:

N/A

d. Construction contracts or developments now being performed by such contractor or builder:

IDENTIFICATION OF CONTRACT OR DEVELOPMENT	LOCATION	AMOUNT $	DATE TO BE COMPLETED
N/A			

e. Outstanding construction-construction bids of such contractor or builder:

AWARDING AGENCY	AMOUNT $	DATE OPENED
N/A		

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11. Brief statement respecting experience, financial capacity and/or other resources available to such contractor or builder for the performance of the work involved in the development of the land:
    TBD

12. Statements and other evidence of the developer's qualifications and financial responsibility (other than the financial statement referred to item 4a) are attached hereto and nearby made a part hereof as follows:
    See attached

13. If the developer, any employee of the developer, or any party holding a financial interest in the developer or development is now a Boston Redevelopment Authority ("BRA") or City of Boston ("City") employee or has been at any time in the year preceding this date, please list the person's name, current position held, and financial interest in development entity, the BRA or City position, and if not currently employed by the BRA or City, the last date of employment with the BRA or City.
    None

14. List the address(es) of all other properties that the owner(s) or principal(s) of the proposed project owns in the City of Boston.
    See attached

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CERTIFICATION

Leslie Reid and Robert Pezzini

I (we)[1] _____ certify that this Developer's Statement of Qualifications and Financial Responsibility and the attached evidence of the developer's qualifications and financial responsibility, including financial statement are true and correct to the best of my (our) knowledge and belief.

4/20/2021

Dated: _____

Leslie Reid

_____

Signature

CEO

_____

Title

184 Dudley St. Roxbury, MA 02119

_____

Address

4/20/2021

Dated: _____

Bob Pezzini

_____

Signature

Vice President of Real Estate

_____

Title

184 Dudley St. Roxbury, MA 02119

_____

Address

1. If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

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MPDC Board of Directors

Name	Address	Title
Lisa Morishanti	97 Bourne St. Jamaica Plain, MA 02130	President
Ivelise Rivera	213 Eustis St. Roxbury, MA 02119	Vice President
Roger M. Carter	555 Columbus Ave. Unit 6 Boston, MA 02118	Treasurer
Nina Ruff	725 Shawmut Ave #301, Boston, MA 02119	Secretary
Elmer Freeman	10 Slocumb Rd. Jamaica Plain, MA 02130	Member
Sonrisa Haynes	5 Kerr Way, Roxbury, MA 02120	Member
Malik Aziz	23 Moultrie St. Dorchester, MA 02124	Member
Ayanna Hines	2693 Washington St. Roxbury, MA 02119	Member
Gloria Brooks	547 Adams St. #2, Dorchester, MA 02122	Member
Karleen P. Porcena	41 Maywood St. Boston, MA 02119	Member
Robert L. Terrell	4 Laurel St. Boston, MA 02119	Member

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Low-Income (Rental Assisted):	*Contract Rent*	*Utility Allowance*	*Total Gross Rent*	*No. of Units*
SRO			$0	0
0 bedroom			$0	0
1 bedroom	$1,812	$112	$1,924	6
2 bedrooms	$2,192	$144	$2,336	8
3 bedrooms	$2,733	$173	$2,906	2
4 bedrooms			$0	0

Low-Income (below 50%):				
SRO			$0	0
0 bedroom			$0	0
1 bedroom	$1,088	$112	$1,200	1
2 bedrooms	$1,296	$144	$1,440	1
3 bedrooms			$0	0
4 bedrooms			$0	0

Low-Income (below 60%):				
SRO			$0	0
0 bedroom			$0	0
1 bedroom	$1,328	$112	$1,440	3
2 bedrooms	$1,584	$144	$1,728	3
3 bedrooms	$1,822	$173	$1,995	1
4 bedrooms			$0	0

Other Income 60%	Below 60% of the median income for the region			
SRO			$0	0
0 bedroom			$0	0
1 bedroom	$1,693	$112	$1,805	6
2 bedrooms	$2,022	$144	$2,166	7
3 bedrooms	$2,329	$173	$2,502	1
4 bedrooms			$0	0

Market Rate (unrestricted occupancy):				
SRO				0
0 bedroom				0
1 bedroom	$1,500			3
2 bedrooms	$2,000			9
3 bedrooms	$3,000			1
4 bedrooms				0

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ATTACHMENT RESPONSE TO #8 and #12

MADISON PARK DEVELOPMENT CORPORATION
REAL ESTATE PORTFOLIO

Summary	Complete	In Construction*	Predevelopment	Total
Rental	1,410	68	304	1,782
Homeownership	113	16	60	189
Subtotal Residential	1,523	84	364	1,971
Commercial	115,627	-	11,400	127,027

*Excludes Haynes House renovation

Property	Status	Completion/PIS Date (Most Recent Syndication)	Location	Type	Units (Rental)	Units (For Sale)	Gross SF (Commercial)	Income Groups Served	Partnership Name	MPDC Ownership %	Equity Partner	Hard Debt	Rental Assistance	HAP Contract Expiration	Property Manager
Beryl Gardens	Complete	1999	Roxbury	Residential	20		-	</= 60% AMI	Beryl Gardens LP	0.50%	Boston Capital	N/A, 1st mortgage cash flow note w/ DND	N/A	N/A	Winn
Orchard Gardens - Madison Trinity	Complete	1999	Roxbury	Residential	216		-	</= 60% AMI	Madison Trinity LP	49.00%	N/A	N/A	BHA ACC	N/A	Trinity
Orchard Gardens - Adams Orchard	Complete	1999	Roxbury	Residential	115		-	</= 60% AMI	Adams Orchard LP	51.00%	N/A	N/A	BHA ACC	N/A	Trinity
Shawmut Estates	Complete	2000	Roxbury	Residential		15				N/A					
Davenport Commons	Complete	2000	Roxbury	Residential		60				N/A					
Highland Homes	Complete	2004	Roxbury	Residential		18				N/A					
Interfaith Apartments	Complete	2005	South End	Mixed Use	69		5,000	</= 60% AMI	Interfaith Housing Developers LLC	0.005%	Boston Capital	MHP	HAP contract on 100% of units w/ HUD	7/29/2023	Maloney
Hibernian Hall	Complete	2005	Roxbury	Commercial			25,300	N/A	Madison Hibernian Hall LLC	100%	N/A	Life Insurance Community Investment Initiative. LLC (LIFE)			NAI Hunneman
Ruggles Shawmut	Complete	2007	Roxbury	Residential	43		0	</= 60% AMI	Ruggles Shawmut LP	0.01%	Boston Financial	MHP	HAP contract on 100% of units w/ HUD	8/31/2025	Winn
2201 Washington	Complete	2007	Roxbury	Commercial			52,000	N/A	Madison Washington II LLC	100%	N/A	Eastern			NAI Hunneman
Brookledge Cummins (Schoolhouse)	Complete	2008	Roxbury	Residential	90		0	Elderly/Disabled	School House Brookledge Cummins LP	0.01%	MHIC	MHFA	HAP contract on 100% of units w/ HUD	12/31/2028	Peabody
Kenilworth Williams (Schoolhouse)	Complete	2008	Roxbury	Residential	38		0	</= 50% AMI	School House Kenilworth Williams LP	0.01%	MHIC	MHFA	HAP contract on 100% of units w/ HUD	7/1/2028	Peabody
20 @ Luma	Complete	2010	Roxbury	Residential		20				N/A					
Madison Park IV	Complete	2013	Roxbury	Residential	143		0	</= 60% AMI	Madison Park IV 2011 LP	0.01%	First Sterling	MHP	HAP contract on 100% of units w/ HUD	6/30/2028	Winn
Dudley Greenville	Complete	2014	Roxbury	Mixed Use	43		2,700	</= 60% AMI	Dudley Greenville LLC	0.01%	First Sterling	MHP	HAP contract with BHA on 38 units (88%)	1/1/2029	Winn
St. Botolph	Complete	2016	South End	Mixed Use	52		1,437	</= 60% AMI	Madison Botolph LP	0.01%	Red Stone	Eastern	HAP contract on 100% of units w/ HUD	12/16/2034	Winn
Madison Park III	Complete	2017	Roxbury	Residential	120		0	</= 60% AMI	Madison Park III LP	0.01%	First Sterling	MHFA	HAP contract on 100% of units, CHA is admin.	12/1/2030, with 15 yr extension option	Winn
Smith House	Complete	2018	Roxbury	Residential	132		0	Elderly/Disabled	Smith House II LP	0.01%	RBC	MHFA	HAP contract on 100% of units, CHA is admin.	1/1/2029	Winn
9 Williams	Complete	2018	Roxbury	Mixed Use	30		7,490	16 LIHTC units at max 60% AMI. 5 workforce units at up	Madison Williams LLC	0.01%	Red Stone	MHFA	N/A	N/A	Winn
Dewitt Community Center	Complete	2018	Roxbury	Commercial			21,700	N/A	owned by Smith House	51.00%	RBC				MPDC
Melnea Cass Apartments	Complete	2019	Roxbury	Residential	76		0	72 LIHTC units at max 60% AMI and 4 market rate	Madison Williams LLC	0.01%	RBC	MHFA	HAP contract for 24 off-site Whittier units	N/A	Winn
Whittier Phase 1	Complete	2019	Roxbury	Residential	92	-	-			N/A					POAH
Haynes House	Complete	2020	Roxbury	Residential	131		0	</= 60% AMI	Haynes House Associates LP	100%	RBC	MHFA	63 HAP and 26 MRVP	N/A	Winn
2451 Washington Street	Complete	2021	Roxbury	Residential		16			2451 Washington LLC	100%					United Housing Management
Whittier Phase 2	In Construction	2021	Roxbury	Residential	52		0		POAH	N/A					POAH
75 Dudley Street	Predevelopment	2023	Roxbury	Mixed Use		20			75 Dudley LLC	100%					
Whittier Phase 3	Predevelopment	2024	Roxbury	Mixed Use	230		9,000		POAH	N/A					POAH
2085 Washington Street	Predevelopment	2024	Roxbury	Mixed Use	74	40	2,400		Madison Trinity TBD	50%					Trinity Management

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FORM D

Additional Massachusetts Required Certifications

Reference is herein made to a certain Request for Proposal dated January 27, 2021, issued by the Boston Redevelopment Authority, d/b/a the Boston Planning & Development Agency (the "BPDA"), relating to land owned by the BPDA, the City of Boston, and the Massachusetts Department of Transportation ("MassDOT"), known as the Crescent Parcel (together with all figures, appendices and forms and any addendum thereto, the "RFP"). Capitalized terms, unless otherwise defined herein, shall have the meanings assigned to such terms in the RFP. This Form D must be executed in full.

Chapter 66A (Confidentiality and Privacy)

The undersigned (the "Proponent") acknowledges that, during the response and selection process for the RFP and, if selected as the Selected Proponent, the Proponent's performance under the Ground Lease, the Proponent may acquire or obtain access to "personal data" and become a "holder" of such "personal data" (as defined in Chapter 66A of the Massachusetts General Laws ("Chapter 66A")) or other information deemed confidential by MassDOT. The Proponent shall comply with Chapter 66A and any applicable regulations promulgated thereunder relative to confidentiality and privacy.

Chapter 62C, Section 49A (Tax Compliance)

Pursuant to M.G.L. Chapter 62C, Section 49A, the Proponent hereby certifies (a) under the pains and penalties of perjury that the Proponent is in full compliance with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors and withholding and remitting child support and (b) to the best of its knowledge and belief, it has no outstanding payment or filing obligations to the Commonwealth of Massachusetts Department of Revenue.

Section 7 of Chapter 521, Acts of 1990 (Child Care Assistance)

Pursuant to Section 7 of Chapter 521, Acts of 1990, as amended by Chapter 329, Acts of 1991, and regulations issued pursuant thereto, 102 CMR 12.00, the Proponent certifies under the pains and penalties of perjury that the Proponent is in compliance with all laws of the Commonwealth of Massachusetts relating to child care assistance, and if the Proponent is a qualified employer having fifty (50) or more full

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time employees, has established a dependent care assistance program, child care tuition assistance, or on-site or near site child care placement; or is an exempt employer.

Chapter 7, Section 22C (Northern Ireland Notice and Certification)

State agencies, state authorities, the House of Representatives or the state Senate may not procure goods or services from any person employing ten or more employees in an office or other facility located in Northern Ireland who fails to complete the certification required by M.G.L. c. 7, Section 22C. The Proponent certifies under the pains and penalties of perjury either that (check the applicable statement):

[x] the Proponent does not employ ten or more employees in an office or other facility in Northern Ireland;

OR

[ ] the Proponent employs ten or more employees in an office or other facility located in Northern Ireland and further certifies that:

1. the Proponent does not discriminate in employment, compensation, or the terms, conditions and privileges of employment on account of religious or political belief, and

2. the Proponent promotes religious tolerance within the work place, and the eradication of any manifestations of religious and other illegal discrimination; and

3. the Proponent is not engaged in the manufacture, distribution or sale of firearms, munitions, including rubber or plastic bullets, tear gas, armored vehicles or military aircraft for use or deployment in any activity in Northern Ireland.

Conflict of Interest/Collusion Certification

The Proponent certifies under the pains and penalties of perjury that (a) no relationship exists between the Proponent and MassDOT or any officer, employee, or agent of MassDOT that constitutes unfair competition or a conflict of interest or that may be adverse to MassDOT; and (b) it has not acted in collusion

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with any other Proponent or other entity doing business with MassDOT in a way that would constitute unfair competition or that may be adverse to MassDOT.

Massachusetts Executive Order 526

Consistent with MassDOT's policy to further the goals of the Executive Order 526, the Proponent shall not discriminate by segregation or otherwise against any person because of race, color, age, gender, ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, national origin, disability, veteran's status (including Vietnam-era veterans), or background in providing or refusing to provide any person or persons the use of or access to any facility including any and all services, privileges, accommodations, and activities of the Proponent. The Proponent shall not discriminate by segregation or otherwise against any employee or applicant for employment because of race, color, age, gender, ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, national origin, disability, veteran' s status (including Vietnam-era veterans), or background and shall undertake specific affirmative action in those areas identified by the MassDOT, from time to time, where utilization of transition plans, reports, goals, and timetables are necessary to ensure equal opportunity and to overcome the effect of past discrimination against specific groups. The Proponent agrees that in all matters related to the Property (as defined in the RFP), it will establish and develop civil rights policies and programs, consistent with those of the MassDOT, designed to prohibit discrimination, ensure equality of opportunity, and implement appropriate narrowly tailored affirmative action in all operations, particularly in the areas of employment and public access.

Other Certifications

The Proponent certifies under the pains and penalties of perjury that the Proponent has filed with the Secretary of the Commonwealth all certificates and annual reports required by law. The Proponent certifies under the pains and penalties of perjury that the Proponent is not presently debarred or suspended from providing goods and/or services to the Commonwealth, or any other applicable debarment or suspension provision under state law or any rules or regulations promulgated thereunder.

Signed under the pains and penalties of perjury on this 20 day of April, 2021 by the duly authorized VP of Real Estate of the Proponent:

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Madison Park Development Corporation

Name of Proponent: _____

Signature: Bob Pezzini

Bob Pezzini

Print Name: _____

VP of Real Estate

Title: _____

DocuSign Envelope ID: 66E569D2-5AE9-481B-B4B1-22CD323D3206

Form J: FHWA and MEPA Agreement

Reference is herein made to a certain Request for Proposals, dated January 27, 2021, issued by the Boston Redevelopment Authority, d/b/a the Boston Planning & Development Agency (the "BPDA"), relating to land owned by the BPDA, the City of Boston, and the Massachusetts Department of Transportation ("MassDOT"), known as the Crescent Parcel (together with all figures, appendices and forms and any addendum thereto, the "RFP").Capitalized terms, unless otherwise defined herein, shall have the meanings assigned to such terms in the RFP.

In order to induce MassDOT to evaluate any Bid submitted to it by the undersigned (the "Proponent") pursuant to the RFP, the Proponent acknowledges and agrees that if it shall acquire the Crescent Parcel pursuant to the RFP (the "Proponent Property"), the Proponent agrees that any and all work, development or other activities thereon shall be subject to all applicable laws, rules and regulations. Without limiting the foregoing, the Proponent acknowledges and agrees that if any such work meets or exceeds a review threshold under the Federal Highway Administration ("FHWA") regulations, 23 CFR 710, Subpart D, to the extent applicable ("FHWA Regulations"), then prior to any "Change in Access Control or Other Use or Occupancy" as defined under the FHWA Regulations, the Proponent shall file or cause to be filed with the Division Office of FHWA in Cambridge, Massachusetts, all such documents as are required by FHWA Regulations in connection with such work. Notwithstanding the foregoing, as to any FHWA filings, the Proponent will be required to assist in the preparation of the filing documents and the actual filings to FHWA will be made by MassDOT.

With regard to the Massachusetts Environmental Policy Act, M.G.L. c. 30, § 61 through 62H and 301 CMR 11.00 et seq. ("MEPA"), the Proponent acknowledges and agrees that development on the Proponent Property may be subject to MEPA. Accordingly, prior to any "Commencement of Construction" as defined under the MEPA regulations, the Proponent shall file or cause to be filed with the MEPA Office at the Executive Office of Energy and Environmental Affairs ("EOEA") all such documents as may be required by the MEPA regulations in connection with such work. In any such filings, the Proponent shall disclose the fact that the Proponent Property has been leased from MassDOT. The Proponent acknowledges that the Agency Action, as defined in MEPA, will not be deemed to be complete unless and until the EOEA Secretary has determined that (i) no Environmental Impact Report is required; or (ii) a single or final Environmental Impact Report

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is adequate and sixty (60) days have elapsed following publication of notice of the availability of the single or final Environmental Impact Report in the Environmental Monitor in accordance with 301 CMR 11.15(2).

The Proponent also agrees to provide to MassDOT evidence of the Proponent's compliance with all such laws, rules and regulations in connection with such work, including, without limitation, FHWA and/or MEPA requirements.

The Proponent acknowledges and agrees that any acquisition of the Proponent Property pursuant to the RFP will be made "as is", "where is" and "with all defects", as more particularly described in the RFP and the [Purchase and Sale Agreement]. As such, MassDOT has not given any assurances to the Proponent as to the nature, extent or scope of any permitted future development on the Proponent Property.

Accordingly, no decision or ruling from or relating to any FHWA review and/or MEPA review (or pursuant to any other applicable law, rule or regulation, including, without limitation, the Town of Sudbury Zoning Bylaw) shall affect any [Purchase Price] rendered, if applicable, for the Proponent Property, or entitle the Proponent to any credit or refund thereof.

This Agreement shall survive the delivery of the Deed to the Proponent Property and shall be binding upon the Proponent and its successors and assigns.

Executed as an instrument under seal as of April 20, 2021.

Name of Proponent: Madison Park Development Corporation

Signature: Bob Pezzini

Print Name: Bob Pezzini

Title: VP of Real Estate

Date: April 20, 2021

Crescent Parcel



Tab L

Appendix C: Team Member Resumes & Bios

TRINITY FINANICAL INC.

WHAT'S *really* IMPORTANT?



32 years

Over $3 billion in development work

9,500 units / over 600,000 sf retail + commercial

7,000 units under management

260 employees

Properties located in MA, RI, CT & NY

Headquarter offices in Boston & Manhattan

TRINITY FINANCIAL





TRINITY FINANCIAL

Since 1987, Trinity Financial has pursued a distinctive vision of real estate development based on a few core principles and a collaborative urban spirit. We love the challenge of each new project, but we're also energized by the broader issues of revitalizing neighborhoods, strengthening cities and fostering opportunity. In every case, we start from a clear understanding of how cities work, how we can help and why our work matters. As the project unfolds, we translate this energy and understanding into structures and relationships that succeed financially, respect every constituency and enhance life for everyone they touch.

Revitalizing neighborhoods

Strengthening cities

Fostering opportunity



Our Projects

60 King - Providence, RI



Total Development Cost: $22.7 million
Units: 60
Completed: 2018

Trinity's 60 King is an adaptive reuse project which converted a vacant historic mill building in the Olneyville neighborhood of Providence into 60 units of mixed-income rental housing. Originally constructed in 1923, 60 King was the home of the Rochambeau Worsted Wool manufacturing facility until the 1950s when the complex was acquired by the Imperial Knife Company.

The redevelopment of 60 King breathes new life into an architecturally significant structure, remediated a contaminated Brownfields site and helped to reconnect this isolated building to the rest of the Olneyville neighborhood. Trinity undertook 60 King in collaboration with two Providence-based community development corporations: ONE Neighborhood Builders and SWAP, Inc. (Stop Wasting Abandoned Property).

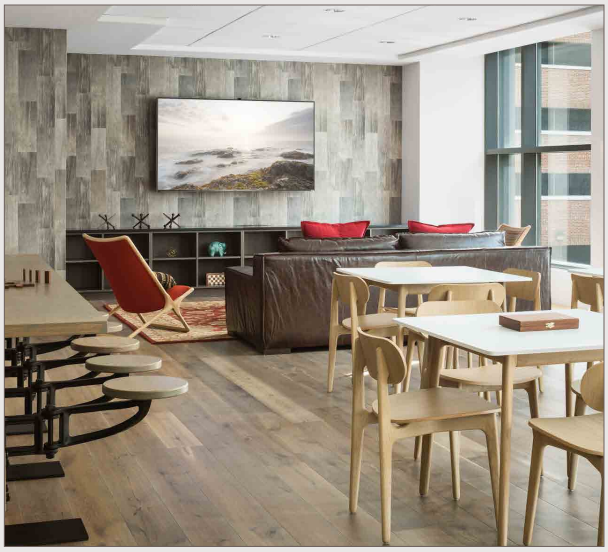
60 King features a total of 60 affordable and market-rate apartments, including studio, one-, two- and three-bedroom units. The rents for the project are targeted to a range of different income levels: 47 units available at 60% of area median income, 7 units with rents set at 30% of area median income, and 6 unrestricted, market-rate units. 60 King was financed with a blend of low-income housing tax credits, federal historic tax credits, state historic tax credits, soft debt from Rhode Island Housing and the City of Providence, as well as RIDEM Brownfields Remediation grant funding.

60 King is the second project in the multi-phase redevelopment of Olneyville that is contemplated in the Build Olneyville Plan, a community-based planning process that was led by the Providence Housing Authority, ONE Neighborhood Builders and Trinity in 2014, and which was financed through a HUD Choice Neighborhoods Initiative (CNI) planning grant.

The Build Olneyville Plans lays out a holistic vision for the future of Olneyville across several different elements, including housing, education and people. Moving forward, Trinity hopes to leverage the 60 King project and the work of the Build Olneyville Plan into a $30 million HUD CNI implementation grant, which would help to catalyze the redevelopment of a portion of the adjacent 330-unit Manton Heights public housing development, and the construction of new mixed-income housing on and around the 60 King site.

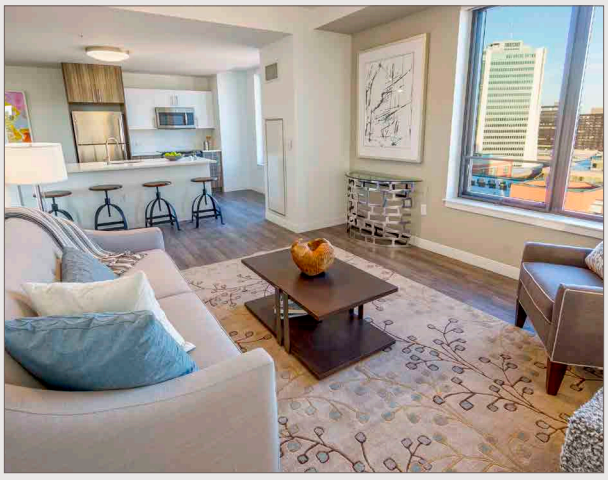
66 Summer Street - Stamford, CT









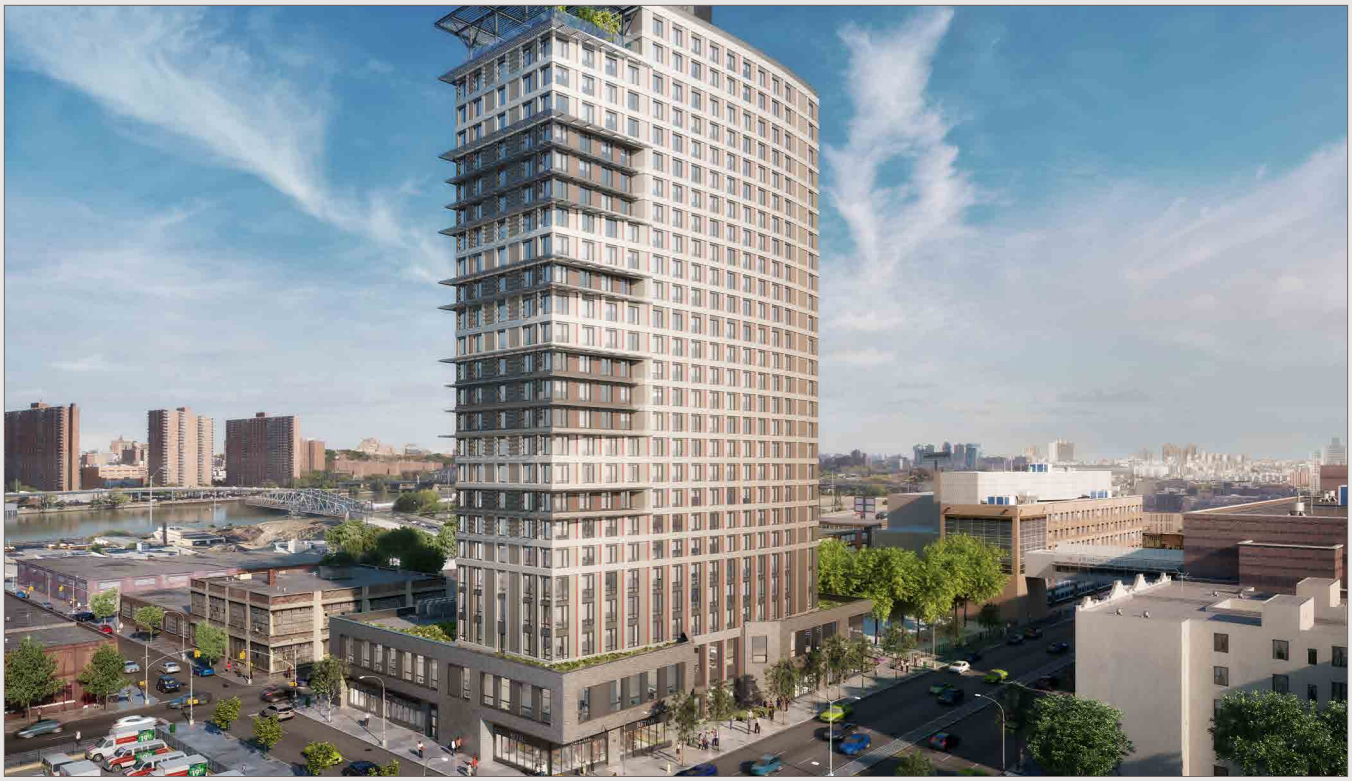


Total Development Cost: $79 million
Units: 194/Retail - 6,800 SF
Completed: 2015

Centrally located in the heart of downtown Stamford, Trinity's Park Square West – Phase 2, known as 66 Summer Street, is a luxury, high rise mixed-use development consisting of 194 residential units in a 15-story structure with approximately 6,800 square feet of ground floor retail, and a structured parking garage. The property consists of a mix of studios, one, two, and three bedroom units. Building amenities include a main lobby area with a security and concierge desk, and a breakfast bar. The second floor features a fitness center and a community lounge with a kitchen area. Each unit boasts a full appliance package with a washer and dryer, granite counter tops, stainless steel appliances including an electric range/oven, a built-in microwave with vent-hood, and a dishwasher.

The immediate neighborhood has lively retail and active entertainment establishments, including the Palace Theatre, the Rich Forum, the Majestic Bow-Tie Cinema, Stamford's Restaurant Row, Target department store, the Stamford Town Center (an 860,000 sf super-regional mall anchored by Saks Firth Avenue and Macy's), and the 115-room Courtyard Marriott hotel. The University of Connecticut's Stamford Campus is on an adjacent block to the site, serving approximately 1,200 students seeking various four-year degrees, MBA, and executive MBA (EMBA) degrees. The site is a 10-minute walk from the Stamford Transportation Center, where commuters can easily connect to Manhattan via a 45-minute train ride.

425 Grand Concourse - Bronx, NY



Total Development Cost: $175 million
Units: 277/Commercial + Retail - 47,000 SF
Anticipated Completion: 2022

The 425 Grand Concourse project is a 27-story, mixed-use, and mixed-income building located in the Bronx, N.Y. When completed, the project will consist of 277 units of housing affordable to households from 30% to 100% of the Area Median Income. In addition to the residential component, the project will also consist of a Supermarket, a Community Health Clinic, an Educational Facility and a Cultural Center. On-site resident amenities will include a fitness center, tenant lounge, community room, a package delivery room, and an accessible roof deck.

The 425 Grand Concourse Project is also designed to meet Passive House Standards - aimed at providing superior energy efficiency within the building and helping to greatly reduce the project's carbon footprint. When completed 425 Grand Concourse will be one of the largest Passive Houses in North America and a major example of innovative and energy efficient development.



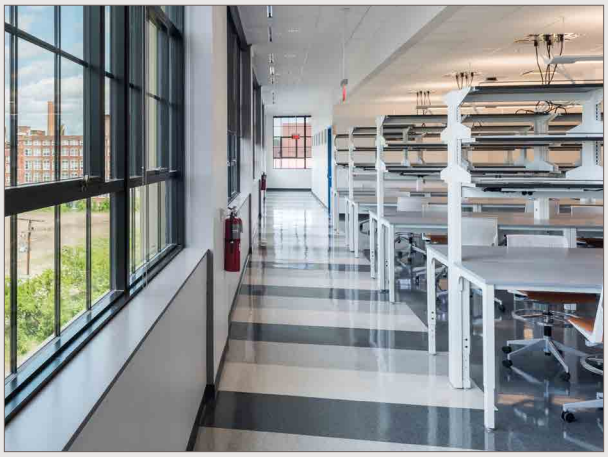


110 Canal Street - Lowell, MA



Total Development Cost: $8.5 million - core and shell rehabilitation
Total Commercial: 55,000 SF
Completed: 2013



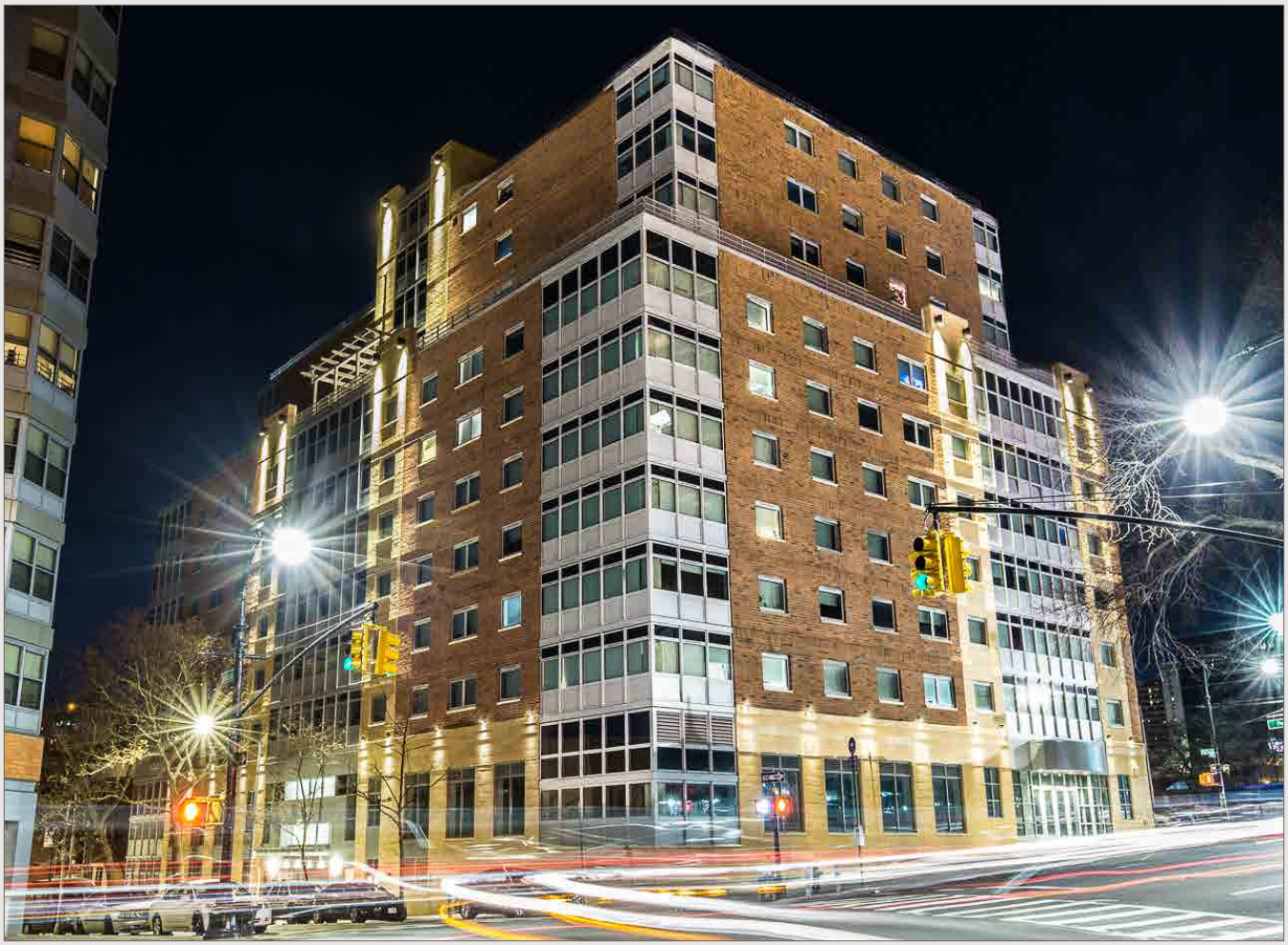


Historic texture. Downtown convenience. Flexible layouts. Unexpected interior design. It all comes together at 110 Canal Street, an exciting venue for office and commercial tenants of varying sizes. Located at the intersection of three historic waterways, 110 Canal offers five open-plan floors of approximately 11,000 square feet. Visually stunning and intensely practical, it's a perfect setting for technology companies, service firms, research and development organizations or brand-new ventures. Vigorous architecture, stylish amenities and fun details make 110 Canal attractive on its own. But it's even better as part of the Hamilton Canal District, a 13-acre site currently being transformed into a vibrant, mixed-use district. When complete, the District will include up to 425,000 square feet of commercial/office space, 55,000 square feet of retail space, and 725 units of housing. Right next door to 110 Canal is Appleton Mills, whose 130 units of loft-style housing for artists are already fostering a growing creative community.

Just steps away from Lowell's restaurants, entertainment and arts venues, 110 Canal offers superior, energy-efficient office space in a unique urban environment. 110 Canal will be accessible via Lowell's historic trolley system and is just three blocks from the Gallagher Transportation Terminal with access to MBTA commuter rail service.

The building is less than 10 minutes from I-495 and Route 3, 30 minutes from Manchester-Boston Regional Airport in New Hampshire, and just 40 minutes from Boston's Logan International Airport.

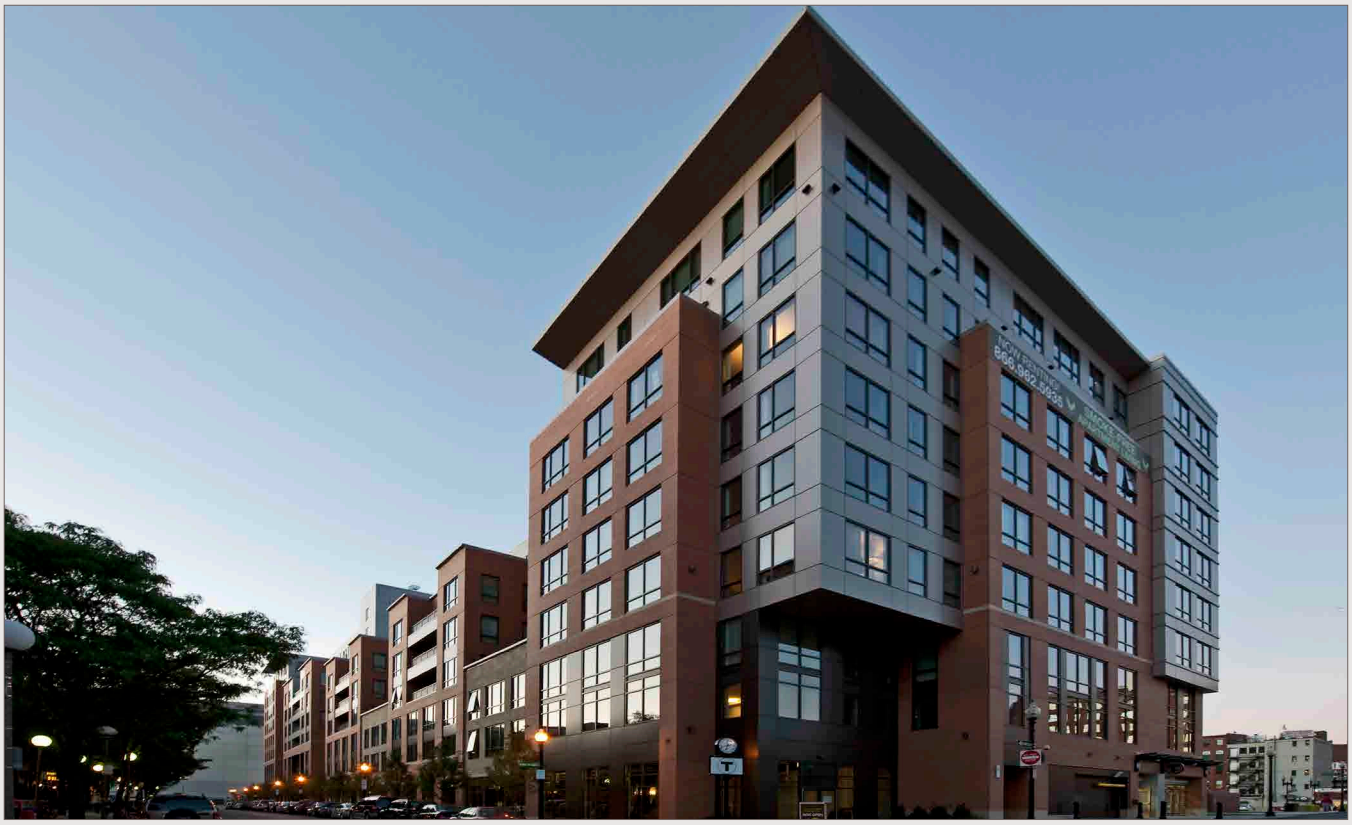
855 Courtlandt - Bronx, NY



Total Development Cost: $66 million
Units: 152/Retail - 21,400 SF
Completed: 2016

The 855 Courtlandt (formerly known as 3160 Park Ave.) project is an exciting mixed-use, mixed-income development that has turned a vacant and underutilized parcel in the Bronx into a vibrant and economically impactful addition to the community by providing apartments affordable to households from 40% to 100% of the Area Median Income. The site is located within the Melrose Commons Urban Renewal Area established by the New York City Department of Housing Preservation and Development (HPD) with its community partners. The site was one of the last undeveloped parcels within the Urban Renewal Area and offered a unique opportunity to put the finishing touches on this ambitious planning effort. 855 Courtlandt is a highly energy-efficient building that exceeds Enterprise Green Communities Criteria.

Avenir - Boston, MA



Total Development Cost: $150 million
Units: 241/Retail - 30,000 SF
Completed: 2009

Located in the heart of Boston's historic Bulfinch Triangle, Trinity developed Avenir as a 10-story mixed-use, transportation-oriented development.

The development is built directly above the North Station Green and Orange lines, and is the subject of a ground lease with the MBTA. The block-long building features retail on the ground floor, a 121-space parking garage on the second and third floors wrapped with housing, and 241 residential units, including 17 affordable units.

Although originally conceived of as a condominium building, Trinity re-positioned the project as luxury rental in the fall of 2006 enabling construction to commence in June 2007. Trinity was responsible for the successful on-schedule completion of the building in July 2009. Originally owned and operated by Archstone Smith REIT, Avenir is now operated by Equity Apartments.

With its stylish interiors and links to public transportation, Avenir Apartments has become one of Boston's most appealing places to live.





Arlington Point - Lawrence, MA



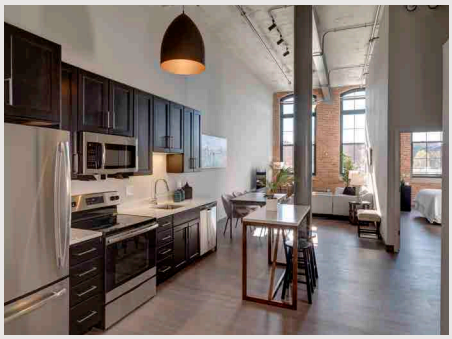
Total Development Cost: $46 million
Units: 102
Completed: 2019

Van Brodie Mill is a project within the multi-phase redevelopment effort of Lawrence's 34-acre Arlington Mills Smart Growth Overlay District. This adaptive reuse project, which is also located in the federally designated Arlington Mills Historic District, transformed a vacant mill into 102 units of mixed-income rental housing, while remediating a Brownfields site. Initially constructed in 1919, the Van Brodie Mill was originally home to a facility that manufactured yarn for wool and flannel products. By the 1950s, the Van Brodie Mill was operated by a different company that shifted production to food products, including packaged breakfast cereals and rations for the military. Van Brodie Mill is Trinity's first project in Lawrence.

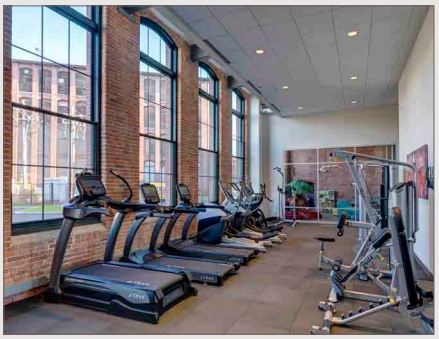
Van Brodie Mill, now known as Arlington Point, serves residents with a broad range of incomes. Of the property's 102 units, 16 are for very low-income households earning at or below 30% of the area median income (AMI), 67 for low-income families earning at or below 60% of AMI, and 19 for Workforce Housing units for households earning between 61% and 80% of AMI. The completed project contains a mix of studio apartments, one-, two- and three-bedroom apartment homes.

Trinity leveraged a combination of tax credit equity sources – 9% low-income housing tax credits (LIHTCs), 4% LIHTCs, state LIHTCs, federal historic tax credits, and state historic tax credits – to finance the majority of the cost of redeveloping Van Brodie Mill. The balance of the funding package included a permanent mortgage and Workforce Housing funds from MassHousing, as well as Affordable Housing Trust Fund and Housing Stabilization Funds from DHCD. TD Bank provided the project's construction financing.

For more information visit **www.arlingtonpoint.net**







Appleton Mills - Lowell, MA

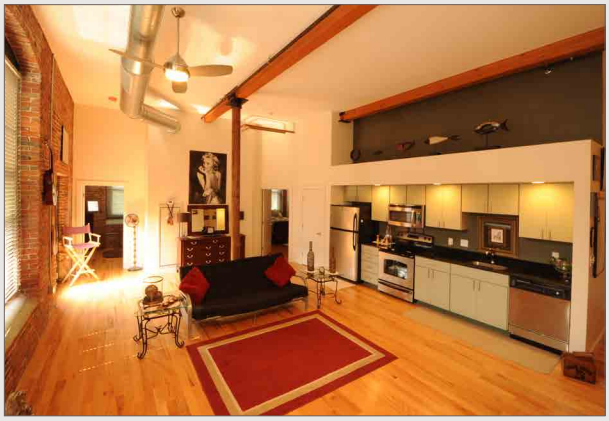


Total Development Cost: $64 million
Units: 130
Completed: 2011

Phase One of the Hamilton Canal District commenced with the $64 million historic restoration of the Appleton Mills complex into 130 units of affordable artist housing. For years, the deteriorated, vacant structure loomed ominously over the gateway to the City, and set a negative tone for visitors to the Downtown and other Lowell venues, including the Lowell National Historic Park. Accordingly, its restoration was a high priority for the City, the local office of the National Park Service, and the Patrick Administration, which designated the Hamilton Canal redevelopment area as a priority Growth District Initiative (GDI).

While the building was significantly deteriorated, the masonry walls were sound and much of the structure was salvageable. In areas where masonry had previously been demolished, new infill walls were designed with clearly contemporary cladding in contrast to historic materials. The restored building includes a five-story, 30-foot wide atrium, to draw sunlight into common areas and create a dynamic architectural feature. The building's green components include a green roof, highly efficient mechanical system components and energy star appliances.

The building was designed and marketed to appeal to artists and other creative professionals, consistent with the City's efforts to attract and retain such individuals as part of its downtown development strategy. A preference for artists was established, subject to Fair Housing guidelines, and units are available to all households meeting income limitations and credit requirements. The loft style units range in size from 500 to 1,400 square feet, and include a mix of unit types and layouts, including studios,



one bedroom flats, one bedroom townhouses, two bedroom flats and two bedroom townhouses. A number of units with ground floor access include artist sell-space. While the units feature high ceilings and considerable light, the unit finishes are simple and durable.

The atrium is designed as a gallery/exhibit space and is conducive to community events such as open studios, film screenings and readings. Common areas in the building include a fitness area, laundry/community lounge, roof deck, artist workshop space and a landscaped mill yard. The elevators, doorways and loading docks are specified to accommodate larger items. The City allocated parking for Appleton Mills residents in the City's new Early Garage, which is across Jackson Street. Today the Appleton Mills is home to a thriving creative arts community and represents the largest affordable artist housing development in the Commonwealth.

Boston East - East Boston, MA



Total Development Cost: $75 million
Units: 200
Completed: 2018

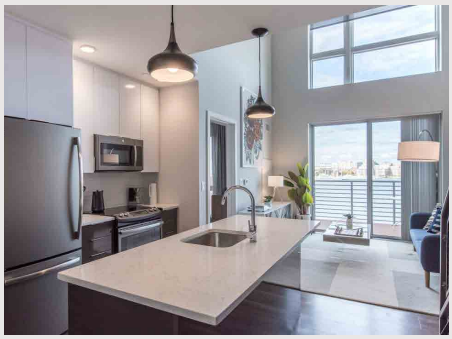
Boston East is a 200-unit luxury multifamily building on the East Boston waterfront. Trinity and its development partner, the East Boston Community Development Corporation, were designated developer of the vacant, city-owned site in December 2006 by the City of Boston's Department of Neighborhood Development. After undertaking a complex permitting process and weathering the financial recession, Boston East commenced construction in 2015.

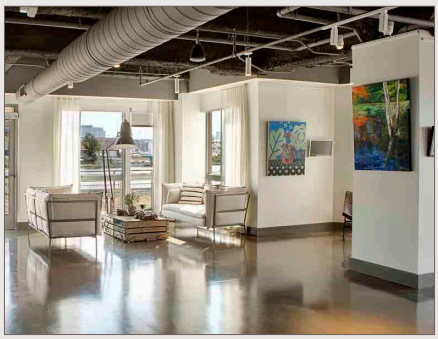
Formerly a Brownfields waterfront site that was inaccessible to the community, Boston East is now a showcase property with private residences and public amenities available to the East Boston neighborhood. Boston East sits one block away from Central Square which offers commercial and retail uses, and four blocks away from Maverick Square and the MBTA's Blue Line to Downtown and Logan Airport.

The northern portion of the site is designated for housing. With highly designed finishes, striking amenities, and access to the water, Boston East continues the renaissance of the East Boston waterfront with thoughtfully designed and programmed luxury apartments. Boston East residents enjoy breathtaking views from a building designed to evoke the sense of the historic wharfs of East Boston. With a welcoming entryway and gracious open spaces, the building is aesthetically appealing from both Border Street and the new Harborwalk that runs along the water edge of the site. The building includes a rooftop lounge, fitness center, pup spa, underground parking and outdoor amenities, including a generous landscaped yard that is programmed with outdoor lawn games, grills and a fire pit. A unique amenity of the building is its inclusion of a community art gallery that hosts public events and art shows and six affordable artist live/work/sell units on the ground floor. In 2017, Boston East was voted Boston's Best New Building by Curbed Boston.

The southern portion of the site will be dedicated to meeting the state's Designated Port Area (DPA)requirements. The East Boston Community Development Corporation is marketing the site to potential marine industrial users.

For more information visit **www.bostoneast.com**







Bristol Commons & Lenox Green - Taunton, MA



Total Development Cost: $65 million
Units: 160
Completed: 2014

In May 2011, the Taunton Housing Authority (THA) and Trinity were successfully awarded a $22 Million HOPE VI Revitalization grant from the U.S. Department of Housing & Urban Development (HUD). In addition to the HOPE VI Grant, private equity resources and other public funds were used to rehabilitate the distressed 150-unit Fairfax Gardens public housing development.

Fairfax Gardens was built in 1951 as an isolated, 150-unit barracks-style development in the middle of a low density, single-family neighborhood. The units were clustered on a third of the 43-acre site, leaving the remaining acreage open as meadows and wetlands. The development's infrastructure, utilities, and many building components are original to the site and were outdated and in need of complete replacement. The buildings were neither energy-efficient nor accessible; the units cramped and much smaller than current space standards dictated; and mold, pests, and deteriorated finishes were problems throughout. The distressed conditions at Fairfax Gardens not only negatively impacted residents' health and quality of life, but had also brought down the property values of nearby homes. The award of the HOPE VI grant allowed for the complete demolition and reconstruction of the existing Fairfax Gardens.

The new project, renamed Bristol Commons, de-densified the existing site replacing the 150 units across two distinct sites for a newly redeveloped total of 160 units. The redeveloped site contains 80 townhomes and eight duplex units, as well as new site infrastructure, a new community center, community gardens, green space, a basketball court and other community amenities. The 88 units in the Bristol Commons phase include one-, two-, three-, and four-bedroom units and 78 of the units are affordable to households earning between 0-60% of the Taunton area median income. Returning residents were given first priority to return to the newly created



development. The majority of the families are considered to be extremely low income and require operating subsidies from the THA. These operating subsidies allow all residents to pay only 30% of their income as rent. The remaining ten units are market rate units and have no income restriction assigned to them.

The second site developed is located in downtown Taunton in a transit oriented development (TOD) overlay district. The Parcel 6A-2 site is adjacent to public transit and other services. The Parcel 6A-2 site, named Lenox Green, has new site infrastructure, eighteen townhomes, a three story 54-unit mid-rise building with community space/management offices, raised community planting beds, walking paths connecting to local services, a playground and other community amenities. The 72 units in the Lenox Green include one-, two- and three-bedroom units and all 72 of the units are affordable to households earning between 0-60% of the Taunton area median income. The same operating subsidies offered to residents of the Bristol Commons site are also available to the residents of the Lenox Green site.

The project had its financial closing in July of 2012 and was completed in the spring of 2014.

Brookfield Commons - White Plains, NY



Total Development Cost: $61 million
Units: 130
Anticipated Completion: 2021

Brookfield Commons will consist of the redevelopment of the 9.3 acre Winbrook Houses public housing development located in downtown White Plains, NY. Trinity Financial and co-developer, the White Plains Housing Authority have partnered to undertake the redevelopment of the site. Brookfield Commons will consist of high quality, modern apartments and will introduce mixed income tiers, including workforce housing units, to promote a diversity of incomes. The project will be built in phases to ensure that existing Winbrook Houses residents are not involuntarily displaced or relocated outside of the Brookfield Commons campus. The existing tenants, community stakeholders, and the City of White Plains were all engaged and provided essential feedback during the planning process.

The current phase, The Overture at Brookfield Commons (Brookfield Commons Phase II), consists of the new construction of a 9 story, 147,229 sq ft mixed-use building with 129 units, and 2,074 square feet of community facility space. The project will also contain 77 at-grade parking spaces. This multi-family building will have 40 one bedrooms, 63 two bedrooms, 23 three bedrooms, 2 four bedrooms and 1 superintendent's unit. There will be a fitness room, children's playroom and a tenant lounge and terrace. When constructed, the subject building will include units for existing Winbrook Houses residents, LIHTC units and workforce housing units. There is a vacant, existing Winbrook building which will be demolished clearing the way for the construction of the Phase II building.

The Overture will be constructed with a block and plank structural system for the typical floors. The architectural vocabulary aims to be sensitive to buildings surrounding the site and also gives the site a new sense of identity. The façade will feature a modern design composed of 3 tones of brick veneer with colored metal panel accents in strategic locations. The building will be designed to exceed New York State, Enterprise Green Communities, NYSERDA and Energy Star minimum energy performance requirements. The mechanical system will feature the highly efficient refrigerant based VRF heat pump system for heating and cooling.

The Overture at Brookfield Commons represents a unique opportunity to preserve and modernize an existing affordable housing resource while physically and economically reintegrating the site with the surrounding community. The $64 million project will be financed with funding that includes LIHTC equity and resources from the New York State Housing Finance Agency, the County of Westchester and the City of White Plains.

Carlton Wharf - East Boston, MA



Total Development Cost: $7 million
Units: 30
Completed: 2005

Carlton Wharf was developed by Trinity Financial with development partner East Boston Community Development Corporation. This project played a critical role in the revitalization of the East Boston waterfront with 30-units of for-sale workforce housing available to households earning between 80% and 120% of area median income.

The project involved the complex Chapter 91 waterfront permitting process that Trinity completed in less than ten months. The seven story building has elevator access to all units and includes a mix of one-, two- and three-bedroom floorplans with magnificent views of Boston Harbor and the city skyline.

Carlton Wharf site - before



View of Boston skyline from Carlton Wharf



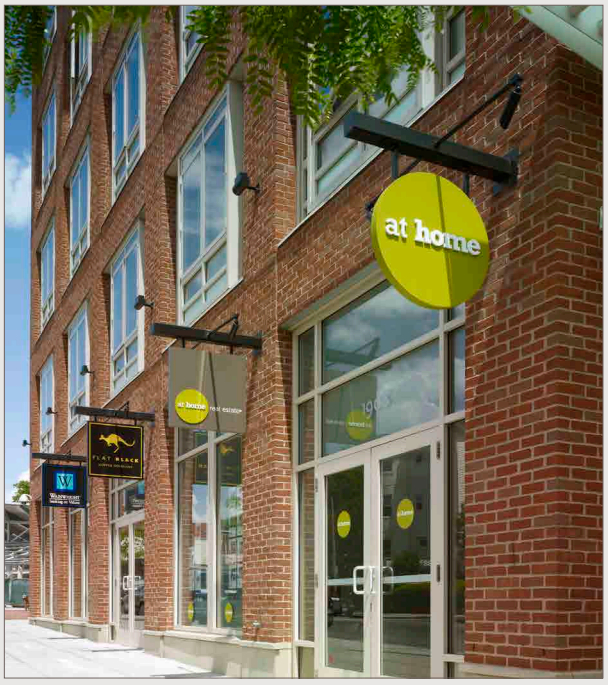
The Carruth - Dorchester, MA



Total Development Cost: $52.6 million
Units: 74 rental, 42 condominium/Retail - 10,500 SF
Completed: 2008

The Carruth is a transit-oriented development that involves the construction of 116 units of mixed-income housing and approximately 10,000 square feet of neighborhood retail on a site directly adjacent to the MBTA's Ashmont Peabody Square Station in the heart of historic Peabody Square. The development parcel is the subject of a long-term ground lease between Trinity and the MBTA. The building is a six-story structure with one floor of neighborhood retail and five stories of housing. Floors 2-4 include 74 affordable rental units and floors 5 and 6 include 42 market rate condominiums. The first floor retail is occupied by Tavolo, an Italian restaurant, a Chiropractic office, a college preparatory program for urban youth, and an innovative banking concept in which a branch of Eastern Bank is integrated with Ripple Cafe, an independent coffee shop.

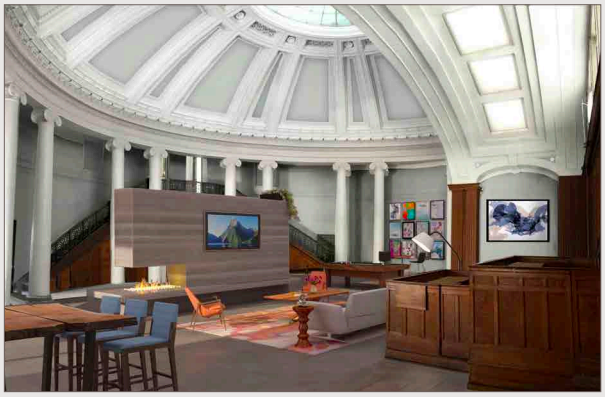
Construction was completed in the summer of 2008.



Courthouse Lofts - Worcester, MA



Total Development Cost: $57 million
Units: 115
Anticipated Completion: 2020





The Worcester Courthouse Project is the certified historic rehabilitation and adaptive re-use of the approximately 214,000 square-foot Old Worcester County Courthouse, originally built in 1845, into a new multifamily mixed income residence, with ancillary amenity space throughout. Upon construction completion, the repurposed building will contain roughly 114 residential units in the form of Studio, 1-, 2-, and 3-bedroom units. Located at 2 Main Street, the redevelopment of the Courthouse is part of a larger revitalization of the Historic Lincoln Square district, which sits just north of Downtown Worcester and the City center.

The primary design approach for Courthouse Lofts is to preserve the character and beauty of the existing building while creating an efficient layout and maximizing the residential square footage within. The design team has created floor plans that contain new comfortable, character-rich apartments while preserving the building's most impressive public spaces. These spaces include two of the most grand historic courtrooms that will be converted into amenity spaces, as well as the main entry hall of the building with its stunning marble columns and curving stone staircases.

The project includes a fitness center, clubhouse lounge, gallery space, and interior bicycle and resident storage. The site will also feature ample parking, landscaping restoration, and outdoor resident gathering spaces. An approximately 2,500 square foot retail/gallery space is also planned.

The income mix of the project is expected to be 50% market-rate (with some units unrestricted and some at a workforce tier of 120% of AMI) and 50% affordable to households below 60% of area median income.

Davenport Commons & Shawmut Estates - Boston, MA





Total Development Cost: $50 million
Units: 125 student housing, 75 condominium/retail - 2,100 SF
Completed: 2001

In 2001, Trinity and a local community development corporation completed Davenport Commons, a 200-unit, $50 million housing program in Lower Roxbury.

The project consisted of 125 units of housing that are leased to Northeastern University as student housing and 75 units of homeownership housing, and 2,100 square feet of ground floor commercial space.

The project was sold out nearly eight months ahead of schedule including the market-rate homes that were sold to households with incomes up to 175% of area median income.

The homeownership units are accessed from the street, with the lower duplex units having individual entries complete with stoops reflective of the surrounding South End neighborhood. The first floor duplex units have some backyard space. All of the homeownership units have at-grade parking spaces.







Enterprise Center - Brockton, MA



Total Development Cost: $100 million
Units: 215 rental housing
10,000 square feet of retail space
52,000 square feet of commercial space
Completed: 2015 (phase one)

The Enterprise Center project is a vibrant, mixed-use development re-creating a significant city block and its street edges in downtown Brockton. The transit-oriented development sits within walking distance of the commuter rail station in downtown Brockton, and within walking distance of the city's center. The new development is occurring in two phases and will restore several historic buildings for retail, commercial and housing uses. The block is bounded by Centre Street, Main Street, Montello Street and Petronelli Way and has suffered from considerable blight and physical deterioration.

Trinity's development will be the catalyst to bring significant reinvestment back to downtown Brockton and reinvigorate what was once a bustling downtown location. The project is designed to comply with the goals of the Downtown Brockton Smart Growth Overlay District (DBSGOD) and was permitted using the Commonwealth's 40R Permitting Process. The project consists of two phases of housing and the historic rehabilitation of an existing commercial building. The project is funded using Historic Tax Credits, Low Income Housing Tax Credits, private tax credit equity and other public and private resources.

Trinity has worked with the community to develop a multi-phase development program reflective of the goals of the City and its residents. The first phase of development consisted of 113 units of housing in new construction along Centre Street. A section of the new construction, named Enso Flats, includes 42 artist live/work units which are affordable to artists earning up to 60% of the Area Median Income (AMI). The remaining 71 units of new construction, named Centre50, include a mix of affordable and market rate units. In addition to the housing there is space for ground floor retail, artist gallery space, green space and parking.

Enterprise Main (the existing Enterprise Building) has been historically rehabilitated to create 52,000 square feet of new commercial and office space.

The second phase of development consists of 111 units of housing, again a mix of affordable and market rate units and additional green space.

Upon completion this project will consist of 226 units of housing, 10,000 square feet of retail and artist exhibition space, and 52,000 square feet of commercial space.





Foundry Square - Newburyport, MA



Total Development Cost: $7.2 million
Units: 20
Completed: 2006



In 2002, the City of Newburyport designated Trinity Financial developer of the former Newburyport Department of Public Works site with the goal of bringing affordable home ownership opportunities to the city. Trinity devised a plan to transform the blighted and vacant site into a vibrant community consistent in design, material and landscaping with the finest neighborhoods in Newburyport.

Foundry Square entailed the development of 20 units of for-sale housing, 13 of which are affordable to first time homebuyers earning below 80% of the area median income. The remaining seven units were sold at market rates. The plan called for one-, two-, and three-bedroom units in four townhouse structures built around a landscaped common. The building on the north side of the square is evocative of the former Albert Russell & Sons Foundry, a landmark building in Newburyport which was once located on the site.

Glenark Mills & Glenark Oaks- Woonsocket, RI



Total Development Cost: $13 million
Units: 89
Completed: 2013







Glenark Mills and Glenark Oaks are sister properties located approximately a half-mile from one another in the Constitution Hill neighborhood of Woonsocket, Rhode Island. Situated along the banks of the Blackstone River, Glenark Mills was built in 1865 as a textile mill and was later converted to 67 units of residential housing. Glenark Oaks was built in 1990 and contains a total of 22 units.

In 2011, Trinity Financial was selected by Rhode Island Housing as the developer to acquire, renovate and revitalize both Glenark Mills and Glenark Oaks. Working with Rhode-Island-based contractors, Trinity invested $13 million in redeveloping and modernizing both properties. The buildings' common areas were updated and the apartment interiors were refurbished with new kitchens and bathrooms.

The redevelopment of Glenark Mills and Glenark Oaks were financed through the sale of low-income housing tax credits and historic tax credits. All 89 of the project's units are affordable to households earning up to 60% of area median income. Other financing sources include HOME Funds and state housing resources from Rhode Island Housing.

completed in December of 2013, Glenark Mills and Glenark Oaks represents Trinity's first project in Rhode Island since the completion of Newport Heights HOPE VI in 2006.

Franklin Hill - Dorchester, MA



Total Development Cost: $95 million
Units: 266
Completed: 2009

Franklin Hill was a 366-unit family public housing development located in Dorchester, MA that was severely physically distressed and, arguably, one of the least safe developments in the Boston Housing Authority portfolio. The BHA applied for, but did not receive, a HOPE VI implementation grant for the redevelopment of this site and decided to move forward in redeveloping Franklin Hill without HOPE VI funds.

Trinity Financial was selected to be the developer for this project in the summer of 2005. The first phase of redevelopment was completed in February 2008 and created 114 units of affordable rental housing. Trinity closed on the second phase of development in April 2008 and completed construction in October 2009. Phase 2 created an additional 152 units of affordable rental housing. The total development program called for the new construction of 157 replacement public housing rental units, 67 Section 8 project-based voucher rental units and 42 low income housing tax credit only units for total of 266 rental units. Funding for this 266-unit public housing redevelopment effort included $17 million of Replacement Housing Factor funds from the BHA, $71 million in LIHTC equity and additional funding from the Commonwealth of Massachusetts and the City of Boston. The redevelopment plan reconfigured the site with a new street layout, resulting in more traditional city blocks and better integration with the neighboring community. Additionally, the new development offers a variety of housing types better suited for this diverse population. Residents are now able to choose from larger townhouse style units with individual backyards or the modern convenience of an elevatored mid-rise building. The redeveloped property includes offices for on-site property management, community meeting space, and program space for both the Boys and Girls Clubs of Boston and the Greater Boston Food Bank.







The Mattapan Campus - Mattapan, MA









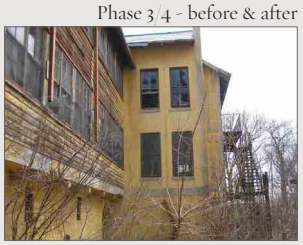
Phase 2 - before & after





Phase 3/4 - before & after









Total Development Cost: $100 million
Units: 332
Completion Dates: Phase 1 - 2003/Phase 2 - 2006
Phases 3/4 - 2008/Phase 5A - 2012

Mattapan Heights is a multi-phased comprehensive redevelopment project that is transforming the former 52-acre hospital campus in the Mattapan neighborhood of Boston. Portions of the grand campus were abandoned for more than 20 years and the few remaining campus buildings were in an advanced state of disrepair.

Phase 1 commenced in November 2001 and was completed and occupied in March 2003. This first phase encompassed the rehabilitation of the Foley Building into 98 mixed-income elderly assisted and independent living units, and 18 units for Latina women in recovery and their children in the E Building. Mattapan Heights Phase 2 was completed in late 2006 and consists of the rehabilitation of five historical buildings into 83 affordable family housing units. Mattapan Heights Phases 3 and 4 were completed in February 2008 and created 73 affordable family housing units. Phases 3 and 4 included both new construction and historic restoration.

Phase 5A was completed in late 2012, creating a newly constructed building on the upper portion of the campus. This building, which is designed to be LEED Silver certifiable and Energy Star Multifamily High Rise Certified, contains 60 affordable units.

With the completion of the fifth phase of Mattapan Heights, more than 330 new units of mixed-income housing have been created, eight historic hospital buildings saved from demolition and more than 27 acres of campus landscape reclaimed and restored.

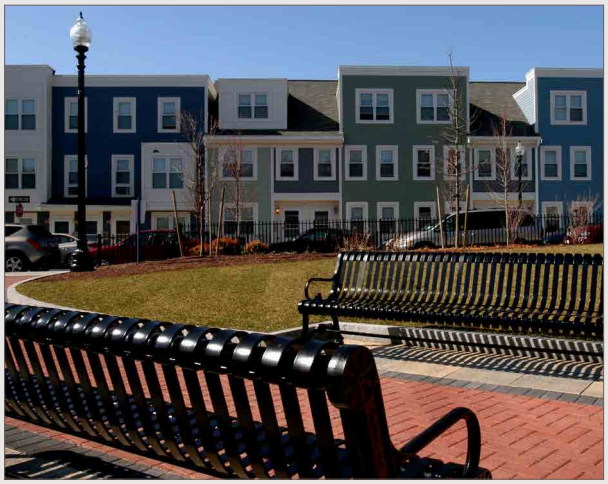
Awards Received: "Massachusetts Historical Commission Preservation Award," 2004; "Charles L. Edson Affordable Housing Tax Credit Excellence Award," 2004; "Boston Preservation Alliance - Significant Rehabilitation/Restoration Award," 2009.

Maverick Landing - East Boston, MA









Total Development Cost: $109 million
Units: 396
Completed: 2006

Maverick Landing is a mixed income neighborhood located on the East Boston waterfront. In 2001, the Boston Housing Authority was awarded a $35 million HOPE VI award for the complete renovation of Maverick Gardens, a deteriorated public housing development. Working with development partner, the East Boston Community Development Corporation, Trinity devised a four phase redevelopment plan calling for demolition of all 413 units to be replaced with 396 units in newly constructed buildings including, 20 townhouse buildings and six six-story mid-rise buildings and a community center.

The new development was the first LEEDs certified multi-family housing development in New England and includes energy efficient lighting, appliances, and structural elements including photovoltaic panels. Maverick Landing is a mixed income community with 77% of the units affordable to households earning up to 60% of area median income and the remaining 23% as market rate rentals.

The reconfiguration of the historic street pattern provides a new corridor to Boston Harbor, and reconnects Maverick to the surrounding East Boston community. A new non-profit, Maverick Landing Community Services, Inc. provides on-going supportive services for residents of the development.

Maverick has received national recognition for its focus on energy efficiency and earned the honor of Affordable Housing Magazine's 2006 "Best Affordable Housing Development".

Newport Heights - Newport, RI







Total Development Cost: $74 million
Units: 299
Completion Dates: Phase 1 - 2004/Phase 2 - 2006/Phase 3 - 2007

Located in the North End neighborhood of Newport, RI, the Tonomy Hill housing development was one of the most distressed public housing projects in the state of Rhode Island. Originally constructed in 1939 as temporary housing for Navy personnel, the property was suffering from major structural deficiencies and outdated and inadequate mechanical systems. Additionally, the site configuration isolated residents from their neighbors and the larger community, exacerbating the already high rates of poverty, crime, substance abuse, domestic abuse and illiteracy prevalent at the site. In 1999, Trinity Financial was selected as the developer for the site and put together a multi-phase mixed finance plan to transform Tonomy Hill into a new, mixed-income community called Newport Heights.

Completed in 2004, Newport Heights Phase 1 replaced 64 units of distressed public housing with 81 newly constructed units of mixed-income rental housing, new public streets and other public infrastructure improvements. The 81 units of housing serve a range of income categories including units subsidized with PB Section 8 or Public Housing subsidies, tax credit units (40%-60% AMI), moderate units (60%-80% AMI) and market rate units (greater than 80% AMI) without income restrictions. The $16 million Phase 1 project was financed with a mixed-finance package that includes nearly $7.8 million of equity raised through the sale of low income housing tax credits. Other resources include Housing Authority Capital Grant Program funds, City of Newport contributions and state housing resources from Rhode Island Housing.

Completed in 2006, Phase 2 of Newport Heights replaced 120 units of distressed public housing with 147 newly constructed units of mixed-income rental housing as well as continuing the public infrastructure improvements begun in Phase 1. Phase 2 also serves a mixed-income population. The $33 million Phase 2 project was financed with a mixed-finance package that includes nearly $17 million of equity raised through the sale of low income housing tax credits. Other resources include Housing Authority HOPE VI and/or Capital Grant Program funds, City of Newport contributions, and state housing resources from Rhode Island Housing.

Completed in 2007, phase 3 of Newport Heights replaced 91 units of distressed public housing with 71 units of mixed-income rental housing and continued the public infrastructure improvements of the first two phases. Phase 3 also serves a mixed-income population. Additionally, the Phase 3 project includes residential and program space for the Winslow Place program serving formerly homeless women and their children. The $24.3 million Phase 3 project was financed with a mixed-finance package that includes nearly $13 million of equity raised via the sale of low income housing tax credits. Other resources include Housing Authority HOPE VI and/or Capital Grant Program funds, City of Newport contributions, Federal Home Loan Bank AHP funds and state housing resources from Rhode Island Housing.

Northampton Square - Boston, MA







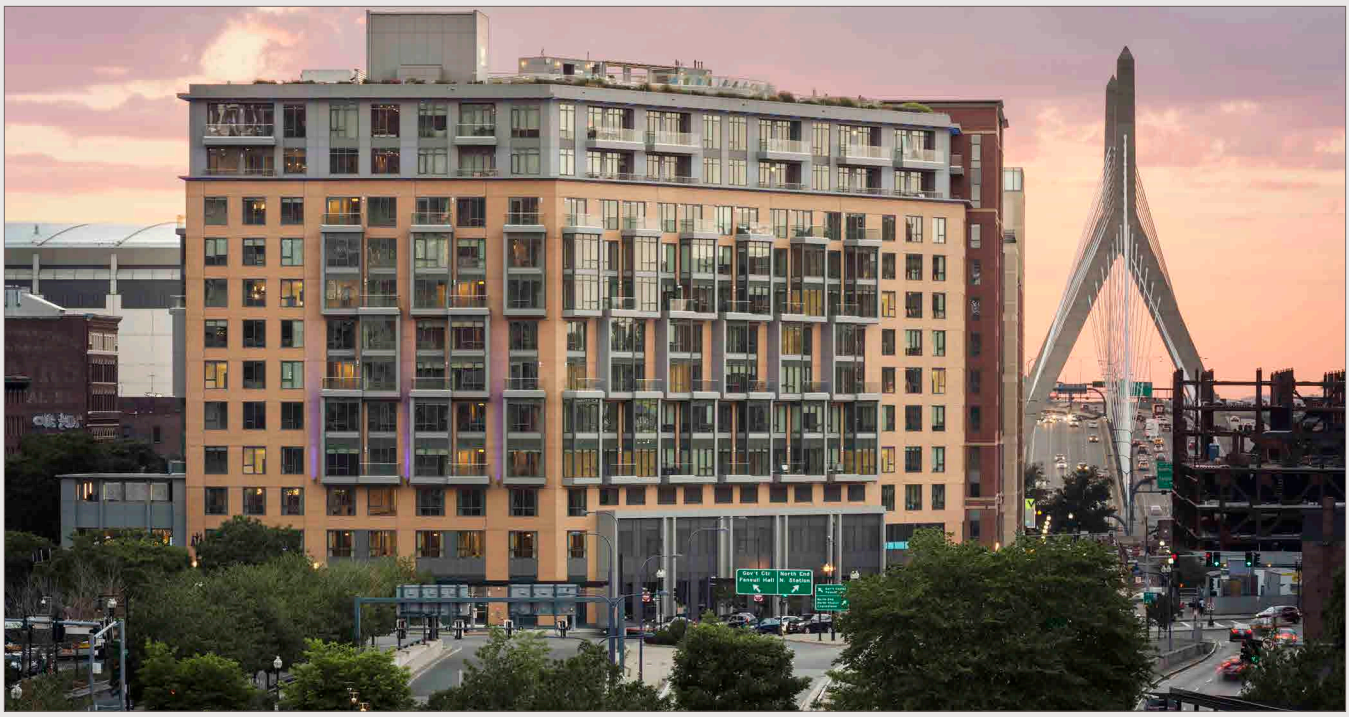


Total Development Cost: $91 million
Units: 347
Completed: 2016

The Northampton Square complex is located in the South End/Lower Roxbury neighborhood of Boston, one block away from the Boston Medical Center and the Boston University Medical Campuses. The complex consists of a 29-story residential and commercial building at 35 Northampton Street and a 12-story residential building at 860 Harrison Avenue. The Northampton Square project involved three main components - (1) the renovation of 35 Northampton Street, (2) the renovation of 860 Harrison Avenue, and (3) the new construction of a shared lobby and connector corridor that wrap the existing facade of the building. In total, the project will create or preserve 347 units of housing, 60% of which will be maintained as affordable and below market rent. The complex includes an existing 539-space parking garage with sufficient capacity for the renovated housing as well as the commercial uses also housed in the development.

The original complex was built between 1969 and 1973 to house the Boston City Hospital School of Nursing. The Boston Public Health Commission (BPHC) acquired the site on July 1, 1996 and has managed the property since. In December of 2010, the BPHC selected Trinity Financial to redevelop various components of the site.

One Canal Street - Boston, MA



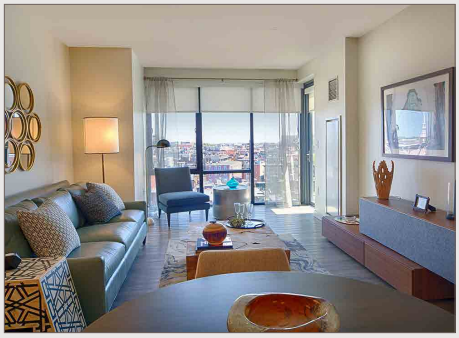
Total Development Cost: $195 million
Units: 310 rental housing/retail - 21,000 SF
Completed: 2016

Located at the tip of the Rose Kennedy Greenway, the One Canal Project involves the development of surface and air rights on three parcels in the Bulfinch Triangle area of Boston. These parcels are among the development sites in the Bulfinch Triangle created by construction of the Central Artery/Tunnel Project and submersion of the Massachusetts Bay Transportation Authority (MBTA) Green Line. In August 2010, both agencies designated Trinity Financial as the developer for these Parcels: 2A, 2B and 2C.

The removal of the elevated Central Artery and Green Line structures has allowed for new development and pedestrian scaled streets that reconnect the North End to government and entertainment uses at Government Center and the TD Garden, as well as the residential historic mixed uses of the Bulfinch Triangle and residential West End.

Designed to emulate the historic patterning of the historic Bulfinch Triangle, while providing a stunning capstone to the Rose Kennedy Greenway, the One Canal project includes the development of approximately 435,000 square feet of residential and retail space. The lobby entrance on Canal Street includes visual and historic references to the Middlesex Canal and its extension that once flowed through the site. The second and third floors contain state-of-the-art amenities including a fitness center, community room, outdoor plazas, leasing space, and a 147-space parking garage for the residents of the building. The fourth through twelfth floors contain 310 luxury apartment homes, including exceptional penthouse level finishes and designs on the upper two floors. One Canal also provides 20 affordable apartment homes on-site.

One Canal, adjacent to the Avenir building (completed by Trinity Financial in 2009), continues the transformation of the Bulfinch Triangle area into a mixed-use district that complements its surrounding areas and brings vitality to an area once in shadow from the elevated highway and Green Line structures.







Orchard Gardens - Roxbury, MA







Total Development Cost: $58 million
Units: 331
Completed: 1999

Orchard Gardens consists of the development of 331 units of rental housing on 15 acres of land in the Roxbury neighborhood of Boston. Completed in three phases, the development includes a new park, six new streets, and new offices for the resident association and on-site property management team. The team included Trinity, a local community development corporation and a local resident association.

Selected in May 1996, Trinity Financial and company achieved two closings for a total of $57.67 million of financing, including $27.3 million of private equity. With these closings, nine buildings containing 126 rehabilitated housing units were acquired; 162 new townhouses were constructed; and the former Dearborn school building was converted into 42 units of housing using historic tax credits. In December 1999, all 331 units were completed and occupied. Housing units are affordable to households in six different income categories.

Overlook Terrace at Orient Heights - East Boston, MA



Total Development Cost: $52 million
Units: all phases - 373
Completed: phase one - 2018

The Orient Heights development comprises 331 units of state-funded public housing terraced into a steep hillside at the northern edge of East Boston's Orient Heights neighborhood. The 15-acre site is comprised of thirteen three-story buildings, seven two-story townhouse blocks, a Community Center and a Central Boiler Plant.

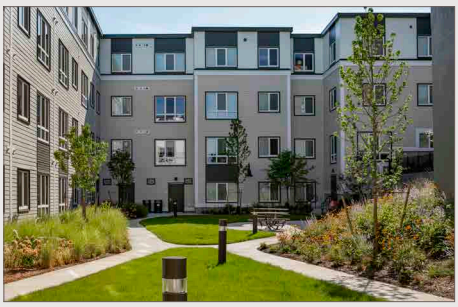
The Boston Housing Authority (BHA) undertook a planning process in 2008, funded by the Massachusetts Department of Housing and Community Development (DHCD), to look at redevelopment options for the site, and prepared a master plan with an overall design concept. This process resulted in a framework for selecting a development team with the collective goal of transforming the site into a modern mixed-income community modeled on the successful transformations of the BHA's Federal HOPE VI sites and recent redevelopment at West Broadway, Washington Beech and Old Colony.

In January of 2015, the BHA selected the Trinity Financial and East Boston CDC development team to work with the BHA and DHCD to finalize a redevelopment strategy for the site. Since that time, the development team has conducted due diligence at the site and met with the residents and broader neighborhood to understand the needs and desires of the community. All of this work resulted in the preparation of a draft Architectural and Engineering Study (A/E Study) by the development team. This A/E Study evaluated three conceptual options for the redevelopment of Orient Heights: Option 1 explored existing building rehabilitation, Option 2 combined rehabilitation with limited new construction, and Option 3 evaluated total new construction. DHCD rendered the decision for the redevelopment to be all new construction. Based on the current design, the redevelopment will consist of 373 units, of which 331 are replacement state public housing units.

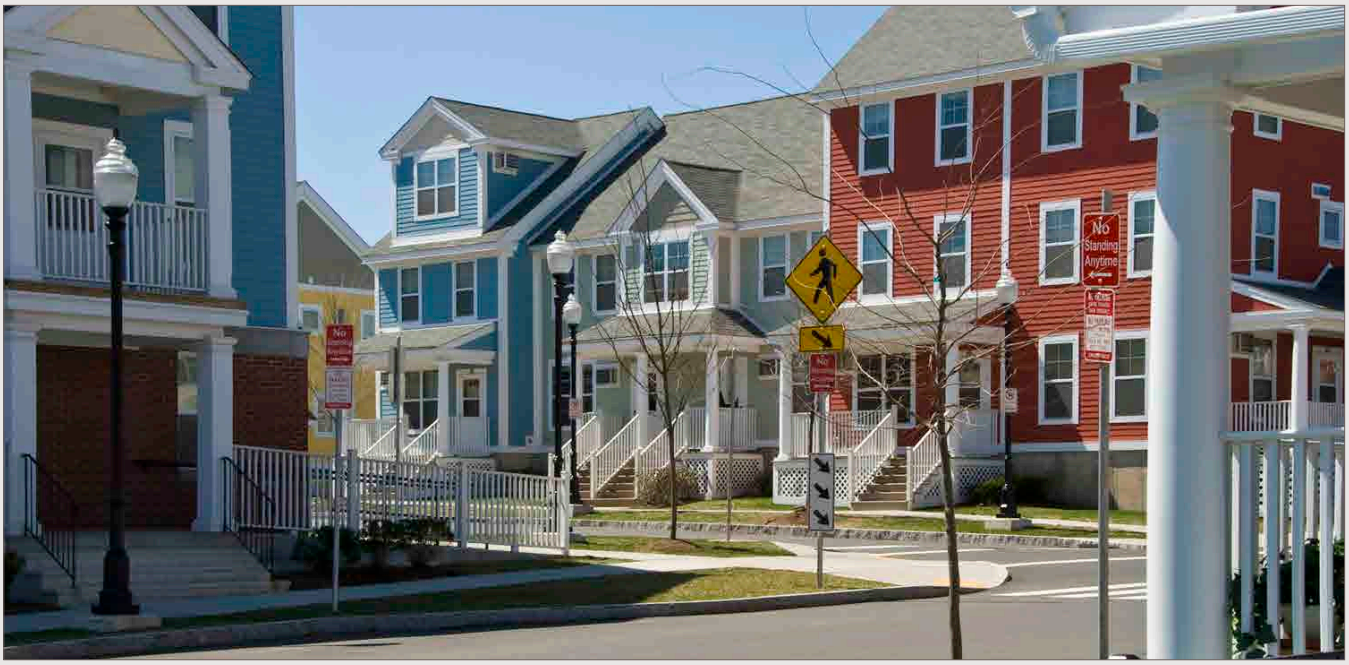
Orient Heights is being redeveloped in phases: the newly completed Phase 1 consists of 120 units and construction plans for Phase 2 are underway.







Quinnipiac Terrace - New Haven, CT



Total Development Cost: $69 million
Units 193
Phase 1 Completed: 2006
Phase 2 Completed: 2008
Phase 3 Completed: 2011

Quinnipiac Terrace, New Haven, Connecticut Trinity was the development partner selected by the Housing Authority of the City of New Haven (HANH) for the HOPE VI redevelopment of Quinnipiac Terrace. In March 2003, HANH was awarded a $20 million HOPE VI grant for the redevelopment of Quinnipiac Terrace. As part of this effort, Trinity transformed a severely distressed public housing development into a vibrant new mixed-income community that will reconnect to the larger Fair Haven neighborhood and create an exciting new riverfront community in New Haven.

The new Quinnipiac Terrace provides housing that meets the needs and lifestyles of today's families with appropriate kitchens, living areas, and outdoor spaces. The design maximized private, individual entries and created private backyards in almost all units. The redevelopment occurred in three phases and consists of 193 new units of housing with a mix of public housing and rental housing. Financial closing for the first rental phase occurred on April 15, 2005. Phase 1 consisted of the demolition of seven existing public housing buildings and the construction of 81 new family apartments. The total development costs for Phase 1 were approximately $22 million and were financed through a combination of HOPE VI funds, 9% Low Income Housing Tax Credits and City of New Haven funds. In 2006, Trinity was awarded $2.2 million in 9% credits by Connecticut Housing Finance Agency for Phase 2, twice the amount of credits in a single allocation than had been anticipated. Phase 2 construction began in September 2006 and was completed in March 2008. Phase 2 created an additional 79 units of affordable rental housing. The third phase of development, which includes 33 units of mixed income rental housing, closed in July 2010 and was completed in May 2011 for a total development cost of $15 million.





Randolph Houses - Harlem, NY

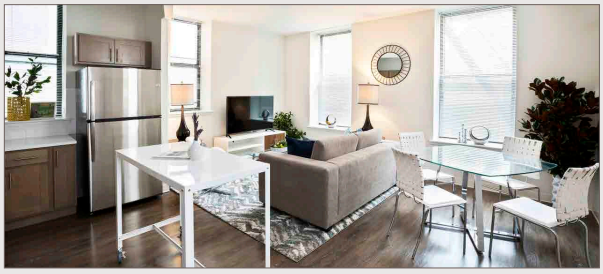


Total Development Cost: $164 million
Units: 283
Completed: phase one - 2016; phase two - 2018

The Randolph Houses project is comprised of 36 five-story Old Law tenement buildings, 14 of which are on the north side of the street and 22 on the south side. This exciting project involved the historic rehabilitation and consolidation of the existing structures into three interconnected and fully handicapped accessible buildings. As part of the substantial rehabilitation of Randolph Houses, building facades were restored and the building interiors were completely demolished and rehabilitated.

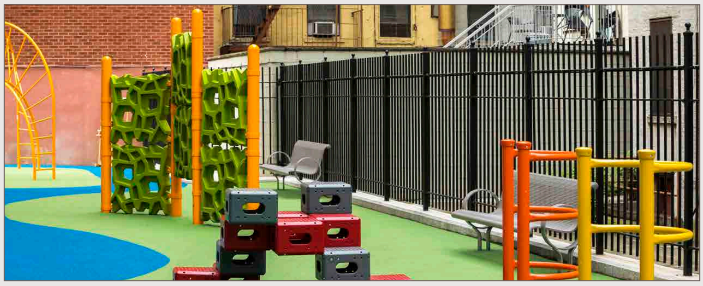
The redevelopment of Randolph Houses – as a HUD mixed finance and LIHTC project – included the gut-rehabilitation of 452 housing units. The rehabilitated buildings on the south side of the street contain 168 units in what are now two interconnected buildings with central circulation and elevator access. The north side contains 115 units in what is now one interconnected building with central circulation and elevator access.

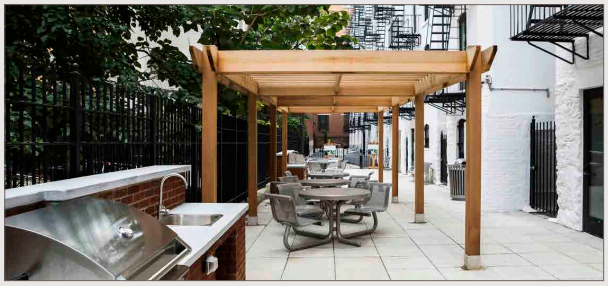
The newly reconfigured units are a mix of Studio, 1, 2, 3 and 4 bedroom apartments designed to accommodate family living. The rehabilitated buildings contain community spaces, a teaching kitchen, computer lab, fitness room, yoga room after school/arts room and storage units and bicycle storage for residents. There are also site improvements which include two children's play areas for different age groups and active and passive outdoor spaces for residents to enjoy, including barbecue areas, ping pong, chess tables and resident garden plots.



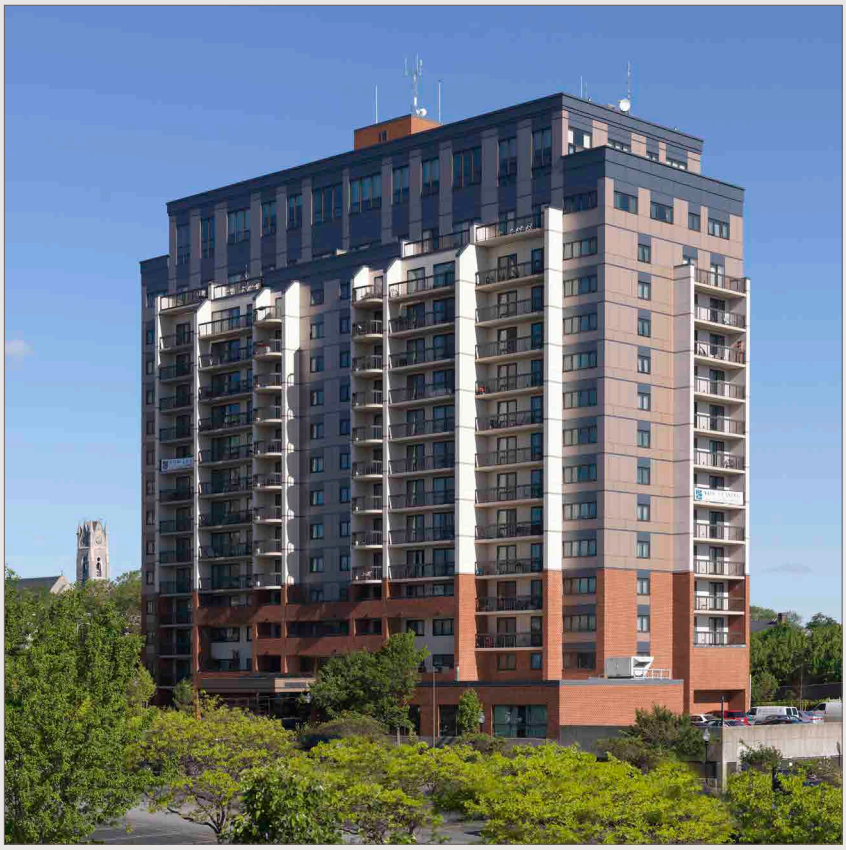


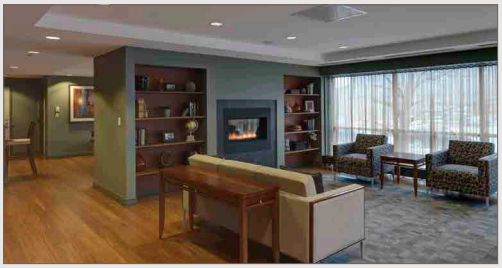


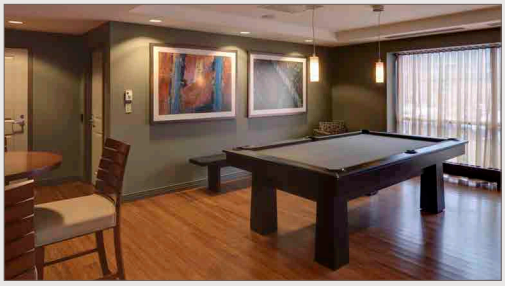


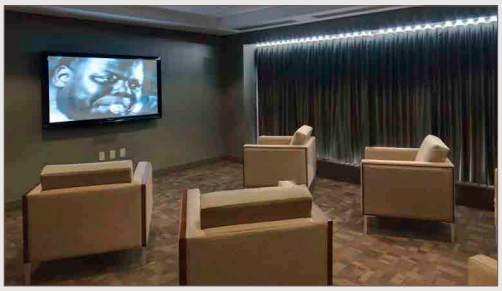


The Regency - New Bedford, MA









Total Development Cost: $30 million
Units: 129
Completed: 2011

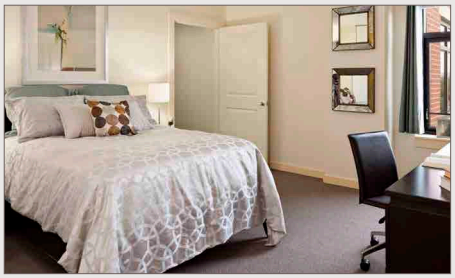
Standing 16 stories tall with commanding harbor views and located steps from the historic downtown district, The Regency is the most prominent building in downtown New Bedford. It was completed in 1988 as a luxury apartment complex. The property suffered from serious façade deterioration and water damage because no major capital investments had been made since its opening.

MassHousing foreclosed on the property in 2005 and in 2009 Trinity Financial was selected to acquire and redevelop the building. Trinity made a total capital investment of $32 million converting underutilized commercial space into new apartments, increasing the total number of units from 123 to 129. The unit mix includes 33 affordable units, 10 ”workforce” units and 86 market-rate units. The façade was replaced on floors 5-16, and additional repairs were made to floors 1-4, including new windows and patio doors. The building’s common areas and apartment interiors were renovated with new kitchens, bathrooms and HVAC systems. The building is now fully leased at rents above pro forma levels. This property commands the highest rents in the area and is arguably the best high-rise apartment property in the area.

Rowe Apartments - New Haven, CT









Total Development Cost: $36 million
Units: 104
Completed: 2011

Completed in 2011, the William T. Rowe (Rowe) redevelopment transformed a blighted property into high-quality housing for residents with a mix of incomes. The existing Rowe property (old Rowe) was physically distressed, required structural repairs, and a complete overhaul of existing building systems. After evaluating the existing structure it became apparent the old Rowe building was not salvageable and had to be demolished. The new Rowe has been repositioned so that it maintains the sense of community established during the old Rowe's 37-year history while still taking advantage of the positive changes occurring in the downtown area of New Haven.

The redevelopment of the Rowe Apartments consisted of the new construction of 104 units of one- and two-bedroom apartments in a nine-story building on land that is adjacent to the existing Rowe building. The adjacent property was acquired via a unique land swap agreement with the Yale-New Haven Hospital. The building also includes off-street parking for 88 vehicles, approximately 2,000 square feet of first floor retail/commercial space, and approximately 2,000 square feet of community and supportive service space. Of the building's 104 units, 78 of them are set aside to households earning at or below 60% of the area median income (AMI). The remaining 26 units are market rate, targeted towards people working in the nearby medical district.

Soundview Landing - Norwalk, CT







Total Development Cost: $44 million
Units: 80
Completed: phase 1 - 2018

Soundview Landing, formerly named Washington Village Phase One, is the new construction of 80 rental residences on two vacant parcels in the South Norwalk Neighborhood of Norwalk, CT. The project is the initial phase of a larger multi-phase redevelopment effort that will replace the existing, obsolete 136-unit Washington Village public housing project with a new 273-unit, mixed-income community.

The Norwalk Housing Authority, the Norwalk Redevelopment Agency, and Trinity Financial are working together on this exciting Choice Neighborhoods Initiative that will benefit the existing residents of Washington Village and the broader South Norwalk section of the city.

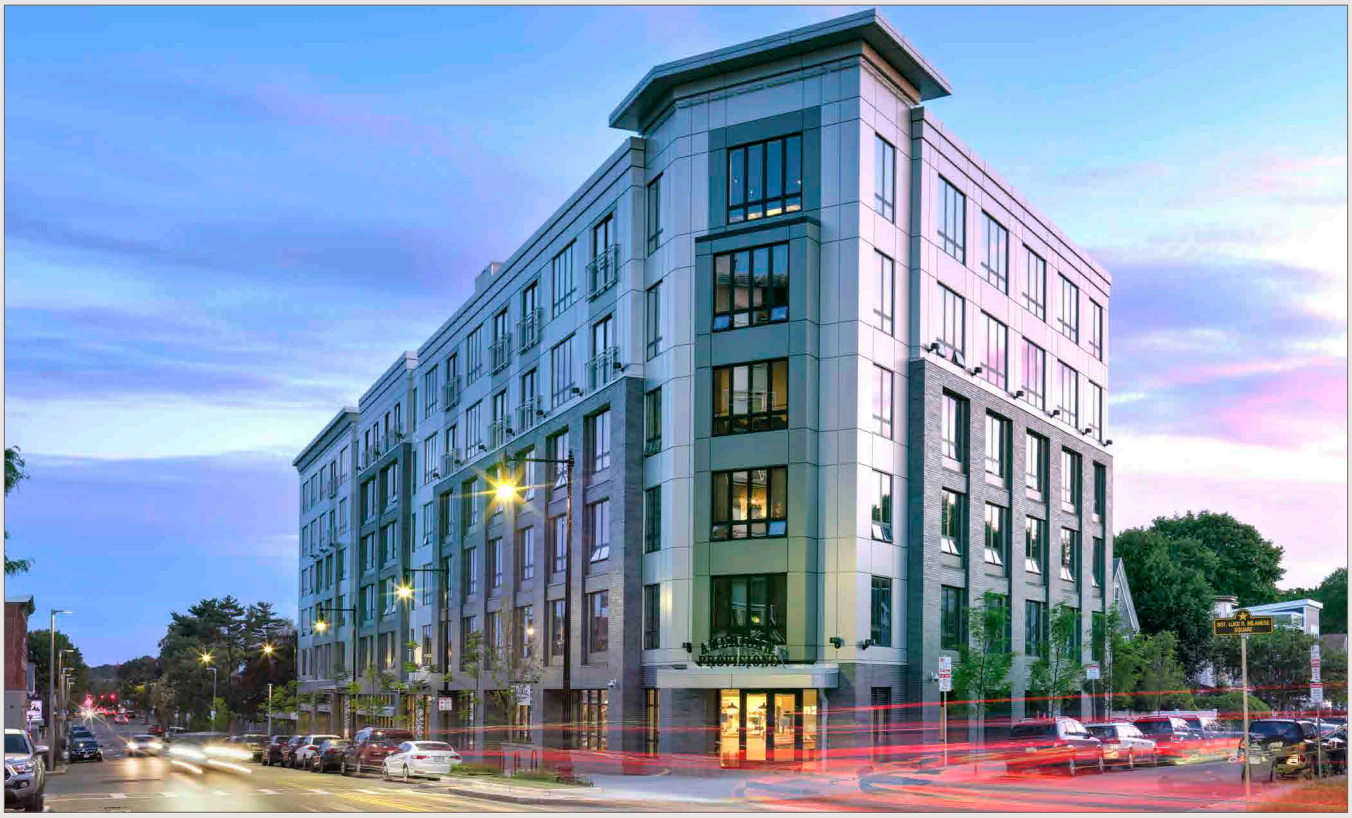








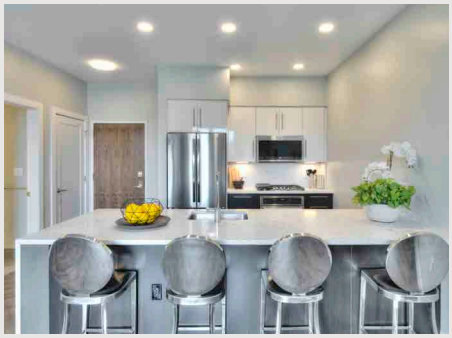
Treadmark - Dorchester, MA

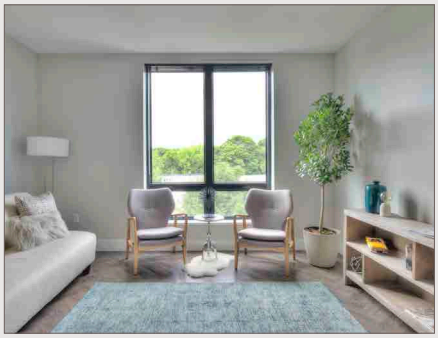


Total Development Cost: $45 million
Units: 83
Completed: 2018

Treadmark is an 83-unit, six-story building located at the end of the southern end of the MBTA's Red Line, at Ashmont Station. The site was formerly the home to Ashmont Tire shop for the past 40 years and was an underutilized site. The unit mix includes 51 Low Income Housing Tax Credit (LIHTC) rental units, affordable up to 60% of the Area Median Income (AMI) and 32 for sale condominiums. Four of the condominiums meet the requirements of the City of Boston's Inclusionary Development Policy (80-100% of AMI), 16 units are affordable to individuals making up to 110% of AMI (workforce units) and the balance are market rate.

The building also includes 5,000 square feet of ground floor neighborhood retail and 32 spaces for parking (30 garage spaces and 2 surface spaces). The project enhances the streetscape with the addition of street trees and street furniture down the block as well as the creation of 8 on-street parking spaces in front of the building. Following its sister property directly across the street, The Carruth, Treadmark is the second new construction building to be built in and around the Ashmont/Peabody Square area over the past 10 years. The building adds to the vibrancy and growth that is already well underway in the Ashmont/Peabody Square neighborhood. The building is designed by The Architectural Team with interiors by celebrity firm, Taniya Nayak Design.







Trinity Terrace - Dorchester, MA



Total Development Cost: $17.2 million
Units: 62
Completed: 2004

Trinity Terrace is a 62 unit, affordable housing development in the Four Corners neighborhood of Dorchester. The project began in 2003 with the acquisition of one privately owned parcel of land, and twenty-two parcels owned by the City of Boston. For many years the vacant lots served as dumping grounds for refuse, adversely affecting the surrounding community. The development process entailed construction of twelve townhouse structures and the rehabilitation of a 19th century commercial building that had been vacant for 30 years. The three-story commercial building provides first floor retail space, with eight housing units above. Trinity Terrace also includes a community center that provides space for property management and recreation activities for residents. Key design elements include: front porches, private outdoor space, surface parking, and a new street featuring a linear urban park.









Before Images

Van Dyke III - Brooklyn, NY



Total Development Cost: $101.3 million
Units: 180
Anticipated Completion: 2020



Van Dyke III is a 12-story, mixed-use, affordable housing project located in the Brownsville area of Brooklyn, N.Y. on the site of the Van Dyke Houses NYCHA development. When completed, the project will consist of 180 units of housing affordable to households from 30% to 60% of the Area Median Income. In addition to the residential component, the project will also consist of an Early Childhood Educational Center, a Community Health Clinic and a Wellness Center. On-site resident amenities will include a resident library, a computer lab, a fitness room, a tenant lounge, a community room, an accessible roof deck, tenant roof gardening plots, a package delivery room, and a ground floor outdoor recreational area.

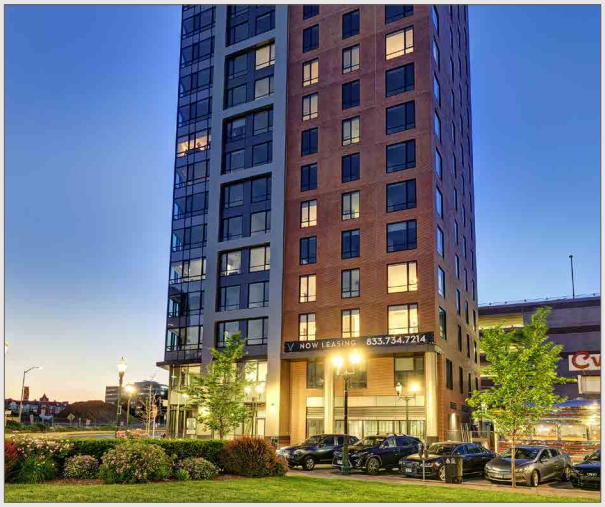
VELA on the Park - Stamford, CT



Total Development Cost: $79 million
Units: 209/Commercial: 3,800 SF
Completed: 2018

As the fourth development phase of Park Square West, Vela on the Park features 209 units and offers residents hotel inspired service and convenience. Amenities include a 19th floor roof deck space, cutting edge health and wellness facilities, pet amenities, and unprecedented park and water views.

Vela is located in downtown Stamford at the top of Restaurant Row, steps away from arts, entertainment, and gourmet food options. The development features studio, one and two-bedroom units located an eight-minute walk from Metro North and Amtrak.











Washington Beech - Roslindale, MA



Total Development Cost: $100 million
Units: 206
Completion Dates: phase 1 - 2010; phase 2 - 2011



The HOPE VI redevelopment of Washington Beech includes demolition of the existing 266 units and creation of 206 new rental units. The new site design reduces density to be more in keeping with the surrounding neighborhood. A variety of unit types replace the existing institutional walk-ups including a low-rise elevator building, garden apartments, duplexes over flats, and townhouses. New roads were built so that all unit entries front on a street and residents can park nearby. A central green space with play facilities and park benches is provided for young children and adults.

Construction of Washington Beech occurred in two stages to accommodate the relocation and re-housing of existing residents. Residents began relocation of the first phase buildings in the summer of 2008. Lease up of the new buildings was completed in December 2011, three months ahead of schedule.

Redevelopment of Washington Beech cost approximately $100 million, with $20 million provided through federal HOPE VI funds and $10 million through federal American Recovery and Reinvestment Act funding. Other funders include the Commonwealth of Massachusetts through the HOME, HSF and AHT programs, the City of Boston's Neighborhood Housing Trust Program, Department of Public Works, and Department of Neighborhood Development, the Boston Water and Sewer Commission and private equity generated from the syndication of Low Income Housing Tax credits through RBC Capital Markets.

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Mariner Mill Lawrence, MA	$36.6m (P)	$26.7m (P)	Mixed Income	84	Tax Exempt Bonds, LIHTC, DHCD, HSF, HTC	Owner Developer	2020 (P) 2022 (P)
Orient Heights Phase 3 East Boston, MA	$63.5m (P)	$22.7m (P)	Public Housing, Mixed Income	123	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2020 (P) 2022 (P)
425 Grand Concourse Bronx, NY	$175m (P)	$45m (P)	Mixed Income Rental Housing, Commercial	277 47,000 SF	Tax Exempt Bonds, HDC, HPD, LIHTC	Owner Developer	2019 2022 (P)
Washington Village CNI Phase 3 Norwalk, CT	$57.5m (P)	30.7m (P)	Mixed Income Rental Housing	108	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, NRA CTDOH	Owner Developer	2019 2021 (P)
Enterprise Center Phase 2 Brockton, MA	$60m (P)	TBD (P)	Mixed Income Rental Housing	111 414+ Parking Garage	LIHTC, Tax Exempt Bonds	Owner Developer	2020 (P) 2022 (P)
Brookfield Commons White Plains, NY	$61m (P)	$30.5m (P)	Public Housing, Mixed Income	130	Tax Exempt Bonds, Private Debt, LIHTC, HCR, HFA, Westchester County Funding	Developer	2019 2021 (P)
Van Dyke III Brooklyn, NY	$101.3m (P)	$38.8m (P)	Mixed Income Rental Housing	180 24,000 SF	Tax Exempt Bonds, HDC, HPD, LIHTC	Developer	2018 2021 (P)
Courthouse Lofts Worcester, MA	$57m (P)	$40m (P)	Mixed Income Rental Housing	115	LIHTC, Historic Tax Credits, Tax Exempt Bonds, AHT, HOME, Workforce Funds	Owner Developer	2018 2020 (P)
Orient Heights Phase 2 East Boston, MA	$51.8m (P)	$19.6m (P)	Public Housing, Mixed Income	88	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2018 2020 (P)

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Washington Village CNI Phase 2 Norwalk, CT	$51.6m (P)	25.4m (P)	Mixed Income Rental Housing	85	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, CHFA, CTDOH	Owner Developer	2018 2020 (P)
Washington Village CNI Phase 1 Norwalk, CT	$44m	20.6m	Mixed Income Rental Housing	80	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, CHFA, CTDOH	Owner Developer	2016 2018
Treadmark Dorchester, MA	$45m (P)	$22.4m (P)	Mixed Income Rental, Home-ownership, Com-mercial	83 5,000 SF	LIHTC, State LIHTC, Private Debt & Equity, Tax Exempt Bonds, DHCD, DND	Owner Developer	2016 2018
Orient Heights Phase 1 East Boston, MA	$52m	$18m	Public Housing, Mixed Income	120	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2016 2018
60 King Street Providence, RI	$22m (P)	$19m (P)	Mixed Income Rental Housing	60	LIHTC, Federal HTC, State HTC, HOME, HPP, RIDEM, Brownfields	Owner Developer	2017 2018
Arlington Point Lawrence, MA	$48m (P)	$37m (P)	Mixed Income Rental Housing	102	LIHTC, Federal HTC, State HTC, AHT, HSF, MassHousing Work Force Housing Fund	Owner Developer	2017 2019
Randolph Houses Phase 2 Harlem, NY	$67m (P)	$44m (P)	Affordable Rental Housing	115	LIHTC, Tax Exempt Bonds, HPD, HDC, His-toric Tax Credits	Owner Developer	2016 2018
Boston East East Boston, MA	$71.4m	$23.1m (P)	Market Rate Rental, Marine Related Commercial	200 50,000 SF	Private Debt & Equity	Owner Developer	2015 2017
VELA on the Park Stamford, CT	$79m	$21m	Mixed Use Market Rate Rental, Commerical	209 3,699 SF	Private Debt and Equity	Owner Developer	2016 2018

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
3160 Park Avenue Bronx, NY	$66m	$31m	Mixed Income Rental, Commercial	152 21,000 SF	LIHTC, Tax Exempt Bonds, HDC, HPD, NMTC	Owner Developer	2014 2016
Randolph Houses Phase 1 Harlem, NY	$99m (P)	$57m (P)	Affordable Rental Housing	168	LIHTC, Tax Exempt Bonds, NYCHA Capital Funds, HPD, HDC, Historic Tax Credits	Owner Developer	2013 2016
35@Eight Sixty Phase 2 Boston, MA	$35m	$18m	Mixed Income Rental Housing	102	Federal and State LIHTC, City of Boston, DHCD	Owner Developer	2014 2016
One Canal Boston, MA	$196m	N/A	Market Rate Rental, Mixed Use	310 21,000 SF	Private Equity/ Debt	Developer	2013 2016
66 Summer Street Stamford, CT	$73m	$7m	Mixed Use, Market Rate Rental Housing	209 6,600 SF	Private Debt and Equity	Owner Developer	2013 2015
Enterprise Center Phase 1: Enso Flats and Centre50 Brockton, MA	$62m	$34m	Mixed Use, Mixed Income Rental Housing, Commercial, Office, & Retail	113 62,000 SF	LIHTC, TEB, NMTC, State LI-HTC, MassWorks DHCD	Owner Developer	2013 2015
35@Eight Sixty Phase 1 Boston, MA	$56m	$28m	Mixed Income, Rental Housing	245	Federal and State LIHTC, City of Boston, DHCD	Owner Developer	2013 2014
Bristol Commons and Lenox Green HOPE VI Taunton, MA	$69m	$52m	HOPE VI Mixed Income Housing	160	Federal and State LIHTC, HOPE VI, Construction Bridge Loan, Section 108 Loan, HUD BEDI Grant	Owner Developer	2012 2014
Glenark Mills/ Glenark Oaks Woonsocket, RI	$14m	$5m	Affordable Rental	89	LIHTC, Tax Exempt Bonds, HOME, Rhode Island Housing	Owner Developer	2012 2013

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Mattapan Heights Phase 5-A Mattapan, MA	$24m	$15m	Affordable Rental	60	LIHTC, Tax Exempt Bonds, HSF, HOME, NHT, AHT	Owner Developer	2012 2012
Lucerne Gardens Dorchester, MA	$11.9m	$5m	Mixed Income	45	LIHTC, Tax Exempt Bonds, Exempt HSF, AHT, CBH, HOME, NHT	Owner Developer	2011 2012
Quinnipiac Terrace Phase 3 New Haven, CT	$15m	$4.5m	Affordable Rental Housing	33	LIHTC, Tax Exempt Bonds, City of New Haven, HANH, State, HUD	Owner Developer	2010 2011
Rowe Apartments New Haven, CT	$36m	$7.7m	Mixed Income Rental Housing	104 2,300 SF	LIHTC, Tax Exempt Bonds, City of New Haven, HANH, State, HUD	Owner Developer	2010 2011
The Regency New Bedford, MA	$30m	$11m	Mixed Income Rental Housing	129	LIHTC, MassHousing, MHP, City of New Bedford	Owner Developer	2010 2010
Appleton Mills Lowell, MA	$64m	$42m	Affordable Rental	130	LIHTC, HOME, Tax Exempt Bonds, PDF, MassHousing, HTC, AHT	Owner Developer	2009 2011
110 Canal Lowell, MA	$15m	$11m	Commercial	 55,000 SF	HTC, NMTC, Massworks	Owner Developer	2009 2012
Washington Beech HOPE VI Roslindale, MA	$90m	$45m	Affordable Rental, Affordable Home Ownership	206	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2009 2011
Avenir Boston, MA	$150m	$148.4m	Market Rate Rental, Transit Oriented Development, Commercial	241 29,000 SF	Private Equity	Developer	2007 2009

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Franklin Hill Dorchester, MA	$106m	$71m	Affordable Rental	266	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2007 2009
The Carruth Dorchester, MA	$52m	$28.2m	Transit Oriented Development, Mixed Income Rental and Home Ownership Housing, Commercial	116 10,000 SF	State LIHTC, LIHTC, HOME, NHT, PDF, TOD, Tax Exempt Bonds	Owner Developer	2006 2008
Mattapan Heights III Mattapan, MA	$27.7m	$16m	Mixed Income, Limited Equity Cooperative and Home Ownership	73	HTC, LIHTC, HSF, HOME, NHT, PDF, AHT, Tax Exempt Bonds, State LIHTC	Owner Developer	2006 2008
Foundry Square Newburyport, MA	$7.2m	N/A	Mixed Income, Home Ownership	20	HSF, AHT, HOME, North Shore - HOME, City of Newburyport	Developer	2005 2006
The Riverway Dorchester, MA	$7.92m	N/A	Commercial	61,000 SF	Private Financing	Owner Developer	2005 2006
Quinnipiac Terrace HOPE VI New Haven, CT	$62m	$19.2m	Mixed Income Rental	160	HOPE VI, LIHTC, City of New Haven	Owner Developer	2004 2008
Mattapan Heights II Mattapan, MA	$28.9m	$21.3m	Mixed Income Rental	83	Tax Exempt Bonds, HTC, LIHTC, CDBG, NHT, AHT, State LIHTC	Owner Developer	2004 2005
Maverick Landing HOPE VI East Boston, MA	$105m	$50m	Mixed Income Rental	396	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2003 2006
Carlton Wharf East Boston, MA	$7m	$12m	Workforce Home Ownership	30	HOME, HSF, AHT, NHT, CDBG, MTC, Construction Loan Linkage Sources	Developer	2003 2005

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Trinity Terrace Dorchester, MA	$17m	$11m	Mixed Income Rental	62	LIHTC, HOME, CDBG, HTC	Owner Developer	2003 2004
Newport Heights HOPE VI Newport, RI	$73m	$37.8m	Mixed Income Rental	299	HOPE VI, LIHTC, HOME, FHLB, Tax Exempt Bonds	Owner Developer	2002 2007
The Foley Mattapan, MA	$20m		Affordable, Assisted & Independent Living, Supportive Housing	116	LIHTC, HTC, HOME, CDBG, FHLB	Owner Developer	2001 2003
Shaw's Supermarket Lower Mills Dorchester, MA	$24m	N/A	Commercial Supermarket	59,800 SF	Private Financing, HTC	Owner Developer	2001 2003
Winchester Park Ipswich, MA	N/A	N/A	Open Space Subdivision	20 Lots	Private Financing	Owner Developer	2001 2002
Harborlight House Beverly, MA	$3.5m	$1.8m	Assisted Living	35	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	2000
Mass Pike Towers Boston, MA	$19.7m	$4.7m	Mixed Income Rental	200 10,000 SF	Tax Exempt Bonds, LIHTC 4%, HOME, Sec. 236	Owner Developer	2000 2000
Davenport Commons Boston, MA	$50m	$0	Mixed Income Home Ownership and Student Residences, Neighborhood Retail	200 2,100 SF	Tax Exempt Bonds, HOME, Taxable Bonds, FHLB Linkage, HOPE VI	Developer	1999 2001
Southwark Plaza Philadelphia, PA	$57m	$18m	Mixed Income Rental	470	Tax Exempt Bonds, LIHTC 4%, HOME, CDBG, HUD Mixed Finance	Development Manager	1998 2000

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Countryside Village Marlborough, MA	$6.9m	$2.9m	Mixed Income Rental	118	LIHTC, HOME, Sec. 236	Owner Developer	1999
Orchard Gardens HOPE VI Roxbury, MA	$58m	$27.3m	Mixed Income Rental	331	HOPE VI, LIHTC, CGP, HTC	Owner Developer	1998 1999
Camfield Gardens Roxbury, MA	$16m	N/A	Mixed Income Rental	131	HUD Demo Disposition	Development Consultant	1998 1998
Beverly YMCA Cabot Street House Beverly, MA	$3.8m	$2m	SRO/Efficiency	45	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	1998 1998
Springfield YMCA Chestnut Street Residence Springfield, MA	$3.8m	$1.9m	SRO/Efficiency	104	LIHTC, HOME CDBG	Development Manager	1997 1998
Sonoma, Maple, Schuyler Dorchester, MA	$9.8m	N/A	Mixed Income Rental	102	HUD Demo Disposition	Development Consultant	1997 1998
Beryl Gardens Roxbury, MA	$3.3m	$1.4m	Mixed Income Rental	20	LIHTC, HOME, CDBG, FHLB	Development Manager	1997 1998
Madison Park IV Roxbury, MA	$12.4m	$2.6m	Mixed Income Rental	143	LIHTC, HOME, CDBG, FHLB	Development Manager	1996 1997
Smith House Roxbury, MA	$5.9m	$2.3m	Mixed Income Rental	132	LIHTC, HOME, CDBG, FHLB	Development Manager	1995 1996

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Haynes House Roxbury, MA	$9.6m	$2m	Mixed Income Rental	136	LIHTC, HOME, CDBG, FHLB	Development Manager	1995 1996
Boston YMCA Boston, MA	$7.8m	$5.4m	SRO/Efficiency	88	HTC, HOME, CDBG, FHLB	Development Manager	1995 1996
Mason Square Springfield, MA	$3.6m	N/A	Commercial	30,000 SF	CDBG, Private Financing	Development Consultant	1994 1995
Cape Ann YMCA Cape Ann, MA	$2.2m	$1.2m	SRO Commercial	52 8,099 SF	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	1994 1995
Joslin Court Syracuse, NY	$3.1m	$1.2m	Mixed Income Rental	22	LIHTC, NYHTF, NYHDF, HOME	Development Manager	1994 1995
Orchard Hill Estates Oxford, MA	$19.5m	$5.4m	Mixed Income Rental	215	LIHTC, HOME, Flex Sub, Sec. 236	Development Manager	1994 1995
Abyssinian Development Corporation New York, NY	$2.7m	N/A	Mixed Income Commercial	30 5,250 SF	FHLB	Development Consultant	1994 1995
Lucerne Gardens Dorchester, MA	$5.4m	$3.4m	Mixed Income Rental	45	LIHTC, HOME, CDBG, FHLB	Owner Developer	1993 1994
Cambridge YMCA Cambridge, MA	$4.2m	$2.2m	SRO/Special Needs	134	LIHTC, HTC, CDBG, HOME, FHLB	Developer	1993 1994

TRINITY FINANCIAL

Current and Completed Projects

In order by completion year
(P) = Projected

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Trinity House East Boston, MA	$1.5m	$700k	SRO	15	LIHTC, HTC, CDBG, FHLB	Development Manager	1992 1993
Lithgow Block Dorchester, MA	$3.5m	$1.5m	Mixed Income Rental Commercial	33 33,000 SF	CDBG, Private Financing	Development Manager	1991 1992
Egleston Center Boston, MA	$2.2m	N/A	Commercial	10,000 SF	CDBG, Private Financing	Development Consultant	1991 1992
1734 Washington Boston, MA	$2.2m	$1.1m	SRO	24	LIHTC, HTC, CDBG	Development Manager	1990 1991
Bowditch School Boston, MA	$5.2m	$2.9m	Apartments/SRO Commercial	45 4,000 SF	LIHTC, HTC, CDBG	Development Manager	1990 1991
398 Park Street Boston, MA	$1.3m	$550k	SRO/Special Needs	18	LIHTC, CDBG	Development Manager	1989 1990
300 Shawmut Avenue Boston, MA	$2m	$650k	SRO	20	LIHTC, CDBG	Development Manager	1989 1990
438 Warren Street Boston, MA	$1.1m	$500k	SRO/Special Needs	15	LIHTC, HTC, CDBG	Development Manager	1988 1989
Totals	**$3.3b**	**$1.4b**		**9,521 units** **616,100 SF**			

MADISON PARK DEVELOPMENT CORPORATION

At Madison Park Development Corporation, we are building healthy communities. MPDC is a leading developer of affordable housing and one of the largest community development corporations in Massachusetts. We take a multi-dimensional approach to community development by offering impactful programming for youth development, health and community wellness, public safety, resident leadership, civic engagement, and arts & culture.

Affordable Housing

MPDC is a major developer of quality affordable housing in Roxbury and Boston.

- Affordable & Mixed-Income
- Retail & Commercial Space



Scan me

Contact: Bob Pezzini
bpezzini@madison-park.org

Arts & Culture @ Hibernian Hall

Your home for arts & culture in the heart of Roxbury!

- Produce
- Create
- Collaborate
- Cultivate



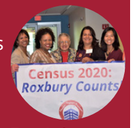
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Contact: Olawumi Akinwumi
oakinwumi@madison-park.org

Community Engagement

Building Community in Roxbury!

- Voter Registration & Education
- RoxVote
- Housing & Development Advocacy
- Civic Engagement Trainings
- Resident Association Support
- Homeownership Program
- First-Time Homebuyer Classes



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Contact: Eva Ackerman
eackerman@madison-park.org

Community Support

Supporting Roxbury!

- Village in Progress (VIP) Meetings
- VIP Block Captains
- VIP Movie Nights
- Roxbury Neighborhood Trauma Team
- SummerRox Youth Basketball
- Community Events



Scan me

Contact: Wilbur Smart
wsmart@madison-park.org

The Dewitt Center

Do it at The Dewitt!

- Classes & Programs
- Local Art Gallery
- Sports & Fitness
- Community Events
- The Dewitt Center Tech Lab



Scan me

Contact: Erica Davis
edavis@madison-park.org

Health Equity & Community Wellness

Healthy neighbors build healthy neighborhoods!



- Peer Health Leader Program
- Roxbury In Motion
- Fitness Program
- Supermarket Tours
- Nutrition Preparation Participation Class
- Community Gardens
- Kids' Garden Club
- Food Distribution

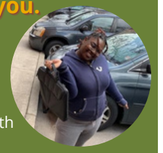
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Contact: Leslie Stafford
lstafford@madison-park.org
Chavella Lee-Pacheco
clee-pacheco@madison-park.org

Opportunity Employment Program

Looking for a fresh start? This is the program for you.

- Career Exploration
- HiSET Preparation Classes
- Job Readiness & Workforce Development Workshops
- Case Management / Mental Health Services
- Post-Secondary Educational Exploration
- Community Engagement Opportunities



Scan me

Contact: Sandra Sierra
ssierra@madison-park.org

Stay connected!

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madison-park.org

Workforce Diversity & Development

MPDC builds *and* creates job opportunities!

- Community Job Fairs
- Madison's Train 2 Trades
- Minority & Women-Owned Contractors Relief Fund
- OSHA Classes
- Applicant Referral Pool
- Minority/Women-Owned Business Enterprises Development
- Hands-On Workforce Training



Scan me

Contact: Katrina Conrad
kconrad@madison-park.org

Youth Development

Investing in Roxbury's future!

- College Tuition Assistance
- After-School Youth Employment Program (AYEP)
- Summer Youth Employment Program (SYEP)



Scan me

Contact: Yhinny Matos
ymatos@madison-park.org

DONATE!

MPDC's mission today remains true to our history—to foster a vibrant, healthy Roxbury neighborhood that supports the well-being and advancement of the community.

MAKE AN IMPACT!

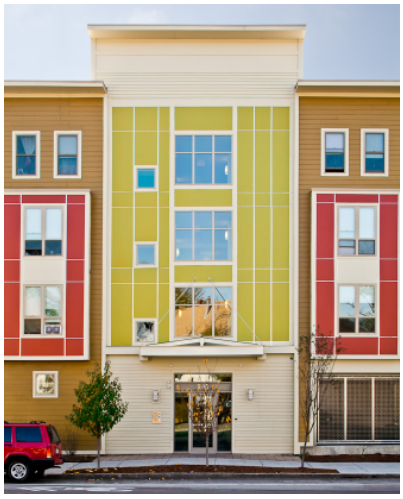
DHK ARCHITECTS



DHK ARCHITECTS

DHK Architects

Firm Overview







DHK Architects is an award-winning Boston-based architecture, and planning firm that has been in practice since 1978. With a staff of 25 professionals the company is able to provide a depth of experience and resources to meet any design challenge within their practice areas. The firm is known for its work in the realm of public facilities, multi-family housing, and transportation facilities. Over the past 40 years, DHK has successfully completed projects throughout the Northeast, Midwest, and in Puerto Rico. Services regularly provided to clients include: programming, existing facility assessment, master planning, urban design, building design, space planning, project management and construction administration and owner's project management (OPM) services.

DHK's projects range from design of small, stand-alone wood frame structures, to large, complex, multi-story, multi-use projects in dense urban areas and multi-phase transportation projects. A portion of the firm's work has involved repair, rehabilitation, adaptive reuse of expansion of existing buildings to accommodate a range of programmatic uses including housing, community facilities, retail, transit, and industrial operations. DHK was recently selected to receive a 2019 Preservation Achievement Award from Boston Preservation Alliance for the 2101 Washington Street adaptive reuse project in Roxbury and a 2019 Paul and Niki Tsongas Award from Preservation Massachusetts for the Greylock Tower Improvements Project in Adams, MA.

DHK has also provided solutions to a wide range of master planning and urban design challenges. These services supplement the traditional set of building-related design tasks, as DHK strives to better support and advise their clients. Insights that evolve from these "pre-design" activities significantly enrich later stages of projects, allowing DHK to more finely-tune traditional design services to the clients' needs.

DHK approaches projects with a macro-scale view, one not restricted to architecture. Our staff has a keen understanding of complicated design and construction methodologies and the ability to quickly conceive imaginative design approaches. Working in collaboration with specialists in appropriate engineering disciplines, we routinely create projects of strong technical merit in a fiscally- and time-responsive manner. All of our projects now incorporate sustainable and high-performance building technologies and are designed following resiliency principles to respond to ever present climactic challenges. DHK utilizes the most current design technology including the use of Building Information Systems (BIM) in all of its projects. We are committed to blending new building technologies with strong design concepts, creating buildings that create energy, not only use it.

The enormous capital costs associated with our clients' projects, and the intense public scrutiny of public agency decisions, places intense pressures on design consultants. DHK has learned that part of the solution is to give equal attention to the process of design, to the development of technical details, and also to public participation and consensus-building. The firm takes great pride in having successfully supported many complex, highly complex projects.





DHK Architects
Housing Services







DHK Architects has concentrated the greater part of its practice since 1978 on the resolution of a wide range of multi-family housing problems. Primarily, the firm has worked closely with local housing authorities, developers, and neighborhood Community Development Corporations (CDCs) in the production of new and rehabilitated affordable housing. Our portfolio includes over $700 million in housing projects, including planning and building services.

As a midsize firm, we are able to provide a depth of experience and resources to meet any housing design challenge. Our senior staff members are able to develop areas of expertise which in turn benefit the entire organization, i.e. design, specification writing, project management, construction administration, etc.

Housing projects completed by DHK include a wide range of building types, as determined by site conditions, development programs and budgets. Projects have ranged from scattered single-family and two-family wood frame dwellings, to related sets of clustered buildings, townhouse developments within an urban neighborhood, and complexes of walk-up buildings and midrise and highrise multi-use projects. The firm also designed the first state-sponsored, publicly bid modular public housing project in Massachusetts. Rehabilitation projects have ranged from moderate upgrade of existing dwellings, to the stabilization and reconfiguration of long-abandoned buildings within inner-city neighborhoods, and the adaptive re-use of older structures into affordable housing units.

DHK also offers an expanded range of services to supplement the traditional set of building design tasks, to assist clients in their response to the evolving housing development marketplace:

- **Master Planning** – Master planning services provide large-scale organizational structure, along with thoughtful consideration of public spaces and amenities, and the variety of intersections between the public and private domains that make a local urban community vibrant.
- **Programming** – DHK assesses the capacity of available property to support housing needs of an identified constituency, leading to a comprehensive development program that represents the most beneficial use of available assets.
- **Existing Conditions Assessments** – We research available public archives, prepare digitized drawings, and undertake comprehensive inspections of existing facilities to determine modernization needs.
- **Community Participation Process** – Meaningful resident participation in the design process is one cornerstone of DHK's practice.
- **Design-Build** – A variety of new project delivery methods are being tested for affordable housing development. DHK has participated in an increasing number of projects based on design-build format.
- **Historic Structures** – Repair, rehabilitation and/or restoration of buildings with significant historical value, in compliance with local, state and federal standards.

MIXED USE / MIXED INCOME

2085 Washington Street
Roxbury, MA



Ongoing design for a 170,000 sf mixed-use project completing Parcel 10 and creating a gateway marker for Nubian Square at the intersection of Washington Street and Melnea Cass Boulevard. The development program includes retail space at ground level, three levels of structured parking above grade and 117 units of housing for rental and homeownership. The design features an innovative structure that uses light steel prefabricated framing members. The project is being designed to meet Passive House standards of sustainability and it will offer affordable and market rate units.

Developer: Madison Park Development Corporation / Trinity Financial
Project Cost: $60 Million
Expected Completin 2024





2101 Washington Street

Roxbury, MA

Awarded
2019 Preservation Achievement Award
by Boston Preservation Alliance



Adaptive re-use of a 44,000 SF historic building in Nubian Square in Roxbury, MA for residential and commercial functions. The project complies with ADA accessibly guidelines for places of accommodation. Project required substantial reconfiguration of building structure of what were original three separate but attached buildings. Worked with National Park Service in determining historical features for preservation.

Client: Madison Park Development Corporation
Date Complete: 2018
Project Cost: $13 Million





Parcel 10
Boston, MA

At the crucial junction between Washington Street and Melena Cass Boulevard, this site represents the gateway into Nubian Square. With Madison Park Development Corporation, DHK was part of the team designated by the BRA to redevelop this public parcel. In addition to the public land, the site includes a portion of site and a building occupied by Tropical Foods, an ethnic food store. As master planner, DHK organized the site with three buildings, and an interior surface parking area. Buildings consist of a new 36,000 sq. ft. grocery store, a new 75,000 retail and office building, and the adaptive re-use of the existing building into street level retail and 30 units of housing above. In addition to master planner for the whole site, DHK is also architect-of-record for the retail/ office building as well as for the adaptive reuse portions of the project.

Client: Madison/Tropical Joint Venture
Total Construction Cost: $85 million
Completion Date: 2017







2147 Washington Street
Boston, MA

Ten-story building with two levels of underground parking and a total of 145,000 square feet of space. The project includes 14,713 square feet of retail at street level, 91 dwelling units of various sizes on the upper nine floors, and 93 parking spaces in underground parking below street level. The project site consists of a parcel of land with approximately 20,000 square feet, and located on a block along Washington Street, principally between Williams and Ruggles Street

Developer:	Alinea Capital Partners
Project Cost:	$35,000,000
Completed By:	Development Proposal





Four Corners (10-22 Bowdoin Street)

Dorchester, Massachusetts



Four Corners Plaza is a mixed-use affordable housing development in a neighborhood business district that will bring 31 dwelling units and 9000 SF of retail use, parking and landscaped open space. The design includes a 28-unit four story apartment building with ground floor retail facing Bowdoin Street, and three attached townhouses facing Bowdoin Avenue. The apartment building will have a hybrid structural system consisting of poured in place concrete for the basement and first floor retail, and wood framing for the three upper floors. The townhouses will be stick-built.

Owner: Codman Square Neighborhood Development Corporation
Status: Construction Documents
Project Cost: $11.7 Million



Jackson Square Site 3 Master Plan
Jamaica Plain, MA



The revitalization of Jackson Square is an ambitious transit oriented development in the area surrounding the MBTA Orange Line and bus station on Center Street in Jamaica Plain. It was undertaken through a joint venture of several CDC's. The Site 3 Master Plan by DHK extends the street network to provide access and link the development to the neighborhood. The development program includes a 104-unit condominium building with ground floor retail, a 40- unit affordable apartment building and the reclamation of vacant area subject to an MBTA access easement along the train right of way. This area will be transformed into community public space including a landscaped plaza and park, a green buffer and a bike/pedestrian path.



Client: Jackson Square Partners
Cost: Study
Schedule: Start 2013, Complete 2014



278 Union Street
New Bedford, MA

Located in the heart of New Bedford, this is the first new construction apartment building in the City in a very long time. The project addresses the needs of market housing in addition to the needs of affordability. The six story plus basement building includes 53 residential units, 4100 square feet of retail along Union Street, plus 37 underground parking spaces. The residential portion includes amenities such as a fitness center, a business center and meeting rooms. As it rises from the lower levels , the 75000 SF building partakes magnificent view of from the upper floors. The architecture of the building is contemporary and simple. Units are endowed with plenty of natural light and ventilation, creating a transparent and semi-transparent architectural element. Most units will have balconies from which views out to the New Bedford harbor can be observed.



Developer : Alinea Capital Partners LLC
Construction Cost: $15 million
Completed By: Development Proposal





The Home for Little Wanderers
Roslindale, MA



Design of a two-building, mixed-use project that combines clinical services for the Home for Little Wanderers organization, along with workforce housing and other community facilities. The 120 unit development consists of one building, with 96 units, contains one level of parking at grade and covered by a structured deck. The other building, contains 24 units for clients of the Home for Little Wanderers, plus 40,000 square feet of clinical and office space. The clinical component of the program includes space for the Dimock Street Health Center to provide out-patient medical services and for the Home for Little Wanderers to provide counselling and other support services.



Washington Village, Phase Three
Norwalk, CT



North Elevation

On-going project for the new construction of 108 housing rental residences in two (2), five (5) story buildings, site improvements and landscaping. The work also will require the abatement and demolition of five (5) existing two-story masonry buildings and a community building. Located on the existing Washington Village federal housing development in the South Norwalk Neighborhood of Norwalk, CT, the project is the third phase of a larger multi-phase redevelopment effort that will replace the existing, obsolete 136-unit Washington Village public housing project with a new 273-unit, mixed-income community consisting of 54 public housing units, 27 moderate-income/work-force units, and 27 market rate units.

Owner: Norwalk Housing Authority
Client: Trinity Financial
Project Cost: $46 Million
Date Completed: Ongoing



South Elevation



West Elevation

92 Grand Street Housing

Worcester, MA



Redevelopment of an empty site to create an affordable housing complex with 48 dwelling units and retail space. The flat site is bounded by public streets on three sides and residential development on the fourth side. Six (6) proposed woodframe structures will consist of attached two and three story townhouses. Four of the buildings will have a three-story multifamily block on one end. The interior of the site will accommodate at-grade parking, a common area with landscaped green space and semi-private rear yards for the townhouse units.



Owner: Main South Community Development-
Client: Main South Community Developmen
Project Cost: $11.6 Million
Completion Date: Expected 2021





The Modern 1.0 & 2.0 Condominiums

Boston, MA

This development spearheaded an effort to revitalize a neglected, underused block within the historic district of the South End that had been occupied by garages for many years. The Modern 1.0 is the first phase of a two-part project. It contains 25 market rate condos on five upper floors and affordable artist's lofts and parking on the ground floor. It has a penthouse loft at roof level and outdoor roof decks.

The Modern 2.0 is the second phase of the revitalization effort, built on an adjacent parcel. It is a 43,500 sq. ft. building with 37 loft-style condominiums, including seven affordable artist live/work units on the ground floor. Although the two buildings have separate entrances, they are functionally integrated and share an internal stair and access to grade level parking in the rear.

The interiors of both buildings are designed to satisfy the contemporary demand in urban markets for moderately sized and moderately priced but spacious units with flexible, open floor plans. The exterior treatment is a striking contemporary design that skillfully combines metal and glass with masonry cladding to successfully integrate the new buildings with a historic factory building located across the street. Both buildings use a similar palate of colors and textures that are woven together to create a rich and dramatic presence on the street. However, the Modern 2 adds a distinctive character of its own by introducing subtle differences in colors, textures, detailing and proportions.

The Modern 1.0

Client:	SoCo Lofts LLC
Complete:	2007
Project Cost:	$6.7 million

The Modern 2.0

Client:	SoCo Lofts LLC
Cost:	$9.5 million
Complete:	2011



Modern 1.0





Modern 2.0



SUSTAINABILITY

DHK Architects
Sustainability Overview

DHK has enthusiastically pursued a commitment to sustainability in our designs for both public and private sector clients in housing, transportation, and facilities. DHK's LEED Accredited Professionals work closely with our clients and consultants to incorporate best practices of green design in our work. Our projects have embodied sustainable practices that include site restoration and storm water management, high performance building envelopes, enhanced indoor air quality control, high efficiency HVAC systems and selection of building materials for low environmental impact. DHK has completed a number of LEED or LEED equivalent certified projects as well as other "certifiable" ones. All of DHK's projects in the City of Boston for the past ten years were developed under Article 37 of the Zoning Code that requires these projects to be LEED "certifiable".

DHK has also completed several LEED certified projects, including recently the Whittier Street Health Center, the Levedo Apartment building, and 20 at LUMA, an affordable homeownership project. Several of projects that we completed for the MA Army National Guard meet the Sliver certification level under the Army's SpiRit program, which is equivalent to LEED Silver. DHK is also the architect of record for a "Net Zero Energy" project for the MWRA that is in final design and has an estimated construction cost of $44 million.

The pursuit of a sustainable ethos in an organization needs to be nurtured from the inside. As the art and the science of sustainability continue to evolve DHK promotes a culture within our organization that is sensitive to, aware of and knowledgeable about the issues, technological innovations and politics that surround this field. DHK promotes this through an earnest pursuit of sustainability at all project levels and by nurturing a culture of sensitivity to the complex world that sustainability represents. We encourage all members of the firm to learn more about the field to get LEED certified. The firm will pay for the employee's study materials and preparation for the LEED exam. As a result, almost half of our professionals are currently LEED certified. The firm strives to disseminate the message through seminars and events where the subject of presented and discussed. To this end DHK has sponsored a series of in-house learning seminars led by experts in the field of "passive house". DHK is currently designing a 12-story residential building on the conrer of Melnea Cass Boulevard and Washington Street which will be the first passive house project in Roxbury and a significant milestone in Boston.

These DHK projects are designed to LEED Standards and demonstrate our commitment to sustainable design:

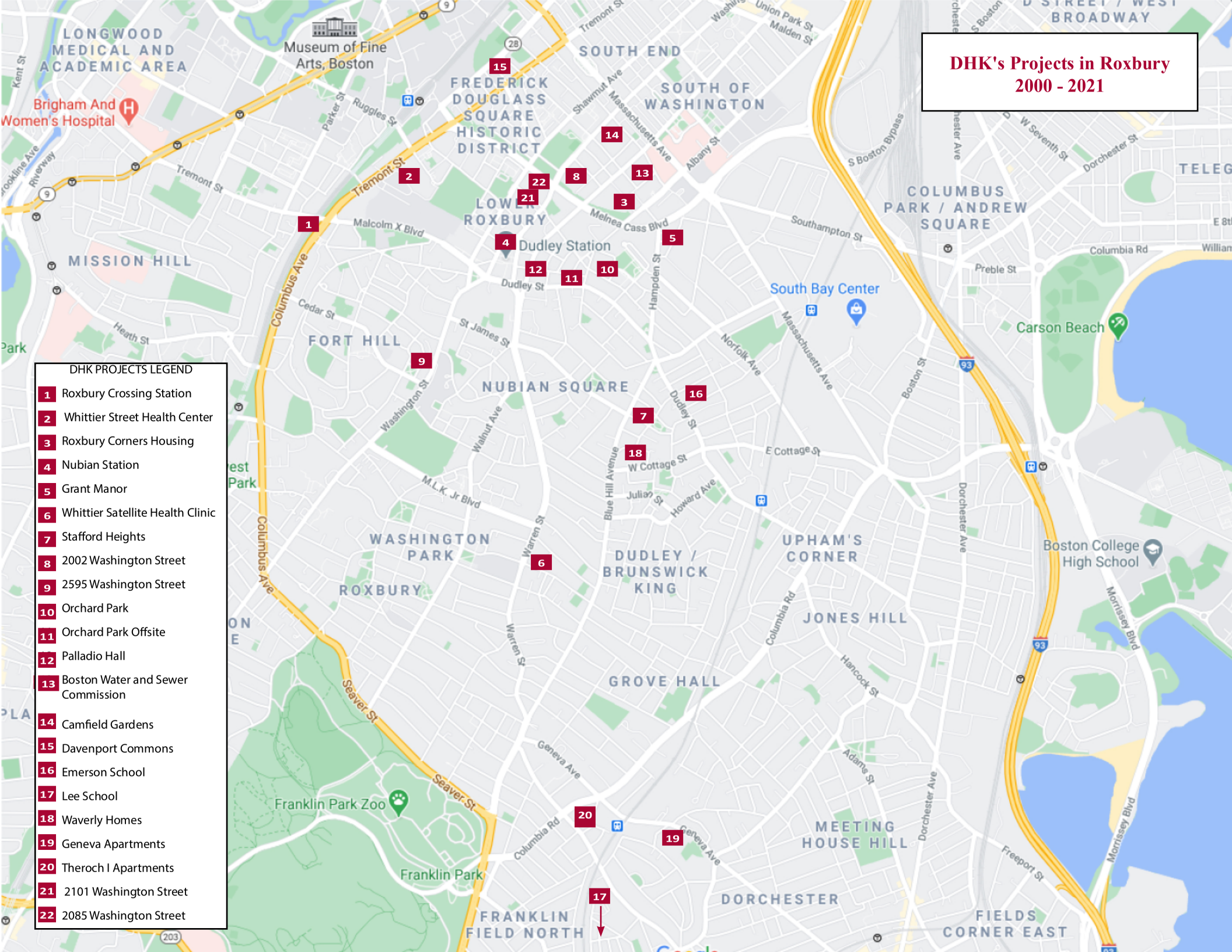
- Levedo Housing, Boston, MA (LEED Silver certified)
- 20 @ Luma, Boston, MA (LEED Silver certified)
- Markham Gardens, Staten Island, NY (LEED Silver certified)
- Whittier Street Health Center, Roxbury, MA (LEED Silver certified)
- Franklin Hill Housing, Boston, MA
- Franklin Hill Boys and Girls Club, Boston, MA
- Mattapan Heights, Phase V, Mattapan, MA
- MAANG Vehicle Maintenance Facility, Reading, MA - Eligible for Silver Award by the DoD SPiRiT ; the Army's equivalent to LEED
- MAANG Natick Readiness Center, Natick, MA
- Myrtle-Wykoff Station Complex Rehabilitation, New York, NY(LEED Silver certified)





ROXBURY PROJECTS




DHK's Projects in Roxbury
2000 - 2021
DHK PROJECTS LEGEND
1 Roxbury Crossing Station
2 Whittier Street Health Center
3 Roxbury Corners Housing
4 Nubian Station
5 Grant Manor
6 Whittier Satellite Health Clinic
7 Stafford Heights
8 2002 Washington Street
9 2595 Washington Street
10 Orchard Park
11 Orchard Park Offsite
12 Palladio Hall
13 Boston Water and Sewer Commission
14 Camfield Gardens
15 Davenport Commons
16 Emerson School
17 Lee School
18 Waverly Homes
19 Geneva Apartments
20 Theroch I Apartments
21 2101 Washington Street
22 2085 Washington Street
LONGWOOD MEDICAL AND ACADEMIC AREA
Museum of Fine Arts, Boston
Brigham And Women's Hospital
FREDERICK DOUGLASS SQUARE HISTORIC DISTRICT
SOUTH END
SOUTH OF WASHINGTON
LOWER ROXBURY
Dudley Station
COLUMBUS PARK / ANDREW SQUARE
MISSION HILL
FORT HILL
NUBIAN SQUARE
South Bay Center
Carson Beach
WASHINGTON PARK
ROXBURY
DUDLEY / BRUNSWICK KING
UPHAM'S CORNER
Boston College High School
JONES HILL
GROVE HALL
MEETING HOUSE HILL
DORCHESTER
FRANKLIN FIELD NORTH
FIELDS CORNER EAST
Franklin Park Zoo
Franklin Park
Tremont St
Malcolm X Blvd
Columbus Ave
Melnea Cass Blvd
Dudley St
Washington St
Warren St
Blue Hill Avenue
Seaver St
Geneva Ave
Columbia Rd
Dorchester Ave
Morrissey Blvd
Southampton St
Preble St
Boston St
Norfolk Ave
Massachusetts Ave
Hampden St
Howard Ave
Hancock St
Freeport St
E Cottage St
W Cottage St
M.L.K. Jr Blvd
Albany St
S Boston Bypass
Dorchester St
Cedar St
Heath St
St James St
Walnut Ave
Julian St
Adams St

2101 Washington Street

Roxbury, MA

Awarded
2019 Preservation Achievement Award by Boston Preservation Alliance



Adaptive re-use of a 44,000 SF historic building in Nubian Square in Roxbury, MA for residential and commercial functions. The project complies with ADA accessibly guidelines for places of accommodation. Project required substantial reconfiguration of building structure of what were original three separate but attached buildings. Worked with National Park Service in determining historical features for preservation.

Client: Madison Park Development Corporation
Date Complete: 2018
Project Cost: $13 Million





Whittier Street Community Health Center
Roxbury, MA

A/E design services for new 80,000 sq. ft. community health center facility for the Whittier Street community in Roxbury. The program includes the design of clinics for urgent care, pediatrics, internal medicine, dentistry, OB/GYN, counseling services, administrative offices and retail space. Energy efficient and sustainable design components will allow this project to become LEED Silver certified.

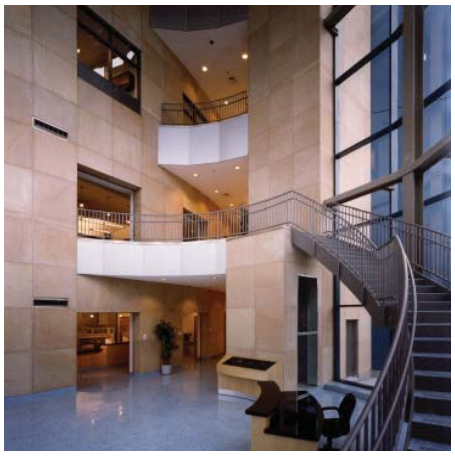
Client: Whittier Street Health Center
Date Completed: 2011
Project Cost: $26 million







Boston Water & Sewer Commission Headquarters
Roxbury, MA









DHK was architect-of-record for the adaptive reuse and additions to an abandoned warehouse to house the consolidated operations and administrative functions of the Boston Water & Sewer Commission. The project also included partial demolition and rehabilitation of an adjacent light industrial building, and surface parking for 500 cars on adjacent sites. The final building configuration totaled 315,000 sf, almost double the size of the original structure.

Treatment of the building exterior reflects the different programmatic elements within: office spaces; industrial spaces; vehicle storage; public entrance; and circulation stair towers. A select palette of materials, colors, and finishes identifies the various functions while maintaining a compositionally unified whole. Stone, precast and steel-faced panels of similar color and texture provided a continuous base to the upper office floors of architectural aluminum panels and glass. The facetted glass atrium and projecting steel and glass canopy anchor the building to the most public corner of the site while providing a welcoming gesture through the use of transparency and light.

DHK was retained again in 2014 by the Boston Water and Sewer Commission to assist in the process of adding new departments as well as expanding several existing departments. Based on DHK's knowledge of the building and the client, DHK first performed a space planning study. The objective of the assessment was to evaluate the current space usage of the offices areas in the main office building and identify alternatives to utilize the space more efficiently. Another objective is to maximize the flexibility of interior spaces to accommodate the current organizational structure and workflows as well as future needs for new work processes and / or employees. On the basis of this study, DHK performed the design and oversaw the construction of these modifications, inclusive of all the FFE.

In 2018 DHK was again retrained to perform a comprehensive facility programming study for the entire building, which focused on departmental organization and adjacencies, responding to changes in reporting, operations, and technologies over the years since the building first opened.

Owner Boston Water and Sewer Commission
Project Cost: HQ: $33 million, MIS Expansion Study Design Cost Estimate: $400K , Comprehensive Facility Programming Study N/A
Date Complete: HQ: 2001, Study- 2015, Design Task 1 &2 2016
Comprehensive Facility Programming Study 2018

Davenport Commons
Roxbury, MA



This project seized a landmark opportunity to accommodate student housing and affordable housing on public land through a unique partnership between the university and the developer. The development provides 125 apartment style dorms that accommodate 610 student beds in two 6-story structures, plus 60 affordable townhouse condominiums on two adjacent sites. The final design was the result of intense negotiations with community activists, the BRA, and the Boston Civic Design Commission. The site planning reinforces a strong existing urban grid, locating the taller structures (the student component) on the north end of the site closer to Northeastern University. The student housing contains 5 bed suites, with two doubles, and one single bedroom, plus living, dining and compartmented bathrooms. The first floor contains ancillary spaces including lobbies and student lounges. The affordable housing component includes a series of interconnected townhouses each containing four dwellings, a pair of side-by side duplexes stacked in a 4-story structure. Street frontage has been thoughtfully shaped in response to the architectural context of the surrounding neighborhood. Interior courtyards are exterior "rooms," extensively landscaped to provide a strong sense of place and community. Davenport Commons was developed through a design/build/lease-back agreement between a private real estate



DHK was awarded a
2002 Grand Award
by the National Commercial
Builders Association for its design of
Davenport Commons.





Client: Trinity Financial Group
Date Complete: Spring 2001
Project Cost: $35 million

Orchard Park Homeownership (Twenty At Luma)

Roxbury, MA



The revitalization of inner city neighborhoods is a long and arduous process that can only achieved through multiple initiatives. This 20-unit project was built on vacant lots and it fills a decades-old gap in the urban fabric. It provides an opportunity for families of moderate incomes to take a stake in their community by investing in affordable homeownership. It is one more initiative that helps to complete the transformation of a neighborhood that began more than a decade earlier with the HOPE VI program for the revitalization of the Orchard Park public housing development. Twenty at Luma includes 16 two-family homes and 4 town houses designed to help re-establish the lost urban fabric on three sides of a city block. Townhouses hug the edge of the site, reinforcing the street wall and animating it with large windows, doors, stoops, gables, porches and cornices - architectural features that bespeak the presence of a revitalized residential community. Sustainability was a key goal and the buildings meet LEED Silver standards for energy efficiency with features that include photovoltaic solar panels on the roofs.

Client: Madison Park Development Corporation
Complete: 2011
Project Cost: $4.5 million





Theroch I Apartments

Roxbury, MA





Theroch I Apartments was part of MassHousing's Demonstration Disposition Program, a group of HUD-financed, severely distressed residential developments that underwent comprehensive modernization to reflect the needs of current tenancy.

Theroch I included 7 buildings on scattered sites which originally housed a total of 109 apartments - the completed project provides 99 dwelling units. The masonry structures were stripped to the frame, floor plans reconfigured, and windows replaced. Exterior masonry has undergone substantial restoration, and some roof repairs were required as well.

All building systems were replaced, along with utility connections. Complete fire sprinkler / smoke alarm systems were also installed. The structures were permitted under the 5th Edition of the State Building Code under the alternative compliance provisions, which allow for development of a reasonable degree of conformance with current code standards for pre-existing buildings.

Client:	Massachusetts Housing Finance Agency, Agents for HUD
Complete:	2004
Project Cost:	$10.4 million

Orchard Gardens Revitalization

Roxbury, MA

Orchard Gardens is recognized as one of the nation's most successful examples of a new concept in community revitalization: HUD's HOPE VI public housing program. The new Orchard Gardens replaced a failed, dysfunctional public housing development with a mixed income community of over 200 units of affordable family housing in an inner city neighborhood. DHK developed a master plan that included a new street network designed to re-integrate the development with the surrounding community, the preservation of an historic school building converted to housing, and the re-development of old Orchard Park as a major asset at the heart of the new community. Implementation took place in two phases. The first consisted of 90 units including two and three story townhouses and detached two-family buildings. The townhouses provide two and three bedroom units with private rear yards. The two-family structures house larger units with 3, 4 and 5 bedroom units and have larger yards. The second phase of implementation was designed to consolidate the core of the neighborhood around the public park and the rehabilitated Dearborn School, and to create the setting for a new K-8 public school. It included the conversion of the school building to house one-bedroom units and community space, as well as the construction of additional townhouses for a total of 115 units. These were designed as attached two-family, two-story buildings with interlocking 2BR/3BR duplexes, and as three story walk-ups with stacked one-bedroom flats.

Client: Trinity Financial and Madison Park CDC
Complete: 2000
Project Cost: $30 million



Orchard Park **Site Plan**





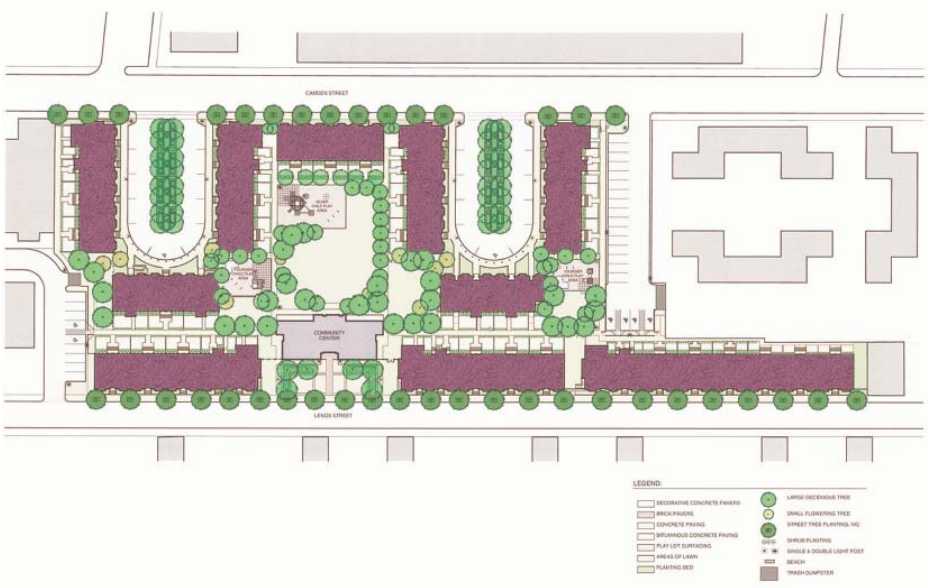


Camfield Gardens Revitalization

Roxbury, MA



The redevelopment of Camfield Gardens illustrates a new paradigm for the renovation of residential communities in inner city neighborhoods. Where insensitive, speculative development had ravaged the historic urban fabric, this new community reintroduced the traditional concept of residential streets and cul-de-sacs lined with townhouses. It replaced a HUD subsidized project built in 1969 that contained 136 units in 5 precast concrete buildings arranged in a haphazard manner on an asphalt paved superblock. The new design's intent was to shape the buildings and the site to create a sense of community and respect the patterns of adjacent buildings and streets, something the 1969 project totally failed to do. The new Camfield consists of 10 residential buildings with 102 family apartments in three story townhouses, each with defined front and rear yards and direct access to defensible community space. In addition, a new 5,000 sf. community building provides space for management and resident recreation and educational activities.





Client: Massachusetts Housing Finance Agency
Date Complete: 1999
Project Cost: $15 million

Palladio Hall Historic Rehabilitation
Roxbury, MA

This urban renewal project is located in the historic section of the Dudley Square area of Roxbury, MA. The building was originally constructed in the late 19th century and contained 16,000 sf of space for retail stores, offices and an assembly hall.

The scope of work includes complete shell and core renovations of the upper floors for new office space and upgrading of all retail areas on the first floor. Renovations include new fire protection, plumbing, mechanical and electrical systems throughout the building; new windows, new roofing, repairs and restoration of the existing facade; new storefronts at all retail areas, replicating the original details that have been lost; interior renovation to accommodate proposed office spaces; restoration of an existing monumental wood and marble staircase.

This project has a phased construction plan to allow for renovations to occur with a minimal amount of disruption to the existing businesses.

Client: Nuestra Communidad Development Corporation
Complete: 1999
Cost: $1.8 million



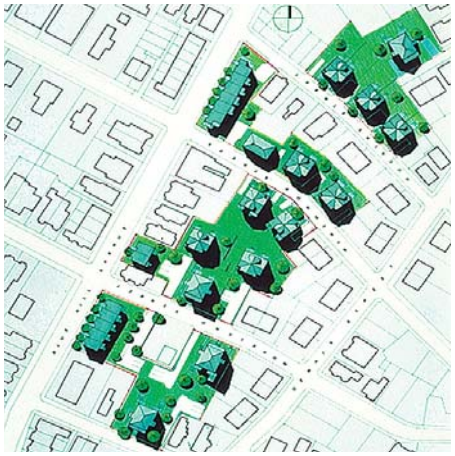




Stafford Heights
Roxbury, MA









These contiguous parcels of land located off Blue Hill Avenue in the Roxbury district of Boston were a wasteland and dumping ground. After years of urban decay and abandonment, this development of 41 units, undertaken by a non-profit organization, commences to reclaim this old neighborhood.

New townhouses now line the edge of Blue Hill Avenue, creating an articulated urban wall. The side streets contain two-family and three-family detached buildings. All buildings have individual front entrances, front porches, rear decks, private parking spaces, and individual backyards.

A 1500 sq. ft. community building, located on one of the inner streets serves for a wide variety of activities.

The scale of the buildings has been kept consistent with the neighborhood, and their architectural expression draws on the many details that make up the buildings of the area. Color is used in many different combinations to add liveliness and individuality to the ensemble, while the details, such as porches, columns and bright white trim provide continuity throughout this community.

Client:	Nuestra Communidad Development
Complete:	1996
Project Cost:	$4.6 million

This project was the subject of a very positive article by Robert Campbell, architecture critic of the Boston Globe, August 1, 1996.

The Boston Society of Architects honored this project in 1998 with an "Award for Design Excellence."

Waverly Homes
Roxbury, MA







Waverly Homes consists of 13 units of wood-framed residential units developed by Nuestra Comunidad Development Corporation as a "for-sale" project under the auspices of the City of Boston Public Facilities Department.

The project is also part of the Blue Hill Avenue initiative intended to revitalize residential and commercial areas along one of the city's major thoroughfares. The project was designed and built in two phases. Typical houses are semi-detached two family structures, three bedroom townhouses on three separate living levels. All units/houses were built with separate dining rooms, full basements with bulkheads, one-and-a-half baths, front porches and rear decks.

Phase II also has two single family building types: one a variation of the semi-detached three bedroom unit; the other a variation to provide an accessible unit. The project is located on four separate sites along or adjacent to Blue Hill Avenue.

Client:	Nuestra Communidad Development
Complete:	1996
Project Cost:	$2.06 million

Roxbury Corners Cooperative Housing
Roxbury, MA







This 54-unit limited equity development occupies the former sites of vacant buildings and empty lots, and included the renovation of two existing buildings. The majority of the units are two-, three-, and four-bedrooms, designed with families in mind. A particular challenge of the project was to provide each family unit with its own front door and yard or balcony, while still keeping the development within an affordable housing budget. The requirements to create as many individual entrances as possible, as well as the need for high density led to a scheme of "overlaying" floor plans. The main building section consists of a pair of side-by-side duplex units, with another stacked pair on top, all of these accessed from individual doors at each "stoop", topped by single-loaded corridor flats (accessed by elevator) located on the fifth level of the structure. In addition to the housing units, the development includes 5,900 sf of first-floor commercial space, as well as site design and landscaping. A special effort was made to fit the development architecturally and historically into the neighborhood, which involved incorporating the original brick facades of the renovated buildings into the design, along guidelines established by the South End Landmark Commission and the Massachusetts Historical Commission.

Client:	United South End/Lower Roxbury Development Corporation
Complete:	1991
Project Cost:	$6.5 million

The Boston Society of Architects honored this project in 1992 with an "Award for Design Excellence."

Roxbury Crossing Station
Roxbury, MA







When the MBTA replaced the antiquated "el" service on its Orange Line branch with a new rapid transit line, the project required the design of nine new subway stations. Occupying the right-of-way carved in the 1960s for an interstate highway that was never built, the Southwest Corridor project was not only an upgrade of Orange Line service, but it was also an opportunity to link the neighborhoods torn apart by the abandoned highway project.

In keeping with the plan of all the Southwest Corridor stations, DHK (in joint venture with Jung/Brannen Associates) designed Roxbury Crossing station to best serve its primarily residential surrounding neighborhood.

The project consists of a fully-accessible, below-grade platform, a headhouse building with commercial space at street level, and a landscaped plaza with bus platforms.

Owner:	Massachusetts Bay Transportation Authority
Client:	PRC Harris, Inc.
Complete:	1985
Project Cost:	$5 million

RESUMES



Fernando J. Domenech, Jr., FAIA, LEED AP
Principal

Years Experience
40+ years; 37 years with DHK

Background
1985 - Present
President
DHK Architects

1978 - 1985
Castro-Blanco, Piscioneri & Feder Architects, P.C.

Education
1974 M. Architecture, Harvard University

1970 B. of Arts, Magna Cum Laude, University of Puerto Rico

Registration
MA, NY, PR, OH, CT, PA, RI, DC

Professional Affiliations
American Institute of Architects
NCARB
Urban Land Institute
US Green Building Council

Fernando J. Domenech Jr. received his Master of Architecture degree from the Graduate School of Design, Harvard University in 1974. He has worked since 1971 with various architectural firms in both Boston and Puerto Rico and is a Registered Architect in Massachusetts, Connecticut, District of Columbia, New York, Ohio, Pennsylvania, Puerto Rico, Rhode Island. He was recently elected to the College of Fellows of the AIA.

Mr. Domenech has led the design effort on a number of family housing projects in the office, including numerous affordable developments. He was Principal-in-Charge for the Hyde Square Cooperative Housing, which won a design award from the Boston chapter of the AIA, and two of his projects were published in Good Neighbors: Affordable Family Housing. In addition, Orchard Gardens recently won a national award, AIA/HUD Secretary "Building Community by Design", as well as a "Focus on Affordability Award" given by Builder Magazine.

His project experience includes:

2085 Washington Street - Roxbury, MA
Prinicpal in Charge of planning and design services for a 12-story mixed use building at the corner of Washington Street and Melnea Cass Boulevard, the entry to Nubian Square. The project consists of 114 residential units that include both rental and condominiums, plus 6,000 of retail at grade level. In addition in includes structured parking for 52 cars. The project establishes an important landmark in the Dudley Square area.

2101 Washington Street - Roxbury, MA
Principal in Charge of adaptive re-use of 44,000 SF historic building in Nubian Square in Roxbury MA for mixed-income residential and commercial functions. Project required substantial structural repair and reconfiguration of a challenging building structure of what were originally three separate but attached buildings. Worked with the National Park Service in determining historical window and facade features for preservation. Recipient of 2019 Preservation Achievement Award from Boston Preservation Alliance

The Home for Little Wanderers - Roslindale, MA
Principal in Charge of design for a 120 unit development consisting of two buildings. One building, with 96 units, contains one level of parking at grade and covered by a structured deck. The other building, contains 24 units for clients of the Home for Little Wanderers, plus 40,000 square feet of clinical and office space.

Whittier Street Health Center - Roxbury, MA
Principal in Charge for the design and construction of this major building in Roxbury consisting of 80,000 SF community health center facility for the Whittier Street community in Roxbury. The program included the design of clinics for urgent care, pediatrics, internal medicine, dentistry, OB/GYN, counseling services, administrative offices and retail space. Energy efficient and sustainable design components were part of the program to make the project LEED Silver certified. DHK provided full interior design, including FFE. DHK continues to provide advice to the institution.

Mattapan Heights 5A - Mattapan, MA
Principal in Charge of redevelopment of former circa late 1800's historic hospital that was part of the campus of Boston Speciality and Rehabilitation Hospital. The building has gone through various stages of rehabilitation and additions over its life. The current phase involves rehabilitation and conversion of the existing building into a community center. A new 74,000 SF 6-story structure on the property will contain sixteen 1-bedroom and forty-four 2-bedroom units.

278 Union Street - New Bedford, MA
Principal in Charge of project that addresses the needs of market housing in addition to the needs of affordability. The six story plus basement building includes 53 residential units, 4100

square feet of retail along Union Street, plus 37 underground parking spaces. The residtial portion includes amenities such as a fitness center, a business center and meeting rooms. As it rises from the lower levels, the 75000 SF building partakes magnificent view of from the upper floor

The Modern 1.0 and 2.0 - Boston, MA
Principal in Charge of development that spearheaded an effort to revitalize a neglected, underused block within the historic district of the South End that had been occupied by garages for many years. The Modern 1.0 is the first phase of a two-part project. It contains 25 market rate condos on five upper floors and affordable artist's lofts and parking on the ground floor. The Modern 2.0 is the second phase of the revitalization effort, built on an adjacent parcel. It is a 43,500 SF building with 37 loft-style condominiums, including seven affordable artist live/work units on the ground floor.

Franklin Hill Housing - Boston, MA
Principal-in-Charge for master planning and design services for the demolition and reconstruction of this severely distressed public housing development. The new development exemplifies best practices in community design and sustainable architecture and it is LEED certifiable. It provides a variety of housing solutions with 254 units tailored to the needs of a diverse population, and it includes community facilities and a neighborhood park. The site was totally reconfigured and organized into regular city blocks with the introduction of a grid of new public streets. The design includes a combination of midrise, six-story elevator buildings and two and half story townhouse buildings. The midrise buildings define the edges of the site, while townhouses establish a more residential scale in the center of the development. The midrise buildings contain the one- and two-bedroom units on the upper five floors, and three bedroom units on the first floor, accessed directly from the exterior. Townhouse units are strictly three and four-bedroom units, designed for larger families. Franklin Hill meets LEED Silver certification requirements.

Orchard Gardens HOPE VI - Roxbury, MA
This 120-unit HOPE VI project for the revitalization of the Orchard Park public housing project. The off-site components of the project were designed to further the integration of Orchard Gardens with the surrounding context by developing infill housing on vacant parcels. This effort focuses on several mid-size parcels of land along Dudley Street, a traditional main street in the Roxbury area. DHK designed two and three story, wood framed townhouses to re-create the missing fabric of the street.

Orchard Park Homeownership (Twenty at Luma) - Roxbury, MA
Principal in Charge for project that included 16 two-family homes and 4 town houses designed to help re-establish the lost urban fabric on three sides of a city block. Townhouses hug the edge of the site, reinforcing the street wall and animating it with large windows, doors, stoops, gables, porches and cornices - architectural features that bespeak the presence of a revitalized residential community. Sustainability was a key goal and the buildings meet LEED Silver standards for energy efficiency with features that include photovoltaic solar panels on the roofs.

Levedo Affordable Housing - Dorchester, MA
Principal in Charge for a 24 unit affordable rental housing building with an 800 SF commercial rental space located in Codman Square, Dorchester, MA. The building is located on a pie shaped lot formed by two streets. The development consists of 5 3-bedroom townhouses, 3 studio, 3 1-bedroom and 13 2-bedroom apartments. Twelve parking garage spaces will be provided at grade which will be accessed from the side street. The construction will be primarily wood frame construction with some steel between the first and second floors at the garage area. Environmentally friendly materials will be used in several areas of the building to achieve LEED standards.



Alberto Cárdenas, AIA

Principal

Years Experience
50 years; 31 years with DHK

Background
2004 - Present
Principal
DHK Architects

1987 - 2004
Senior Associate
DHK Architects

1974 - 1976
Assistant Director
Bogotá City Planning Department

1966 - 1984
Private Practice
Bogotá, Colombia

Education
1966 B.S. and B. Architecture, Rensselaer Polytechnic Institute
1987 M. Architecture, Urban Design, Harvard University

Registration
MA, NCARB

Professional Affiliations
American Institute of Architects
Boston Society of Architects

Alberto Cárdenas is an architect and urban designer with over forty years of experience including architecture, planning and teaching in the United States and Colombia. He holds B.S. and B. Arch. degrees from Rensselaer Polytechnic Institute and an M. Arch. in Urban Design from Harvard. He is a registered architect in Massachusetts and Colombia.

Since joining DHK in 1987, Mr. Cárdenas has concentrated on the revitalization of residential areas and the design of affordable housing within Boston's neighborhoods. As a principal of the firm and project manager, he has led master planning projects for both existing and new neighborhoods and has designed a broad range of housing types for both new and rehabilitated construction.

A major concern in all of the housing that he has designed with DHK has been to reestablish viable urban streets in residential neighborhoods through a community-based planning and design process in which the end users and abutters play a major role. Through this process Mr. Cárdenas has gained extensive experience in working closely with community groups, resident associations and public agencies. Examples of this work include Mission Hill Main and Orchard Gardens Master Plans for the Boston Housing Authority and the award-winning Stafford Heights Cooperative within the Dudley Neighborhood Initiative, and Davenport Commons, an innovative project with Northeastern University that comprises 125 units of student apartments and 75 affordable family units in Boston.

Prior to joining DHK, Mr. Cárdenas practiced in Bogotá, Colombia. His housing experience there includes the development, design and construction of individual and multi-family housing. He also has experience in the public sector where, as Assistant Director of the Bogotá City Planning Department, his responsibilities included design review and permitting for all residential subdivisions, drafting new zoning regulations and presiding over the Zoning Board.

His project experience includes:

Four Corners (10-22 Bowdoin Street) - Boston, MA
Principal in Charge of design of a mixed-use, affordable housing development in a neighborhood business district that will provide 31 dwelling units and 9000 SF of retail use, parking and landscaped open space.

92 Grand Street - Worcester, MA
Principal in Charge for the redevelopment of an empty site to create an affordable housing complex with 48 dwelling units and retail space. The flat site is bounded by public streets on three sides and residential development on the fourth side. Six (6) proposed woodframe structures will consist of attached two and three story townhouses. Four of the buildings will have a three-story multifamily block on one end. The interior of the site will accommodate at-grade parking, a common area with landscaped green space and semi-private rear yards for the townhouse units.

Washington Village Phase Three - Norwalk, CT
Principal in Charge of on-going project for the new construction of 108 housing rental residences in two (2), five (5) story buildings, site improvements and landscaping. The work also will require the abatement and demolition of five (5) existing two-story masonry buildings and a community building. Located on the existing Washington Village federal housing development in the South Norwalk Neighborhood of Norwalk, CT, the project is the third phase of a larger multi-phase redevelopment effort that will replace the existing, obsolete 136-unit Washington Village public housing project with a new 273-unit, mixed-income community consisting of 54 public housing units, 27 moderate-income/work-force units, and 27 market rate units.

Orchard Gardens HOPE VI Housing - Boston, MA
This HOPE VI project involved the remaking of an urban neighborhood in one of the most disinvested areas of Boston, Nubian Square. DHK's master plan called for the rehabilitation of 126 units within an existing public housing development plus new construction of approximately 220 units within the existing housing development site and new construction of 120 units on vacant surrounding sites. The proposed new development also included a new K-12 school.

Headquarters for Boston Water & Sewer Commission - Roxbury, MA
Master-planning/programming, design, CA, FFE for the adaptive reuse of existing former shoe factory that was repurposed for headquarters for the Boston Water & Sewer Commission operations. Programming and planning for the relocation of the BWSC facilities, and design and implementation of the same. Portions of the building are new; other portions of the building consist of an adaptive re-use of a former factory. Programmatic spaces include lobbies, administrative office, conference rooms, maintenance and storage rooms, locker areas and changing facilities, vehicle storage and maintenance facilities. The building configuration totaled 315,000 SF; almost double the size of the original structure and had a total construction cost of $33 million dollars.

Markham Gardens - Staten Island, NY
Thirteen acres of green residential design define the 290 units of Markham Gardens Homes. This complete revitalization of the existing Markham Gardens housing project sets a new standard for sustainability in affordable housing. This redevelopment plan is one of the first in the Northeast to garner full approval from the U.S. Green Building Council. This is the organization that monitors Leadership in Energy and Environmental Design, granting Markham with “LEED silver status”.

Lyman Terrace Revitalization - Holyoke, MA
Principal in Charge for the preservation and revitalization of a 167-unit federal public housing development located in downtown Holyoke. The project included master planning for the comprehensive redesign of the site with new residential streets, common green space and a new community building. The program for the residential buildings comprises a comprehensive renovation of all building systems, building additions for new kitchens and bathrooms, the creation of accessible units and the renovation of interior finishes.

Camfield Gardens - Boston, MA
Redevelopment project that reintroduced the traditional concept of residential streets and cul-de-sacs lined with townhouses. It replaced a 1969 project that located 5 precast concrete buildings in a haphazard manner on an asphalt paved superblock. The new design creates a sense of community and respects the patterns of adjacent buildings and streets, something the 1969 project totally failed to do. The new Camfield consists of 10 residential buildings with 102 family apartments in three story townhouses and a community building.

Ulin House Modernization - Brighton, MA
Principal in Charge for the occupied rehabilitation of an existing multi-story building within the Jewish Community Housing for the Elderly campus. The project encompassed interior renovations to the common areas and extension of office space on the first floor. Renovations included kitchen and bathroom upgrades for 240 units, creating 4 new fully accessible units as well as MEP upgrades to bring the systems up to code and to incorporate sustainable features. Work in the non-residential areas included renovation of the administrative offices and other common areas and the construction of a new entrance lobby addition.



Toshihiko Taketomo, AIA, LEED AP

Design Director

Years Experience
45 years; 3 years with DHK

Background
2019 - Current
Design Director
2017 - 2019
Senior Design Architect
DHK Architects

2013-2015
Senior Design Architect
Elkus Manfredi Architects, Ltd

2011-2013
Vice President
Monica Ponce De Leon Studio, Inc.
MPDL Design and Architecture, LLC

2005-2009 and 1989-1993 Principal
1984-1989 Associate
1979-1984 Architect
Moshe Safdie and Associates, Inc.

1993-2005, 2010, 2016
Principal
Toshihiko Taketomo Architect

Education
1975 M. Architecture
Harvard University
Julia Amory Appleton Fellowship
James Templeton Kelley Prize

1971 Bachelor of Arts
Columbia College,

Registration
MA, NY

Professional Affiliations
American Institute of Architects
Boston Society of Architects
BSA Honors and Awards Committee 2011-2014
BSA Higher Educational Facilities Awards Jury 2009

Toshihiko Taketomo, our Design Director, has over 40 years of experience with planning and architectural project development, design and management. He received his Master in Architecture from the Graduate School of Design, Harvard University in 1975. He is LEED certified and a registered architect in both Massachusetts and New York. Over his career he has been a Principal, Vice President, and design leader at various architectural firms and has worked on major institutional, academic, cultural, commercial, residential, and government projects-many of which have received multiple national and international design awards and which include winning entries for prominent institutional and mixed-use competitions. Additionally, he has also served on award selection juries for both the AIA and BSA. Mr. Taketomo has also had his own independent practice in architecture, planning, and design consulting and taught at prestigious academic institutions including the Harvard Graduate School of Design, the Rhode Island School of Design and the Boston Architectural Center.

His project experience includes:

Home for Little Wanderers - Roslindale, MA
Design for a 120 unit development consisting of two buildings. One building, with 96 units, contains one level of parking at grade and covered by a structured deck. The other building, contains 24 units for clients of the Home for Little Wanderers, plus 40,000 square feet of clinical and office space.

2085 Washington Street - Roxbury,MA
On going design for mixed-use building that will complete the third and final phase of DHK's master plan for this gateway project located at the corner of Washington Street and Melnea Cass Boulevard. The development program includes retail space at ground level, three levels of structured parking above grade and 117 units of housing for rental and homeownership. The design features an innovative structure that uses light steel prefabricated framing members. The project is being designed to meet passive house standards of sustainability and it will offer affordable and market rate units.

Four Corners (10-22 Bowdoin Street) - Dorchester, MA
Design of a mixed-use, affordable housing development in a neighborhood business district that will provide 33 dwelling units and 9000 SF of retail use, parking and landscaped open space.

24 Drydock - Boston, MA
DHK was selected to design this project for Cronin Development that recently received tentative designation from the BPDA for its development. The building is located in the South Boston Seaport District on a ¾ acre site. It will house marine-related uses including the Boston Ship Repair Company, research and development labs as well as educational and operational space for marine-related non-profits. The Cronin Group headquarters and its commissary operations will be housed in the building. The five-story structure will have 125,000 SF of space and structured parking. Project goals include a high level of resiliency, achievement of LEED Gold standards and a signature, cutting edge design that translates historic precedents into iconic imagery though the use of advanced construction technology.

Harvard Club Redevelopment Project - Boston, MA
Ongoing design services for a 200 key hotel plus new athletic facilities for the Harvard Club on club-owned land located adjacent to the main clubhouse.

Columbus Center, New York, New York
Project Architect for Design/Design team leader of winning developer-architect competition entry, responsible for overall design of $550 million, 3 million sf mixed-use complex on the Coliseum site in midtown Manhattan. The 69-story twin tower design includes 2,000,000 sf headquarters for Salomon Brothers Inc; 450,000 sf of condominiums; a 300-room hotel and a three level retail

galleria. Bid documents completed. (Moshe Safdie and Associates, Inc., Somerville, MA)

Cambridge Center, Cambridge, MA
Project Designer for four completed buildings forming the core of the master plan for the 1,500,000 sf mixed use development adjacent to the Massachusetts Institute of Technology, and now center of Cambridge's thriving innovation district. (Moshe Safdie and Associates, Inc., Somerville, MA):

- **Cambridge Center Marriott Hotel, Cambridge, MA**
  A 25 story, 431 room hotel with 10,000 sf ballroom, restaurants and public spaces opening onto a major urban plaza.
- **One Cambridge Center and Four Cambridge Center, Cambridge, MA**
  Two 12 story buildings, each providing 225,000 sf prime office space.
- **Cambridge Center Parcel Three Parking Garage, Cambridge, MA**
  850 car parking garage with public access roof garden.

High Street Atlanta Mixed Use Development, Dunwoody, GA
Senior Design Leader for Concept and Schematic Design of 2,400,000 sf, 14 acre Phase 1 components of 6,000,000 sf, 35 acre master plan for a new mixed-use lifestyle center north of Atlanta--comprised of 900,000 sf residential, 250,000 sf new office, and 140,000 sf of retail space and associated parking surrounding a .75 acre park and two level piazza that also serves to anchor the central spine and public space armature. (Elkus Manfredi Architects, Ltd., Boston, MA)

Temple Isaiah - Lexington, MA
Renovation and addition to the Sanctuary, Social Hall and Chapel Wing. Published in Houses of God – Religious Architecture for a New Millennium by Michael J. Crosbie, Images Publishing Pty Ltd, Australia, 2006 (Toshihiko Taketomo Architect)

Rosovsky Hall, Harvard Radcliffe Hillel House, Harvard University - Cambridge, MA
Project Manager/Architect of 21,000 sf, $4 million, religious-social-educational center for Jewish university community located in Harvard Square. (Moshe Safdie and Associates, Inc., Somerville, MA)

QLB BioTherapeutics - Brighton, MA
Zoning and concept design study for the expansion of research and development facilities for a leading edge biotechnology firm in Brighton, MA.

Boston University Computational Sciences Building Competition, Boston, MA
Senior Design Leader for a competition entry of a new Computational Science Building at a prime campus location on Commonwealth Avenue and overlooking the Charles River. (Elkus Manfredi Architects, Ltd., Boston, MA)

Marina Bay Sands Integrated Resort, Singapore
Principal / Design team leader of 1,250,000 sf, Meeting, Convention & Exhibition building, with 87,000 sf Grand Ballroom and 240 meeting rooms, and Podium facades development for 6,000,000 sf, 40 acre waterfront development—a new landmark harbor side city sector for Singapore. (Moshe Safdie and Associates, Inc., Somerville, MA)

Ottawa City Hall, Ottawa, Ontario, Canada
Design team leader of winning competition entry for 400,000 sf, C$60,000,000 new City Hall, including renovation and integration of the existing 122,000 sf structure. (Moshe Safdie and Associates, Inc., Somerville, MA)

STANTEC



MASTER PLANNING APPROACH AND EXPERIENCE

STANTEC'S URBAN PLACES

CRAFTED FOR THE CRESCENT PARCEL DEVELOPMENT PROPOSAL


burgers
burg
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04 // THOUGHT LEADERSHIP



↑ **Village Walk Master Plan,** Irving, Texas
Our plan turns a grayfield site into a walkable, transit-oriented community with rail connections to downtown Dallas and the Dallas/Fort Worth airport. A mix of uses and a carefully detailed public realm help the community stand out among its peer suburbs in the competition for new employers and new investment.



The world has changed

Shifts and trends are leading to an urban renaissance.

Shifting workforce demographics. The growing urgency of resilience. The expansion of the knowledge economy—and a shortage of knowledge workers. The impending mobility revolution. Converging in urban centers, these and other trends will drive a steady flow of investment over the next two decades. As the digital realm reshapes the way people live, work, and learn, in the real world they increasingly crave human interaction. They respond powerfully to unique experiences, distinctive architecture, and design that creates common, shared spaces. In short, they want walkable urban places.

We know urban

Our clients told us they wanted a more integrated approach to solving problems and seizing opportunities. They wanted a sharper focus and innovative solutions. Our Urban Places team delivers just that, with urban-focused experts in:

- Transportation, including smart and urban mobility
- Resilience
- Real estate feasibility
- Planning and urban design
- Mixed-use architecture
- Smart cities
- Brownfield redevelopment

By integrating more than a dozen disciplines, we've helped communities across the globe chart a path to greater livability, sustainability, and equity.

INSIGHT AND INNOVATION

Blending big data and on-the-ground experience, we help clients manage change by capturing the new demand for urban living. Our understanding of emerging trends allows us to create plans and designs that turn overlooked demand into authentic, vibrant places where urban life thrives.



→

Oakridge Centre Redevelopment
Vancouver, British Columbia
Architect: Stantec in collaboration with Gensler and Henriquez Partners Architects. This LEED Platinum redevelopment will create a beautiful, sustainable micro-community—all built while the mall's doors stay open.

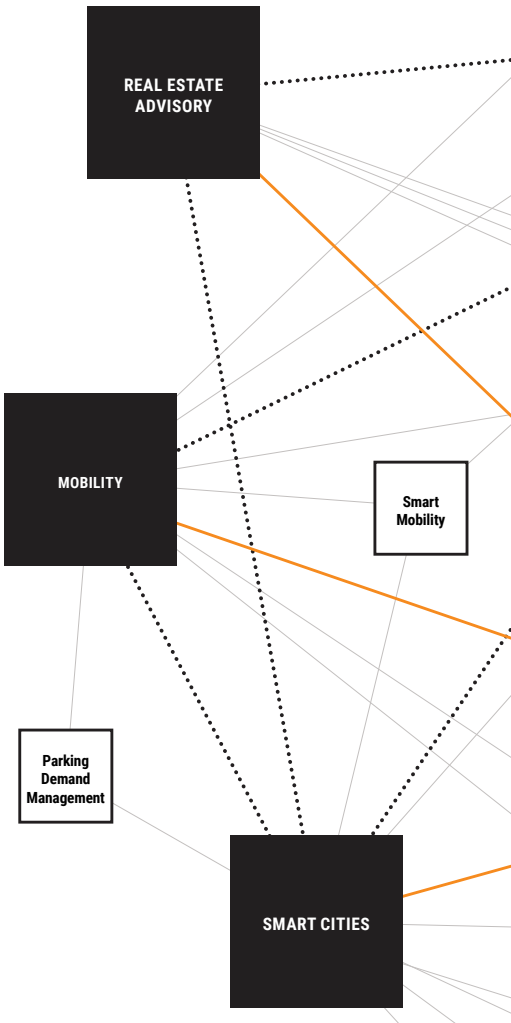

OGILVY

Who we are

Urban Places is more than just a collection of technical skills—it's an integrated approach that "connects the dots." Bringing together our best minds in multiple disciplines allows us to solve complex problems and unlock bigger urban opportunities. We've found that unexpected pairings can lead to great ideas, and we build project teams to capture those kinds of sparks while ensuring strong project management and effective working relationships.

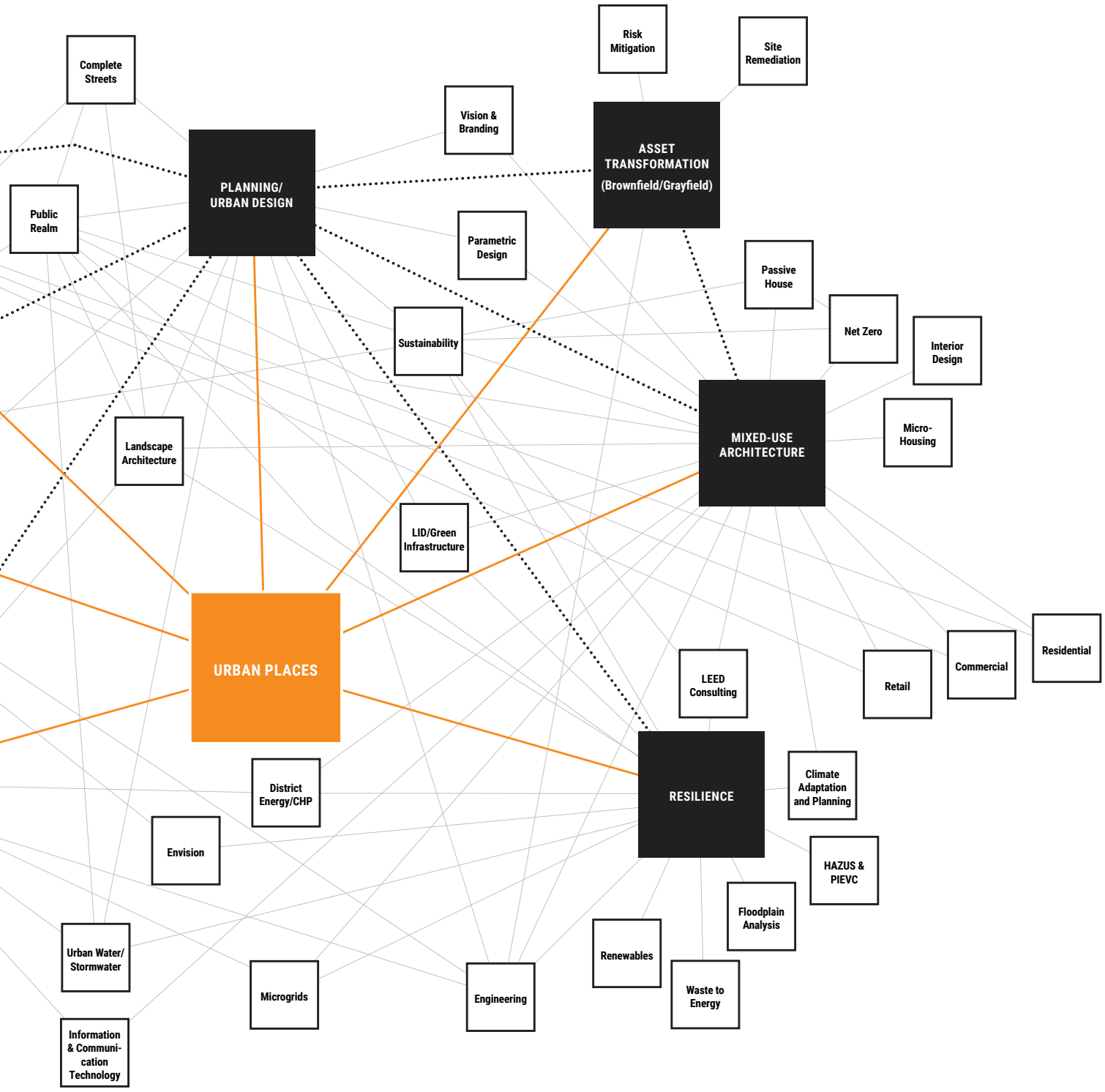
A company-wide commitment to designing with community in mind unites the team in another key way: our architects, engineers, planners, urban designers, and economists know how their own active involvement improves *their* communities. That translates directly to their work and a commitment to improving *your* community.





←

One Charlestown
Boston, Massachusetts
Through context-sensitive planning and design, our architects, planners, engineers, and real estate professionals are leading transformation of New England's largest public housing site into a sustainable, mixed-income community.


Risk Mitigation
Site Remediation
Complete Streets
Vision & Branding
ASSET TRANSFORMATION (Brownfield/Grayfield)
PLANNING/ URBAN DESIGN
Public Realm
Parametric Design
Passive House
Net Zero
Interior Design
Sustainability
MIXED-USE ARCHITECTURE
Micro-Housing
Landscape Architecture
LID/Green Infrastructure
URBAN PLACES
Residential
Commercial
Retail
LEED Consulting
RESILIENCE
Climate Adaptation and Planning
District Energy/CHP
Envision
HAZUS & PIEVC
Floodplain Analysis
Renewables
Urban Water/ Stormwater
Microgrids
Engineering
Waste to Energy
Information & Communi-cation Technology

Bringing communities to life

From urban to suburban, it all boils down to designing places for people.

WALK. WORK. LIVE.

Demographic changes have created a compelling development opportunity. Urban-loving Millennials and downsizing Baby Boomers both want to live in walkable neighborhoods. Planning for walkability demands mixed uses (which add efficiency and lower development costs) and new ways to free people from reliance on cars. Even more important, it requires design that builds in sustainability, welcomes rather than excludes, and creates places that people want to be in. You need a team that knows how to plan and design for all these moving parts.

That's us. We help our clients and their communities imagine, plan, design, build, and operate thriving communities where people can live, work, shop, and play.

We also work hard to understand what's coming next for communities. One way we do this is through a long-term partnership with the International Downtown Association to develop a Downtown Vitality Index. Building on research into what brings urban projects and districts to life, this annual index will score urban neighborhoods and centers on key economic, social, and environmental measures of downtown success.

#1

Ranking among the top 100 architecture/engineering firms, by Building Design & Construction 2017

$15+B

In planning and design of large, walkable urban districts in Charlotte, Tampa, Baton Rouge, Austin, Edmonton, and Boston.

30M

Square feet planned in new walkable, mixed-use, and authentic urban districts



Domain
Austin, Texas
Over nearly two decades, we've helped Simon Property Group re-imagine a 234-acre manufacturing site as a bustling mixed-use development. Midway through development we completely overhauled an outdated landscaping plan to introduce a truly urban feel, double down on walkability, and help establish The Domain as Austin's "second downtown."

Building resilient, sustainable communities

Effective resilience planning and design moves beyond physical changes to reinforce social, environmental, and economic systems. Long-term partnerships with resilience leaders that understand this, like the Rockefeller Foundation, extend our ability to strengthen communities across the globe.





BUILDING SUSTAINABILITY AND RESILIENCE

The worldwide acceleration of urban growth has left even the most successful cities grappling with aging infrastructure, outdated transportation networks, and rising populations. Underlying these stresses, an unpredictably shifting climate threatens the very survival of some urban areas. Weather-driven extremes—flash floods, stronger hurricanes, droughts, wildfires, and devastating heat and cold—have shown that business-as-usual planning for cities no longer works.

We plan and design to safeguard human life, protect investments, and build a sustainable and resilient future for communities. We approach this work with a clear understanding that promoting environmental stewardship—which includes working to mitigate climate impacts—simply represents the right thing to do. To us, planning today means helping cities prepare for an uncertain tomorrow with systems and programs that restore, maintain, and improve essential functions.

TOOLS WE USE

Over the last 20 years, Stantec has helped move sustainable and resilient design in North America from the fringes to the mainstream. Our experts understand green frameworks like LEED®, ENVISION®, and WELL® and know how to use them to make our clients' projects better. By embracing new frameworks, we constantly sharpen and expand the way we approach sustainability and resilient design.

That constant rethinking has led us to add a host of disciplines to our urban repertoire—including alternative-energy systems, microgrid and district-energy design, building-performance analysis, daylighting strategies, energy audits, energy performance modeling, life-cycle costing, green roof design, gray- and black-water systems, indoor environmental assessments, and natural ventilation design. Our expertise in designing and deploying these systems helps advance a sustainable agenda for our clients, our communities, and our collective future.

"Building resilience means restoring natural systems and improving social equity by advancing education, public health, and personal wealth."

John Bucher, Hazard Mitigation Planner

←

RiverWalk Urban Waterfront
Calgary, Alberta
Reclaimed brownfields create "multitasking infrastructure" that protects the city from flooding while creating new options for recreation, development, and social connection.

Evolving mobility

BRT? SAV? MaaS? No area has seen more rapid and disruptive change than smart mobility. From complete streets to long-range planning for autonomous vehicles, we help you make sense of it all.

Every week brings more changes and more choices in transportation technology and systems. Through all the upheaval, we stay focused on two goals. First, getting people to their destinations with maximum efficiency, safety, and comfort. Second, improving the design and function of everything along the way.

That's where we start when we work with you. But our understanding of the big picture—trends, technology, and best practices—means we also do something else: help you prepare for the future. That might mean creating a plan that weaves different networks into a truly multimodal system. Or managing parking to raise efficiency, lower environmental impacts, and jump-start new development. Or preparing a building or a district for the design and development opportunities that autonomous travel will bring.

Through our involvement with groups like the National Complete Streets Coalition, Transportation Research Board, Congress for New Urbanism, and many more, we're helping shape the future of North American transportation. We can help you figure out how to get the most out of an evolving mobility ecosystem. And show you how to profit from it.





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South End Vision Plan
Charlotte, North Carolina
Our community-driven South End Vision Plan balances three seemingly contradictory goals: preserving a grassroots arts scene, protecting low-income residents, and encouraging billions of dollars of new development over 750 acres along Charlotte's light rail line.

#1

At ACTIVE-AURORA, Canada's first testbed network for connected vehicles (CV), we're helping install and test CV technology on a variety of street types.

"Brownfields embody our community's history and future. I translate my vision for what they can be into value for clients and communities."

Elias Rashmawi, Vice President

Finding new value in neglected sites

We look at brownfield and grayfield projects with a developer's eye

THE ALCHEMY OF BROWNFIELDS RESTORATION

We incorporate clean-up into the overall project to expedite delivery, save our clients money, and turn risks into opportunities. We field an integrated team with a development focus that can identify opportunities and amortize costs across every phase of a project, from planning and entitlement to design and operation. Our approach lowers costs and risk while uncovering the value in your asset.

GRAYFIELDS: OPPORTUNITY HIDING IN PLAIN SIGHT

We help suburbs compete for investment and growth by transforming outmoded malls and office parks into walkable centers that mix housing, retail, entertainment and other uses. With field-leading experience in planning and creating these places, we know they can deliver a strong sense of community. We can also help local leaders shape the future by pulling together stakeholders to envision how their community can grow by embracing change.





Southpark on Whyte
Edmonton, Alberta
We worked closely with the surrounding community to build enthusiasm for "walkable density" that supports the cost of redeveloping old car dealership sites and reinvigorates this popular shopping street.

We don't just design projects, we create them

With direct experience as developers, as consultants, and as clients, our team can spot opportunities for growth and guide clients through the challenges every project faces. From due diligence and permitting to financing and development services, one integrated team develops the right strategy for your project.





“Urban professionals address the needs of our communities and help unlock the benefits of development. We build cities.”

—Nancy MacDonald, Vice President

INTEGRATED EXPERTISE

Our model offers an unconventional approach to development. It breaks down the wall between design and real estate services so that each side understands how the other works—and that both deliver targeted, informed support. Our team has deep market knowledge and the authority to engage the best designers from across the firm. This combination of market savvy and design chops helps us uncover great opportunities and build winning teams that often include developers and other services with strong local knowledge.

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Brooklyn Village Development
Charlotte, North Carolina
We’re creating a vibrant, mixed-use neighborhood in the heart of downtown Charlotte.

Smarter, connected communities

With more than 2/3 the world's people projected to live in urban areas by 2050, communities must think about how designing "smart" can help meet the environmental and social demands of urbanization.

A CITY FOR TODAY AND TOMORROW

Smart cities deploy technology to improve quality of life. They deliver services more efficiently, connect residents with government—and each other—and choose frameworks that allow the addition of future technologies as they emerge.

We help communities decide which approaches best meet their needs, taking into account factors as varied as data security, privacy protection, and equity of impacts. As an example, our long-term partnerships with various technology firms has given us particular expertise in applying digital technology to manage the procurement, distribution, and management of water around the globe.

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Preparing cities for autonomous (self-driving) transportation research project
Chicago, Illinois
How will AVs change urban design? We're on it. Funded by our in-house innovation program, we studied how downtown Chicago's streets could shrink from six lanes to two, making room for expansive pedestrian zones, stormwater swales, LED crosswalks—and major new development.




Solar panel streets and kinetic sidewalks produce energy on multiple surfaces.
Intersection of Halsted & Randolph Streets.
Bike lanes are visible and easy to access.
Crosswalks will activate and indicate right-of-way through LED equipped streetscape as pedestrians approach.



Colorado Rockies West Lot Redevelopment
Denver, Colorado
Our master plan turns a parking lot into a vibrant mixed-use square that ties the Colorado Rockies' stadium to Denver's downtown. With wall-sized projection screens, intuitive wayfinding, resilient landscape design, and interactive technology, the square will rise as a gateway, a year-round meeting place, and an icon of the city.

SERVICES

PLANNING & URBAN DESIGN

The best planning and urban design delivers a range of benefits, from lower environmental impacts to higher economic performance to a stronger sense of community. Whether planning for urban downtowns or walkable suburban centers, we set our sights on delivering plans that create distinctive and exciting places that people want to return to again and again.

RESILIENCE PLANNING & DESIGN

We take a broad view of resilience. It includes the ability to bounce back from weather-driven extremes, like hurricanes and flooding. But it also means responding to economic downturns, infrastructure delays, hackers, an aging population, terrorism, and more. Our work in resilience assessment, mitigation, and design unites new thinking about infrastructure, environment, and quality of life to strengthen communities around the globe.

SUSTAINABILITY

We think sustainable design should propel communities into the future. Informed by data and grounded in the market, our designs do that, reducing life-cycle costs, boosting energy efficiency, shrinking the carbon footprint, and supporting health and wellness. We help clients navigate the thicket of green strategies—from net-zero design and the LEED® and ENVISION® frameworks to passive house standards and the WELL® program—and choose the ones that produce better projects.

ARCHITECTURE & INTERIOR DESIGN

We create spaces that engage and excite people; enhance health and wellbeing; and advance environmental stewardship of the communities around them. Whether designing retail, hospitality, entertainment, offices or homes—or a mix of several uses—we promise creative solutions grounded in the real world.

MOBILITY PLANNING & DESIGN

Mobility is the secret sauce for urban success, from economic performance to human health to quality of life. Our multi-modal approach integrates walking, biking, transit and cars; adds key supporting systems, like parking and smart technology; and builds in flexibility for future technologies, like shared autonomous vehicles.

DEVELOPMENT & REAL ESTATE SERVICES

Every project starts with a strategic and financial plan. Our experts work with you to develop that plan by understanding real estate options, financing alternatives, and other issues from the beginning. We help you develop practical strategies that meet your financial and program goals.

LANDSCAPE ARCHITECTURE

We restore infrastructure in all its forms, creating vibrant and beautiful spaces for people to enjoy. Whether an urban park, a town center, a waterfront destination, or transportation facility enhancement, our team provides creative and innovative solutions through thoughtful design and interdisciplinary collaboration.

ENGINEERING

From civil and structural to mechanical and electrical, we help clients identify opportunities to enhance performance and sustainability while improving operations. Our designs focus on safety, energy efficiency, and dependability, as we aim to help you use less—while accomplishing more.

POWER ENGINEERING

An ongoing transition from fossil to renewable fuels has upended the power industry. Our experience in this field—particularly with solar and wind installations, microgrids, and district energy—equips us to provide strategic advice that helps you move toward greater efficiency and smarter facilities.

INVESTING IN RESEARCH

Our $2 million annual Greenlight Fund supports ideas that could benefit our clients and communities. Any Stantec employee can apply—all they need is a good idea. From researching the use of living seawalls in complex urban environments to studying how autonomous vehicles will reshape cities, our team is continuously pushing the envelope to help our communities thrive.

These ideas feed our Creativity and Innovation Program, a mechanism for making sure that the ideas we test under Greenlight—in collaboration with clients—become new firm-wide best practices for every client and project.

VIRTUAL REALITY

What makes virtual reality (VR) different at Stantec is integration: We don't have a separate VR team—the designers themselves use the tool. Our construction team can spot problems when it's easy (and much cheaper) to head them off, designers and clients can work together to fine-tune design, and clients can walk through a building long before it breaks ground.

In 2016, following a successful research pilot, our architectural designers launched a follow-up study to explore new ways to integrate virtual reality technology and building design modeling. It included extended VR design testing and the creation of VR showrooms in targeted Stantec offices. Both studies received the full support of our Greenlight Fund.

COMPUTATIONAL & PARAMETRIC DESIGN

These tools help us generate rapid-fire alternatives that improve our understanding of a project's program and its financial, environmental, and site constraints with each iteration. The result? Better results for client, designer, and end user.

These tools let us plug demographic and psychographic data into the design process at an early stage, helping us tailor the program to a city, a neighborhood, and a developer. They let us revise the design to account for zoning requirements, siting strategies, views and construction costs and give us more flexibility to explore massing, solar exposure, and sustainability factors.

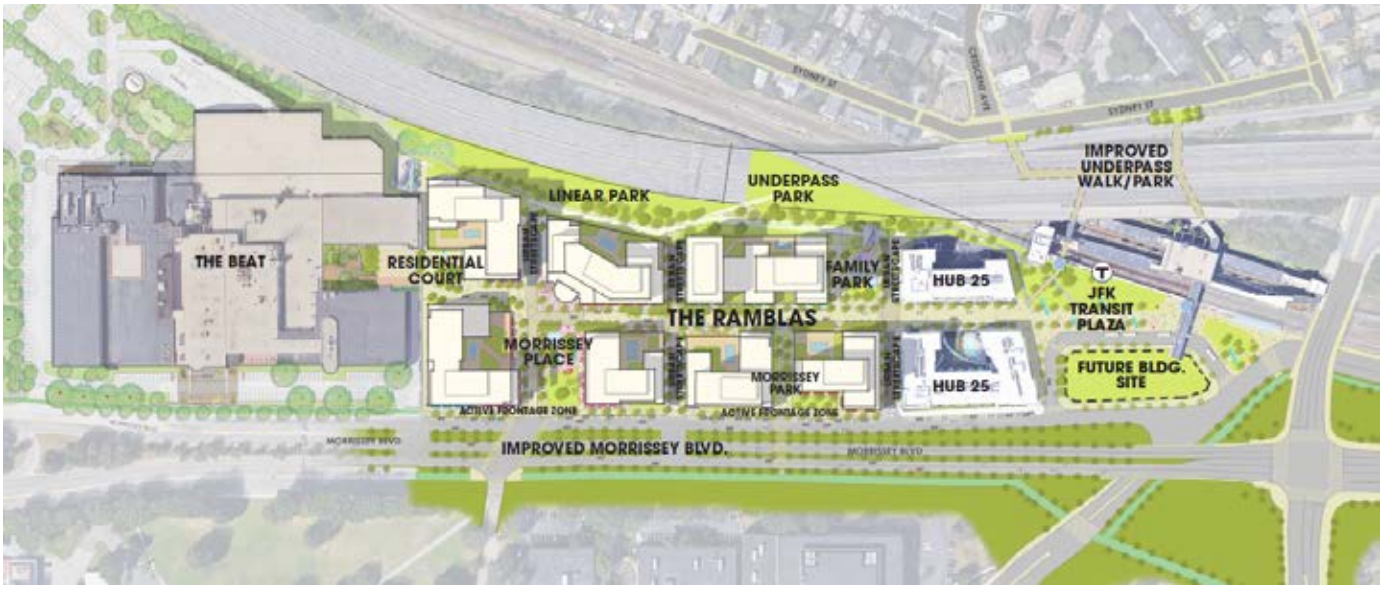
In short, parametric design serves as a powerful new tool for reinforcing the ability of architecture and urban design to improve the human experience.

"It's surprising how often the needed technology exists and just hasn't been applied in our context—yet. With the right kind of questioning, we can solve any problem with elegant solutions."

Aubrey Tucker, Innovative Technology Developer

Pittsburgh Downtown Revitalization, Data Visualization Project
Pittsburgh, Pennsylvania
Our data-driven 3D animations gave members of a city task force a clear picture of how downtown Pittsburgh retail patterns changed throughout the day. That helped them target revitalization funds to the areas that needed them most.





75 Morrissey Boulevard

Boston, Massachusetts

Our team is leading an interdisciplinary design team to produce a master plan for this 3.6 million square foot mixed-use, transit-oriented development located in Boston's rapidly changing Dorchester neighborhood, a block from Boston's Red Line subway. Facilitating the project's navigation through the City's complex and contentious Article 80 permitting process, our team's primary role is to technically define and publicly communicate how the development physically integrates into its surrounding neighborhood and strengthens local communities with excellent design and diverse amenities, destinations, and services. The design incorporate key public benefits such as open spaces, community services, and sea level rise resiliency measures.

PROJECT HIGHLIGHTS:

- New TOD mixed-use urban neighborhood
- Working with BPDA to adapt to seal level rise issues
- In BPDA permitting process for first phase
- Strong focus on shared parking, mobility, access strategies to support density



One Charlestown

Charlestown, Massachusetts

The master plan for the Charlestown mixed-use redevelopment aims to restore street and pedestrian connections to surrounding blocks producing a top-to-bottom makeover in three phases.

Developed in collaboration with residents and neighbors, the plan creates 2,850 apartments—1,750 at market rate and another 1,100 workforce and deeply subsidized units—to replace the existing 1,100 units.

Based on an unusually open and expansive community-consultation process, the plan reclaims historic neighborhood scale from Modernist superblocks; restores street and pedestrian connections to surrounding blocks; creates pedestrian-friendly streetscapes across the redevelopment by consciously varying building style and massing; and incorporates district-wide handling of resources and waste. The new community will invite all Charlestown residents to share its new parks and public facilities for cultural, social, educational, and wellness activities.

The Stantec-led architecture team includes four small, local, and minority-owned architecture studios to help reflect the neighborhood's diversity and to give the final design a broader stylistic range. The team has developed an architectural language derived from analysis of the historic urban context that divides necessarily large, contemporary buildings' facades into discrete segments with dimensions and proportions that echo the 19th-century buildings around them. We systematically assigned multiple segments along each block to different team members to assure a visually varied and dynamic urban environment.

PROJECT HIGHLIGHTS:

- Mixed-use project adjacent to historic, culturally rich neighborhood
- Architectural scale designed to transition to existing, lower-density urban fabric
- Major new public park as a "front door" to the development



Catalyst District

Austin, Texas

The Catalyst project creates a walkable, sustainable innovation district in the heart of one America's fastest-growing regions, combining dense, tech-oriented development with the preservation and restoration of a sensitive wetlands area. Home to the University of Texas, Austin has built a booming innovation, tech and research economy that makes the city a magnet for young knowledge workers from across North America.

Stantec's Urban Places is developing a master plan designed to expand the city's innovation footprint by acting as an extension of Oracle's new Austin research campus—located just across the street. Our master plan introduces 835,000 square meters of new development adjacent to a sensitive wetlands area while restoring the area's hydrology to create a beautiful public open-space. The plan organizes an ambitious mix of housing, offices, hotels, stores and restaurants—designed to assure lively street life—around a large, landscaped public square. From this focal point, a network of streets, sidewalks and trails extends across the site, inviting walking and biking, with plenty of shade to keep users comfortable during the brutal Texas summers. This mobility network in turn ties into an extensive regional trail that takes users to some of Austin's top recreational resources and open spaces. The wetlands restoration creates a contemplative open space, opens new recreational opportunities, and delivers significant environmental services, such as stormwater purification and control.

PROJECT HIGHLIGHTS:

- Site development capacity studies for land owner seeking to market the site for redevelopment
- Mixed-use, phased development focused around a lively new high density town square



Kendall Square and Central Square Redevelopment Plan*

Cambridge, Massachusetts

Our plan spells out strategies for transforming parking lots into mixed-income housing that expands housing choices, better connects the squares to adjacent neighborhoods, and broadens the range of retail and cultural venues. It transforms Massachusetts Avenue, the Central Square's spine, into a coherent public space with strong identity and a vibrant series of connected parks and plazas. It balances demand for new housing, office and retail development with policies that help retain businesses and landmarks treasured by the community.

The planning team facilitated more than 30 public meetings, including workshops and meetings of the two advisory committees created to address the distinct issues of each square. These conversations were critically important to building consensus among often-divergent interests on policies that will have major impacts on preserving cherished elements and transforming places that deserve change.

The plan's transportation policies further advance Cambridge's national leadership in promoting transit use, biking and walking; and its progressive sustainability policies place special emphasis on more efficient use of energy and water. Finally, the plan outlines streetscape, transportation and land use strategies that enhance connectivity between Central and Kendall Squares and their adjoining neighborhoods.

PROJECT HIGHLIGHTS:

- Planning and zoning to guide 2020-30 next stage development
- Transitioning from single focus on life science to mixed innovation focus, strong focus on mix of housing, retail, arts etc. to support shift to mixed innovation center
- Determine redevelopment capacity for "Volpe Site" as basis for site disposition
- Led intensive stakeholder engagement process with district's owners, developers, tenants, adjacent community

**David Dixon completed this project while employed at another firm*



Northland Needham Street Master Plan

Newton, Massachusetts

Northland Investment wanted to reinvent a classic strip mall in Newton, Massachusetts, an older suburb of Boston. The developer asked for an urban design strategy that would make the site a focal point for the area around it—a destination with a strong sense of character. We didn't have to look far for a good model: historic commercial villages throughout Newton. Built before cars, they embodied just the right scale for walkability.

Our plan replaces all the buildings on the site except for a 19th-century mill building. Walkable new development wraps around the historic mill, adding more than a million square feet of stores, offices, and multi-family housing. Tying everything together—and giving the new development strong "curb appeal"—is a carefully-planned Main Street defined by a public realm of active sidewalks, accessible bike paths, and a landscaped square designed and programmed to serve as a new community hub.

Our work brought the project in line with the city's goals for design, density, and mix of uses while creating maximum value for our client. Moreover, it gives Northland a model it can use across the US. for redeveloping larger sites in urban neighborhoods.

PROJECT HIGHLIGHTS:

- Higher density, mixed use, urban neighborhood Involving mix of rehabilitation of older mill buildings and new construction
- Northland increased density in response to planners' analysis of critical mass essential to support a lively "Main Street" and retail presence
- Initially highly controversial, project was strongly endorsed in a citywide referendum in November, 2019--supporters pointed noted its "green density"
- Project permitted



onMain Imagination District

Dayton, Ohio

The announcement in 2017 that the Montgomery County Fairgrounds would relocate opened a unique redevelopment opportunity less than a mile from downtown Dayton. Two abutting institutions—Miami Valley Hospital and the University of Dayton—jointly purchased the 38-acre site with plans to create a regional economic development engine. They turned to an interdisciplinary team led by Planning Next with Stantec's Urban Places as planning, urban design and mobility lead sub-consultant to develop a vision for the site's future and a roadmap for getting there. Our shared goal: to create a distinctive, mixed-use and walkable neighborhood that attracts employers who need the kinds of educated workers seeking these types of places.

Our team began by consulting with a wide range of constituents, thinking with them about the future of this key site. We developed a flexible framework that reconnects the parcel to the surrounding, human-scale street grid; introduces a mix of employment uses, housing, and retail; and defines public spaces that will provide community members with distinctive places to gather. The plan builds in flexibility: beyond a clearly defined first phase of investment, our client wanted to make sure that later phases could respond to both the evolving market and community needs while advancing the overall vision. As part of the planning process, we developed preliminary infrastructure cost estimates to help the partners assemble the right funding to ready the site for development. The team also produced a commercial market analysis, developed a financing strategy, and conducted implementation planning to position the client to move quickly at plan completion. The "Vision onMain" plan was published in September 2018, setting out the vision and principles for the new Imagination District, an approximately 2.0 million square foot mixed-use neighborhood that will catalyze economic and community development while building long-term value and demonstrating sustainable development.

PROJECT HIGHLIGHTS:

- Redevelopment of 26-acre historic Montgomery County Fairgrounds site
- Mostly new construction, but historic elements together with new "Main Street" create strong sense of place
- Strong innovation focus
- Assisting client partnership in permitting



Riverside Transit-Oriented Development

Newton, Massachusetts

This project will finally bring transit oriented development (TOD) to a prime site in Newton, MA. Currently a large surface parking lot serving the terminal stop of a light rail line into Boston, the project will introduce a dynamic mix of office, housing, retail, and hotel organized along a new two-sided "Main Street" to create a walkable neighborhood. Significant density will support housing affordability and transit ridership while helping the city meet its planning goals of smart growth, increased commercial tax base, and transit oriented development. Stantec's Urban Places provided mobility and urban design expertise and led the development of design guidelines to streamline permitting in a complex and contentious suburban community.

Working on a team including a collaboration with walkability expert Jeff Speck, our mobility team is leading the mobility component of the development to ensure that it takes full advantage of this transit-oriented site. Our design includes retrofitting existing streets to be complete while still maintaining appropriate vehicle throughput in order to balance these needs with the creation of a more urban district.

Further, we understand that controlling parking is key to managing access and have worked with multiple stakeholders to build consensus around a shared parking approach. This required a modeling process based on both existing demand patterns as well as national standards. We used stop-motion to efficiently gather parking utilization data at the site today that underpins the model, and have used this to create a flexible parking management plan that continues to allow for game day parking while encouraging transit-oriented uses at the site.

PROJECT HIGHLIGHTS:

- Planners responsible for developing massing, public realm and character to support significant density for this suburban site
- Earlier, lower density, proposals had been rejected as "too massive"--lively walkable public realm built public and city support



Exchange South End Redevelopment

Boston, Massachusetts

Home of the former wholesale trade-member only Boston Flower Exchange, our design for 540 Albany Street incorporates cultural, commercial, retail, and research uses into a mixed-use technology and life sciences hub that will complement the surrounding neighborhood while also turning a grayfield in the historic South End into a modernized place to live, work and play.

The plan for 540 Albany Street turns a 246,500-square-foot parcel into 1.6 million square feet of space for a variety of purposes, bringing a vibrant look to the 550 feet of frontage along Albany Street. It restores a historic structure to form a pedestrian-friendly experience and creates a new public park right in the middle of the project's footprint by pushing the buildings to the perimeter. It's a commercially active design, yet through its diversity of uses and space for arts and community activity, it will fit into the eclectic feel of the growing, evolving neighborhood around it. Clever and creative use of the considerable space will allow commerce and culture to coexist in a way that feels authentic to the area, all within easy walks to several public transportation outlets.

PROJECT HIGHLIGHTS:

- Site development massing and capacity studies focused on introducing higher density, mixed-use development and establishing a strong sense of place to anchor a new innovation district
- Lively public realm, arts, and food introduced to connect to South End's "culture"



Spire District

Dallas, Texas

With a 25-acre site secured, our client wanted to build four 400,000 square foot office buildings, that also housed retail, a hotel, and five thousand parking spaces, but was having trouble developing a site plan that was inspiring and exciting. They called on our team to help.

Working with the client over a 2-day charrette, our team of planners, landscape architects, urban designers, and architects brainstormed ideas for a re-envisioned plan. We tested the feasibility of each idea, which allowed us to determine a mix of uses that would work for the client and the site.

Our final plan brings together unique retail, walkable streets, and a range of characters to create an urban, 21st century destination. As part of the plan, we devised a sophisticated shared parking strategy, which allowed our client to create three million square feet of development, as opposed to the original two million square feet, all while maintaining the same amount of parking spots (which met the standards needed by the client).

Our team also suggested including 1,000 units of housing, which would bring new residents to walk the streets and support the variety of retail, helping to create a destination. The residential buildings have front doors, facing the street, bringing life for pedestrians. The site is oriented around a network of streets (main street, residential street, public entry street) each with its own character, bringing the streets to life, transitioning them from auto-centric to people-centric.

PROJECT HIGHLIGHTS:

- Took over planning for mixed-use urban district located between Dallas' Downtown and the Arts Districts--plan for 2M SF of office was generating resistance from the city and nearby cultural institutions
- New plan transformed "development" into a mixed-use district with 3M SF, no increase in parking (shared parking strategy), and lively public realm that generated support for the project



Union Square Development

Somerville, Massachusetts

With a new transit connection coming into Union Square, we're working on a plan that will drive business and economy without driving out the residents.

Years before new service would join Somerville's Union Square to Boston's light rail system, city officials began planning for a new approach to development and transport. Burdened by relentless cut-through traffic and only comprising two- to four-story buildings, planners knew the community would resist any greater density. A smart development partner was sought though a competition to help prove the merits of taller buildings with narrower streets, and the development team that partnered with Stantec was selected in part because of our respected approach to progressive transport analysis and design.

US2 began by having Stantec's urban design team get the pulse of Union Square—a diverse, energetic and funky neighborhood—to get a read on the unique look and feel of the place. We ran workshops that brought developers and community members together, starting a conversation about how redevelopment could create jobs at all skill levels, slash environmental impacts, and increase revenue to the city—while keeping Union Square fun, affordable, and distinctive. All the while, our transport team began amassing detailed count data for every mode and full parking utilization counts, ultimately creating a detailed model for the district.

Our team was able to demonstrate the benefit of creating a live-work community of much higher density than anyone imagined. By focusing on place and not parking, new trips would travel like locals already do—on foot and bike, while cut-through traffic would be diverted. Elements such as mixed-income housing enable current residents to stay in the square. New mixed-use buildings generate the activity that supports new and existing businesses. And local artists are put in charge of street furniture, public art, and signage. With other strategies like district utilities and green roofs, Union Square will become a model for how urban communities can develop significantly without losing their roots.

PROJECT HIGHLIGHTS:

- Developed initial competitive RFP submission for developer, conducted massing, use studies to determine density, scale, and use mix
- TOD mixed-use innovation district, mix of reuse and new construction on multiple sites
- Assisted client in permitting



University District*

Seattle, Washington

Members of the Urban Places team worked with the University of Washington on two rounds of planning for the area west of its Seattle campus. In the first effort, our team members developed strategies to help transition the existing university district, which was oriented almost exclusively to undergraduates and focused only along University Way, into a more diverse, expanded district that served the entire student body as well as faculty, staff, and the broader community. This required introducing a broader range of housing and retail options to bring more streets to life and create a welcoming sense of place. This new development would in turn set the stage for a future light rail station to increase mobility options and connectivity throughout the city.

In the second round of planning, we looked specifically at the southern third of the district to identify strategies to create an innovation district leveraging the University of Washington School of Medicine. The university wanted to create this district immediately adjacent to their campus in order to reduce travel time for faculty and graduate students between teaching spaces and research labs. This would maximize their time thinking and testing new ideas, which in turn would support the university's focus on commercializing intellectual property. While large floorplate research buildings and incubator spaces were an important part of the mix, our team realized that the most critical step was to create the type of environment that would attract and retain knowledge workers in a competitive industry. That meant creating a series of distinct places with retail, restaurants, and public spaces that encouraged researchers to meet one another and exchange ideas.

PROJECT HIGHLIGHTS:

- Initial planning to create a TOD innovation district immediately adjacent to the University of Washington (Seattle) Medical Campus in response to planned light rail extension to "U" District

**David Dixon completed this project while employed at another firm*



Water Street Tampa

Tampa, Florida

Strategic Property Partners (SPP) had a vision for 50+ acres of parking and warehouses it owned in downtown Tampa: create a sustainable, walkable urban district that would land Tampa on the list of cities with renaissance downtowns. Fusing amenities, culture, multiple uses, a new street system, and a memorable public realm, Water Street Tampa will emerge as a walkable new urban neighborhood and a nationally known destination.

Stantec played a key role in bringing SPP's ambitious vision to life, starting with early planning, zoning, and infrastructure studies. We followed up with a deep dive into infrastructure planning. Our plan turns streets designed primarily for cars into a pedestrian-focused framework of landscaped streets, parks, and plazas designed to support a broad range of activities. The plan fills in this framework with 9,000,000 SF of condos, apartments, offices, unique shops, restaurants, and a medical school.

PROJECT HIGHLIGHTS:

- Project intended to give Tampa a place in the global innovation economy
- Earlier studies had suggest a 3.5M SF project, initial analysis indicated a much stronger, largely untapped, urban housing market that in turn could support lively streets and be more effective in attracting office and innovation uses
- Studies included new homes for the University of South Florida Medical School and a research building
- Shared parking strategies reduced parking count while increasing total development



David Dixon, FAICP

PROJECT LEADER & PLANNING LEAD

EDUCATION

Master of Architecture
University of Pennsylvania

Master of Urban Design
Harvard University

Bachelor of Arts
Wesleyan University

MEMBERSHIPS

2006 chair of the AIA's Regional and Urban Design Committee, co-facilitator of AIA's National Roundtables on Sustainable Design, American Institute of Architects

2003 Boston Society of Architects President; Director, Civic Initiative for a Livable New England; Chair, Barr Foundation Transportation Planning Initiative, Boston Society of Architects

AWARDS

AIA Thom. Jefferson Medal for Public Architecture

APA Innovative Economic Development (East Franklinton, Columbus, Ohio)

APA Comprehensive Implementation (the University District, Columbus, Ohio), and APA Outstanding Planning Firm

Residential Architecture 2012 Hall of Fame Award

More than three dozen national awards from the AIA, CNU, IDA, SCUP

** Denotes projects completed prior to joining at Stantec.*

David believes that, in the face of an unprecedented "perfect storm" of dramatic demographic, economic, technological and environmental changes, North America is at the cusp of a period of unprecedented urban opportunity—in cities and suburbs alike. He is committed to helping communities and clients manage these changes to create economic, social, and environmental value...for cities and suburbs alike. Over the past five years he has led planning and urban design initiatives to:

- Launch more than $20 billion of investment in **new and revitalized walkable, mixed-use districts** for cities from Austin TX and Tampa FL to Columbus OH.
- Unlock opportunity for **downtowns** from Memphis TN to Albany NY
- Create **new downtowns and walkable centers for suburbs** surrounding cities such as Atlanta, the District of Columbia, and Dallas.
- Launch and expand innovation districts in Cambridge MA, Seattle, Philadelphia, and diverse other cities.
- Help communities ranging from Leesburg VA to Birmingham AL shape **new, more livable, growth strategies.**
- Address growing **equity and affordability** challenges for diverse neighborhoods in many of these same cities. He is particularly proud of leading the post-Katrina Master Plan for New Orleans.

David speaks and writes frequently on the opportunities and challenges posed by an era of rapid change. He is especially known for initiating a national dialogue - through lectures, commentary, and the organization of two national conferences - on creating "walkable density" as an essential tool for achieving the benefits unlocked by the flow of people and dollars into urban environments—in cities and suburbs alike.

He is the co-author of Urban Design for an Urban Century; shaping more livable, equitable, and resilient cities (Wiley, 2014) and co-editor of Suburban Remix: the next generation of urban places (Island Press, 2018).

David has consistently been an active member of his professional community:

- A Fellow of the **American Institute of Architects** (AIA), he chaired the AIA's Regional and Urban Design Committee and its National Sustainability Task Force, was a member of the Institute's national Regional and Urban Design Awards jury, and served as President of the Boston Society of Architects.
- He served as a member of the **Urban Land Institute's** (ULI) Global Excellence and Public Open Space Awards jury for three years as well as awards juries for North Texas ULI and other councils and has participated on four ULI Technical Assistance Teams for Birmingham AL and Denver.
- He is currently working with the **International Downtown Association** (IDA) to help guide the IDA's three-year Value of Downtowns Study and development of a Downtown Vitality Index.
- He is currently working with **The Congress for the New Urbanism** (CNU), in partnership with Stantec's Urban Places, to develop a "blueprint" to guide community-based planning for autonomous mobility.
- He currently serves on the board for **America Walks**.

RELEVANT EXPERIENCE

Urban Districts

- 75 Morrissey Boulevard—Urban Mixed-use Neighborhood, Boston (Center Court Development—3.5M SF TOD new mixed-use urban neighborhood)
- Buffalo NY Mobility Innovation: reshaping Buffalo for the 21st century (regional vision as context forsignificant transportation infrastructure investments—partnership with the City of Buffalo andCongress for the New Urbanism)
- Buffalo NY Region Central Plan (Greater Buffalo-Niagara Regional Transportation Council)
- Catalyst District, Austin TX (Jones Lang Lasalle—approx. 1.8M SF mixed-use urban neighborhood)
- MetroHealth Line TOD Planning, Cleveland (Greater Cleveland Regional Transit Authority)
- onMain Imagination District, Dayton Ohio (University of Dayton, Premier Health Alliance—approx.2.6M SF mixed-use, innovation district)
- East Franklinton, Columbus OH (City of Columbus—approx. 4M SF mixed-use urban arts/innovation district, mix of reuse and new construction)*
- Friendship Court mixed-income neighborhood, Charlottesville VA (Piedmont Alliance—mixed-use, mixed-income urban neighborhood)
- Newport News Town Center VA (private developer)
- River District, Elkhart IN (River District Partnership—approx. 2M SF mixed-use urban neighborhood, mix of reuse and new construction)
- Royal Victoria Hospital Reuse Plan, Montreal (Province of Quebec—approx. 3M SF mixed-use, innovation focus, redevelopment of historic downtown site)
- Union Square, Somerville MA (U2 Partners—approx. 2.5M SF TOD mixed-use innovation district, mix of reuse and new construction)
- Water Street District, Tampa, Florida (Strategic Property Partners/Cascade Investments—approx. 5M SF TOD mixed-use district, innovation focus…district has subsequently grown, via additional site control, to approx. 9MSF)
- West Annapolis MD Neighborhood Plan
- West Village, Calgary, Alberta (Calgary Urban Municipal Land Corporation—approx. 5M SF mixed-use urban neighborhood)

Equity and Affordability

- Livable Claiborne Communities Corridor Study, New Orleans, (City of New Orleans, Federal HighwayAdministration)*
- MetroHealth Line Transit-oriented Development Planning, Cleveland (Greater Cleveland RegionalTransit Authority)
- Near East Choice Neighborhoods Plan, Columbus OH (City of Columbus, Columbus HousingAuthority)*
- One Charlestown, Boston MA—redevelopment of public housing into a new mixed-incomeneighborhood (Corcoran Jennison/SunCal)
- Planning for Public Realm to Promote Diversity, Boston MA (A Better City, the Barr Foundation, Cityof Boston) [CNU Charter Award]
- Wheatley Choice Neighborhoods Plan, San Antonio TX (San Antonio Housing Authority*

Downtowns

- Albany NY (Capitalize Albany Corporation)*
- Birmingham AL (REV Birmingham)
- Brockton MA (Mass Development, City of Brockton)
- The Future of Mobility: Remaking Buffalo for the 21st Century (City of Buffalo, Congress for the New Urbanism)
- Flemington NJ (Downtown Flemington Parntership)
- Hammond IN Downtown Revitalization Plan (City of Hammond)
- Memphis TN (Downtown Memphis Commission)
- Moorhead MN (Downtown Partnership)
- New Orleans (Downtown Development District) [IDA Award]*
- Topeka KS Downtown River District Plan (City of Topeka, Downtown Partnership)*
- Wichita KS (Downtown Wichita)*

Innovation and Innovation-related University Districts

- Drexel University, Philadelphia (Drexel University—transformation of Drexel Campus into a mixeduse, mixed academic/innovation district) [Society of College and University Planners (SCUP) HonorAward]*
- East Franklinton, Columbus OH (City of Columbus—approx. 4M SF mixed-use urban arts/innovation,mix of reuse and new construction) [American Planning Association (APA) Planning ExcellenceAward for Innovative Economic Development]*
- Kanata North Innovation District Plan, Ottawa, Canada (Kanata North Alliance and City of Ottawa)
- Kendall Square, Cambridge MA (City of Cambridge) [Congress for the New Urbanism (CNU) CharterAward]*
- South End Exchange, Boston (The Abbey Group—2.0M SF mixed-use innovation)
- The Ohio State University District (Campus Partners for Community Development) [APA Planning Excellence Award for Comprehensive Planning]*
- The Ohio State University North Campus Plan, Columbus OH, (The Ohio State Univ)*
- Union Square, Somerville MA (U2 Partners—approx. 2.5M SF TOD mixed-use innovation, mix ofreuse and new construction)
- University District, Seattle (University of Washington, Seattle)*

Suburban Remix: Downtowns and Walkable Districts

- Celina TX (City of Celina)
- Dayton Mall OH Redevelopment (Miami Township)
- Delhi IN Township Strategic Redevelopment Plan (Delhi Township)
- Dublin OH (City of Dublin)
- Flemington NJ Downtown Plan (Flemington Community Partnership)
- Lyndale Corridor, Bloomington MN (City of Bloomington)
- Metro Center NJ (suburban TOD, NJ DOT)
- Mount Comfort Corridor Plan, IN (Stellar Communities Partnership)
- Newton MA (Northland Development)
- Opa Locka Downtown Plan, FL (City of Opa Locka)
- Richmond Hill ON "Visionary Advisor" for the community's Official Plan
- Riverside TOD (Mark Development—2M SF mixed-use urban district)
- Roanoke VA, (Rte 419 New Town Center, City of Roanoke)
- Sandy Springs GA (City of Sandy Springs)*
- Stafford County VA (Stafford County)
- Wellington FL (Town of Wellington)

Comprehensive Regional and Citywide Plans

- Birmingham AL Comprehensive Plan, Birmingham AL (City of Birmingham)
- Buffalo NY Region Central Vision and Plan (Greater Buffalo-Niagara Regional Transportation Council)
- City of Miami FL Parks and Public Realm Plan (City of Miami)*
- Corpus Christi TX Comprehensive Plan (City of Corpus Christi)
- "How We Live", Vision for the Boston Region (Metropolitan Area Planning Com)*
- Leesburg Virginia Community-wide Plan (City of Leesburg)
- Post-Katrina New Orleans Master Plan (City of New Orleans) [APA Planning Excellence for a Hard Won Victory]*
- Saco MN Comprehensive Plan
- The Future of Mobility: Remaking Buffalo for the 21st Century (City of Buffalo, Congress for the NewUrbanism)

RELEVANT SPEAKING ENGAGEMENTS

- America Walks 2020 National Walking Summit, "The Value of Walkability"
- 2019 Downtown New Jersey Annual Meeting, keynote speaker, "The value of downtowns"
- Institute de Developpment Urbaine, Quebec, keynote speakers 2019 IntenCité Quebec Conference, "Urbanizing suburbs"
- International Downtown Association, 2019 Annual Conference, "Urban design matters" and "Vitality Defined: IDA's Vitality Index"
- AIA Colorado, 2019 Practice and Design Conference (Breckenridge, CO), plenary speaker, "Suburban Remix: the future of suburbia"
- The Ohio State School Knowlton School of Architecture, 2019 Baumer Lecture Series, "The urban future of America's suburbs"
- Vision Zero Cites 2019, "Bringing Vision Zero to the suburbs"
- Project for Public Spaces, 2019 3rd International Placemaking Week (Chattanooga, TN), "From pavement to placemaking: the rebirth of America's suburbs"
- American Public Transit Association, 2019 Mobility Conference, "Innovative approaches to TOD"
- American Public Transit Association 2019 Sustainability Conference, plenary speaker, "Managing the curb in an era of rapid urban change"
- Boston Society of Landscape Architects 2019 Annual Conference, "Equity, diversity and the public realm"
- Harvard University Graduate School of Design, 2019 Cities by Design Seminar and Lecture Series, "Making mixed-income communities work"
- American Planning Association and Lincoln Institute Big City Planning Directors 2018 Conference, "The five urban dividends of shared autonomous mobility"
- Southwest Florida Real Estate Investment Society, 2018 keynote speaker, "Rapidly emerging urban trends and how they are reshaping real estate development"
- International Downtown Association (IDA) Master Talk, 2017 Annual Conference, "The value of equity"
- Regularly speaks at APA, IDA, CNU national conferences, summits, and regional meetings



Jeff Sauser

PROJECT MANAGER

Jeff is a planner and urban designer whose work centers on the relationships between markets, community, sustainability, and urban form. Jeff has played a central role on a range of design and planning projects in cities and suburbs across the country, with particular focus on creating compact, walkable, mixed-use redevelopment in transitioning neighborhoods and emerging communities. His experience includes large-scale comprehensive plans, downtown master plans and neighborhood revitalization plans.

EDUCATION

Master of Architecture and City and Regional Planning
Georgia Institute of Technology

Summer China Program
University of North Carolina at Charlotte, Charlotte

Bachelor of Arts
Metropolitan Studies
New York University

MEMBERSHIPS

Studio Design Review Juror, Boston Architectural College

Member, Boston Society of Architects

** Denotes projects completed prior to joining at Stantec.*

RELEVANT EXPERIENCE

Northland Needham Street Master Plan
Newton, MA
Plan for transforming a low-density suburban site into an authentic urban village that strengthens the surrounding neighborhood and introduces new housing and retail choices into a district long starved for both. Redevelopment will replace the non-historic elements with more than 1,000,000 sf of walkable stores, offices, and multifamily housing.

Dayton Fairgrounds Master Plan
Dayton, OH
Urban planner and designer responsible for urban design development, community engagement and GIS analysis. The project involves a long-range master plan to transform a successful two-square-mile, car-oriented area around the Dayton Mall into an economically competitive, walkable and identifiable "21st Century Urban Village".

Exchange South End Redevelopment
Boston, MA
Planner supporting master planning services for the redevelopment of 540 Albany Street, the former home of the Boston Flower Exchange. This project incorporates cultural, commercial, retail and research uses into a mixed-use technology and life sciences hub that will complement the surrounding neighborhood while also turning a grayfield in the historic South End into a modernized place to live, work and play.

Water Street Tampa
Tampa, FL
Plan for a walkable nine-million SF mixed-use transit-oriented district to "place Tampa on the growing list of 'renaissance' downtowns—"... a new, sustainable heart for the region full of people trading ideas, sharing conversations, breaking bread...having fun together..." This $3 billion-dollar project on 50-acres represents the first wellness-certified district in the US and includes a new University of South Florida Medical School, "Makers' Alley", two hotels, cutting-edge new cultural venues, and a network of urban public spaces.

Union Square Development
Somerville, MA
Urban planner and designer responsible for urban design development, community engagement and GIS analysis. The project involves creating a plan for transit oriented development in conjunction with a new transit connection to Union Square.



Planning for life in cities after the pandemic

By: David Dixon, FAIA

This blog was originally featured on Stantec's Ideas Hub, and was subsequently posted to Public Square and BD+C.

How we can help our clients and communities transition to planning in the post-pandemic world

We've been here before. In the midst of the Coronavirus pandemic, heavy clouds hang over words like "density" and "urban". These same clouds took shape in the aftermath of 9/11, when influential articles like a Blueprint for a Better City (Wired, December 1, 2001) proclaimed "Density Kills", and called for a return to safer suburbs. Just recently, the governor of one of America's largest states publicly questioned whether his state needed to explore lower density models for growth in the aftermath of COVID-19.

Yet density and the lively interaction it brings to urban life has been foundational to the plans so many of us continue to work on—and in many cases are about to publish. We learned important lessons from 9/11—one of which was to enrich our approach to creating increased densities and great urbanism, but not lose sight or our long-term goals of creating more livable, equitable, and resilient communities.

As we continue to plan today in an era of social distancing, we need answers to three critical questions:

- Will all the effort we have put into the plans we are working on—and the considerable community engagement that they were grounded in—still matter?
- Will the pandemic have taught us critical lessons that will continue to be relevant in the post-pandemic world?
- Can we integrate these lessons into the planning work we have been doing and should we continue to move forward?

The answer to all three questions is a resounding YES!!!

COVID-19 has revealed critical lessons that can enrich our urban planning

Even in the midst of an unfolding tragedy, we cannot afford to lose sight of "the new norm"—the fundamental realities that will continue to forge a more urban future for our communities over the next decades. These fundamental realities began well before the pandemic and will continue well after this crisis has passed.

We need to create more opportunities to enjoy nature. The most often noted positive change in our cities due to the pandemic—whether sampling Twitter or talking to friends and colleagues in Boston and other cities across North America—is that fewer cars on the road means the air has become significantly clearer. And a close second, as we spend less time in our cars, many of us report rediscovering how much taking a walk in nature renews our spirits and nurtures our soul

We need to create healthier communities by paying more attention to what science and data tell us about the outcomes of our plans. The reality is that the health, social, environmental, and economic benefits of density far outweigh the risks, and we need to make this case to our communities and be far better prepared for those risks

We have to redouble our efforts to address inequity. The pandemic's toll, measured in health and economic impacts, has been far greater for people of color and those living in poverty.

Dramatic demographic shifts, projected to accelerate for the foreseeable future, are creating unprecedented demand for housing in walkable downtowns and urban neighborhoods

Harvard's Joint Center for Housing Studies projects that singles and couples will increasingly dominate household growth—and steadily increase demand for urban living. Drilling down into this data suggests even stronger market potential for walkable downtowns and urban neighborhoods. Most notably? Better educated (and higher income) households that represent the talent that powers our knowledge economy are increasingly more likely to move to regions with lively downtowns and urban neighborhoods than their peers.

An aging workforce and booming knowledge economy are combining to create unprecedented competition across North America for increasingly scarce talent—and raising the importance of walkable downtowns and urban neighborhoods

As "industries of the mind" take center stage in fueling economic growth, a global competition for talent is taking hold. Organizations like the Brookings Institution and the International Downtown Association (with support from Stantec's Urban Places) report that regions with lively, walkable downtowns and urban neighborhoods are the winners. Even knowledge workers who "tele-work" prefer to live in walkable urban places. Dublin, Ohio (just outside of Columbus) is creating a new higher density, walkable downtown to attract knowledge industry employers—while also attracting talent that wants to work from home. Perhaps more importantly, MIT's Sloan School of Management reports that attracting and retaining educated workers is critical to a region's ability to grow jobs across the board.

Emerging new mobility paradigms will strongly favor downtowns and closer-in urban neighborhoods

Today urban dwellers already spend roughly half as much of their disposable income on mobility compared to their suburban peers. The shared and emerging micro-mobility technologies (think Lyft and e-scooters) that flourish in urban cores are reinforcing this advantage. Stantec's smart mobility planners tell us that future mobility will take the form of shared autonomous vehicles (SAVs) in downtowns and urban neighborhoods with the densities to support on-demand service, increasing convenience while reducing cost.

As we continue to plan for more livable communities in the future, early lessons from the COVID-19 pandemic can enrich and expand the core principles that should guide us:

- **Continue to promote walkable density to promote healthier, more economically competitive, and more resilient communities.** The data tells us that dense, walkable downtowns and urban neighborhoods lead to better public health outcomes, make communities more competitive, and provide increased opportunities to reduce carbon emissions and increase resiliency
- **Expand our efforts to build equity into every plan we bring forward.** Equity has many dimensions, but let's start with three: build significantly more affordable housing (for people at all income levels) in the denser urban cores where demand continues to push housing costs up; expand workforce readiness and training for the knowledge economy; and introduce new programs to support disadvantaged entrepreneurs and businesses in participating in an era of urban opportunity
- **Make sure our communities grow greener as they grow denser.** Not all density is created equal—development and trees should never compete, they support each other. Treelined streets and lively parks enhance the value of development, which in turn pays for more trees and parks.

Crises bring us together as a community, supported by the political will to bring forth bold plans that lead to transformative change. Much of the urban renaissance we have enjoyed over the past two decades stems from the funding put forth to prevent an economic collapse following 9/11, and again following the Great Recession of 2008. As we shift our attention from crisis management to recovery, let's nurture our newfound collective political will and tap newfound state and federal resources to build an era of more robust, more just, healthier urban places going forward!

Click here to view online

Communities are fundamental. Whether around the corner or across the globe, they provide a foundation, a sense of place and of belonging. That's why at Stantec, we always design with community in mind.

We care about the communities we serve—because they're our communities too. This allows us to assess what's needed and connect our expertise; to appreciate nuances and envision what's never been considered; to bring together diverse perspectives so we can collaborate toward a shared success.

We're designers, engineers, scientists, and project managers innovating together at the intersection of community, creativity, and collaboration. Balancing these priorities results in projects that advance the quality of life in communities across the globe. Stantec trades on the TSX and the NYSE under the symbol STN. Visit us at stantec.com or find us on social media.



DMLA



DMLA

FIRM DESCRIPTION

DMLA is a nimble firm specializing in planning, landscape architecture and community building. Based in Boston, Massachusetts, we are focused on design, our clients, and meeting the expectations of each unique community in which we work.

Landscape architecture is all about context, and at DMLA, we're inspired by the people and places that surround us. From urban multifamily housing to public and private institutions, we work closely with the community to design an environment that meets their needs today while remaining flexible for what's to come tomorrow. We lead and support projects from initial feasibility discussions and community meetings through to permitting, design, and construction support, whether for small, private development sites or large, public complexes. No matter the scale, we design to create unique places for unique people.

DMLA



OVERLOOK TERRACE AT ORIENT HEIGHTS

East Boston, MA

Overlook Terrace at Orient Heights is a mix of residential and community buildings ranging in height from two-to-five stories in a combination of townhouses and mid-rises. DMLA was the site planner for this multi phased 300+ unit development in East Boston, MA. The team prepared construction documents, specifications and provided construction administration for the completed phase 1. Phase 2 is currently out to bid and phase 3 has just started schematic design.

This LEED Platinum-certified project will eventually include 42 units of affordable housing, a new community center and management office, a new public park, and significant connectivity improvements and enhancements that will improve circulation, safety, and access for vehicles, pedestrians, and cyclists.







DMLA

BARTLETT YARD MASTER PLAN

Roxbury, MA

DMLA is currently working with a team of local architects and two community-based developers to create new urban housing development within the historic Fort Hill neighborhood located in Roxbury. Formerly, abandoned bus yard this eight-acre site will consist of new housing, a public events plaza, public market, shops, and interactive arts. The master plan includes a series of semi-public and public landscape spaces are distributed amongst eleven parcels. A strong pedestrian network through the entire site connects Bartlett Yards with nearby Dudley Square and adjoining urban neighborhoods.

DMLA's master plan role involves siting of the building structure the integration of private and public landscapes and fully accessible open spaces. DMLA is providing full landscape architectural services with its co-consultants including public meetings, the development of schematic, permitting and construction documentation for selected Bartlett Yard parcels.





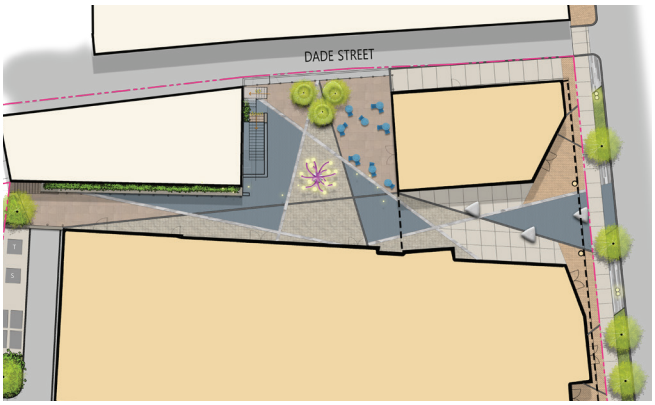
DMLA

2147 WASHINGTON STREET

Lower Roxbury, MA

The redevelopment of 2147 Washington Street in Dudley Square will be a new 6-story building with a live/work/play environment. In collaboration with DREAM Collaborative, DMLA has re-envisioned the site design to encourage community engagement throughout day and night.

With a limited site, DMLA has created a welcoming courtyard for the Haley House Café patrons as well as new residents, and artists. DMLA advocated for as much plantable and permeable space for storm water infiltration and shade trees as feasible. The result is a safe and energetic neighborhood courtyard to be enjoyed with future Dudley Square generations.







RESUMES

DMLA



DEBORAH MYERS ASLA

Principal Landscape Architect | deb@dm-la.com | 617-922-6741

Deb Myers is a people person, and that's what has fueled her design career for over 20 years. Deb works to blend people's needs with their surroundings. Her background includes years at both small design studios and large, multidisciplinary firms, giving her a well-rounded perspective on every step of the project process.

Ms. Myers is responsible for management of a wide range of projects for municipal, institutional and residential clients. As a registered landscape architect, Deb has a broad range of experience including permitting, site design, and construction documentation and administration. Deb has been lead designer and project manager for several Boston projects, including Boston Collegiate Charter School in Dorchester, Dewitt Community Center in Roxbury.

Deb has been with DMLA since its inception in 2015, and is currently working on the design and permitting for Overlook Terrace at Orient Heights in East Boston, MA and Jackson Square Greenway in Jamaica Plain, MA.

EDUCATION

Virginia Tech: Blacksburg, VA
Bachelor of Landscape Architecture, 1992-1996

PROFESSIONAL REGISTRATIONS

Registered Landscape Architect, Commonwealth of Massachusetts, #1304
Registered Landscape Architect, Rhode Island #680

PROFESSIONAL ASSOCIATIONS

American Society of Landscape Architects
CREW Boston
Professional Women in Construction, Boston Chapter and founding board member
Town of Brookline Conservation Commission Member
Urban Land Institute

AWARDS

Deborah has served as lead designer and Design Principal for several local and national award winning projects. These include the following awards:

2018 CREW Boston—Networking Award: Holmes Beverly Project
2017 CREW Boston—Entrepreneur of the Year Award
2013 Boston Society of Landscape Architects—Merit Award in Design: Temple Beth Elohim
2013 Boston Society of Landscape Architects—Merit Award in Urban Design: Washington Beech
2012 Faith & Form, Religious Architecture: Temple Beth Elohim
2011 Boston Society of Architects—Honor Award: Temple Beth Elohim
2008 Boston Society of Landscape Architects—Merit Award in Urban Design: Maverick Landing

PUBLICATIONS

ULI Living With Heat 2019
ULI Technical Assistance Panel Weymouth 2019
ULI Techinical Assistance Parcel Town of Ashland 2017
ULI Living With Water 2015

DMLA

DEBORAH MYERS ASLA, RLA
Principal Landscape Architect | deb@dm-la.com | 617-922-6741

RELEVANT EXPERIENCE

The following is an abbreviated list of current and past projects completed by Deborah while serving as Principal at DMLA.

Multi-Family Residential

Overlook Terrace at Orient Heights; East Boston, MA
Artblock; South Boston, MA
Washington Beech; Boston, MA
Bunker Hill Redevelopment Masterplan; Charlestown, MA
Jackson Square Site III; Boston, MA
Smith House Residences; Roxbury, MA
Haynes House Residences; Roxbury, MA
Worcester Courthouse; Worcester, MA
Mattapan Heights; Boston, MA
One Webster, Highland Terrace; Chelsea, MA
Putnam Green, Cambridge, MA
Maverick Landing; East Boston, MA
Atlas Lofts; Chelsea, MA
Spencer Row & Webster Block; Chelsea, MA
The Regency; New Bedford, MA

Parks and Playground

Scituate Playground; Scituate, MA
Jackson Square Greenway; Boston, MA
Junior Lombardi Park; East Boston, MA
Washington Beech Park and Playground; Boston, MA
Manor Fields Recreation Center; Dedham, MA
Pierce School Playground & Amphitheater; Brookline, MA
Park School Playground; Brookline, MA

Educational

Gibbs School; Arlington, MA
Hardy School; Arlington, MA
Boston Collegiate Charter School; Dorchester, MA
UMass McGuirk Stadium Improvements; Amherst, MA
Framingham State University Master Plan; Framingham, MA
Worcester State University Athletic Center; Worcester, MA
Malden Catholic High School; Malden, MA
Nobles and Greenhough School Site Drive, New Dorm, Arts Center; Dedham, MA

Community Institutional

Stoughton Public Library; Stoughton, MA
Dedham Community House Master Plan; Dedham, MA
Hale Reservation Master Plan; Westwood, MA
Temple Beth Elohim; Wellesley, MA

Mixed Use

Charlseview Housing and Community Center; Boston, MA
Avenir; Boston, MA
Millennium Place; Boston, MA

DMLA



JEFFREY THOMA RLA

Senior Associate | jeff@dm-la.com | 978-409-9815

For more than 25 years, Jeff's career as a landscape architect has focused on providing the highest level of service and design to his clients. His technical experience and creativity have contributed to the successful management and completion of a broad spectrum of projects in the northeast, from institutional campus master planning and design to urban streetscapes and parks to signature residential landscapes. Throughout his career, Jeff has constantly challenged himself, his colleagues and the staff he has managed to provide creative, contemporary and informed solutions that not only address the needs of his clients, but those of the larger community as well.

Some of his recent projects include the Overlook at St. Gabriel's, a large multifamily residential project in the heart of Boston's Brighton neighborhood that preserves the historic Monastery and Olmsted Brothers' landscape; the award-winning Newbridge on the Charles Intergenerational Community; and the new Commonwealth Honors College residential complex, a vibrant residential and academic community on the flagship campus of UMASS, Amherst.

EDUCATION

University of Massachusetts Amherst: Amherst, MA
Bachelor of Science in Landscape Architecture, 1990-1994

PROFESSIONAL REGISTRATIONS

Registered Landscape Architect, Commonwealth of Massachusetts, #1377

PROFESSIONAL ASSOCIATIONS

Board of Directors West Parish Church Garden Cemetery

AWARDS

Jeff has served as lead designer and Project Manager for several local and national award winning projects. These include the following awards:

2010 Boston Society of Landscape Architects- Honor Award for Institutional Design- New Bridge on The Charles Intergenerational Community
2010 Distringuished Outdoor Tennis Facility- ASBA- New Bridge on The Charles Cottage Community Tennis Center
2006 School Planning and Management Education Design Showcase- Grand Prize Winner - Carlton Elementary School, Salem, MA
Whole Building/ Campus Design
2006 Logan Airport 911 Memorial International Design Competition- Finalist

DMLA

JEFFREY THOMA RLA

Senior Associate | jeff@dm-la.com | 978-409-9815

RELEVANT EXPERIENCE

The following is an abbreviated list of current and past projects completed by Jeff while serving as a Senior Associate for Shadley Associates, as Senior Associate at Meridian Associates Inc., and as Senior Associate at Stantec Planning and Landscape Architecture

Parks and Playground

FitzGerald Park; Malden, MA
Picket Park; Worcester, MA
Polar Park; Worcester, MA
Callahan Park; Malden, MA
Abigail Adams Memorial Park; Quincy, MA
Drummer Boy Park Master Plan; Brewster, MA
Chestnut Hill Reservoir Master Plan; Chestnut Hill, MA
Boston Convention & Exhibition Center, East Service Dr. Park; Boston, MA

Educational

UMASS Commonwealth Honors College Complex; Amherst, MA
UMASS Studio Arts Building; Amherst, MA
UMASS North Residential Housing Complex; Amherst, MA
Boston College Conte Plaza; Chestnut Hill, MA
Boston College Higgins Slope Improvements; Chestnut Hill, MA
Carlton Elementary School; Salem, MA
Endicott College South Campus Master Plan; Beverly, MA
Eastern Nazarene College Master Plan; Quincy, MA

Community Institutional

Boston Convention & Exhibition Center Street Improvements; Boston, MA
Newbridge on the Charles Intergenerational Campus; Dedham, MA
Malden Police Station; Malden, MA
Quincy City Hall Plaza; Quincy, MA
The Residences at Riverbend Assisted Living; Ipswich, MA
Forestdale Park Senior Living Residences; Malden, MA
Brook School Senior Apartments; Weston, MA

Multi-Family Residential

The Overlook at St Gabriel's; Brighton, MA
Meriel Marina Bay; Quincy, MA
Deco Apartments; Quincy, MA
One Seaport Square; Boston, MA
Putnam Green; Cambridge, MA
191 Washington Street; Brighton, MA
RE 150 Apartments; Medford, MA

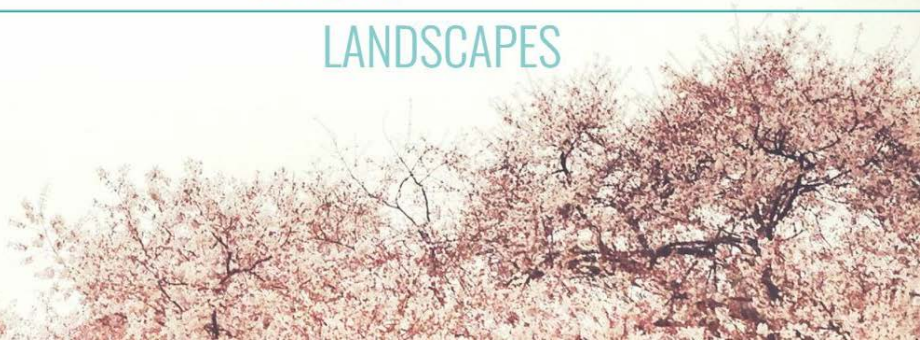
Mixed Use/ Office

Belcare Luxury Residences & Retail; Wellesley, MA
120 Commerce Way; Woburn, MA
Forward Inc.; Roxbury, MA
400 River's Edge Drive; Malden, MA

SKYLINE LANDSCAPES

SKYLINE LANDSCAPES

FLOURISHING LANDSCAPES THROUGH HORTICULTURE



WHO WE ARE

Skyline Landscapes was founded by Brendan McCarthy and Matt Connelly after working together at the Arnold Arboretum of Harvard University for a combined 15 years. We are focused on providing the highest quality ornamental tree care, planting and landscape construction service to our clients both commercial and residential.

Our primary philosophy is that trees, shrubs and stonework are components of the landscape that should outlast everything else. We carry out this philosophy by using only the materials and unique plants that will make each project functional for its intended purpose. A new landscape may take years to mature and this is why it is so important to get things right the first time.

We believe that a carefully constructed and well maintained landscape will last for generations. We have helped many homeowners, landscape architects, builders and propriety managers on projects of all shapes and sizes. Our company is unique because we use our background and education in horticulture, arboriculture and quality construction techniques to ensure that your landscape is functioning well and looking great.





Brendan McCarthy

Founding Partner & Arborist
Specializing in Ornamental Pruning, Orchard Production, Tree Health Assessments, Pest Management

Brendan McCarthy is a founding partner of Skyline Landscapes and the lead arborist. He possesses a Bachelor's of Science degree in Urban Forestry from the University of Massachusetts in Amherst, MA. He is also a graduate of The Stockbridge School of Agriculture with an Associate's degree in Arboriculture and Park Management. During his time at school he spent a semester in Sydney, Australia training as a tree climber.

After graduating college Brendan further developed his professional tree care skills by working as a tree climber for some of the top companies in the tree care industry around metro Boston.

In 2007 Brendan was offered a job at America's oldest tree museum, The Arnold Arboretum of Harvard University. The Arnold Arboretum is home to some of the rarest and oldest plants in North America. At the Arnold he maintained and improved numerous collections of trees and shrubs sometimes managing up to 30 acres of important collection material (trees) at a time. He became the lead horticulturist at the award winning Leventritt Shrub and Vine garden and oversaw a crew of up to ten people during parts of the growing season.

Brendan loves sharing his knowledge and experience with his clients. He brings a unique knowledge of plants and arboricultural techniques to all of the projects that he encounters.

LICENSES & CERTIFICATIONS

- International Society of Arboriculture Certified Arborist for 10 years [NE-6436-A]
- Massachusetts Commercial Pesticide Applicators License [#35986]
- Massachusetts Hoisting Engineer's License (Class 2A) [HE-165662]
- American Welding Society Certified Welder [#2486]
- Commercial Driver's License

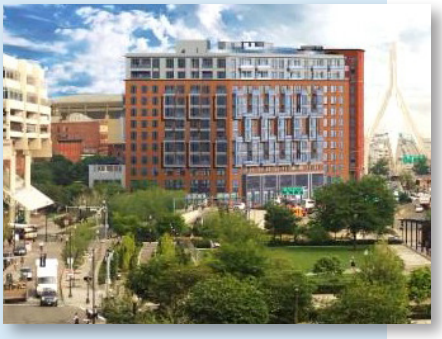
NITSCH ENGINEERING

Nitsch Engineering

Building better communities with you



Temple Landing
New Bedford, MA



One Canal
Boston, MA



Woodrow Wilson Court
Cambridge, MA



Orient Heights
Boston, MA

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

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

Civil Engineering

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

Transportation Engineering

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

Structural Engineering

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

Land Surveying

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

Green Infrastructure

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

Planning

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

GIS Services

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

Whittier Place
Roxbury, MA

Nitsch Engineering

Nitsch Engineering is providing civil and transportation engineering services for the redevelopment of Whittier Street Apartments, a Boston Housing Authority multi-family housing development in Roxbury. Nitsch Engineering worked directly for the private developer leasing the Boston Housing Authority land, Preservation of Affordable Housing (POAH), to redevelop the 3.8-acre site in three phases, The four building, 200-unit housing development, originally built in 1953, will be replaced with six buildings containing mixed-income rental housing and 14,225 square feet of commercial space. The creation of two new public ways through the private site, Tenor Lane and Choice Way, is also included as part of the project.

Nitsch Engineering is providing services for design and permitting with the Boston Planning and Development Agency (BPDA), Boston Water and Sewer Commission, Public Improvement Commission, and the Boston Transportation Department (BTD); and provided construction administration services.

Nitsch Engineering is also charged with the design, permitting, and oversaw construction of the publicly funded roadways, Tenor Lane and Choice Way, constructed by the private developer. Throughout the roadway design and construction process, Nitsch Engineering has coordinated with the City of Boston on the Ruggles Street Improvement Project, which runs in conjunction with our project.

Project Features
- *3.8-acre site*
- *Multi-phased project*
- *4-building, 200-unit housing development*
- *Boston's Roxbury neighborhood*
- *Assisted permitting with BPDA, BWSC, PIC & BTD*

Client
Preservation of Affordable Housing

Owner
Boston Housing Authority

Completion Date
Phase 1: Spring 2020
Phase 2: TDB
Phase 3: TDB

3368 Washington Street
Boston, MA

Nitsch Engineering

The proposed residential and office development at 3368 Washington Street in the Jamaica Plain neighborhood of Boston is planned to include Supportive Housing units for individuals served by PSI and low- and moderate-income residential units. TCB will be the Management Agent for all residential units on-site. As the project is in close proximity to the Green Street MBTA orange line station and the Forest Hills Commuter Rail and Orange Line station, it is considered a Transit-oriented Development project.

Nitsch Engineering is providing civil engineering and transportation permitting services for development. We are designing new utilities, stormwater infrastructure, and grading for the site and the abutting public way. We are assisting in the permitting process for City of Boston Public Improvement Commission (PIC), Boston Water and Sewer Commission (BWSC), and Boston Planning and Development Agency (BPDA). Additionally, we are preparing construction documents and specifications, attending and presenting at public hearings and meetings, and providing construction administration services.

We are conducting traffic studies, site design assistance for parking access and design, and roadway mitigation design services in the public ways as well as assisting the permitting process for the BPDA, Boston Transportation Department (BTD), and BPWD. In addition, we are providing public meeting and PIC assistance. Using the City, State, and Federal standards, we are assessing the existing street network conditions and analyzing the impacts of increased traffic. We are also providing mitigation options to minimize the impacts such as promoting alternative means of transportation. As part of the BPDA Article 80 review process, we are also developing the Transportation Access Plan Agreement (TAPA) for the BTD Planning Department's review which involves identifying and describing parking accommodations, bicycle accommodations, pedestrian accommodations, site access, and transportation demand management measures. In addition, we are working with TCB and Suffolk Construction to develop the Construction Management Plan (CMP) which identifies on-site construction logistics as well as temporary traffic control with regards to pedestrian management and on-street parking restrictions. For this CMP, coordinating logistics with the abutter, BMS Paper Company, is crucial so existing operations can be maintained throughout the 3368 Washington Street construction.



Rendering courtesy of RODE Architects

Project Features
- *Supportive housing units*
- *Transit-oriented development*
- *Supporting the BPDA Article 80 review process*
- *Providing public meeting and PIC assistance*
- *Assisting City of Boston permitting*

Client
RODE Architects

Owner
The Community Builders & Pine Street Inn

Completion Date
Ongoing

image credit: RODE Architects

Jackson Square Redevelopment
Jamaica Plain, MA

Nitsch Engineering

In an effort to reknit the urban fabric blighted from years of neglect and damage, Jackson Square Partners redeveloped 11 acres of private and public land to revitalize the neighborhood where the Jamaica Plain and Roxbury communities meet. Jackson Square Partners, a collaboration of three community-based non-profit organizations, created a mixed-use development based on a comprehensive planning effort aimed at creating a balanced community. The LEED for Neighborhood Development (LEED ND) Pilot project, which was the first project in the northeast to earn a Silver Certified Plan rating, includes development of three lots around the Massachusetts Bay Transportation Authority's (MBTA) Jackson Square station and improvements to the area's streets.

Nitsch Engineering provided land surveying, and civil and transportation engineering services for the four-phase redevelopment project. We provided boundary retracement and existing conditions surveys for 27 acres in the area, including the 11-acre site. Our engineers then began work on the Phase 1A Infrastructure, which was completed in the fall of 2011, and which will support the area's new mixed-use buildings (residential condominiums and retail space). Nitsch Engineering used Low Impact Development (LID) principles to develop the site; the development includes green roofs, re-use rainwater, and utilizes other green design techniques. We designed roadway infrastructure improvements for five streets in the area: Columbus Avenue, Centre Street, Amory Street, the MBTA busway, and Ritchie Street. We also prepared design documents that include new curb alignments, sidewalks, street lights, and median dividers.

Our design balances the need to maintain the vital transportation arterials of Columbus Avenue and Centre Street with the need to support pedestrian and bicycle travel, as well as the need to provide on-street parking and improved landscaping and amenities. Nitsch Engineering provided technical support for the Boston Planning and Development Agency permitting, and was responsible for providing utility design, stormwater management design, site layout and grading, and construction administration services; as well as permitting with the Boston Water and Sewer Commission, the Department of Environmental Protection, and the Boston Public Improvement Commission.

As part of the first phase of this project, Nitsch Engineering provided civil engineering services for the development of a 103-unit mixed-use development at 225 Centre Street, which opened in September 2013. The overall Jackson Square project includes 14 buildings with 436 housing units, 61,200 square feet of retail/commercial, 13,500 square feet of office space, 66,500 square feet of community facilities, and open space.



Project Features
- *LEED ND Project*
- *Low Impact Development*
- *Roadway Infrastructure Improvements*
- *Transit-Oriented Design*
- *Permitting*
- *Stormwater Management*

Client
Jamaica Plain Neighborhood Development Corporation/ Urban Edge

Completion Date
2018

Rendering courtesy of Prellwitz Chilinski Architects

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

Nitsch Engineering

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

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

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





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

Client
ICON Architecture

Owner
Boston Housing Authority

Developer
Trinity Financial

Completion Date
Phase I - 2010
Phase II - 2013

Deborah M. Danik, PE, CPESC, LEED AP BD+C

Deputy Director of Civil Engineering

Nitsch Engineering



Years of Experience

- *17 in industry*
- *15 at Nitsch Engineering*

Registration

- *Massachusetts: Professional Engineer (Civil) #47098, 2007*
- *LEED Accredited Professional, Building Design + Construction, 2008*
- *Certified Professional in Erosion and Sediment Control, 2011*
- *OSHA (10-hour) Certification, 2010*

Education

- *B.S., Civil Engineering, University of Massachusetts, Amherst, 2002*

Professional Affiliations

- *American Society of Engineering Companies, Engineering Excellence Awards Committee, Co-Chair*
- *NAIOP Massachusetts, Member*
- *USGBC Massachusetts Member*

Awards

- *Boston Society for Civil Engineers Section 2010 Younger Member of the Year*

Deb has 17 years of experience in the civil engineering field, with an emphasis on urban site design, coordinating projects, integrating sustainable site practices, and resolving permitting issues in the City of Boston. Her project experience includes mixed-use and commercial developments, transportation-related projects, academic facilities, and providing review services in Massachusetts. She is very experienced in managing multiple projects to provide innovative civil engineering design services and is able to combine her technical and communication skills to successfully serve a number of clients.

Deb is actively involved in the American Society of Engineering Companies, serving as the Co-Chair of the Engineering Excellence Awards Committee. She is the 2010 recipient of the Boston Society for Civil Engineers Section (BSCES) Younger Member of the Year Award. Deb is also a member of Nitsch Engineering's Board of Directors and worked to help establish Nitsch Engineering's employee-resource group, Nitsch Cares, which functions as the philanthropic arm of Nitsch Engineering. Deb, along with a Nitsch Cares co-chair and committee, helps organize volunteer events for Nitsch Engineering employees and determines how the company distributes its annual charitable contributions to non-profits within the Nitsch Engineering offices communities. Deb is a downtown Boston resident and volunteers her time as one of the five members of her Condominium's Board of Trustees for the 370-unit building. In her free time, she enjoys exploring new parts of Boston with her husband, hiking and snowboarding in New Hampshire, and entertaining friends and family.

Representative Projects

Orient Heights, East Boston, MA: Project Manager for civil engineering services for the redevelopment of a Boston Housing Authority multi-family housing development consisting of 331 units. The development will contain new public space, a community center, and management office. Conducted feasibility studies and analysis of the existing site. Performing site design services (grading, utilities, and layout design). Providing permitting services permitting with the Boston Planning and Development Agency (BPDA), Boston Water and Sewer Commission (BWSC), Public Improvement Commission (PIC), and the Boston Transportation Department (BTD).

28 Austin Street, Newton, MA: Project Manager for civil engineering services for the redevelopment of a parking lot into a four-story mixed-income rental residential building, with below-grade and at surface public parking and first floor retail in Newtonville. Designed the site layout, utilities, and grading, as well as improvements to the Private Way abutting the site. Approval of the project required the City of Newton Zoning Board of Appeals, included obtaining approval from the City of Newton Planning and Development Department, City of Newton Department of Public Works and the Newton Engineering and Utilities Divisions, and the City of Newton Fire Department.



Orient Heights, East Boston, MA



Washington-Beech Housing, Phase I, Boston, MA



Jackson Square, Boston, MA

Representative Projects - continued

55 Lagrange Street, Boston, MA: Senior Project Manager responsible for civil engineering services for the redevelopment of the existing parking lot on a 7,700-square-foot parcel located in Boston's Theater district. The proposed 21-story multi-use building with first floor retail, comprises the total site to provide 170 residential units and a small commercial space on the first floor. Conducted a comprehensive study of the existing site conditions during the feasibility stage. Led the permitting processes for the project through the PIC and BWSC; prepared Contract Documents; and attended and presented at public hearings and meetings; and is currently providing construction administration services.

Mattapan Heights V, Boston, MA: Senior Project Engineer for civil engineering services for the construction of a new 60-unit, all affordable housing rental housing facility including providing technical support for the Project Notification Form filing with the BPDA. Also responsible for the utility design, stormwater management design, site layout and grading, roadway design, construction administration, and permitting with the BWSC, and the Massachusetts Department of Environmental Protection (MassDEP).

Washington-Beech Housing, Phase I, Boston, MA: Project Engineer for civil engineering services for the redevelopment of the Washington-Beech housing development. The first phase added 100 new units to the property (in four townhouses and a midrise building) and created three new streets. Designed the site utilities, grading, and layout for Phase I, as well as two new public streets and one private way. Permitted the improvements and additions with the Boston Public Works Department, Boston Transportation Department, Boston Water and Sewer Commission, Boston Street Lighting Division, Boston Parks Department, and private utility companies. Developed the specifications and cost estimates for the project. Worked closely with the project team to address AUL concerns during the design and permitting process.

Jackson Square, Boston, MA: Project Engineer for civil engineering services for the four-phase redevelopment project that turned the 11-acre entry area to Jamaica Plain and the Fort Hill section of Roxbury into a mixed-use, transit-oriented community. Using Low Impact Development (LID) principles to develop the roadway improvements and private sites; the development will include green roofs and utilize other green design techniques for stormwater management. The project includes designing roadway infrastructure improvements for five streets in the area: Columbus Avenue, Centre Street, Amory Street, the Jackson Square Massachusetts Bay Transportation Authority (MBTA) busway, and Ritchie Street. Most of the public roadway site improvements were above the underground MBTA Orange Line train tracks. Provided technical support for the BPDA permitting, was responsible for providing utility design, stormwater management design, site layout and grading, and construction administration; as well as permitting with the BWSC, MassDEP, PIC, and MBTA.

Adina J. Alpert, PE, ENV SP, PTOE
Senior Transportation Engineer

Nitsch Engineering



Years of Experience
- *11 in industry*
- *3 at Nitsch Engineering*

Registration
- *Massachusetts: Professional Engineer (Civil), Reg. #53602*
- *Arizona: Professional Engineer (Civil), Reg. #48367*
- *Certified Professional Traffic Operations Engineer (PTOE) #4615, 2019*
- *Institute for Sustainable Infrastructure, Envision Sustainability Professional, 2020*

Education
- *M.S., Civil Engineering, University of Arizona, 2006*
- *B.A., Physics, University of Pennsylvania, 1998*

Professional Affiliations
- *Women's Transportation Seminar (WTS) International, Boston Chapter, Membership Committee, 2017 - Present*
- *Institute of Transportation Engineers (ITE), Member, 2017 - Present*

Adina is a professional engineer with a focus in Transportation. Her project experience includes Road Safety Audits (RSAs) and Complete Streets designs, as well as a variety of traffic analyses and traffic impact studies, and design plans for traffic signals, signing and marking, roadway segments, roundabouts, and traffic management. Adina possesses excellent analytical skills with an attention to detail that lends itself to her knowledge of technical writing and report development. Her ability to confidently consult with clients is shown by her past project management experience, including work for local municipalities and developers, as well as on State DOT projects, primarily in Massachusetts and Arizona.

Adina is skilled in industry-standard and advanced computer programs, including AutoCAD/Civil 3D, Synchro and SimTraffic, VISSIM, and SIDRA. She is familiar with the standards and guidelines of the Highway Capacity Manual, the Manual on Uniform Traffic Control Devices, the ITE Trip Generation Manual, A Policy on Geometric Design of Highways and Streets, and the MassDOT Project Development & Design Guide.

Representative Projects

1165R Massachusetts Avenue Apartments, Arlington, MA: Senior Transportation Engineer for transportation permitting services for a 4-building, 130-unit residential development within the Mirak Innovation Park in Arlington. The project involves demolishing two buildings, constructing two new buildings, and renovating two existing buildings. The project is currently under review with the Town of Arlington Planning Board. The permitting effort involved completing a full traffic impact study for eight intersections including data collection, Synchro traffic capacity analysis, Massachusetts Bay Transportation Authority (MBTA) transit analysis, safety analysis, and determining the appropriate mitigation measures to alleviate congestion.

115 West Main Street, Millbury, MA: Senior Transportation Engineer for transportation permitting services for a 3-building mixed-use development comprising 197 residential units, 2,400 square feet of restaurant space, 10,000 square feet of office space, and two underground parking garages. The project involves renovating an existing manufacturing building and constructing two new buildings. The project is currently under review with the Town of Millbury Planning Board. The permitting effort involved completing a full traffic impact study for six intersections including data collection, Synchro traffic capacity analysis, safety analysis, and determining the appropriate mitigation measures to alleviate congestion and address safety concerns. Coordinating with the project team to address project-related issues with the Town of Millbury and the Town of Sutton. Presented the Traffic Impact Study to the planning board and public.

Intersection Improvement Plan for Main Street at Prospect Street, Acton, MA: Senior Transportation Engineering responsible for improvements at the highly-trafficked intersection of Main Street and Prospect Street. Evaluated four alternatives (two non-signalized alternatives, signalized intersection, and roundabout) to improve vehicular,



Improvements at the Intersection of Trapelo Road and Waverly Oaks Road, Waltham, MA



Weston Town Center, Weston, MA

Representative Projects - continued

pedestrian, and bicycle safety and to improve traffic circulation. Performed traffic counts at the intersection, and conducted a traffic study. Analyzed the results and developed conceptual alternatives for intersection improvements. Conducted two public meetings with stakeholders and residents. Prepared a Final Traffic Report with recommendations for improvements and presented this report to a Board of Selectmen.

Intersection Evaluations, Medfield, MA: Senior Transportation Engineer responsible for evaluation of five unsignalized intersections identified by the Town of Medfield to have existing operational and/or safety issues, and to develop a set of recommended improvements that can be implemented in the short term. Services included site visits, traffic counts, a traffic signal warrant analysis, sight distance evaluations, and development of a report with concept plans for the intersections.

Improvements at the Intersection of Trapelo Road and Waverly Oaks Road, Waltham, MA: Senior Transportation Engineer responsible for the intersection traffic operations analysis in Synchro for existing and future conditions and the development of improvement alternatives based on that model. Designed alternatives for a new, more efficient lane configuration within the constrained right-of-way, and designed traffic signal system improvements including all new equipment, new signal timing, and coordinating with the adjacent traffic signal in the Town of Belmont. Developed a report documenting existing conditions, operational and safety analyses, proposed alternatives, and our recommendations for improvements. Coordinated with the City and presented the results of our traffic analysis, the proposed alternatives, and our recommendations to the Waltham Traffic Commission and the public.

Fenway-Yawkey Multi-Use Path, Boston, MA: Transportation Engineer responsible for developing a fully revised and updated Functional Design Report documenting existing conditions and describing key elements of the proposed design of this multi-use path, which will connect the Emerald Necklace park system to two rail stations and the area surrounding Fenway Park.

Holden Street, Drummond Avenue, and Shore Drive, Worcester, MA: Project Engineer responsible for the design of a new traffic signal system at this intersection, with accompanying signing and pavement marking design. The project is being completed as part of the Massachusetts Department of Transportation's (MassDOT) Transportation Improvement Program (TIP).

Weston Town Center, Weston, MA: Senior Transportation Engineer for transportation engineering services for the Weston Town Center Improvement Project. The project includes approximately ¾ of a mile of streetscape, traffic calming, lighting, and landscape design. Three new open spaces are being design which will include new site amenities for the public to enjoy, as well as updates to drainage and water utilities, and undergrounding of overhead utilities (Electric, Phone, Cable, Town Fiber).

Jonathan Hedlund, PE
Project Manager

Nitsch Engineering



Years of Experience
- *11 in industry*
- *4 at Nitsch Engineering*

Registration
- *Massachusetts: Professional Engineer (Civil), #52304*
- *OSHA 10-hour Certified*
- *OSHA 40-hour Certified*

Education
- *B.S., Civil Engineering, University of Massachusetts, 2010*

Professional Affiliations
- *American Society of Civil Engineers, Rhode Island Chapter*
- *Solid Waste Association of North America*

Jon is a civil engineer with over 10 years of experience in engineering design and construction management projects (i.e. industrial site planning, underground utilities, stormwater management). His background of experience includes working for both public and private sector clients. As project manager, Jon is responsible for overseeing the civil engineering scope of services and monitoring the project process closely to make sure that Nitsch Engineering provides adequate and timely attention to the project.

Jon strives for a more efficient and client-focused design approach, and focuses on maintaining utilization while staying within project scope and budget to meet the client's needs.

Representative Projects

Whittier Place, Roxbury, MA: Project Manager for civil engineering services for the redevelopment of Whittier Street Apartments, a Boston Housing Authority multi-family housing development in Roxbury. Worked directly for the private developer leasing the Boston Housing Authority land, Preservation of Affordable Housing (POAH), to redevelop the 3.8-acre site in three phases. Providing services for design and permitting with the Boston Planning and Development Agency (BPDA), Boston Water and Sewer Commission (BWSC), Public Improvement Commission (PIC), and the Boston Transportation Department (BTD); and provided construction administration services.

Orient Heights, East Boston, MA: Senior Project Engineer for civil engineering services for the redevelopment of a Boston Housing Authority multi-family housing development consisting of 331 units. The development will contain new public space, a community center, and management office.

The Homes at Old Colony, South Boston, MA: Senior Project Engineer for civil engineering services for the redevelopment of a LEED ND public housing project near Andrews Square. The two-phased project included 116 new units and a 10,000-square-foot community center during Phase 1, and 169 new units and five new public streets during Phase 2.

730 – 750 Main Street, Cambridge, MA: Senior Project Engineer for a site redevelopment for MITMCO. Project includes two buildings with an associated parking garage with site and utility improvements. Stormwater improvements were designed based on Cambridge Stormwater regulations.

Dedham Public Safety Building, Dedham, MA: Senior Project Engineer for civil/site engineering services including the design of the site utilities (water, sewer, drainage) and the preparation of utility, demolition, and drainage plans, specifications, construction administration and all local/state permitting.

The Williams Inn, Williams College, Williamstown, MA: Project Engineer for civil engineering services associated with the new Williams Inn and municipal parking lot. The Inn includes 100 guest rooms, a restaurant, and event and meeting spaces. The project site is adjacent to

Jonathan Hedlund, PE, Senior Project Engineer



Orient Heights, East Boston, MA



The Homes at Old Colony, South Boston, MA



The Williams Inn, Williams College, Williamstown, MA

Representative Projects - continued

Christmas Brook, a perennial stream, and an unnamed intermittent stream. Extensive permitting was required through the Williamstown Conservation Commission. Designed site utilities and layout for the Inn and parking lot.

Tufts University, Cummings Building, Medford, MA: Senior Project Engineer responsible for the planning, site design, and permitting coordination services for the Cummings Building Project. Site design services include a two-phase construction approach which started with a site utility enabling package and ended with proposed utility improvements for the proposed 150,000-square-foot facility. Prepared plans and specifications and provided review and comment on cost estimates.

Tufts University, Squash Facility, Medford, MA: Senior Project Engineer responsible for the planning, site design, and permitting coordination services for the Squash Facility Project. Provided permitting services, grading, stormwater management, building layout, parking lot layout, and utility improvements. Prepared plans and specifications and provided review and comment on cost estimates.

Tufts University, Athletic Campus Utility Project, Medford, MA: Senior Project Engineer responsible for the planning, conceptual design, and permit scoping to provide power from Tufts Central Energy Plant to their Athletic Campus. Collaborated closely with the Owner, Electrical Engineer, and cost estimator to develop conceptual level plans for the consideration of different routes to provide power. Conceptual designs were evaluated for cost, complexity, and permitting challenges to help support the decision process on the preferred route.

Tufts University, Stormwater Improvements Project, Medford, MA: Senior Project Engineer responsible for the design, bid support, and construction administration services for the second phase of the Stormwater Improvements Project for their Athletic Campus. Collaborated closely with the Owner, Geotechnical Engineer, and cost estimator to update permits and construction documents for bidding purposes. Prepared plans and submittal packages for filing with the City engineering department. Supplied construction support, reviewed shop drawings, and responded to Requests for Information.

Massachusetts Institute of Technology, Metropolitan Warehouse Renovation, Cambridge, MA: Senior Project Engineer for a site redevelopment for MIT. Project includes redevelopment of the MIT MET building with associated utility and stormwater water improvements adhering to Cambridge Regulations.

Stonehill College, New Welcome Center, Easton, MA: Senior Project Engineer responsible for civil/site engineering services including the preparation of utility, demolition, and drainage plans, specifications, construction administration and all local/state environmental permitting for the construction of a new Welcome Center building.

Stonehill College, Solar Project, Easton, MA: Senior Project Engineer responsible for civil/site engineering services including the preparation of utility, layout, demolition, and drainage plans, specifications, construction administration and all local/state environmental permitting for the construction of new solar canopies in an existing parking lot at the college.

Coleman Horsley, PE
Project Engineer

Nitsch Engineering



Years of Experience
- *3 in industry*
- *3 at Nitsch Engineering*

Registration
- *Massachusetts: Professional Engineer, #55996, 2020*

Education
- *B.S., Civil Engineering, Worcester Polytechnic Institute, 2016*

Professional Affiliations
- *Boston Society of Architects Revit Users Group, Member, 2016-Present*

Coleman provides design support on Nitsch Engineering's civil, planning, and surveying projects. A creative and collaborative designer, Coleman has experience working on a multitude of projects including small and large scale Residential, Commercial, Academic, and Utility Coordination/Design.

In addition, he has a full command of the design process, including drafting, producing renderings, and performing context analysis. Also, he has extensive construction administration, and permitting experience including but not limited to BWSC, PIC, MBTA, CH91, and MEPA.

Representative Projects

Franklin Highlands, Boston, MA: Project Designer for renovations of the 14, 4-story apartment buildings that comprise Franklin Highlands, located within a 10-block area near Franklin Park. Renovations will include interior and exterior repairs, utility upgrades, and the expansion of an existing community center. Civil engineering services included coordinating with architects and the design of a stormwater infiltration system. Also prepared construction documents.

Lorenzo Pitts Portfolio, Boston, MA: Project Designer for the rehabilitation of 22 affordable housing buildings spread out amongst Dorchester and Roxbury. Services include permitting through the Boston Public Works Department (BPWD), coordination with the Project Team, and the preparation of Construction Documents.

One Dalton Mixed-Use Development, Boston, MA: Project Designer for civil engineering services for a new 61-story high-rise tower that houses a Four Seasons Hotel and Private Residences at One Dalton Street; a 26-story residential tower with below-grade parking; and a new urban park at the intersection of Dalton and Belvidere Streets. Supported design of the site utilities (water, sewer, and drainage) and provided the curb and site layout design. Provided permitting assistance for the Boston Planning and Development Agency process, and led permitting coordination the Public Improvement Commission (PIC), Boston Water and Sewer Commission (BWSC), Massachusetts Department of Environmental Protection (MassDEP), and National Pollutant Discharge Elimination System (NPDES) permits. Provided construction administration services.

Clippership Wharf, East Boston, MA: Project Designer for civil engineering services for the new mixed-used development along Boston Harbor. The development consists of four buildings including 478 residences and 30,200 square feet of retail and public space, as well as a 300-space underground parking garage. Assisted with design of the site utilities, site circulation, groundwater recharge system, public and private street improvements, and the BWSC 48-inch storm drain that traverses the site. Permitting included the Boston Planning and Development Agency (BPDA) Large Project Review, Chapter 91, Boston Conservation



One Dalton Mixed-Use Development, Boston, MA



Clippership Wharf, East Boston, MA



Smith College, Neilson Library, Norhampton, MA

Representative Projects - continued

Commission, BWSC, PIC, and the Environmental Protection Agency (EPA) NPDES registration.

Kendall Square, Cambridge, MA: Project Designer responsible for providing civil engineering services associated with the planning and rezoning phase for the redevelopment of the Kendall Square area in Cambridge. The five-year planning project (2010-2014) investigated adding up to 1.1 million square feet of lab, academic, office, and retail buildings surrounding the Kendall Square MBTA station at the end of the MIT campus Infinite Corridor. Provided utility coordination and design for Water, Stormwater, Sewer, Electric, Telecom, Steam, and Gas utilities in addition to permitting with the Cambridge Water Department.

DC Water Clean Rivers Project, Rock Creek A Green Infrastructure, Washington, DC: Project Designer for the construction of green infrastructure facilities, including planter bioretention facilities, curb extension bioretention facilities, alley permeable pavement facilities, and parking lane permeable pavement facilities.

125 Amory Street Redevelopment, Boston, MA: Project Designer responsible for providing civil engineering services for the redevelopment of approximately six acres into an integrated mixed-use neighborhood in Jackson Square of Boston, Massachusetts. Designer responsible for providing utility coordination and design for Water, Stormwater, Sewer, Electric, Telecom, Steam, Gas and Chilled Water utilities in addition to assisting permitting.

Smith College Neilson Library, Northampton, MA: Project Designer responsible for providing civil engineering services associated with the renovations and additions to the Neilson Library at Smith College in Northampton, Massachusetts. Providing utility coordination and design for Water, Stormwater, Sewer, Electric, Telecom, Steam, Gas and Chilled Water utilities in addition to permitting with the City Engineering department, Massachusetts stormwater standards and LEED.

Brandeis University, Skyline Residence Hall, Waltham, MA: Project Designer responsible for civil engineering services for the new Skyline Residence Hall at Brandeis University to replace the housing that was part of the Usen Castle complex. Responsible for providing utility coordination and design for Water, Stormwater, Sewer, Electric, Telecom, Steam, Gas and Chilled Water utilities in addition to permitting with the City Engineering department and the City Zoning Board of Appeals, Massachusetts stormwater standards and LEED.

Bryan Zimolka, PE, ENV SP
Project Manager

Nitsch Engineering



Years of Experience
- *12 in industry*
- *2 at Nitsch Engineering*

Registration
- *Massachusetts: Professional Engineer (Civil) #50901, January 2014*
- *Institute for Sustainable Infrastructure, Envision Sustainability Professional, 2019*

Education
- *B.S., Civil Engineering, University of Delaware*

Professional Affiliations
- *Boston Society of Civil Engineers Section, Transportation and Development Institute Group (Group Chair), 2016-2018*
- *Institute of Transportation Engineers, Massachusetts Section Committee Member, 2012-2015*

Bryan has 12 years of experience in providing transportation permitting and traffic engineering services for public and private developments including project management, temporary traffic control, construction management, contract administration, project planning, highway design, and traffic analysis. As a Project Manager at Nitsch Engineering, Bryan is responsible for managing Transportation Permitting and Design projects for private development and municipal projects. Having extensive experience working with the Boston Planning and Development Agency, the Massachusetts Department of Transportation, the Massachusetts Port Authority and the Massachusetts Environmental Policy Act Office, he is proficient with procuring the necessary building permits. He has over six years of experience managing staff to conduct Traffic Impact Studies; design Transportation Access Plan Agreements; and prepare Construction Management Plans and Temporary Traffic Control Plans while also keeping projects on schedule and within budget. He is also experienced in coordinating construction and highway work permits, roadway and bridge widening design, and construction planning and inspection.

Representative Projects

Indigo Block, Boston, MA: Project Manager for transportation permitting services for a mixed-use, mixed-income development that will provide housing for various income levels and also a job generating light industrial use. The project involved coordinating with the contractor to develop a Construction Management Plan that includes on-site construction logistics and off-site traffic management. Coordinated with the Boston Transportation Department for expedited review and approval.

COTE Village, Boston, MA: Project Manager for transportation permitting services for a multi-building affordable housing development in Boston's Mattapan neighborhood. This project received Boston Planning and Development Agency (BPDA) Board approval in July 2019. Developed the Transportation Access Plan Agreement (TAPA) and the Construction Management Plans (CMP) to finalize the review process.

3368 Washington Street, Boston, MA: Project Manager for transportation permitting services for a development in the Jamaica Plain neighborhood which includes the removal of the existing building and development of a new 6-story mixed-use residential/commercial building. This project received BPDA Board approval and is continuing with design review. The approved Expanded Project Notification Form involved a full traffic impact study including data collection, Synchro traffic capacity analysis, and recommending mitigation measures. The remainder of the design approval process involves finalizing the Transportation Access Plan Agreement and continuing to develop the Construction Management Plan.

1165R Mass Ave Apartments, Arlington, MA: Project Manager for transportation permitting services for a 4-building, 130-unit residential development within the Mirak Innovation Park in Arlington. The project involves demolishing two buildings, constructing two new buildings, and renovating two existing buildings. The project is currently under review



3368 Washington Street, Boston, MA



401 Congress Street, Boston, MA



Hyde Park Senior Center, Hyde Park, MA

Representative Projects - continued

with the Town of Arlington Planning Board. The permitting effort involved completing a full traffic impact study for eight intersections including data collection, Synchro traffic capacity analysis, Massachusetts Bay Transportation Authority (MBTA) transit analysis, safety analysis, and determining the appropriate mitigation measures to alleviate congestion. Coordinating with the project team to address project-related issues with Town and will present the Traffic Impact Study to the planning board and public.

Allston Square Housing, Allston, MA: Project Manager for transportation permitting services for a multi-building housing development in Boston's Allston neighborhood. Working with the contractor to develop the first phase of the project (1 Highgate Street). This project received BPDA Board approval in November 2019. Developing the Construction Management Plans (CMP) to finalize the review process.

401 Congress Street, Boston, MA: Project Manager for transportation permitting services for a commercial/retail/lab development on Massport's Parcel A2 in the South Boston Waterfront. This project has just received BPDA Board approval and is finalizing the review process with the Massachusetts Environmental Policy Act Office (MEPA), Massachusetts Department of Transportation (MassDOT), the MBTA, and Massport. The permitting effort involved completing a full traffic impact study for 12 intersections including data collection, Synchro traffic capacity analysis, MBTA transit analysis, safety analysis, and determining the appropriate mitigation measures to alleviate congestion. Coordinating with the project team to finalize the Transportation Access Plan Agreement.

Hyde Park Senior Center, Hyde Park, MA: Project Manager for transportation permitting services for Boston's first LGBTQ-friendly senior housing development at 15 Everett Street in Hyde Park. The project involves the interior renovation of the former William Rogers High School along with landscape and site design improvements. The project recently received BPDA Board approval and is continuing with design review. The approved Supplementary Traffic Assessment Report highlighted the high-level traffic impacts to the neighborhood as compared to the former school. The remainder of the design approval process involves finalizing the Transportation Access Plan Agreement and continuing to develop the Construction Management Plan with NEI General Contracting.

Moakley Park Vision Plan, Boston, MA: Project Manager for traffic engineering services to support the redevelopment of the park. The Moakley Park Vision Plan positions the park to serve as protection for the South Boston community against climate change impacts. Traffic engineering services included developing a feasibility study to identify opportunities for site access, pedestrian mobility improvements, and off-site roadway improvements. The feasibility study also included the transportation permitting process for this use redevelopment and all stakeholders involved for each improvement opportunity.

DIMEO

DIMEO

DIMEO - PAST BOSTON PROJECTS

For over four decades, Dimeo Construction Company has served the Boston market providing high quality, innovative construction management and general contracting services for residential, municipal, retail, R&D, healthcare, educational and corporate clients, and has been in the forefront of many signature assignments throughout the city. Included in our featured case studies is the Northeastern University Davenport Commons apartment buildings in Roxbury.

Some of these projects were instrumental in taking blighted areas and creating economic vitality to the neighborhoods. Our responsibilities included working directly with Federal, State and Local agencies to secure all necessary permits. Additionally, beyond the Article 80 process, we either held periodic public community meetings or developed the appropriate communication platforms to manage all neighborhood concerns.

Northeastern University Mugar Lab Renovation

Copley Place Mall Retail Renovations

HUB 25 Residences New Residences at Morrissey Boulevard

860 Harrison Avenue/ Northampton Tower Residential Renovations

NorthPoint II Residential Redevelopment (Precon)

Northeastern University Davenport Commons

CVS Health Digital Innovation Lab

Avenir Residential & Mixed Use Development

Maverick Landing New Residential Development - Phases I-IV

Kenmore Towers Improvements

One Brigham Circle Mixed-Use Retail & Office Complex w/Parking Garage

Independence Wharf 470 Atlantic Avenue Renovations

Edward W. Brooke Courthouse Trial Court Facility

420 Boylston Street

Neiman Marcus Renovation of Existing Store

Boston Medical Center (formerly Boston City Hospital) New Inpatient Facility

Langham Court Residential Development

Boston Medical Center Menino Pavilion (formerly Atrium Pavilion)

Queensbury Court

Children's Hospital Longwood Galleria and Vertical Expansion

John Hancock Life Insurance Clarendon Building Renovations

Department of Transportation Corporate Headquarters

Tent City Phase II Residential & Retail Construction

New England Deaconess Hospital Clinical Laboratory and Radiation Therapy Facility

University of Massachusetts Classroom Facility & Parking Structure

Bradford Towers Elderly Housing Facility

Restoration Housing Moderate Income Housing

Duane Morris, LLP Tenant Fit-Out at Independence Wharf

DIMEO - CURRENT BOSTON/GREATER BOSTON PROJECTS

Old Colony Senior Public Housing Community - 170 units

This project in South Boston required the demolition of the existing public housing buildings and construct two affordable housing residential projects on the project sites.

Allston Yards - 165 units

Allston Yards Building A is a Mixed Use, Transit Oriented Development that includes a four-story residential building over two stories of lobbies, retail, and a fit out of a Stop & Shop grocery store with parking.

Orient Heights - 123 new units

Orient Heights Phase 3 will be a wood-framed public housing residential redevelopment and renovation that includes the demolition of three existing apartment buildings and one community building. The new construction will include three new mid rise townhouse apartment buildings, and renovations will be made to seven existing rowhouse buildings.

DIMEO - RECENTLY COMPLETED BOSTON/GREATER BOSTON PROJECTS

Hilton Garden Inn - 83 units

Hilton Garden Inn Guestroom Addition in East Boston is scheduled for completion in June 2020. The project includes the elimination of a 1-story, approx. 4,035 square foot retail building on the eastern edge of the project site and the construction of a 5-story, 84-room addition to the existing Hilton Garden Inn hotel.

The Residences at Forest Hills Station - 250 units

Dimeo and Criterion Development Partners (CDP) are transforming the former LAZ Parking Lot at the corner of Washington Street and the Arborway in Jamaica Plain, MA into a vibrant, pedestrian friendly, transit-oriented, mixed-use development called The Residences at Forest Hills Station, LLP. It will include apartments, townhouses, retail and restaurant spaces

Lowell Justice Center

Just outside Greater Boston, Dimeo is currently nearing completion on the Lowell Justice Center new Trial Court. This 270,000 sf trial court will act as the cornerstone for the entry into this historic area and will be the first new building construction for Lowell's Hamilton Canal District development master plan. Consistent with the state's commitment to the environment, this model courthouse is designed to achieve LEED Gold and possibly could attain Platinum certification.

The College of the Holy Cross

The 85,000 sf Performing Arts Center and 52,000 sf Joanne Chouinard-Luth Recreation and Wellness Center at The College of the Holy Cross in Worcester are recent awards and currently in construction.

DIMEO

Massachusetts College of Art

Dimeo Construction recently completed phase 2 of the MassArt Art Museum renovation for DCAMM, focusing primarily on the interior renovation of gallery-affiliated spaces and the completion of the plaza initiated in phase 1.

22-24 Magazine Street

Apartment Renovations at 22-24 Magazine Street, Cambridge, owned by MITIMCO (Massachusetts Institute of Technology Investment Management Company); a major fire in the fall of 2017 resulted in damage to the façade and structure and extensive water and smoke damage throughout the interior.

UMass Isenberg School of Management

The recently completed University of Massachusetts Amherst Isenberg School of Management 70,000 gsf building addition is just one of several assignments Dimeo has completed for the University of Massachusetts. It is expected to achieve LEED certification. Dimeo Construction has completed four major assignments on the University of Massachusetts Amherst campus since 2006.

Northeastern University Mugar Lab Renovation

The 4260 sf renovated project spaces were a mix of wet and dry spaces, including but not limited to laboratory spaces, lab support spaces, write-up/student seating spaces, and storage spaces. Most of the spaces required gut level renovations.

Cambridge

Harvard University Seas Lab, Cambridge

Harvard University Pound Hall, Cambridge

Harvard University Leverett-McKinlock Hall, Cambridge

Harvard University Old Quincy House Renewal Exploratory, Cambridge

Harvard University Stone Hall (formerly Old Quincy House) Renewal, Cambridge

Jackson Gardens & Lincoln Way Neighborhood Revitalization, Cambridge

DIMEO HIGHLIGHTS - MIXED USE, WATERFRONT AND TRANSIT-BASED BOSTON PROJECTS

HUB 25 Residences New Residences at Morrissey Boulevard – Transit Center Residential Building
NorthPoint II Residential Redevelopment (Precon) – Transit Center Residential Building
Avenir Residential Development – Transit Center and Mixed Use Residential Building
One Brigham Circle – Mixed-Use Retail & Office Complex w/Parking Garage
Independence Wharf 470 Atlantic Avenue Renovations – Waterfront Construction
Brighton Landing New Balance Headquarters – Mixed Use Corporate/Retail

These projects, amongst others, are representative assignments where Dimeo Construction has achieved a high level of success for our clients and the community at large.

LOCATION
South Boston, MA

COST
$62,500,000

TYPE
CM/GMP

SIZE
182,360 sf

SCHEDULE/COMPLETION DATE
27 Months, November 2022

OWNER REFERENCE
Beacon Communities Services LLC
Two Center Plaza, 7th Floor
Boston, MA 02108
Darcy Jameson, Development Director
617-574-1100 x585
djameson@beaconcommunitiesllc.com

ARCHITECT REFERENCE
The Architectural Team
50 Commandant's Way at Admiral Hill
Chelsea, MA 02150
Nate Thomas, Project Manager
617-889-4402



Case Study:

OLD COLONY PUBLIC HOUSING COMMUNITY

AFFORDABLE WOOD FRAME SENIOR HOUSING, PHASE 3 B & C

The Boston Housing Authority proposed to demolish the existing public housing buildings and construct two affordable housing residential projects on the project sites.

Phase Three B construction includes an approximate 105,000 sf development comprised of one hundred fifteen (115) one, two, three and four-bedroom residential units in one four-story elevator building, known as Building B, with accessory property management and maintenance space located on the first floor.

Phase Three C construction includes an approximate 51,000 sf development comprised of fifty-five (55) one bedroom units in one four-story elevator building, known as Building C, with first floor resident service space for low-income seniors.



MassHousing is providing Beacon Communities with construction and permanent financing; other financing sources for Phases Three B and Three C includes federal and state Low Income Housing Tax Credit (LIHTC) equity, BHA, the Massachusetts Affordable Housing Trust Fund, the state's Community Based Housing program, and a grant from the Massachusetts Clean Energy Center.

PHIUS® The project will meet certified Passive House standards.

LOCATION
Allston, MA

COST
$115,000,000

TYPE
CM/GMP

SIZE
292,000 sf

SCHEDULE/COMPLETION DATE
28 Months, September 2023

OWNER REFERENCE
New England Development
75 Park Plaza
Boston MA 02116
Joseph J. Polizzotti Jr., Dir. of Construction
617-243-7851
jpolizzotti@nedevelopment.com

ARCHITECT REFERENCE
Stantec Architecture, Inc.
311 Summer Street
Boston, MA 02210
Matt Roberts, Senior Associate
617-960-6115 (cell)
Matt.Roberts@stantec.com

CERTIFICATION
Seeking LEED Silver



Case Study:

ALLSTON YARDS

BUILDING A, MIXED USE, TRANSIT ORIENTED DEVELOPMENT

Allston Yards, Building "A," is a mixed-use project that includes a four-story residential building over a podium level. Below the podium level is two stories of lobbies, retail, fit out of a Stop & Shop grocery store with parking, storage and MEP services. Below grade is another two stories of underground delivery corridors and parking.

The site is located within the existing parking lot area of the Stop & Shop Shopping Center and is bound by the Mass Pike/Commuter rail line (Boston Landing Station) immediately to the north.

In total the building is eight levels high and approximately 292,000 sf. The overall footprint covers approximately 65,000sf. The residential apartment complex includes 165 units, an amenity space and fitness center. The structured parking includes approximately 295 spaces. The lower four levels for the retail structure is a post-tensioned, reinforced concrete structure and the upper four levels for the residential structure is wood framed.

Included with the project (early on) is construction of an enlarged parking lot to offset the parking needs for the existing Stop & Shop Grocery Store, utility and roadway work for the future Guest and West Streets and the demolition of the existing Home Goods/Dollar Tree building for future development.

LOCATION
East Boston, MA

COST
$51,552,000

TYPE
CM/Lump Sum

SIZE
142,630 sf

SCHEDULE/COMPLETION DATE
20 Months, December 2022

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Kevin McCarthy
Senior Design and Construction Manager
617-720-8400
kmccarthy@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Jonathan Lashley, AIA
617-541-3333
jlashley@iconarch.com

CERTIFICATION
Seeking LEED Gold



Case Study:

ORIENT HEIGHTS PHASE 3

WOOD-FRAMED PUBLIC HOUSING
RESIDENTIAL REDEVELOPMENT AND RENOVATION

Dimeo Construction Company was recently awarded the BHA-owned public housing development Orient Heights Phase 3 in East Boston, Massachusetts. Designed by ICON Architecture, this residential project will begin in spring of 2021 and includes the demolition of three existing apartment buildings and one community building. The new construction will include three new mid rise townhouse apartment buildings, and renovations will be made to seven existing rowhouse buildings. A total of 123 new apartments will be provided as well as complete sitework and landscaping.



LOCATION
Roxbury, MA

COST
$35,700,000

TYPE
CM/GMP

SIZE
280,000 sf

SCHEDULE/COMPLETION DATE
19 Months, June 2001

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
DHK Architects
54 Canal Street, 2nd floor
Boston, MA 02114
Fernando Domenech, FAIA, President
617-267-6408
dmhicks@dhkinc.com



Case Study:

DAVENPORT COMMONS ROXBURY

NORTHEASTERN UNIVERSITY

Northeastern University has provided both local residents and Northeastern students with critically needed housing with the construction of Davenport Commons. Construction included 2 large, 6 story apartments buildings with a total of 125 suites, and 4 smaller affordable housing buildings with 60 duplexes and flats that were sold as subsidized affordable homes. The apartments include living rooms, bathrooms and service kitchens with microwaves, sinks and refrigerators. Common areas include lounges located on each floor, front entrance and elevator lobbies, laundry facilities and multipurpose conference rooms.







LOCATION
Jamaica Plain, MA

COST
$78,227,225

TYPE
CM/GMP

SIZE
267,452 sf

SCHEDULE/COMPLETION DATE
26 Months, December 2020

OWNER REFERENCE
Criterion Development Partners
1601 Trapelo Road, Suite 280
Waltham, MA 02451
Jack Englert
Executive Vice President/Principal
781-890-5600
Jenglert@criteriondp.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Michelle Apigian,AIA, LEED AP, AICP, CPHC,
Associate Principal
617-939-0721 (cell)
mapigian@iconarch.com

CERTIFICATION
Seeking LEED Silver



Case Study:

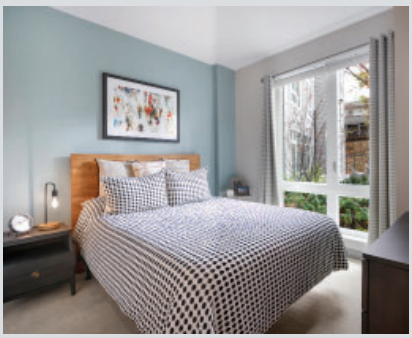
THE RESIDENCES AT FOREST HILLS STATION, LLP

WOOD-FRAMED RESIDENTIAL & MIXED USE DEVELOPMENT, PHASE I

This Jamaica Plain project in the Forest Hills section consists of a mixed-use development with apartments and future retail/restaurant space.

Criterion Development Partners (CDP) transformed the existing parking lot at the corner of Washington Street and the Arborway into a vibrant, pedestrian-friendly, transit-oriented, mixed-use development with market-rate, affordable workforce housing and access to the Orange Line. Two building complexes include 250 residential units. Building 1 will consist of a single retail level and five levels of residential space above. Building 2 is composed of two towers and is connected at the basement level by a 120-vehicle parking garage. Its six levels of residential space include a fitness center, yoga studio, clubhouse with teaching kitchen, gathering areas, theater room, bicycle storage/maintenance areas and electric vehicle charging stations.

An area of 5,500 sf of street-front retail/restaurant space for local merchants complement the neighborhood retail offerings abutting the project site along Washington Street.







LOCATION
Boston, MA

COST
$66,453,017

TYPE
CM/GMP

SIZE
219,000 sf

SCHEDULE/COMPLETION DATE
19 Months, August 2016

OWNER REFERENCE
Qianlong Criterion Ventures
1601 Trapelo Road, Suite 280
Waltham, MA 02451
Jack Englert,
Executive Vice President/Principal
781-890-5600
Jenglert@criteriondp.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
David Stockless, AIA, LEED AP
Associate Principal
617-451-3333
DStockless@iconarch.com



Case Study:

HUB 25

WOOD-FRAMED RESIDENTIAL DEVELOPMENT

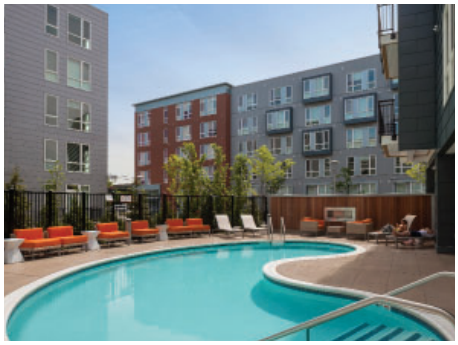
Located in the Dorchester section of Boston, HUB 25 includes 278 suites or apartments in two buildings nestled on a 2.35 acre site, situated directly adjacent to the JFK Redline Transit station (with bus, train and commuter rail services). The east building has a parking garage for 128 cars under the building.

Hub 25 mixes commercial and live/work ground level spaces with innovative apartments. Each building is five stories tall, clad in unique combinations of metal shingles, corrugated metal siding, metal panels and brick. The buildings are designed with a structural steel frame on the lower levels and a panelized wood frame on the upper floors. Amenities include a fitness room, a club room and an outdoor pool.

The residences cater to Boston working professionals looking to live in a diverse, transit-oriented community with rents less expensive than downtown. Sheltered from the bustle of the city and the expressway beyond, the Courtyard is serene and peaceful. Pockets of seating and small gathering areas provide areas for individuals or small groups, while allowing privacy for patio and deck areas.







LOCATION
Boston, MA

COST
$17,869,598

TYPE
CM/GMP

SIZE
95,000 sf

SCHEDULE/COMPLETION DATE
12 Months, December 2015

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
The Architectural Team
50 Commandant's Way
Chelsea, MA 02150
Glen Hoffman, AIA, Principal
Current Contact:
GPH Design, LLC
617-823-3093



Case Study:

860 HARRISON AVENUE

OCCUPIED RESIDENTIAL RENOVATION

This project included the rehabilitation of fifty studio units, twenty-one 1-bedroom units, and twenty-four 2-bedroom units, along with the conversion of eight units into four studios, one 1-bedroom unit, and two 2-bedroom units.

On the first floor, most of the MEP systems were relocated. In addition, the project included three permit-related components. One was a new entrance for the South End Fitness Center (SEFC) and included a small entry lobby and a 4-stop, double-door elevator connecting all levels. A second was landscaping improvements along Massachusetts Avenue, and the third was landscaping/ playground improvements on a portion of the green parking garage rooftop.

In total, the project created or preserved 558 units of housing, 65 percent of which will be maintained as affordable and below-market rent.







LOCATION
Cambridge, MA

COST
$40,575,418

TYPE
CM/GMP
Procured under MGL Chapter 149A

SIZE
168,500 sf

SCHEDULE/COMPLETION DATE
37 Months, August 2013

OWNER REFERENCE
Cambridge Housing Authority
362 Green Street, 3rd Floor
Cambridge, MA 02139
Margaret Donnelly Moran
617-520-6251
mmoran@cambridge-housing.org

ARCHITECT REFERENCE
Baker/Wohl Architects
132 Lincoln Street, Suite 4
Boston, MA 02111
Stephen Baker
617-350-7420
sbaker@baker-wohl.com

CERTIFICATION
LEED Silver



Case Study:

CHA JACKSON GARDENS & LINCOLN WAY

WOOD-FRAMED RESIDENTIAL REDEVELOPMENT

Cambridge Housing Authority (CHA) selected Dimeo to perform construction and renovation of housing on two separate sites on parallel schedules. Dimeo replaced the 60-unit Lincoln Way property with a new low-rise family residential development on the same 3.1 acre site in West Cambridge. At the same time, Dimeo comprehensively modernized Jackson Gardens, a 45-unit property in the Central Square neighborhood of Cambridge.







LOCATION
Boston, MA

COST
$107,176,896

TYPE
CM/GMP

SIZE
380,000 sf

SCHEDULE/COMPLETION DATE
24 Months, June 2009

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Janis Mamayek, AIA, LEED AP
Principal
617-541-3333
jmamayek@iconarch.com

CERTIFICATION
LEED Gold



Case Study:

AVENIR

RESIDENTIAL & MIXED USE DEVELOPMENT, NEW CONSTRUCTION

Located within Boston's historic Bulfinch Triangle, the Avenir site is bounded by Causeway, Canal and Haverhill Streets, and Rip Valenti Way. The development is a 241 unit 'high end' rental development, with 17 below-market units, in a ten story steel-framed structure.

Included within the structure are 116 parking spaces, 28,000 sf of commercial space, and 7,000 sf of reworked MBTA station entries. The project is situated above, and is partially supported by the structure of the MBTA's Orange and Green Line North Super Station. On a daily basis, 15,000 passengers traverse through the building through two exits/entrances located on the north and south sides of the building. The Dimeo team maintained an excellent rate of safety in this busy, active environment.

Units consist of one-level condominiums with studio, one, one plus, or two bedrooms; and duplexes with loft space and double-height windows. Other features include a roof deck and French balconies and terraces.

The block-long building was designed to appear as a series of varied building masses ranging from three to ten stories, reminiscent in character of the separate buildings along existing streets in the district.







LOCATION
East Boston, MA

COST
$84,875,000

TYPE
CM/GMP

SIZE
530,000 sf

SCHEDULE/COMPLETION DATE
30 Months, January 2005

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Nancy Ludwig, FAIA, LEED AP, President, Senior Principal
617-451-3333
NLudwig@iconarch.com

CERTIFICATION
LEED Certified





Case Study:

MAVERICK LANDING

WOOD-FRAMED RESIDENTIAL DEVELOPMENT PHASES I-IV

Phases I & II of this joint venture with CWC Builders consisted of a phased redevelopment comprised of the demolition of four masonry apartment buildings and the construction of 230 units in two mid-rise buildings with underground parking and four, wood framed, townhouse style buildings on two parcels. Demolition and asbestos abatement were necessary prior to commencing new construction.

Phases III & IV consisted of 166 units of affordable 3 story, wood framed townhouses in 16 buildings for a total of 270,000 sf. There is a new 10,000 sf community center and a new park on the site. In total, Dimeo built 396 units in Phases I through IV.

The project got its start with the award of a $35 million HOPE VI grant from the federal government. Funding for the $105 million project is also being provided by a number of public/private partners including the City of Boston (Neighborhood Housing Trust and Department of Neighborhood Development), state funded low-income tax credit equity, the Boston Housing Authority, Mass Housing and the Department of Housing and Community Development.

A transit-oriented development, Maverick Landing is Massachusetts's first green, affordable multi-family housing development. Maverick Landing was chosen for the Best Overall Development Award in the 2006 Affordable Housing Finance Magazine Reader's Choice Awards.

LOCATION
New Haven, CT

COST
$54,933,010

TYPE
CM/GMP

SIZE
206,801 sf

SCHEDULE/COMPLETION DATE
28 Months:
Phase I June 2006
Phase II April 2008
Phase III May 2011

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
617-451-3333
Steve Heikin, David Wright
sheikin@iconarch.com
dwright@iconarch.com



CONNECTICUT



Case Study:
QUINNIPIAC TERRACE
WOOD-FRAMED RESIDENTIAL DEVELOPMENT, PHASES I-III

The new residences at Quinnipiac Terrace were designed to help unite the development with the surrounding New Haven community by replacing institutional housing with mixed-income, single and multi-family houses, individual parking spaces, yards, and attractive streetlights, greenspace and community centers.

Phase I of this multi-phased project included the demolition of 18 existing buildings and the construction of 81 new wood framed, low income, residential units. The project was being funded by HUD, The City of New Haven and the New Haven Housing Authority. The plan won a $20 million Hope VI grant in 2003.

Phase II was comprised of two separate parcels - the main Quinnipiac Terrace parcel and the Quinnipiac Ridge parcel. The complete scope of work for both parcels consisted of the construction of a total of 79 family dwelling units in a total of 15 wood frame, two and three story structures. The main Quinnipiac Terrace parcel includes 50 units, and the Quinnipiac Ridge parcel includes 29 units. All dwelling units conform to the requirements of the energy star program.

Phase III consisted of 33 additional mixed income units, bringing the total count to 193 new units of housing.





LOCATION
New Haven, CT

COST
$23,776,818

TYPE
CM/GMP

SIZE
124,000 sf

SCHEDULE/COMPLETION DATE
13 Months, August 2011

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Richard O'Dwyer
617-451-3333
rodwyer@iconarch.com





Case Study:

ROWE RESIDENCES

RESIDENTIAL REDEVELOPMENT

Completed in 2011, the William T. Rowe Redevelopment transformed a blighted property into high-quality housing for residents with a mix of incomes.

The redevelopment of the Rowe Apartments consisted of the new construction of 104 units of one-and two-bedroom apartments in a nine-story building on land that is adjacent to the existing Rowe building. The building also includes off-street parking for 88 vehicles, approximately 2,000 square feet of first floor retail/commercial space, and approximately 2,000 square feet of community and supportive service space. Of the building's 104 units, 78 of them are set aside to households earning at or below 60% of the area median income (AMI). The remaining 26 units are market rate, targeted towards people working in the nearby medical district.

Credit is due to Trinity Financial, HUD and HANH.





LOCATION
New Haven, CT

COST
$11,884,440

TYPE
CM/GMP

SIZE
98,000 sf

SCHEDULE/COMPLETION DATE
12 Months, October 2004

OWNER REFERENCE
C.A. White, Inc.
1211 Chapel Street
New Haven, CT 06511
Michael Schaffer, Commercial Real Estate
203-777-6891
michael@cawhite.com

ARCHITECT REFERENCE
Newman Architects
300 York Street
New Haven, CT 06511
Herbert Newman, FAIA
203-772-1990
hnewman@@newmanarchitects.com



Case Study:

THE CENTER POINTE

BLOCK 235 HOUSING REDEVELOPMENT

This project involved the complete rehabilitation of the 17,000 sf 866 Chapel Street Building, and the 60,000 sf existing former Woolworth's building at 109 Church Street. The first floors remain retail, and the upper 5 floors in both buildings were converted to 85 apartment units: 40 efficiencies, 32 single bedroom, and 13 two bedroom units. All systems needed to be replaced and brought up to current building code and life safety standards. Work on all architectural details had to meet historic restoration and preservation guidelines. Project funding was a combination of a State of Connecticut Urban Development action grant and a HUD mortgage.







LOCATION
South Norwalk, CT

COST
$32,554,177

TYPE
CM/GMP

SIZE
111,270 sf

SCHEDULE/COMPLETION DATE
14 Months, August 2018

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110
Patrick Lee, Principal
617-720-8400
plee@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Nancy Ludwig, AIA, LEED AP
617-451-3333
NLudwig@iconarch.com

CERTIFICATION
Energy Star

CONNECTICUT



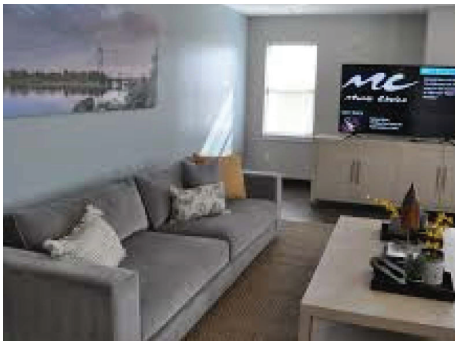
Case Study:

SOUNDVIEW LANDING

WOOD-FRAMED RESIDENTIAL REDEVELOPMENT OF WASHINGTON VILLAGE BUILDINGS A & B, PHASE I

This residential redevelopment initiative represents total collaboration of Federal, State and Local agencies resulting in the construction of 80 apartments in two buildings. Constructed on two vacant brownfield parcels adjacent to the existing Washington Village housing (which will be demolished and replaced on completion of the new buildings), Phase I is part of a larger, three-phase redevelopment effort to revitalize South Norwalk; upon completion, this initiative will replace the present 136-unit Washington Village public housing project with a new 273 apartment complex, 50 percent of which will be reserved for public housing. The project is located in a Coastal Flood Zone and will be constructed simultaneously with the City of Norwalk's reconstruction of adjacent Raymond and Day Streets to mitigate flood damage to the development.







LOCATION
South Norwalk, CT

COST
$32,554,177 / $37,673,074

TYPE
CM/GMP

SIZE
111,270 sf / 82,568 sf

SCHEDULE/COMPLETION DATE
14 Months, August 2018 P1
17 Months, May 2020 P2

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110
Patrick Lee, Principal
617-720-8400
plee@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Nancy Ludwig, AIA, LEED AP
617-451-3333
NLudwig@iconarch.com

CERTIFICATION
Energy Star



Case Study:

SOUNDVIEW LANDING

WOOD-FRAMED RESIDENTIAL REDEVELOPMENT OF WASHINGTON VILLAGE AND PARKING, PHASES I AND II

This residential redevelopment initiative represents total collaboration of Federal, State and Local agencies resulting in the construction of 80 apartments in two buildings. Constructed on two vacant brownfield parcels adjacent to the existing Washington Village housing (which will be demolished and replaced on completion of the new buildings), Phase I is part of a larger, three-phase redevelopment effort to revitalize South Norwalk; upon completion, this initiative will replace the present 136-unit Washington Village public housing project with a new 273 apartment complex, 50 percent of which will be reserved for public housing. The project is located in a Coastal Flood Zone and will be constructed simultaneously with the City of Norwalk's reconstruction of adjacent Raymond and Day Streets to mitigate flood damage to the development.

Phase II involves 85 units of apartment housing built over steel podium with four levels of stock framed housing above. The site accommodates surface level parking, in addition to exterior surface parking, landscaping, site lighting, street trees, and sidewalk. The project is also being administered under two section 3 guidelines.







LOCATION
Newport, RI

COST
$55,965,320

TYPE
CM/GMP

SIZE
310,000 sf

SCHEDULE/COMPLETION DATE
50 Months, November 2006

OWNER REFERENCE
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02210
Jim Keefe, Principal
617-720-8400
jkeefe@trinityfinancial.com

ARCHITECT REFERENCE
ICON Architecture
101 Summer Street
Boston, MA 02110
Janis Mamayek, AIA, LEED AP
Principal
617-541-3333
jmamayek@iconarch.com



RHODE ISLAND



Case Study:
NEWPORT HEIGHTS
WOOD-FRAMED RESIDENTIAL DEVELOPMENT, PHASES I-III

The Newport Housing Authority selected Trinity Financial to redevelop the Tonomy Hill public housing project, consisting of 498 existing low income rental units. The redevelopment was divided into three phases consisting of rental and home owner units. The plan called for 81% of the units to be affordable to different tiers of low-income households, and 19% targeted toward market-rate households with no income restrictions.

Dimeo completed three phases of construction to create 299 units of new mixed-income residences. Based on new urbanist principles, the development was designed to be characteristic of the surrounding neighborhood while replacing an obsolete public housing development. The development includes a 4-story, 60-unit mid-rise building reminiscent of the grand Newport shingle-style hotels. The second phase encompassed the completion of the Boulevard and the redevelopment of the site from its southern edge of Miantonomi Park to Maple Avenue on the north edge of the site. An additional 71 units were created during the final phase.





BRADFORD S. DIMEO
PRESIDENT

As President of Dimeo Construction Company, Brad interfaces regularly with all levels of company personnel and client teams to assure that the work is running smoothly and that outstanding issues are resolved in a timely and equitable manner. He attends key meetings throughout preconstruction and construction as well as visiting the site on a regular basis to review progress of the work.

Brad establishes and implements policy, procedures, and organizational structure with an eye toward exceptional staffing. He has been involved with all aspects of the organization, including project management, planning and estimating, purchasing, administration, and marketing. With a bachelor's degree in economics and over 30 years experience in construction management, Brad is a hands-on manager and strategic planner for Dimeo.

RELEVANT EXPERIENCE:

- The Residences at Forest Hills Station, Residential & Mixed-Use Development, Jamaica Plain, MA, $77 million*
- HUB 25, new 278-Unit Residential Development at Morrissey Boulevard, Boston, MA, $66.4 million
- Avenir, Residential & Mixed Use Development, Boston, MA, $107 million
- Washington Village Residential Redevelopment Phase III, Buildings D & E, Norwalk, CT, $47 million
- Washington Village Residential Redevelopment Phase II, 13 & 20 Day Street, Norwalk, CT, $37 million
- MITIMCO, 22-24 Magazine Street Apartment Renovation, Cambridge, MA, $8.7 million
- Northeastern University, Mugar Lab Renovations, Boston, MA, $4.6 million
- Harvard University, Cambridge, MA, $Confidential
  - Renovation to Stone Residential House (formerly Old Quincy)*
  - Leverett McKinlock Hall Renovation*
- Electric Boat, Universal Building 9A/B, North Kingstown, RI, $Confidential
- Electric Boat/General Dynamics, Bay 4 R&D Facility, Quonset, RI, $32 million
- FM Global Research Campus, Expansion, West Glocester, RI,

*LEED Project



YEARS IN INDUSTRY/WITH DIMEO

38 years/38 years

EDUCATION

University of Rhode Island
BA, Economics

Ohio Wesleyan University

Salisbury School

AFFILIATIONS

United Way of Rhode Island, Board of Directors & Community Advisory Board

Children's Museum of RI, Board of Overseers

Crossroads Rhode Island, Board of Directors

Women & Infants' Hospital, Board of Trustees

Rhode Island Public Expenditure Council, Trustee

Associated General Contractors (AGC), Economic Development Task Force, Executive Committee

Leadership RI - Class of 1996

YMCA of Greater Providence, Board of Directors

The Providence Foundation, Trustee

Rhode Island Commodores, Member

Johnson & Wales University, Member of the Corporation

REFERENCES

FM Global
Shivan Subramaniam, CEO (Retired)
401-965-3766 (cell)
shivan.subramaniam@fmglobal.com

Lifespan Hasbro Children's Hospital
Dr. Timothy Babineau
401-626-7548
tbabineau@lifespan.org

CVS Health
Charles Golden, SVP, Real Estate, Construction & Property Administration
401-216-3000

STEPHEN RUTLEDGE

PRINCIPAL-IN-CHARGE

As COO, Stephen directs the overall construction operations of the company, including project administration, contract management, preconstruction planning and estimating, purchasing, construction operations and safety compliance. He serves as a resource to the firm's project executives on the management of specific project operations and is also a liaison to owners and consultants on the overall performance of Dimeo's efforts; he also serves as principal-in-charge on specific projects.

Dimeo's culture and mindset is built upon providing outstanding service to clients and project stakeholders and maintaining long term relationships. Stephen has been instrumental in cultivating the "builder's mindset" philosophy in everything we do in service to our clients.

RELEVANT EXPERIENCE:

- Trinity Financial Orient Heights Phase 3, East Boston, MA, $TBD
- Ocean House, New Luxury Hotel & Residential Suites, Watch Hill, RI, $84 million
- Hilton Garden Inn East Boston, Guestroom Addition, Boston, MA, $18 million
- Allston Yards, Building "A" Mixed Use Residential and Retail Development, Allston, MA, $115 million
- Housing Authority of New Haven, Westville Manor, New Haven, CT, $12 million
- Old Colony Public Housing Community Phase 3B&C, Boston, MA, $62.5 million*
- Harvard University, Cambridge, MA, $Confidential
  - Renovation to Stone Residential House (formerly Old Quincy)*
  - Leverett McKinlock Hall Renovation*
- Soundview Landing Washington Village Residential Redevelopment Phase III, Buildings D & E, Norwalk, CT, $48.6 million
- MITIMCO, 22-24 Magazine Street Apartment Renovation, Cambridge, MA, $8.7 million
- Northeastern University, Mugar Lab Renovations, Boston, MA, $4.6 million
- The Residences at Forest Hills Station, Residential & Mixed-Use Development, Jamaica Plain, MA, $78 million*
- One Brigham Circle, Office, Retail, Building & Parking Garage, Boston, MA, $28 million



YEARS IN INDUSTRY/WITH DIMEO

41 years/41 years

EDUCATION

Utica College of Syracuse University
BS, Construction Management

Hartford State Technical School
Architectural Engineering

LICENSES & AFFILIATIONS

OSHA 30 Hour Certification

Company Liaison to Black Contractor Association of Rhode Island

New England Carpenters Labor-Management Program (NECLMP) Management Trustee

REFERENCES

860 Harrison Ave / Northampton Tower
Quinnipiac Terrace and Avenir
Trinity Financial
Patrick Lee, Principal
617-720-8400
plee@trinityfinancial.com

University of Massachusetts Amherst
Commonwealth Honors
and North Residential Complexes
Andrew Soles, Project Manager
413-545-6464
asoles@admin.umass.edu

Yale University
Keith Fordsman
Director of Facilities Capital Program
keith.fordsman@yale.edu
203-859-8552

*LEED Project

KEVIN FERREIRA

LEED GA, PHIUS Certified Builder℠

PROJECT EXECUTIVE

Kevin is responsible for directing Dimeo's overall project performance throughout the preconstruction and construction phases. Kevin will attend key project team meetings and interface with the client to review overall project status and will assist in project design phase planning with phasing and logistics, cost estimating, value-engineering analysis and procurement. Kevin will work closely with the project team throughout construction providing guidance in the resolution of specific project issues and monitoring overall performance of the project.

RELEVANT EXPERIENCE:

- Trinity Financial Orient Heights Phase 3, East Boston, MA, $TBD
- Brown University Brook Street Residence Halls, Providence, RI, $60 million
- Old Colony Public Housing Community Phase 3B&C, Boston, MA, $62.5 million*
- Hilton Garden Inn East Boston, Guestroom Addition, Boston, MA, $18 million
- Harvard University, Leverett McKinlock Residential House Restoration, Cambridge, MA, $Confidential*
- HUB 25, new 278-Unit Residential Development at Morrissey Boulevard, Boston, MA, $66.4 million
- The Sharpe Building, Residential & Mixed-Use Adaptive Renovations, Providence, RI, $31.3 million
- Brown University, Metcalf Laboratory Renovation, Providence, RI, $28 million*
- CVS/Caremark, New Call Center, Data Center, & Parking Garage, Woonsocket, RI, $80 million*
- Brown University, Animal Care Facility, Providence, RI, $3.2 million
- FM Global Corporate Offices, New Building, Johnston, RI, $Confidential*
- First Light New Resort & Casino, Taunton, MA, $750 million (Preconstruction)
- RI Rapid Response Hospital Facilities, Providence, Cranston, Quonset, RI, $17 million

*LEED Project



YEARS IN INDUSTRY/WITH DIMEO

31 years/13 years

EDUCATION

University of Massachusetts Dartmouth
BS, Business Management

Bristol Community College
AA, Accounting

LICENSES

LEED Accredited

MA Construction Supervisors License Unrestricted # CS-077904

City of Boston Builder's License #B34364

RI Construction Forklift License #13296

RI Excavation Equipment License #13296

OSHA 40 HAZWOPER

OSHA 30 Hours Certification

Aerial Lift Operating Training Certificate

First Aid/CPR Certified

Passive House Institute US (PHIUS) Builder's Certification

REFERENCES

Harvard University
Leverett-McKinlock House Renewal
Mark Roberts, Project Manager
617-496-0300
Mark_Roberts@harvard.edu

HUB 25, New Residences at Morrissey Blvd
Building Consultation Services
Robb A. Van Marter, AIA
617-334-8188
rvm@bcs-mail.com

Brown University
Metcalf and Bio-Med Renovations
Jeffrey Parker, Construction Manager
401-863-7850
jeffrey_g_parker@brown.edu

TERESA BIRMINGHAM LEED AP, CM-LEAN

SENIOR PROJECT MANAGER

Terri will be responsible for leading the onsite construction management operations of the project. In her role, Terri will administer all aspects of communications and reporting, as well as the monitoring of project cost, schedule, quality and safety performance of the team and will interface with the client/client representative, consultant and subcontractor teams on issues relating to execution of the work and overall project performance. Terri will be located full time onsite reporting directly to the project executive and will have an active role in supporting the preconstruction and procurement phases.

Teresa joined Dimeo in 2002 from Trammell Crow Company where she worked as a Senior Project Manager and an Operations Manager and has managed many of our most logistically challenging residential and life safety projects.

RELEVANT EXPERIENCE:

- Old Colony Public Housing Community Phase 3B&C, Boston, MA, $62.5 million*
- Brown University Brook Street Residence Halls, Providence, RI, $60 million
- MassArt Art Museum Renovation, Phases 1&2, Boston, MA, $21 million*
- 860 Harrison Avenue, Occupied Residential Renovation, Boston, MA, $16.7 million
- Cambridge Housing Authority, Revitalization of Lincoln Way & Jackson Gardens, Cambridge, MA, $40 million
- Newport Heights, 498-Unit Residential Development, Newport, RI, $55.9 million
- Ocean House, New Hotel & Luxury Residential Suites, Watch Hill, RI, $84 million
- Blue Cross/Blue Shield of RI, New Corporate Headquarters, Providence, RI, $92 million*
- Hasbro, Narragansett Park Administration Building Phases II & III, Pawtucket, RI, $6.4 million
- Harvard University, Residential High Rise Building, Cambridge, MA, $14 million



YEARS IN INDUSTRY/WITH DIMEO

39 years/19 years

EDUCATION

University of New Hampshire
BS, Civil Engineering

LICENSES

OSHA 30 Hour Certification

Boston Builders License, ABC

Massachusetts Construction Supervisor License

LEED Accredited

AGC Certificate of Management - Lean Construction (CM-LC) Accredited Professional

REFERENCES

860 Harrison Avenue/Northampton Tower Newport Heights
Trinity Financial Institute, Inc.
Patrick Lee, Principal
617-720-8400
plee@trinityfinancial.com

Lincoln Way & Jackson Gardens
Cambridge Housing Authority
Margaret Donnelly Moran
Director, Planning and Development Dept
617-520-6251
mmoran@cambridge-housing.org

Blue Cross Blue Shield of RI
Corporate Office Facility
Highland Management Association Inc. (OPM)
Doug Anderson
617-698-6431
doug_h_anderson@hotmail.com

*LEED Project

MARTIN ABT LEED AP, CM-LEAN, CM-BIM
SUPERINTENDENT

As the superintendent, Martin will lead the supervision, coordination, and sequencing of all field construction activities. He will report daily on all onsite activities, including safety compliance, and will conduct regular coordination meetings where these issues and others will be discussed among the subcontractors. He will be Dimeo's onsite contact and will administer all field project activities.

With over 30 years in the construction industry, Martin's experience includes Carpenter Foreman, Superintendent and Owner's Representative. He offers great leadership and the ability to complete jobs in a timely and cost-conscious manner, in addition to expertise in resolving construction issues that arise in the field.

RELEVANT EXPERIENCE:

- Allston Yards, Building "A" Mixed Use Residential and Retail Development, Allston, MA, $115 million
- Old Colony Public Housing Community Phase 3B&C, Boston, MA, $62.5 million*
- The Residences at Forest Hills Station, Residential & Mixed-Use Development, Jamaica Plain, MA, $78 million*
- Copley Place, Occupied Retail Renovation, Boston, MA, $25 million
- Cambridge Housing Authority, Revitalization of Lincoln Way & Jackson Gardens,
  Cambridge, MA, $40 million
- Quinnipiac Terrace, New Residential Development, Phase I-III, New Haven, CT, $56.6 million
- Gateway Community College, New Construction to Consolidate College, New Haven, CT, $160 million*
- The Sharpe Building, Residential & Mixed-Use Adaptive Renovations, Providence, RI, $31.3 million
- Warwick Mall, Expansion & Redevelopment, Warwick, RI, $20 million
- Harvard University, Leverett McKinlock Residential House Restoration, Cambridge, MA, $Confidential*
- Harvard University, Renovation to Stone Hall (formally Old Quincy), Cambridge, MA, $Confidential*



YEARS IN INDUSTRY/WITH DIMEO

38 years/14 years

EDUCATION

SUNY Canton
AS, Electrical Technology

LICENSES & AFFILIATIONS

OSHA 30 Hour Certification

OSHA 10 Hour Certification

LEED Accredited

AGC Certificate of Management - Lean Construction (CM-LC) Accredited Professional

AGC CM-BIM accreditation

Boston ABC License

Cambridge Superintendent's License

Massachusetts Supervisor's License

REFERENCES

The Residences at Forest Hills Station, LLP
Criterion Development Partners
Jack Englert
Executive Vice President and Principal
781-890-5600
jenglert@criteriondp.com

Quinnipiac Terrace
Trinity Financial
Alan Ladson, Construction Manager
617-720-8400
aladson@trinityfinancial.com

Cambridge Housing Authority
Robert Labrecque
Senior Project Manager
Current Contact:
STV Construction, Inc.
617-243-3888

*LEED Project

BOB KUNZ

CORPORATE SAFETY DIRECTOR

As Safety Director, Bob oversees the creation and enforcement of the project safety program for each project. He performs unannounced OSHA-type inspections on projects and closely monitors and issue abatement procedures for each and every violation. Bob will oversee all of the safety officers' work including subcontractor orientations, review of subcontractor safety programs, and the mandatory onsite training program for all participants involved in the project.

Because of Bob's diligent efforts to improve safety on all of Dimeo's jobsites, the Company's EMR has dropped to .73, far below industry averages. As a testament to Bob's dedication to safety practices in the construction industry, he was awarded by the AGC of Connecticut the 2012 Construction Safety Professional of the Year Award.

RELEVANT EXPERIENCE:

- Trinity Financial Orient Heights Phase 3, East Boston, MA, $TBD
- Allston Yards, Building "A" Mixed Use Residential and Retail Development, Allston, MA, $115 million
- Nouvelle at The Natick Collection, Retail, Parking, & Residential Expansion, Natick, MA, $377.7 million
- University of Rhode Island Fascitelli Center for Advanced Engineering, Kingston, RI, $116.7 million*
- Housing Authority of New Haven, Westville Manor, New Haven, CT, $12 million
- Oracle, 3rd & 4th Floor Renovations, Nashua, NH, $3 million
- Hasbro Children's Hospital, Facilities Improvements, Providence, RI $22.6 million
- College of the Holy Cross Joanne Chouinard-Luth Recreation and Wellness Center, Worcester, MA, $Confidential
- College of the Holy Cross, Prior Performing Arts Center, Worcester, MA, $Confidential*
- Garrahy Courthouse 1,285 Car Parking Garage, Providence, RI, $40 million
- University of Connecticut, Ambulatory Care Center Fit-Out, Farmington, CT, $59 million*
- Harvard University, Cambridge, MA, $Confidential
  - Stone Residential House Restoration (formerly Old Quincy)*
  - Leverett McKinlock Residential House Restoration*

*LEED Project



YEARS IN INDUSTRY/WITH DIMEO

31 years/14 years

EDUCATION

University of Rhode Island
Professional Development Courses

LICENSES & AFFILIATIONS

AGC of Connecticut - 2012 Construction Safety Professional of the Year Award

OSHA Construction Health & Safety Instructor - Authorized 10 hour & 30 hour

Keene State College Construction Safety Program Advisory Group Member

MSHA Certified Mine Instructor

NSC DDC-4 Instructor

Liberty Mutual Decision Driver Trainer

National Safety Council Accident Investigation

National Safety Council Fundamentals of Industrial Hygiene

USDOT Supervisory Alcohol & Controlled Substance Awareness Training

AGC Supervisory Training Program Accident Prevention & Loss Control

Certified Trainer - Univ. of Central Florida

AGC, RI Chapter Safety Committee, Chairman 2004-2105

Zurich North America Construction Roundtable Member

City of Warwick, Historic District Commission, Past Chairman

AGC of Massachusetts - Safety Committee Chairman 2015-Present

REFERENCES

Yale University Sterling Chemistry Lab
Jon Olsen, Associate Director (former)
Yale Planning and Construction
Current Contact:
203-376-4268 (cell)
Jolsen12564@gmail.com

University of Massachusetts Amherst
Commonwealth Honors
and North Residential Complexes
Andrew Soles, Project Manager
413-545-6464
asoles@admin.umass.edu

University of Rhode Island
College of Engineering
Hill International Inc. (OPM)
Jim Devol, Project Manager
401-714-8283
jamesdevol@hillintl.com

TARA CONSTRUCTION INC.

TARA CONSTRUCTION INC.
ASSURANCE QUALITY PASSION

"Given what I know today about the contractor's ability to perform in accordance with this contract or order's most significant requirements, I would recommend them for similar requirements in the future."
David O'Connor–USACE
Bldg.674

Hispanic-Owned Business, Certified SBA 8A small Disadvantaged Business, Massachusetts Certified Minority Business

Bonded and Insured:
DUNS # 806013723
CAGE # 58LK6

NAICS:
236116, 236117, 236210, 236220, 238130, 238160, 238170, 238310, 238330, 238350, 238390

CORPORATE OVERVIEW

Tara Construction is a Hispanic-owned small and disadvantaged business certified under the Small Business Administration's 8A program, the Commonwealth of Massachusetts and the City of Boston. We are a general contractor with over two decades of experience in this market. In addition to managing programs from concept to completion, we self-perform all facets of carpentry from rough to finish including installation of all building envelope components on existing structures and new vertical construction for residential, commercial, institutional, retail, and historic restoration. Our highly experienced estimators, project managers, and field staff can provide you with the comfort that the project will be completed within budget and on schedule.

Services That We Provide:

*Project Management
*Davis Bacon compliance
*Records & Document Management
*Residency Requirements
*Scheduling
*Section 3 Compliance
*Estimating

Government Contracting Related Services:

*RAPIDGate ID Management
*QCS Certified
*SDO MBE Certified

Clients:

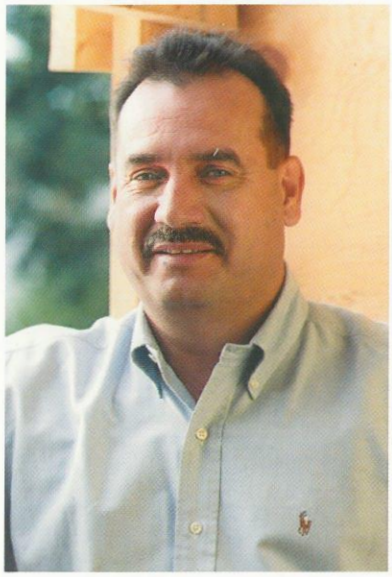
*Chelsea Jewish Nursing Home as GC
*Bilt-Rite Construction
*Dimeo Construction
*U.S. Army & Air Force as GC
*Trinity Financial Corp.
*Suffolk Construction, Corp.

Projects:

*Ft. Devens–Barracks Renovation Bldg. 674 (GC)
*Ft. Devens–UG Utility Infrastructure Upgrade (GC) *South Bay Expansion Project *Chelsea Jewish Nursing Home (GC) *Orient Heights Phase II-East Boston *AO Flats Boston
* Mass Pike Towers Rehab-Boston (GC)

Staff:

Pedro Pirez – *CEO* PPirez@taraconstructioninc.com (781) 391-6400 x202
Mike Donnelly – *President* – Mdonnelly@taraconstructioninc.com (781) 391-6400 x206
David Cortiella – *Business Manager* – dcortiella@gmail.com (617) 773-5836
Ken Hoffman – *VP of Pre-Construction Services/Estimating* – Khoffman@taraconstructioninc.com (781) 391-6400 x216
Mike Canepari – Estimator/PM – Mcanepari@taraconstructioninc.com (781) 391-6400 x216
John Donovan – Accountant/Workforce Compliance (781) 391-6400 x 200
115+ Union Carpenters and Carpenter Apprentices at Various Sites



Pedro Pirez

Opportunity + Hard Work = the American Dream

To tell the success story of Tara Construction is to illustrate the American Dream. It is a simple story of the Pirez family, impoverished and oppressed by the Communist regime of Fidel Castro, a family with the courage and foresight to risk their lives for the chance of a better life.

In 1980, Pedro Pirez, founder and president of Tara, then only 20 years old, fled Cuba on a small boat with his two sisters and parents. With the help of God, they survived their harrowing journey to America and freedom, and quickly set about the work of building the life they had only dreamed of.

The Pirez family settled in Massachusetts. From the beginning, life was not easy. Pedro worked as a construction laborer to help support his family while attending the University of Massachusetts at night. He spoke little English when he first enlisted in the U.S. Army, where he served for the next four years, followed by two years in the Army Reserves. It was during this time that he became skilled as a carpenter, doing both framing and interior carpentry work.

In 1988, Pedro fulfilled his longtime ambition. He started a construction company of his own. Since then, Tara Construction has grown from its infancy as a one-man sub-contracting business into the well established and widely respected venture it is today. Projects have ranged in scope from smaller renovations to large-scale housing developments. Since 1994, Tara has earned its excellent reputation as a successful minority owned and operated general contracting company, serving the greater Boston area and New England.

When asked the key to Tara's success, Pedro offers no magic formula. He attributes it solely to many years of staying focused, never losing sight of his ultimate goals. "Hard work and perseverance will always prevail," he says. Pedro is very proud to be an American citizen. He is keenly aware of the tremendous opportunities this country has offered him and his family. Committed to extending this opportunity to others, Pedro prides himself on Tara's distinction of being a business eager to fill positions at any level with minority men and women.

Pedro Pirez has emerged as an acclaimed small business owner and recipient of prestigious awards. In 2000, the University of Massachusetts College of Management named him Minority Business Entrepreneur of the Year. In 1999, he was honored with a certificate of special recognition from the Minority Business Development Agency of the United States Department of Commerce.

TARA
CONSTRUCTION INC.
ASSURANCE QUALITY PASSION

Pedro A. Pirez

47 Hudson Road
Bolton, MA 01740
Tel(617)212-1457

1988-Present	***Tara Construction Company:*** President, Operation and management of general contracting company, self-performing, carpentry, framing, windows, form work, interior trim, doors and siding.
1986-1988	***Duane Wrecking Company:*** Carpentry part time
1986-1988	***Doran Construction:*** Carpenter/Foreman, Framing and interior carpentry.
1986	***Dimeo Construction Company:*** Laborer, demolition of buildings and associated carpentry work.
1986	***North American Wrecking Company:*** Laborer, form work.
1986-1988	***Duane Wrecking Company:*** Foreman, building demolition.
1986-1988	***US Army Reserves:*** Crane Operator
1982-1986	***US Army***
1980-1981	***U-Mass Boston*** *English & Math courses*
1966-1980	***High School & 2 yrs college in Cuba***

Construction Supervisor License: CS085090

MICHAEL DONNELLY

471 Eastern Ave
Lynn, MA 01902
Phone: (781) 592-6054
Email: doggajr@verizon.net

QUALIFICATIONS

I am a self motivator, communicator, and strong leader. I have been in the construction industry for over 30 years as a controller. My work ranges from reviewing accounts payable, receivable and collection of receivables, and payroll , preparing interim financial statements and tax returns and coordinate reviewed statement with the CPA . I negotiate contracts and project manage many jobs, including new work, gut/rehab, occupied rehab and tenant fit up work. I negotiate new bonding and limits and monitor insurance carriers and coverage's. I deal with both open shop issues and union issues. I negotiated a wood framer's contract between the union and contractors. I have completed MHFA and HUD requirements and fulfilling those requirements. My experiences allows me to follow through with bidding the work, negotiating the work, building the work, billing the work and getting the company paid for the work and most importantly keeping our customer base strong, growing and satisfied.

EDUCATION

1978-1982 Lynn English High School, College Course
1982-1983 Lowell University, Computer Science
1983-1987 Salem State College, Bachelor of Science in Business Administration / Accounting

EMPLOYMENT

2004-Present Controller, Tara Construction, Inc.

Review accounts payable and receivable, payroll. Prepare all quarterly taxes for payroll and filing of those taxes. Prepare internal financial statements and work together with the CPA in the production of the company's financial statements. Review estimates and bids. Negotiate work and signing of contracts. Set up Bonding and Insurance Lines. Hire subcontractors and complete jobs. Project manager which includes running job meetings and the work of many large crews. Obtain loans, SBA certification, 8A filings, and SOWMBA Certification, HUD and MHFA requirement.

1989-2003 Controller, Medford Electrical Contracting Corp.

Review accounts payable and receivable, payroll. Prepare all quarterly taxes for payroll and filing of those taxes. Prepare internal financial statements and work together with the CPA in the production of the company's financial statements. Review estimates and bids. Negotiated new bonding company and limits. Reviewed insurance coverage's and requirements and corrected accordingly. Negotiated with union and new contract. Project managed different jobs from the bidding stage to completion of projects.

1987-1989 Asst. Controller, Central Glass and Aluminum

Accounts payable and receivable, payroll and the production of the quarterly taxes.

Kenneth R. Hoffman

EDUCATION: 1978 M.S. Civil Engineering, Massachusetts Institute of Technology

1977 B.S. Civil Engineering, Massachusetts Institute of Technology

1973, Sharon High School, Sharon, Ma.

EXPERIENCE: 6/2014- present TARA CONSTRUCTION INC, VP- Preconstruction Services

A small GC combined with a large Carpentry Subcontractor, $15-20M/yr. Duties include management of GC operation, all preconstruction services and oversight of all projects. Also chief estimator for subcontractor operations.

11/93 – 5/2014: CWC BUILDERS, INC.
Vice President; Preconstruction Services
A medium sized ($80-$100M/ yr) firm specializing in Housing of all types. Most work negotiated, some select list bidding. Duties including preparing all estimates and proposals. All Preconstruction services including conceptual estimates, CPM scheduling, value engineering, sub-bid packaging, purchasing.

12/89 – 11/93, PEABODY CONSTRUCTION CO., INC.
A larger GC pursuing work in the public and private sector.
Duties include assistance with public bids, and complete responsibility for pursuit and closing of private sector work. Including all preconstruction efforts from conceptual estimating to deal closing and Value engineering, subcontractor price solicitation, CPM scheduling. Included 8 month period as onsite Project Executive to expedite Completion of $63M new Boston City Hospital project.

11/84- 12/89, BARKAN CONSTRUCTION CO., INC.
Hired as Chief Estimator, promoted to Vice President after 1 year. Private sector GC concentrating in housing. Acted as Project Manager for one project (Boston Design Center)then handled all Preconstruction. Duties included all CPM scheduling, Conceptual estimating, value engineering, subcontractor price solicitation, Traffic Plan preparation and purchasing.

4/78 – 11/84, EDWARD R. MARDEN CORP.
Hired as Jr. Estimator, promoted to Project Manager after 6 months, to Vice President after 2 ½ years. A smaller, “public bid” GC. Duties included takeoff, assembly of all bids, purchasing, scheduling, and project management.

AREAS OF SPECIAL PROFESSIONAL INTEREST & EXPERTISE:

- PM strategies for dispute avoidance and resolution
- The value and necessity of proper and complete "preconstruction services".
- the development of useful and realistic CPM schedules and their great value to the execution of a project and avoidance or assessment of delay claims
- the nuances of affordable housing, and multiple funding sources involving various local, state & federal programs or fueled by housing subsidies or tax credits.
- Value engineering of Preliminary Plans

SIGNIFICANT COMPLETED PROJECTS AS GC (since 2002) **Tara Construction, Inc.** 11/5/2020

Project, type and location	Our Contract was with:	Architect	Contract Value	Completed
Occupied Renovations to Grove Hall Apts- Phase 1- 56 units Dorchester MA	**Veterans Benefit CDC Harold Raymond 617-306-9912**	**ICON Architects Janis Mamayek 617-939-0715**	**$2,211,046**	2020
Occupied Renovations to Mass Pike Towers- 200 units, high and low rise bldgs, Boston, MA	**Trinity Financial Inc. James Keefe 617-904-2700**	**The Architectural Team Phil Renzi/ Michael Binette 617-889-4402**	**$5,482,349**	2019
Repairs to Barracks 644, conversion to office building, Fort Devens, MA	**US Army Corps of Engineers Susanne Grant 978-318-8354**	**Colby Engineers Ben Townsend 207-553-7769**	**$4,166,406**	2018
Renovations/ Addition with LULA elevator, DKE Fraternity at MIT, partial occupancy	**Alumni Assoc of DKE Fraternity Mark Spadafora, President 617-216-6303**	**HAJIAN ARCHITECTS David & Paul Hajian 617-926-8282**	**$2,518,652**	2018
Chelsea Jewish Nursing Home, phased/occupied renovations 120 bed Nursing Home, HUD funding	**Chelsea Jewish Nursing Home, Inc Adam Berman 617-799-0584**	**Dimella Shaffer Diane Dooley/ Bill Lassetter 617-426-5004**	**$12,519,517**	2017
Repairs to Barracks 674, renovations and new systems, 45000 SF, Fort Devens, MA	**US Army Corps of Engineers Susanne Grant 978-318-8354**	**US Army Corps of Engineers Susanne Grant 978-318-8354**	**$5,378,615**	2015
Olmsted Green Phase III- new housing	**Lena New Boston LLC**	**ICON Architects Janis Mamayek 617-939-0715**	**$4,800,000**	2012
Franklin Estates- Gut Renovations to 16 Condominiums	**Mass Housing Finance Agency**	**Buck Smith & McAvoy Architects**	**$6,000,000**	2008
Orange Wheeler- new and rehab housing	**The Community Builders**		**$2,750,000**	2008
Villa Victoria (JV with CWC Builders) Occupied renovations	**IBA- Tenant Association**	**Mostue & Associates**	**$10,000,000**	2003
Villa Victoria (JV with CWC Builders) Occupied renovations	**IBA- Tenant Association**	**Mostue & Associates**	**$10,000,000**	2002

SIGNIFICANT RECENTLY (2015-2021) COMPLETED SUBCONTRACTOR JOBS

3/1/2021

TARA CONSTRUCTION INC

JOB NAME	LOCATION	completed	contract with	CONTRACT VALUE	Type of project/ Work performed by TARA
Orient Heights Phase 2	East Boston	2020	Suffolk	**$5,933,735**	New Construction-Housing- wood framing/siding
AO Flats	Jamica Plain	2020	BILT RITE	**$4,590,739**	New Construction-Housing- wood framing/siding
Douglass Park	Boston	2019	Hamilton	**$517,000**	New Construction-Housing- siding
Residence Inn Siding	Roxbury	2019	Cranshaw	**$1,534,000**	New Construction-Housing- siding
79-83 Gardner Street Siding	Allston	2019	Hamilton	**$3,300,000**	New Construction-Housing- siding
South Bay	South Boston	2019	Lee Kennedy	**$9,050,845**	New Construction-Housing- wood framing/siding
221 South Huntington	Jamica Plain	2019	Cranshaw	**$1,414,371**	New Construction-Housing- wood framing/siding
Golda Meir House occ rehab	Newton	2019	Colantonio	**$2,625,905**	Occupied rehab, interior carpentry work
Dimock Sewall center	Roxbury	2018	Timberline	**$1,931,670**	Health Center renovation, interior carpentry trades
Genesis House occ rehab	Brighton	2018	Dellbrook	**$4,270,066**	Occupied rehab, interior carpentry work
Bartlett Place	Roxbury	2018	BILT RITE	**$4,741,795**	New Construction- all carpentry trades
Smith House occ rehab	Roxbury	2018	Dellbrook	**$2,181,752**	Occupied rehab, interior carpentry work
Lynn Gateway	Lynn	2017	BILT RITE	**$5,347,012**	New Construction- all carpentry trades
75 Amory Street	Jamica Plain	2017	NEI	**$2,936,000**	New Construction-Housing- wood framing/siding
402 RINDGE AVE TOWER	Cambridge	2017	BILT RITE	**$2,561,894**	Occupied rehab, interior carpentry work
Cottage Brook	Dorchester	2017	NEI	**$4,774,398**	Housing Renovations, all carpentry trades
2101 Washington St- PARCEL 10	Roxbury	2017	KAPLAN	**$2,413,595**	Housing Renovations, interior carpentry
Parcel 25 Residential/retail	Roxbury	2017	NEI	**$1,470,446**	Renovation for Housing, all carpentry trades
Chauncy St Occ Rehab	Boston	2016	BILT RITE	**$1,577,926**	Occupied rehab, interior carpentry work
Fitchburg Yarn	Fitchburg	2016	Colantonio	**$3,084,893**	Renovation for Housing, interior drywall work
Clutch Works	So. Boston	2016	Hamilton	**$4,505,249**	New Construction- wood framing/sidimg
PATRIOT HOMES	So. Boston	2016	BILT RITE	**$1,256,662**	Rehab & new construction, housing, all Carpentry trades
St. Kevins/ Uphams Corner Housing	Dorchester	2015	Bilt Rite	**$2,042,751**	Rehab & new construction, housing, all Carpentry trades
Dummer St Brookline Housing Authority	Brookline	2015	Colantonio	**$1,343,842**	New Construction- wood framing/sidimg
Worcester Court House	Worcester	2021	Tocci	**$1,803,122**	Renovation for Housing, all carpentry trades
Haynes House	Roxbury	2020	Dellbrook	**$1,759,123**	Housing Renovations, interior drywall work
Lorenzo Pitts	Roxbury	2021	BILT RITE	**$8,953,984**	Housing Renovations, all carpentry trades
O'Connor Way	Boston	2020	BILT RITE	**$2,513,561**	New Construction- wood framing/sidimg

Current "Work in Progress"
TARA CONSTRUCTION INC.

3/31/2021

Job Name	Work Scope	Location	% Complete	Contract With	Value	left to complete
Lenox Apartments	Rough, Finish Carp, Windows, Drywall	Roxbury	5.72%	DF Pray	$ 8,380,000	$ 7,900,575
Old Colony Phase 3B & 3C	Finish Carpentry	So. Boston	0.00%	Dimeo Construction	$ 2,448,117	$ 2,448,117
Mattapan Station	Framing-Siding-Windows	Mattapan	1.49%	Dellbrook	$ 5,352,700	$ 5,272,700
Clippership Apartments - 125 Sumner St	Framing-Siding-Windows	East Boston	95.53%	Cranshaw	$ 975,874	$ 43,640
Clippership Apartments - 132 Sumner St	Framing-Siding-Windows	East Boston	95.28%	Cranshaw	$ 775,142	$ 36,550
Natick Family Housing	Rough, Finish Carp, Drywall	Natick	61.96%	Tocci	$ 907,477	$ 345,236
Cote Village Building A	Framing-Siding-Windows	Mattapan	65.49%	Bilt-Rite	$ 3,408,324	$ 1,176,141
Cote Village Building Townhomes	Framing-Siding-Windows	Mattapan	91.55%	Bilt-Rite	$ 2,688,573	$ 227,090
Cote Village Finish A Carpentry	Finish Carpentry	Mattapan	0.00%	Bilt-Rite	$ 576,000	$ 576,000
Cote Village Finish Town House Carpentry	Finish Carpentry	Mattapan	0.00%	Bilt-Rite	$ 588,000	$ 588,000
West Newton-Rutland	Rough, Finish Carp, Windows, Drywall	South End	75.94%	Bilt-Rite	$ 6,271,997	$ 1,509,113
Wahsington Heights	General Contractor	Roxbury	27.90%	Tara Construction, Inc.	$ 1,467,242	$ 1,057,864

Devens Bldg 3413 HVAC modernization	General Contractor	Devens, MA	99.52%	US Army Corp of Engineers	$ 1,065,776	$ 5,157

	$ 34,905,222	$ 21,186,182
	$ 13,719,040	

DELLBOOK | JKS

Company Profile

Corporate Profile and History

Contacts

Michael Fish
President & CEO
781.380.1675
mfish@dellbrookjks.com

Andrew Baker
Senior VP of Marketing & Development
781.380.1675
abaker@dellbrookjks.com

2020 Awards

#11 Largest MA General Contractor
Boston Business Journal

Corporate Citizenship Award
#68 Top Charitable Contractor
Boston Business Journal

#270 Top 400 National Contractors
Engineering News-Record

2019 Awards

#9 Largest MA General Contractor
Boston Business Journal

#239 Top 400 National Contractors
Engineering News-Record

#45 Top 125 Training
Training Magazine

Corporate Citizenship Award
Boston Business Journal

AGC MA Merit Safety Award
AGC MA

#95 Top 100 CM-at-Risk Firm
Engineering News-Record

Jack Kemp Excellence in Affordable and Workforce Housing Award
Urban Land Institute

Multi-Housing News Excellence Award
Multi-Housing News

Dellbrook | JKS provides a full range of construction services throughout the New England region. Our firm has over three decades of experience and a team of more than 200 exceptionally talented professionals with expertise to provide services across a variety of market sectors, building types and construction methods. Our vast portfolio of projects includes educational facilities, healthcare, residential construction, commercial, retail spaces, and includes occupied renovations, ground up construction, adaptive reuse and expansions so we can service all the needs of our clients.

A factor that helps to set our team apart is our dedication to providing unparalleled customer service. Our singular focus on meeting the goals of our clients is done through the skill and experience of our project managers and site supervisors. We structure our services to assist our clients in all aspects of the decision making process in order to deliver facilities that promote their mission and enhance their business. Regardless of the project, at Dellbrook|JKS we believe that the best formula for success is for all members to be active participants in the process. This philosophy is exemplified in our transparency and openness with the owner and design team.

Dellbrook | JKS has collaborative, long standing relationships with many of the region's most qualified subcontractors which enables us to effectively deliver a quality project on time and on budget without disruption to ongoing operations. Our projects maintain a very cooperative and team driven spirit fueled by our firm's philosophy and management style.

With offices in Quincy and Falmouth, our expertise and collaborative style provide high-quality, responsive service backed by a significant bonding capacity. Our clients have embraced our Team Concept, recognizing the efficiency and predictable results it delivers.

100% Client Centered

Embodying the spirit of our core values and having a true commitment toward excellence is key, however it isn't just quality construction and exceptional service that helps to set us apart. Our mission is to always strive to be 100% client centered in all that we do. Our business model is firmly grounded in tried and tested construction methods and organizational processes, yet we continue to seek new and innovative ways to deliver quality, savings and scheduling efficiencies to our clients. It is our best practices and inclusive approach that makes our firm stand out. The fact that we understand the priceless value of relationships has resulted in long term repeat clients.



Corporate Citizenship and Philanthropy

PHILANTHROPY

At Dellbrook|JKS we are committed to leaving our mark where we work and where we live through meaningful contributions to the community and a personal commitment to corporate and personal social responsibility.

For many years we've been included among the Boston Business Journals **Largest Corporate Charitable Contributors**. The BBJ recognizes companies that have demonstrated innovation and developed best practices in specific partnerships with nonprofits at any level of engagement, including volunteer work, cash donations, in-kind donations and board participation.

In 2020 we were awarded the Corporate Citizenship Award and were ranked #2 within construction and engineering category in their top 100 charitable contributors. We are committed to being an involved and stable partner both on and off site. We routinely provide our time, skills and support to further our clients mission with the same passion and focus we bring to building our projects. That passion for giving back is exemplified by Dellbrook|JKS President and CEO, Michael Fish and his contributions to the strength, resiliency and health of the communities in which we build. Mike was awarded the **2019 You Matter Award** for his commitment to building the new Elizabeth Stone House in Roxbury, creating a haven for thousands of domestic violence survivors. The Elizabeth Stone House partners with adult and child survivors of domestic violence and related trauma - mental illness, housing instability and substance misuse to achieve safety, stability, and overall wellbeing.

NeighborWorks® also recognized the community contributions of Dellbrook |JKS and Mike specifically, when they honored him with the **Good Neighbor Award**. The Board of Directors chose Mike and Dellbrook | JKS as recipient because of our unwavering support of their mission to bring more affordable housing to our area and help families achieve the dream of homeownership.

In addition to our work with non profits to address and prevent housing instability, Dellbrook | JKS has been recognized as one of the top philanthropic companies in the region. In 2019 we were honored to receive the **Community Champion Award from Gosnold Cape Cod**. Gosnold, a leader in the prevention, treatment, and recovery of men and women affected by mental health and substance use disorders, presented Dellbrook|JKS with the Community Champion Award in recognition of our strong support for the Gosnold mission and support of the organization's valuable but unfunded initiatives.

CIVIC ENGAGEMENT

Whether it's using our craft and skills to build housing with Habitat for Humanity, endowing scholarships for local high school students, or volunteering for a community service project, we support our nonprofit partners in their tireless efforts to positively impact the health, safety and education of those in need.



Mike Fish, President & CEO receiving the 2019 You Matter! Award

Madison Park "Train 2 Trades" Workforce Development Program

Dellbrook|JKS currently works in partnership with our client, Madison Park Development Corp and its hands-on Workforce Training program, **Madison's Train 2 Trades**, which offers free construction pre apprenticeship training.

As an **MT2T Funder, Dellbrook|JKS provides free OSHA 10 training and certification** with one of our Safety and Risk Managers to connect MPDC and lower Roxbury residents with opportunities to learn about employment opportunities in the construction industry.

We also are offering **Introduction to Plan Reading**, a two hour introductory course and workshop to prepare students in the MT2T program for pre-apprentice training as they explore a potential career in the construction.

Dellbrook|JKS is an active participant in the **Community Job Fairs** offered by the MPDC. We encourage and recruit our subcontractors to participate as well to connect with a diverse population of applicants and support MPDC in their mission is to help contractors and local businesses excel by attracting and retaining the neighborhood's best talent.



Safety Manager Dave Arancio and his Madison Park OSHA 10 Students



Corporate Cup


Habitat for Humanity Build



Huntington Games - 1st Place

Each year our employees dedicate their energies, skill and hundreds of hours to support local and statewide charitable organizations in their missions.

Each year Team Dellbrook|JKS competes in the Corporate Cup for **Boston Children's Hospital**, raising money (and our heart rates!) for their Every Child fund. We support the **Greater Boston YMCA** in their Huntington Games which raises funds for youths, teens and families in our community, as well as **Save the Harbor/ Save the Bay**, the region's leading voice for clean water and continued public investment in Boston Harbor.

President and CEO Mike Fish is a firm believer that construction is the ultimate team sport. We're proud to support the Scholar Athletes in celebrating academic achievement through athletics. SA partners with public high schools to help close the opportunity gap for thousands of young people in grades 9-12 across the Commonwealth. **Scholar Athletes'** programs leverage the power of athletics and wellness to cultivate the discipline, confidence and social-emotional skills needed to support success in school, as well as success in life!

DIVERSITY, EQUITY, AND INCLUSION

We are committed to building a culture of diversity, equity and inclusion. It is essential for our success as a company and for our employees' growth. Led by **Dellbrook|JKS Director of Diversity, Equity and Inclusion, Sheryce Hearns**, we focus on building inclusive project teams with a range of voices and perspectives that allow everyone a greater opportunity to contribute their ideas ultimately leading to the best outcome for the project.

We believe strongly that our employees are our greatest asset. We understand our responsibility to operate with equity and objectivity as they grow their careers with us. To focus more on achieving our diversity goals in applicants to our employment opportunities, our Recruiting/ Sourcing Specialist Olesia Adams became AIRS certified. This has helped us create effective strategies and business practices that have improved diversity among our potential candidates.

Externally our efforts to expand diversity in our talent include outreach and mentoring with high schools like Madison Park Technical High School and Catholic Memorial in West Roxbury. At Madison Park our Safety and Risk Manager, David Arancio, volunteers his time to provide OSHA safety training to the women and men in the school's carpentry program.

EXPANDING DIVERSITY IN THE INDUSTRY

Dellbrook|JKS is committed to the growth and development of Minority owned and Women owned business enterprises through the implementation of an effective outreach and engagement plan and policies and procedures in the procurement and delivery of preconstruction and construction management services on all of our projects. By breaking down barriers and providing direct support in obtaining contracts with Dellbrook and providing resources such as our Partner Accelerator Program which provides trainings on accounting, safety, Procore software, insurance requirements and more.

In addition to continually trying to improve and educate ourselves by participating in educational events and supporting causes that support this mission, we aim to expand diversity in our industry. Our **Chief Operating Officer, Ed Sople** sits on the board of the **MHIC Minority Participation Committee**. As a board member, Ed is focused on increasing racial equity and inclusion by working with minority-owned enterprises and minority workers/ organizations to develop new strategies that will increase MBE and minority participation initiatives on construction projects throughout New England. In 2018 **Emily Sheedy, our Director of Employee and Project Development** created the **AGC MA Committee for Diversity and Inclusion** to support and inform all construction companies in Massachusetts of the benefits of embedding Diversity, Equity and Inclusion in their organizational culture.

MENTORING, SCHOLARSHIPS AND THE CONSTRUCTION IMMERSION PROGRAM

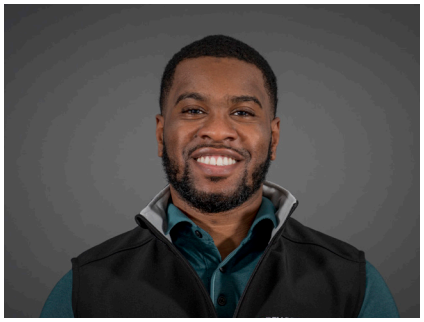
At Dellbrook|JKS, we believe strongly in giving back, whether that be through philanthropy and corporate giving but also through our mentoring, learning and development and Construction Immersion Program. We have been recognized as one of the top charitable companies in the region by the Boston Business Journal over the past several years. Whether sponsoring an event or providing work hours of labor at various' organizations. (i.e. Habitat for Humanity, NAWIC, AGC, etc.), giving back is incredibly important to what we do at Dellbrook|JKS. Mike Fish, President and CEO of Dellbrook|JKS, serves on the board of both the Greater Boston Habitat for Humanity as well as the Children's Advocacy Center of Suffolk County (a group focused on ensuring safety, healing and justice for children and families impacted by violence, exploitation and abuse).

Construction Immersion Program (CIP)

Our Construction Immersion Program is a two-year rotational program for young people just beginning their journey and careers in Construction Management. CIPs develop technical and leadership skills through a wide range of assignments across all phases of a project from preconstruction in estimating through construction in project management and field operations.

During the program, the CIPs rotate through hands-on assignments and have the ability to customize the program with any additional areas they have an interest in (business development, mechanical coordination accounting, etc.). We understand that those just starting their journey should test out every role in construction to find their passion and in return, develop a well-rounded approach to construction where they can grow, become leaders and then serve as mentors to the next generation of CIPs at Dellbrook|JKS.





BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY

In 2020, Dellbrook|JKS established a partnership with the **Benjamin Franklin Institute of Technology (BFIT)** to help the college as they build a talented, well-trained workforce well prepared for success as they complete their program and embark on their career. The partnership focuses on cooperative learning and provides internships for students in their Construction Management, HVAC and Electrical programs. Students enrolled in the City's non-profit technical college are given opportunities to grow their already strong technical foundation through practical on-the-job experience.

In addition to hands-on learning provided by Dellbrook|JKS staff and our trade partners, Dellbrook|JKS has agreed to provide annual scholarships and emergency fund grants to the college so they can continue to make a vital difference in the lives of urban youth in the greater Boston area. Dellbrook|JKS also works with BFIT to present career success seminars; resumes and job application workshops; job site tours, mentoring opportunities and professional development classes throughout the year.

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY
YOUR PATHWAY TO SUCCESS

CM CORPORATE SCHOLARS

The Dellbrook|JKS Corporate Scholars Program is a partnership between Dellbrook JKS and Catholic Memorial School that provides not only financial support, but creates meaningful relationships and leadership development opportunities between students and Dellbrook|JKS employees.

The $25,000 scholarship is awarded annually to two students who have demonstrated extraordinary leadership skills.

In addition to the scholarship funds, the CM Corporate Scholars are connected to a Dellbrook|JKS mentor, where they receive hands on learning opportunities on how to develop strong leadership skills, and build strong relationships through various engagement opportunities such as:

- Welcome Reception at Dellbrook Corporate Office, with students, mentors, parents, and Dellbrook|JKS leadership
- Monthly meetings/opportunities between Dellbrook Scholars and their mentor
- Scholars and mentors one on one dinners
- Participating in volunteering events with Dellbrook|JKS staff
- Professional Development workshops
- Jobsite visits





Experience



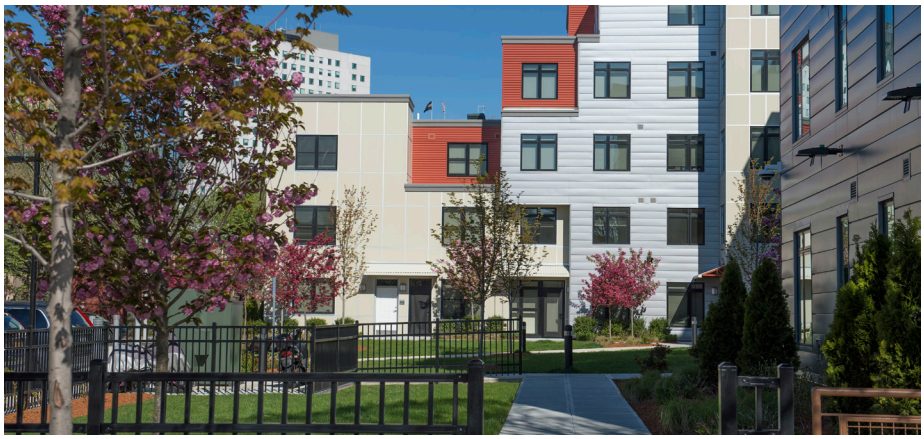
Madison Park Village - Melnea Cass Apartments

ROXBURY, MA

New, wood framed affordable housing development on Melnea Cass Boulevard in Roxbury. The project consists of two multifamily buildings on adjacent sites. The development includes the demolition of a 1 story building and the new construction of 76 units. Building 2A is a 4 story, slab on grade, wood framed building and sits on just over 18,000 SF and included 16 stacked town houses. Building 2B is a five story, slab on grade wood framed building and sits on just under 71,000 SF and included 60 units.

With very tight site conditions, we created a separate access road for vehicles to enter and exit the site, and then close an existing road afterwards. The Melnea Cass buildings have a combination of corrugated metal, Atas and Hardie Panel siding.

Dellbrook|JKS also completed renovations to the neighboring Smith House property at Madison Park Developments as well as the MPDC Village IV renovations for the non profit in 2011.



ARCHITECT
Elton & Hampton Architects
Nick Elton
617.708.1071
nick@eltonhamptonarchitects.com

OWNER
Madison Park Development Corp.
Leslie Reid
617.849.6240
lreid@madison-park.org

COST
$28.7M

START / END
November 2017 / June 2019

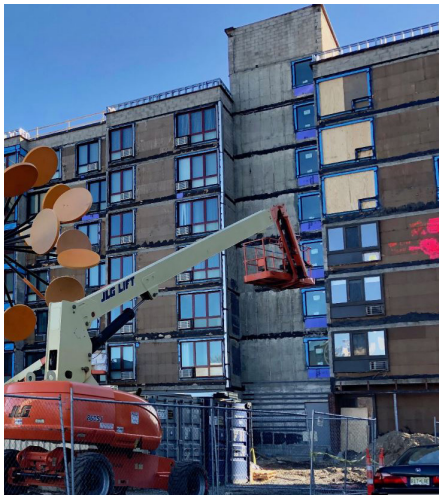
TYPE
New Construction
Affordable Housing
LEED Silver Certifiable



Madison Park - Haynes House

ROXBURY, MA

The Haynes House Renovation for Madison Park Development Corporation is a 136,020 SF, 131 unit, occupied rehab of a seven-story multifamily building, originally constructed in 1974. Interior renovations to the occupied building included life safety system upgrades, energy efficiency enhancements, new accessible units, and selective unit and common area upgrades. In addition renovations included management offices, community room, laundry room and front entrance security desk. Significant building envelope improvements with the demolition and replacement of the building's exterior masonry facade were completed, 100% window replacement, and improved accessible front and rear entrances as well as exterior landscaping, sidewalks and exterior lighting.





ARCHITECT
Davis Square Architect
Ross Speer - Principal
rspeer@davissquarearchitects.com
Lia Scheele - Project Architect
lscheele@davissquarearchitects.com
617.764.3601

OWNER
Madison Park Development
Leslie Reid
617.849.6245
lreid@madison-park.org;

COST
$22.4M

START / END
January 2019 / October 2020

TYPE
Affordable
Owner-Occupied Rehab



Madison Park IV

ROXBURY, MA

The Madison Park Village IV development included a total of one hundred forty-three living units in fifteen low-rise buildings with a mix of one hundred twenty six – two bedroom and seventeen – three bedroom living units.

The work executed by Dellbrook | JKS included exterior envelope work including replacing siding, trim/millwork, windows, doors and roofing.
Most of the HV/DHW systems were also upgraded. Full replacement of the fire detection/alarm system and wiring for security camera systems were completed in each building.



ARCHITECT
Elton & Hampton Architects
Mike Marrotta
617.708.1071
mike@eltonhamptonarchitects.com

OWNER
Madison Park Development Corp.
Leslie Reid
617.849.6240

COST
$9.7M

START / END
April 2012 / December 2012

TYPE
Occupied Rehab / Renovation
Affordable



Madison Park - The Smith House Modernization

BOSTON, MA

This Dellbrook|JKS project involved the renovation of a 12-story, 92,500 SF structure, originally built in 1973, into an affordable senior housing building, now with 132 one-bedroom units. The scope of work included new helical piles and foundation, composite metal panel siding, an emergency generator, replacement of fin-tube radiation, and supplemental through-wall AC units with new vertical heat pumps, a new cooling tower, as well as elevator upgrades.
The building's exterior received a roof replacement, new windows, insulation of walls, masonry & concrete restoration. Within the units themselves, existing lighting was replaced, installment of additional lighting, kitchen cabinet repairs or replacements in each unit, as well as new closet doors, new paint, and replacement of floors.

Renovations were carefully coordinated while the building was fully occupied.



ARCHITECT
ICON Architecture
Bethany Drab
617.451.3333

OWNER
Madison Park Development
Laura Martin
617.541.3900

COST
$13.6M

START / END
January 2017 / June 2018

TYPE
Affordable
Occupied Rehab



Elizabeth Stone House

ROXBURY, MA

Elizabeth Stone House is a new multifamily-mixed use, supportive home for young families in Roxbury, MA. The five story podium building is 56,560 SF with an exterior facade of rain screen of brick, FC Autoclaved panels and corrugated aluminum panels.

The lower 2 floors contain public meeting space, classrooms, offices, conference areas, and childcare facilities. The upper 3 floors contain 32 affordable apartments. Construction included steel framing for the lower levels and wood framing for the upper levels. The project is LEED Silver Certifiable.



ARCHITECT
Narrow Gate
William Boxx
857.294.9961
w.boxx@the-narrow-gate.com

OWNER
Elizabeth Stone House
Nancy Owens Hess
617.409.5406
nhess@stonehouseinc.org

COST
$17.5M

START / END
August 2018 / March 2021

TYPE
New Construction
Podium (3/2) - Steel
Affordable Housing
LEED Silver Certifiable



2Life - Harold and Ronald Brown Family House

BROOKLINE, MA

New, 62,118 SF six-story multi-family/ senior housing building with 62 units. The first level is concrete slab on grade and second level is a steel/concrete podium for wood framed construction to the sixth level. Level 1 has a semi-enclosed parking area that encompasses half of the building footprint. Building massing includes step backs at level 2 and 6. Three sides of the building are built tight to lot line, and the fourth side include a buffer courtyard between itself and Jewish Temple next door.

Foundation work included lateral earth support at the east property line next to a private condo driveway. The building facade is a mix of metal panels, highly dimensioned clapboard siding, custom FC siding panels, storefronts, and better fiberglass window units.

Congregation Kehillath Israel (KI) is sharing space within the campus with the affordable rental apartments for seniors 62 and over. Building amenities constructed include resident common spaces with 1,816 SF ground floor retail / café and parking for 14 cars. The building meets Enterprise Green Communities criteria.



ARCHITECT
Prellwitz Chilinski Associates, Inc.
Alex Bushkoff
617. 547. 8120
abushkoff@prellchil.com

OWNER
2Life Communities
Parke Sickler (OPM)
617.803.5492
parkesickler@waypointkla.com

COST
$20M

START / END
May 2019 / Sept. 2020

TYPE
New Construction
Affordable Housing
Podium (4/2) - Steel & Concrete



2Life - Weinberg House, 132 Chestnut Street

BRIGHTON, MA

The Wienberg House is a LEED Silver, six-story building with 61-units of affordable, elderly, rental housing with common areas and amenity spaces. The new structure consists of 1 level of steel podium and 5 stories of wood above. Construction included existing building take-down and significant site work.

The Weinberg House has 3,500 SF of ground-floor retail and seven residences in the building are reserved for formerly homeless seniors. Five residences are reserved for seniors with lifelong disabilities. **Construction of the Weinberg House required significant ledge removal. Once encountered on the southern side of the site, the ledge was removed by hammering.**

Construction of a second-floor pedestrian bridge connects the Weinberg House to 2Life Communities existing 700-unit campus and amenities include a specialized fitness center, computer center, multi-lingual library, auditorium, an art room, meeting rooms, and lounge areas.



ARCHITECT
Abacus Architects + Planners
Max Moore
617.562.4446
mmoore@abacusarchitects.com;

OWNER
2Life Communities
Rose White
617.912.8400
rwhite@2lifecommunities.org

COST
$16.9M

START / END
June 2017 / April 2019

TYPE
New Construction
Podium (5/1) - Steel
LEED Certifiable
Affordable Housing



VietAid

UNDER CONSTRUCTION | **DORCHESTER, MA**

The VietAid project is the redevelopment of two vacant lots in Dorchester, for construction of a new 495,656 GSF, four story, wood framed, mixed use building with 41 residential apartments.

The mixed-use project includes affordable units for households with incomes at or below 60% of Area Median Income (AMI), with eleven units affordable to households at or below 30% of AMI. The 6,000 square feet of ground floor retail space will be leased to the Dorchester Community Food Coop—a grassroots initiative to build a community and worker-owned grocery store that makes healthy food accessible and advances economic opportunity through neighborhood engagement.

Construction includes 6,200 SF ground-floor retail and basement level parking for 22 spaces. **The complicated urban site required the removal of 700 yards of "pudding stone" ledge.** The project will achieve Enterprise Green Communities Certification.



ARCHITECT
Utile Architecture & Planning
Evan Parkinson
617.423.7200
parkinson@utiledesign.com

OWNER
Vietnamese-American Initiative for Development, Inc.
Eric Fellinger
617.882.3717
eric@vietaid.org

COST
$13.4M

START / END
October 2020 / TBD

TYPE
New Construction
Podium (4/1) - Steel
Affordable Housing
Enterprise Green Communities

ADDITIONAL SIMILAR PROJECTS

PROJECT NAME	UNIT	COSTS	NEW CONSTRUCTION	PODIUM	AFFORDABLE	MBE/WBE, SEC. 3, OR BRJP GOALS
1550 Soldiers Field Rd	211	$51,087,093	●	●		●
180 Telford Street	90	$25,667,731	●	●		●
181 Washington Street	35	$9,659,888	●	●	●	●
197 Washington	30	$8,138,470	●	●	●	
21 Soldiers Field Place	38	$10,610,749	●	●	●	●
257 Thayer Street	95	$19,760,642	●	●		
2Life - 132 Chestnut Brighton	61	$16,995,337	●	●	●	●
2Life - 370 Harvard Brookline	62	$19,318,889	●	●	●	●
2Life - Genesis House	209	$37,358,516			●	●
2Life - Shillman House	160	$26,210,998	●		●	●
2Life - Ulin House Renovations	242	$24,132,669			●	●
3521 Washington Street JP	82	$35,224,813	●	●		●
55 Wheeler	525	$167,538,518	●	●		
57 Quincy Shore Drive / The Neponset	28	$13,038,861	●	●		
59 Fountain Street	260	$61,136,225	●	●		
704 Main Street Falmouth	58	$8,400,000	●		●	
99 Tremont Street	62	$19,537,499	●	●		●
Aberdeen Condos - Brookline	40	$16,137,811	●	●		
Addison - Redgate	230	$63,538,000	●	●		●
Ashers Path	56	$6,300,065	●		●	●
Braintree Landing	172	$36,526,995	●	●		
EAF - Brook Ave	36	$5,339,440			●	●
EAF West Roxbury	80	$20,892,553	●	●		●

PROJECT NAME	UNITS	COSTS	NEW CONSTRUCTION	PODIUM	AFFORDABLE	MBE/WBE OR BRJP SECTION 3 GOALS
East Howard Street	140	$31,897,671	●	●		●
Elizabeth Stone House	32	$16,217,055	●	●	●	●
Harbor Place	80	$44,481,901	●	●	●	
Haynes House	131	$21,476,128			●	●
Madison Park 4	143	$9,757,453			●	●
MPDC - Madison Park Melnea Cass Blvd	136	$28,764,656	●		●	●
MPDC - Smith House - Madison Park	132	$13,574,703			●	●
Munroe Street Apartments	260	$64,315,305	●	●		
Neponset Field Senior Housing	31	$5,352,595	●	●	●	●
Parc At Medfield	92	$17,779,461	●		●	●
POAH - Mattapan, The Loop	135	TBD	●	●	●	●
Sachem Path Housing Nantucket 1	40	$4,936,718	●		●	
Sachems Path Phase 2	22	$9,589,848	●		●	
Sophia Snow	66	$14,249,118	●		●	●
St. Polycarp	29	$5,645,001	●		●	●
St. Polycarp III	31	$6,424,697	●	●	●	●
Stage Coach Road, Barnstable	12	$3,038,010	●		●	
Terrapin Ridge	30	$10,400,000	●		●	
The Residences At Lakeshore	289	$41,855,356	●			
Toll Brothers - Needham	390	$81,930,090	●	●		
Veterans Park Apartments	39	$10,000,000	●		●	
Viva Claremont	300	$61,741,312	●			
West Of Chestnut	169	$37,246,779	●	●		

M/WBE Projects - Boston Locations

2Life - Brown Family
370 Harvard Street, Brookline, MA



Madison Park IV
122 Dewitt Dr, Boston, MA



Smith House
757 Shawmut Ave, Roxbury, MA



Elizabeth Stone House
3012 Washington Street, Roxbury, MA



The Vita
3521 Washington St., Jamaica Plain, MA



EAF Oak Row
1235 VFW Pkwy, W. Roxbury, MA



The Laurent
55 Wheeler Street, Cambridge, MA



VietAid
191-195 Bowdoin St., Dorchester, MA



Haynes House
735 Shawmut Ave, Roxbury, MA



Melnea Cass Apartments
600 Melnea Cass Blvd, Boston, MA



EAF Brook Avenue
147 Moreland Street, Roxbury, MA



Mattapan Station Development
508 River Street Mattapan, MA



M/WBE Outreach and Engagement

Crescent Place Project M/WBE Outreach and Engagement Plan



Dellbrook|JKS and Maven Construction are committed to the growth and development of Minority owned and Women owned business enterprises (MBE/WBE) through the implementation of an effective outreach and engagement plan and policies and procedures in the procurement and delivery of preconstruction and construction management services on the Madison Park CDC Crescent Parcel Project. It shall be our goal and the goal of our trade partners on the project to make effective efforts to utilize certified, minority and women business enterprises and be held accountable for outcomes that will meet the objectives of the contracting plan.

Dellbrook|JKS/Maven Construction are also committed to the expansion of residents, people of color and women workers and professionals in the construction industry through effective policies and procedures in the recruitment, hiring and retention of workers on the project. It shall be our goal and the goal of our trade partners on the project to make effective efforts to hire residents, people of color and women and be held accountable for outcomes that will meet the objectives of the contracting plan.

This plan describes objectives, goals and a series of strategies to achieve the goals of the contracting plan for Dellbrook|JKS/Maven Construction, Madison Park CDC, and the Roxbury Community.

Objectives

1. To establish an effective program to encourage the participation of minority owned and women owned businesses and workers on the project.
2. To be accountable for achieving measurable outcomes of minority engagement in the project.
3. To be open and transparent about the implementation and documented outcomes of minority engagement efforts on the project.
4. Provide qualified firms and individuals with timely and accurate information to support a successful and meaningful engagement with Madison Park on the Crescent Place Project. This assistance includes such areas as strategies to do business with Dellbrook|JKS/Maven Construction, the designated Construction Manager and/or design firms, key subcontractors through 2nd and 3rd tier subcontracting, joint ventures, mentoring and direct award of goods and services.

Goals

Communicate the building and employment opportunities that will be available as part of the Crescent Place Project to minority owned women owned businesses and residents located in Roxbury and the City of Boston as a whole.

Support M/WBE trade partners to increase their level of knowledge, skill and business intelligence of the local minority and women owned construction firms and workers through our **Partner Accelerator Program**.

Assist minority and women owned firms with navigating the prequalification and bidding process for participation on the project.

Collaborate and assist minority trade partners with identifying, pursuing/bidding and successfully performing work on the project in accordance with Dellbrook|JKS, Waypoint, and City of Boston project requirements and contract documents.

Develop and implement workforce goals, tracking and reporting to meet project workforce objectives.

Create new and stronger businesses, strategic partnerships and overall program development results that help improve life for the residents of Roxbury and the area community.

Dellbrook|JKS/Maven Construction commits to meeting or exceeding the following Crescent Place Owners Project Goals:

Madison Park M/WBE Goals for the project:

- 45% of the total contract dollar amount should be awarded to Minority Business Enterprise (MBE)
- 10% of the total contract dollar amount should be awarded to Women Business Enterprise (WBE)

City of Boston Workforce Goals:

- 51% of the employee person hours in each trade will be performed by City of Boston Residents.
- 40% of the employee person hours on the project will be performed by minority employees.
- 12% of employee person hours will be performed by women employees.

Strategies

Dellbrook|JKS/Maven Construction will be charged with the overall responsibility for the administration of the Madison Park/ Crescent Place Project MBE/WBE Outreach and Contracting Plan and our duties and responsibilities shall include:

- Outreach and engagement with our MBE/WBE trade partners, and additional regional business and workforce development partners, project stakeholders, and the community-at-large.
- A focused support of minority and women owned enterprises through the preconstruction process and pricing of the Crescent Place Project
- Pre assessment and pre-qualification of certified M/WBE firms to identify those that are prepared for immediate contract opportunities as well as those needing additional assistance to reach that level of preparation for future contract opportunities.
- Providing needed assistance and necessary skill sets to minority and women owned firms through our Partner Accelerator program to increase their ability to compete successfully for contract opportunities.
- Monitoring the Madison Park/ Crescent Place Project throughout its duration to measure and report the effectiveness of the engagement plan as well as the compliance of subcontractors for the BRJP.
- Providing contract, payment, and workforce utilization data to Madison Park and the City of Boston's BRJP office on a weekly, or monthly basis to track project outcomes and ensure early identification of threats to achieving the expected outcomes.
- Bid package breakdown to create the potential for greater participation from minority and women owned businesses.
- Pre-Bid conferences to give prime and subcontractors preliminary information about the project and to allow prime and subcontractors to meet and create the potential for collaboration on projects.
- Competitive bid process which will require signature for documentation, tracking and participation of the MBE/WBE engagement plan.
- Requiring ALL trade partners to disclose their workforce plan for the project during or prior to preconstruction.
- Providing an upfront list of contract opportunities to be bid specifically by MBE/WBE firms.

M/WBE FIRM OUTREACH PLAN

With a continuous effort being made to capitalize on existing relationships as well as establishing new contacts found within the Roxbury community and the Greater Boston area, Dellbrook|JKS/Maven Construction will encourage, and support minority and women owned businesses to participate in the Madison Park/ Crescent Place project throughout preconstruction.



All trade partners, including minority and women owned businesses will be kept informed of changes to drawings, related scope of work and progress of current work by the Dellbrook|JKS/Maven Construction Preconstruction Team. The team is responsible for responding to all queries regarding scope changes and pricing in a timely manner as well as employing creative strategies to reduce barriers for minority contractors.

Outreach efforts to solicit MBE/WBE and other local firms will utilize our **Strategic Partner Network (SPN) engagement** as well as local media, electronic and print, to market and promote contract business opportunities as well as traditional methods including telephone, email and in person follow-up. We have located centers of influence within the Roxbury Area as well as Greater Boston to ensure that subcontracting and supply opportunities are known to the business community. Some of the outreach partners will include the following:

Partners:

- DCAMM Certified /Office of Supplier Diversity
- City of Boston M/WBE Certified Business Directory
- Black Economic Council, MA (BECMA)
- Center for Women & Enterprise (CWE)
- Amplify Latin X
- Greater New England Minority Supplier Diversity Council (GNEMSDC)
- Mass Minority Contractors Association (MMCA)
- Builders of Color Coalition

Outreach efforts will be recorded and reported as requested by Madison Park, Boston Housing Authority and the City of Boston's BRJP office.

M/WBE Trade Partner Training, Development and Support

All design packages will be made available online for trade partner pricing via our Bid Management Software- ISQFT.com, which is also used as a tool for tracking the participation of minority and women owned businesses. **Hard copies will also be available for any trade partner who does not use online tools in their bid preparations.**

Competitive bid prices will be **solicited per advertisement, community postings, and phone calls** to notify and remind qualified M/WBE contractors of the Crescent Place project opportunities.

Our preconstruction team is responsible for addressing concerns and providing technical assistance specific to barriers that have excluded people of color and women on past projects, **i.e., video meetings, follow up phone calls to support, assess and evaluate relationships.**

During construction, periodic monitoring will take place to assure that not only legal and contractual responsibilities are being met, but that all trade partners have the support they need to be successful on the Crescent Place project, specifically.

Good faith negotiations between Dellbrook|JKS/Maven Construction and trade partners will commence as part of the preconstruction review process. **No minority business enterprise or minority person will be rejected as unqualified without evidence based upon a thorough and documented investigation of their capabilities and experience.**

Dellbrook|JKS/Maven Construction will endeavor to alleviate barriers to inclusion and develop the skills of minority and women owned businesses. All trade partners will participate in the Dellbrook|JKS/Maven Construction **Partner Accelerator Program** and receive project specific learning and training on:

- PROCORE Project Management Software:
- RFI's, Submittals, Specifications, ASI
- Construction Project Accounting:
- Requisition process AIA Billing, Understanding Change orders, Completing Lien Waivers, Worklist/Punch list
- Site Safety: OSHA Requirements/ Inspections and Observations, Fall protection, Scaffolding.
- Bidding and Estimation

Additional resources, skill set and capacity building assistance as needed.

Selected, responsive and qualified subcontractors will be invited to attend all pertinent meetings with the Dellbrook|JKS/Maven Construction project team. All project guidelines will be discussed with the subcontractors. Input from the subcontractors will be solicited and encouraged to ensure complete and proper channels of open communication and common understanding.

Dellbrook|JKS/Maven Construction will routinely monitor the Crescent Place Project to ensure that all contractual commitments are being met and that the residents, minority and female workforce are engaging with our learning and development programs. Meeting with selected contractors on a regular basis to address elements identified as critical to the success of the minority and women owned firm development.

Collaborative Relationship

Collaborative Relationship & Structure

For the Crescent Parcel project, we envision the Construction Management services to be provided by a joint venture of Dellbrook|JKS and Maven Construction. We feel strongly that this joint venture, which will embody the representative strengths of both firms, will provide the ownership and the neighborhood an experienced and engaged construction partner. As evidenced in the enclosed resumes and project summaries, both Dellbrook|JKS and Maven Construction have significant experience with multifamily construction and a record of successful similar projects within the city of Boston.

Together Dellbrook|JKS and Maven would provide the Crescent Parcel Project with a blended set of open shop and organized labor. Dellbrook|JKS is an open shop construction management firm, with the unique strength and ability to successfully solicit, contract with and manage both union and non-union subcontractors for the purpose of providing the best possible value to our clients and their projects. Maven Construction is signatory to organized labor but is afforded relief on multifamily projects which provides the ownership the flexibility necessary to create the best situation for the project. Maven also can self-perform the concrete or rough carpentry scopes of work and this is something we would explore as the project scope and schedule evolve.

Preconstruction and Construction Services for the Crescent Parcel project will be a collaborative effort. Preconstruction oversight and leadership will be led by Project Executives from both Dellbrook|JKS and Maven working collaboratively to provide estimating and scheduling services along with draft construction management and logistics plans. The Dellbrook|JKS/ Maven estimating departments will jointly support the preconstruction team by reviewing trade proposals and providing accurate scopes of work for the project. A Senior Estimator from Dellbrook|JKS will lead the efforts and work with an estimate from Maven to provide hands on mentoring throughout budget preparation and constructability reviews during preconstruction.

As we mobilize to the site and begin contracting with our trade partners – the project team will expand to include:

- Sr. Project Manager – Dellbrook|JKS
- Project Manager – Maven
- Assistant PM – Dellbrook|JKS
- Project Engineer – Maven
- Sr. Superintendent – Dellbrook|JKS
- Site Superintendent - Dellbrook|JKS
- Superintendent – Maven
- Assistant Superintendent - Maven

We truly believe that “teams build buildings” and Dellbrook|JKS and Maven will be solutions oriented and client centric with a focus on success based on the common goal of the entire project team. We will draw on our prior experiences working with MPDC on similar projects on adjacent parcels to provide the ownership team with a trusted construction partner.



Passive & Sustainability

Passive Construction

A REGIONAL LEADER IN PASSIVE HOUSE AND HIGH-PERFORMANCE CONSTRUCTION PASSIVE HOUSE

OUR COMMITMENT

At Dellbrook|JKS, we pride ourselves in staying on the forefront of construction trends and techniques. Through our Learning and Development Department, we offer our employees many opportunities throughout the year to engage in continuing education.

Our team has extensive experience constructing and renovating high performance residential, commercial, healthcare and educational facilities that have less of an impact on the environment, are healthier for those who work and/or live in the building and at the end of the day save the building's owner money.

We work in conjunction with the entire project team as the project documents are developed and identify passive design and construction techniques that we can employ to maximize the sustainability of the project.

Recognizing early that the Passive House Building Standard provides robust energy performance through its emphasis on high performance building enclosures, minimization of loads on mechanical systems, and lowers operating costs to the end user (our client) we knew that this trend would be a part of many Dellbrook|JKS future projects. With that in mind, our team has engaged in hundreds of hours of learning and courses related to Passive House.

Passive Performance

Successful passive house performance requires consistent focus on quality control procedures. Having the CM, design team, passive house consultant (if applicable), and PH rater collaborate during initial design development is key.

FACADE

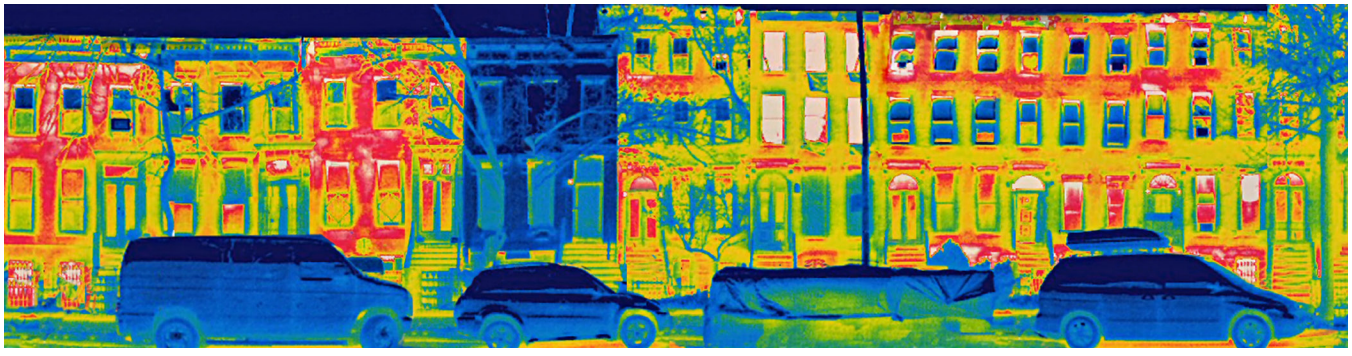
- Focus on keeping the envelope tight
- Minimize thermal bridging
- Details and terminations at windows
- Windows triple (or quadruple) paned with nonmetal spaces and framing
- AVB layers need to be approved by PH Envelope Consultant
- Testing should be provided per floor, and multiple time per floor depending on the building size

MEP

- MEP design and subcontractor coordination is critical
- Pipe sizing needs to be coordinated to meet PH requirements for heat loss
- No more than a 10 degree loss of heat within .6 gallons of water
- Ducts should be sealed inside and out to meet strict leakage criteria

TESTING

- Blower door testing -performed often to confirm construction is trending in the correct direction
- Certification is pass/fail at the end with the PH certifier and expectations are high



PHIUS - Certified PH Builders & Designers

LEADERSHIP IN THE FIELD

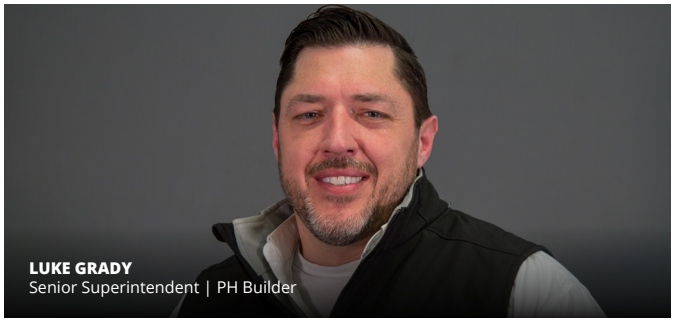
We will continue to prioritize training of our staff as Passive House becomes more prevalent in New England. Through our Learning and Development department, we work to ensure that our employees are thought leaders of these and other important sustainability initiatives.

In March of 2020, members of our staff began their PHIUS Certified Builders Training to become construction professionals and two more their PHIUS Certified Design Professional classes and we are proud to announce that Dellbrook|JKS now has four PHIUS Certified Builders as part of our staff. Later this spring, we look forward to welcoming our PHIUS Certified Design Professionals.

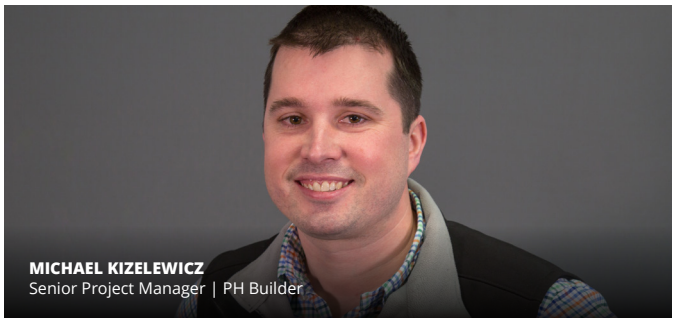
As we continue to grow and expand our involvement in Passive Design and Construction, we have joined several industry associations and groups to provide our staff with thought leadership and opportunities to connect and learn along side other Passive House professionals.

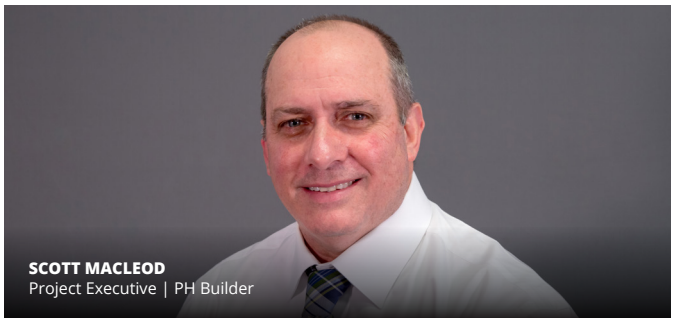
** Currently Pursuing Certification*

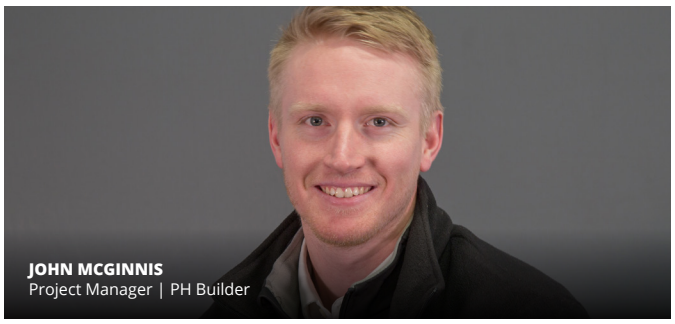
Certified PH Builders & Designers

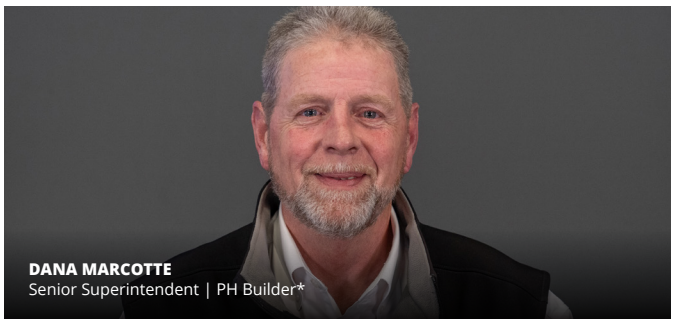


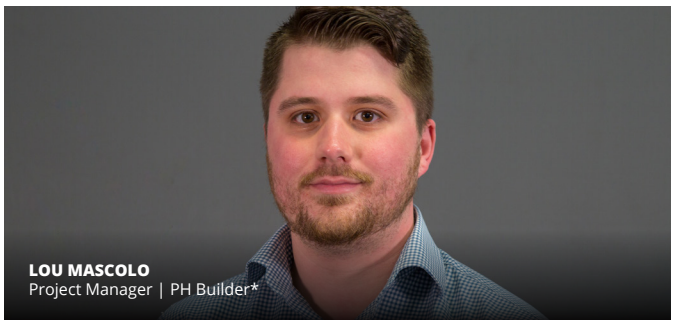


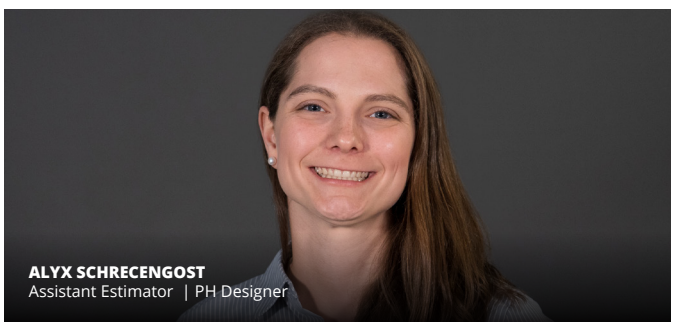










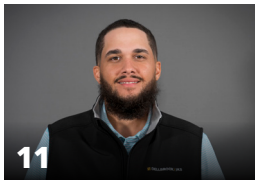


Passive House Staff Training







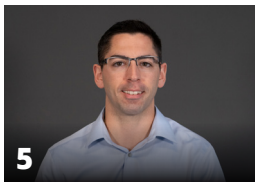


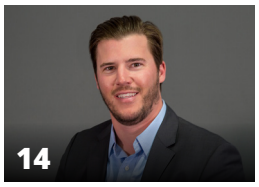




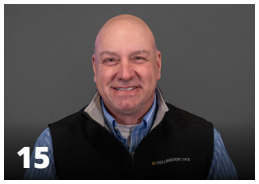






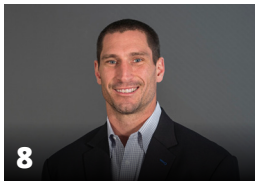




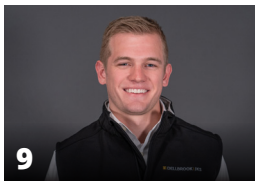














1- Seth Adams
Senior VP of Operations
- Passive House Primer Session 1

2 - Andrew Baker
VP of Marketing & BD
- USGBC- Introduction to Passive House

3 - Ian Briggs
VP Of Field Operations
- Passive House Primer Session 1

4 - Michael Brooks
Assistant Superintendent
- Intro to PH and Building Envelope
- Carpentry, Windows, Air Barrier, & Insul.
- HVAC and Plumbing Trades
- QA/QC Techniques for Ensuring Success

5 - Andrew Damiano
Estimator
- Passive House- MEP Training
- Passive House- Enclosure Training

6 - Steve Dumoulin
Estimator
- Passive House- Facades + Conference

7 - Gregg Ferrelli
Project Executive
- Passive House Primer Session 1

8 - Mike Fish
President & CEO
- USGBC- Introduction to Passive House

9 - Henry Hayes
Assistant Project Manager
- Passive House- Building Energy Boston Conference

10 - Greg Inman
Project Executive
- Passive House Primer Session 1

11 - Derrick Martin
Assistant Superintendent
- Intro to PH and Building Envelope
- Carpentry, Windows, Air Barrier, & Insul.
- HVAC and Plumbing Trades
- QA/QC Techniques for Ensuring Success

12 - Rachel Mager
Project Engineer
- Intro to PH and Building Envelope
- Carpentry, Windows, Air Barrier, & Insul.
- HVAC and Plumbing Trades
- QA/QC Techniques for Ensuring Success

13 -Scott Mitchell
Project Executive
- Passive House Primer Session 1

14 - Michael O'Connell
Project Executive
- Passive House Primer Session 1

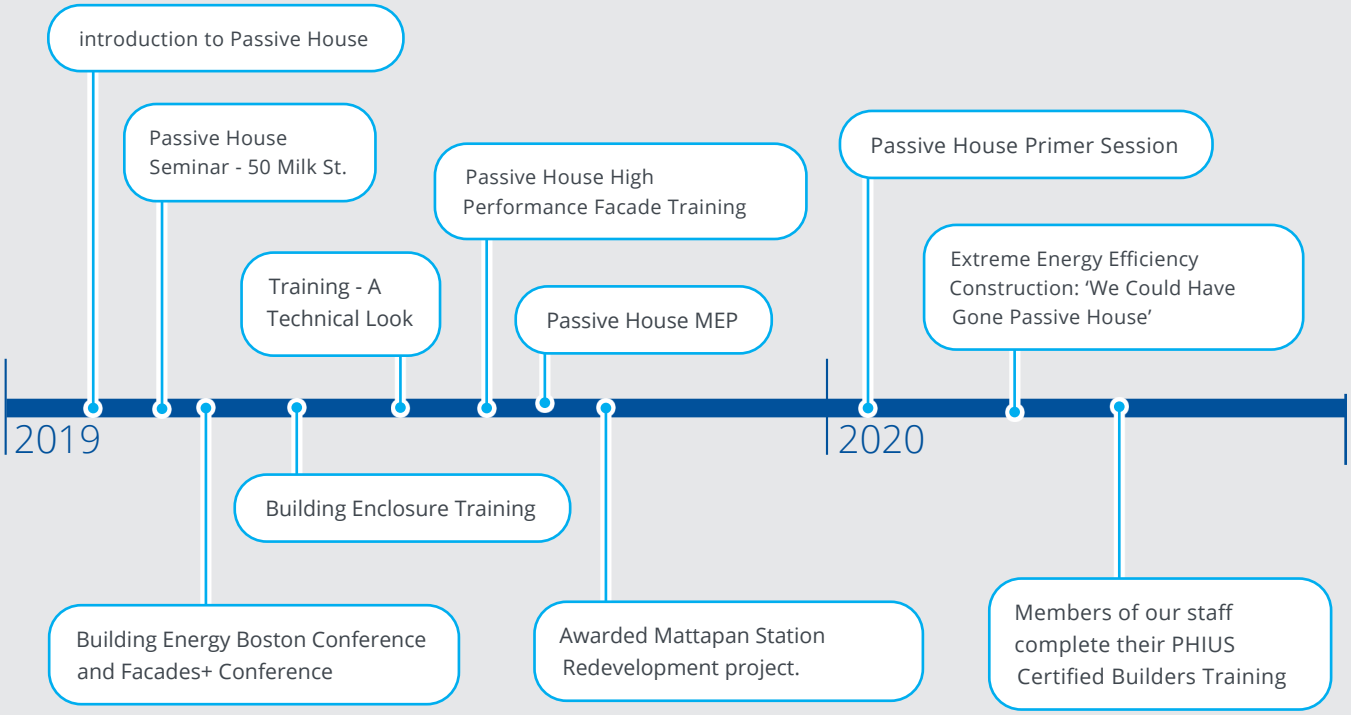
15 - Jim Sanderson
Director Of Field OpS
- Passive House Primer Session 1

16 - Ed Sople
Chief Operating Officer
- USGBC- Introduction to Passive House
- BSA Presentation - Passive House Program
- Intro to PH and Building Envelope
- Carpentry, Windows, Air Barrier, & Insul.
- HVAC and Plumbing Trades
- QA/QC Techniques for Ensuring Success

17 - Pat Spellman
General Superintendent
- Passive House- High Performance Facade Training
- Passive House Primer Session 1

18 - Joe Yee
VP of Estimating
- USGBC- Introduction to Passive House
- Passive House- Enclosure Training
- Passive House- MEP Training

Our Learning Journey



Wanting to learn more about Passive House as a building concept, as well as how it relates to LEED and other building standards, Mike Fish, along with Chief Operating Officer Ed Sople and Vice Presidents Andrew Baker and Joe Yee attended the Mass Clean Energy Centers introduction to Passive House in early 2019. Taking this opportunity to learn the basics of Passive House and have their questions answered by Passive House Massachusetts, they brought an enthusiasm for this approach to sustainable building back to our organization.

Over the spring and early summer of 2019 – twenty Dellbrook|JKS employees attended Passive House seminars and conferences throughout Massachusetts including the Building Energy Boston Conference and Facades+ Conference, in May of 2019 Dellbrook JKS brought Passive House Enclosure Training, Passive House High Performance Facade Training and Passive House MEP Training to employees at our offices in Quincy.

In early fall of 2019 – we were awarded preconstruction services and construction management **Mattapan Station Redevelopment project. A new, 6 story mixed use multifamily building for 135 residential units of PassiveHouse construction.**

In January 2020 we teamed up with our partners at Building Evolution Corporation, to bring a 3 hour Passive House Primer Session to 10 members of our senior leadership team. The seminar focused on performance metrics, heating and cooling demand, understanding airtightness, and as importantly the value proposition in PHIUS+ to owners and developers in terms of energy savings, project financing, compliance and risk management.

Those senior leadership members then brought their understanding and appreciation for PHIUS Building Standards to their own project teams and our commitment to becoming a leader to Passive house and high performance construction was born.

Our Chief Operating Officer Ed Sople along with Building Evolution Corporation, and our client Julie Klump of POAH, led a seminar at the Boston Society of Architects on their approach to estimating the costs of a large scale residential Passive House project.

Our team has attended over 130 hours of Passive House related training. Our online education platform now offers every Dellbrook|JKS employee access to a Passive House Learning Plan where they can begin their own journey to becoming PHIUS Certified Builders or Design Professionals with classes on:

- Passive House in Massachusetts
- Passive House Training Tool
- Passive House Mass April 2020 Meeting
- Cost-Estimating for passive house
- Multi-Family Passive House: Bringing Passive House to Scale
- Passive House- Tools for futureproofing

Sustainable Project Experience

PROJECT	LOCATION	SILVER	GOLD	PLATINUM	LEED CERTIFIABLE
1550 Soldiers Field Road **IN PROGRESS**	Boston, MA				LEED Silver Certifiable
21 Soldiers Field Place **IN PROGRESS**	Boston, MA				LEED Silver Certifiable
The Caldwell	Lynn, MA			●	
22 Federal Street	Nantucket, MA		●		
257 Thayer Street	Providence, RI	●			
2Life - Brown Family House 370 Harvard	Brighton, MA				Enterprise Green Communities
2Life - Coleman House Renovation **IN PRECONSTRUCTION**	Newton, MA				PASSIVE HOUSE Certified
2Life - JJ Carroll **IN PRECONSTRUCTION**	Brighton, MA				PASSIVE HOUSE Certified
2Life - Weinberg House 132 Chestnut	Brighton, MA				LEED Silver Certifiable
55 Wheeler, The Laurent	Cambridge, MA		●		
99 Tremont Street	Brighton, MA				LEED Silver Certifiable
Aberdeen Condos	Brighton, MA				LEED Silver Certifiable
Atria Senior Living	Falmouth, MA		●		
Barstow Village	Hanover, MA		●		
Benfield Farms	Carlisle, MA		●		
Bourne Mills	Tiverton, RI	●			
Cape Cod 5 Cents Savings Bank Headquarters	Hyannis, MA		●		
Commons at Southfield	Weymouth, MA	●			

PROJECT	LOCATION	SILVER	GOLD	PLATINUM	LEED CERTIFIABLE
Elizabeth Stone House **IN PROGRESS**	Boston, MA				LEED Silver Certifiable
Genesis House	Boston, MA				Enterprise Green Communities
International Fund for Animal Welfare Headquarters	Yarmouth, MA		●		
Little Neck Village	Marion, MA		●		
Madison Park Melnea Cass Apartments	Boston, MA				LEED Silver Certifiable
Madison Park Haynes House	Boston, MA				LEED Silver Certifiable
Massachusetts Audubon Society	Wellfleet, MA			●	
Mattapan Station Redevelopment **IN PROGRESS**	Mattapan, MA				PASSIVE HOUSE Certified
Mount Pleasant Home	Jamaica Plain, MA		●		
Oak Row Apartments	W. Roxbury, MA				LEED Silver Certifiable
Saint Polycarp Village Phase 3	Somerville, MA			●	
Sitkowski School Apartments	Webster, MA		●		
Small Friends Early Education Center	Nantucket, MA		●		
The Caldwell / Munroe	Lynn, MA			●	
Union Square Apartments (181 Washington Street)	Somerville, MA			●	
VietAid **IN PROGRESS**	Dorchester, MA				Enterprise Green Communities
Vita JP (3521 Washington Street)	Boston, MA				LEED Silver Certifiable



Mattapan Station Redevelopment

UNDER CONSTRUCTION | **MATTAPAN, MA**

The transformation of a 2.57-acre parking lot at the MBTA Mattapan Station into a mixed-use development with housing, retail and community space.

New, 6 story mixed use / multifamily building for 135 residential units in wood framed construction. A Passive House (PHIUS) project, Mattapan Station will also have 10,000 SF of retail space, 70 structured parking spots, 50 surface parking spots, and 1,800 SF of community space. **The project included a significant amount of ledge removal on a complicated site.**

The building will be truly sustainable and energy efficient as well as Energy Star and LEED for Homes certified. This innovative development project will provide critically-needed affordable and market-rate housing in the Mattapan community.

Residents of the complex will have a variety of transportation options, including public transit, ride-share, and bike-share, along with direct access to the Neponset River Greenway.



ARCHITECT
The Architectural Team
Jim Podesky
617.889.4402
jpodesky@architecturalteam.com

OWNER
Preservation of Affordable Housing
Deanna Savage
617.261.9898
dsavage@poah.org

COST
$50.5M

START / END
Nov 2020 / June 2022

TYPE
New Construction
Podium (5/2) - Post Tension
Passive House
Affordable Housing



2Life - JJ Carroll

UNDER CONSTRUCTION | BRIGHTON, MA

The redevelopment of the John J. Carroll Apartments will create a new approx. 180,000 square-foot building with 142 apartments (124 one-bedroom and 18 two-bedroom) connected to Weinberg House (132 Chestnut Hill Ave) through an enclosed pedestrian bridge. In partnership with the Boston Housing Authority (BHA), 2Life will replace the existing 64 apartments, preserving tenancy and affordability for existing J.J. Carroll residents, and creating 78 additional new affordable homes for low-income older adults. All apartments will be affordable to households earning up to 60% of the Area Median Income. The new building will include the highest standards of universal design, adaptability, and sustainability that are standard in every 2Life project. To comply with City of Boston requirements, the new building must be at least LEED Silver-certifiable, and 2Life has an additional goal of Passive House certification.

Structure will include 2 towers, one at 6 stories and 5 stories. Exterior to include Terracotta Cladding. Work included extensive landscaping and site improvements.



ARCHITECT
Mass Design Group
Jonathan Evans
857.233.5788
jevans@mass-group.org

OWNER
2Life Communities
Rachel Belanger
617.912.8400
rbelanger@2lifecommunities.org

COST
$61M

START / END
July 2021 / March 2023

TYPE
Passive House
New Construction
Affordable Housing
Podium (5 over 1)



2Life - Coleman House Renovation

PRECONSTRUCTION | NEWTON, MA

The 2Life Coleman House project is a two phased, 113,785 SF occupied renovation to 146 units of affordable senior housing apartments. The project is divided into two adjoining buildings. Coleman I has 100 apartments and Coleman II has 46 apartments. Interior renovations include replacing all finishes in the corridors.

Within the apartments we will be replacing all flooring, cabinets, appliances, doors, showers, plumbing fixtures and lighting.

All HVAC systems will be replaced with new energy efficient VRF units. Corridors will also receive new HVAC systems. Exterior improvements will include new fiberglass windows at all locations. The brick masonry exterior will be repaired and replaced as necessary; new colors of brick will be incorporated to enhance the appearance of the buildings. All roofing will be replaced with new TPO membrane and provisions for PV units will be incorporated into the roof structure.



ARCHITECT
Perkins Eastman
Scott Fitzgerald
412.894.8360
sfitzgerald@perkinseastman.com

OWNER
2Life Communities
Elise Selinger
860.462.6357
eselinger@2lifecommunities.org

COST
$22.5M

START / END
May 2021 / Feb 2023

TYPE
Occupied Renovation
Affordable Housing
Passive House or Enterprise Green Communities

MAVEN CONSTRUCTION



MARCUS BRUMMER

PROJECT MANAGER

Since 2015, Marcus Brummer has been responsible for providing effective, ethical, leadership in the areas of commercial construction as a Sr. Project Manager. Specializes in high density residential and workforce housing projects, providing long term strategy including sustainable strategies; energy and water management, and facilities management of assets. Utilized most current technical tools to ensure that all projects are developed and managed within scope, schedule and budget. Understands challenges with Choice Neighborhood initiatives and Community Development Block Grant Programs Prepares project-based construction implementation plans documents to facilitate the end-to-end process for all projects under management.

Marcus works diligently to ensure that all project milestones are met, clients' expectations are exceeded and that all user groups use the schools and education facilities that he builds efficiently.

SELECTED PROJECTS

Westside Trinity Church Housing Stabilization, Atlanta, Ga
Ward 7 Short Term Family Housing, Washington D.C.
Ward 8 Short Term Family Housing Washington, D.C.
Reynoldstown Senior Housing, Atlanta, GA

EXPERIENCE

Prior to joining Maven Construction in 2015, Marcus was responsible for the corporate expansion of a $25M of the residential group Davis Associates, a construction management and general contracting firm. During his time at Davis, Marcus Used professional acumen to manage all operational and administrative roles with the education group. The Davis Companies specialized in municipal construction, including education facilities and affordable and workforce housing products. While at Davis for 13 years , Marcus was recognized for developing and implementing the company's Supplier Diversity and Minority Business Development programs.

In 1994, Marcus joined Jones Lang LaSalle, Chicago, Il office, where he provided comprehensive project and construction management services for community-focused development projects. Responsible for representing the company's owner to provide customers consultation in developing and managing the scope, schedule, and budget of various commercial construction projects. Aided in subcontractor and sub-consultant selection, as well as management. Ethically bid and negotiated multi-million-dollar contracts. Provided quality assurance and quality control oversight to ensure projects were completed on time, and at or under budget.

EDUCATION

TENNESSEE STATE UNIV.
BA Mechanical Eng.

PURDUE UNIVERSITY
Mechanical Eng.*
Transfer

SKILLS

- LIHTC
- Choice Neighborhood
- Hope VI
- CDBG

MAVEN CONSTRUCTION
Building Quality at Every Scale



AISHA LAWAL LAWRENCE

PROJECT ENGINEER

A confident and hardworking professional with over a decade of experience in the areas of project management, construction administration, predevelopment, site evaluation, close out, sustainability role experience. Aisha is dedicated to sustainability and has been a valuable member or our close-out, warrant and sustainability documentation process.

After two years, Aisha has returned to Maven Construction in the education group after a working on two large infrastructure projects totaling over $1.9B. She managed the project from estimating through close out on two aviation projects.

Aisha began her career at Maven Construction as the project engineer for Talley Student Center at North Caroline State University. There she worked as a project engineer, managing the building addition and renovation where she managed all the project management and control tools for the core, shell and interiors. Aisha is a natural task master able to maintain complex project details through submittals, RFIs and LEED documentation. Quality control is such an integrated part of the project an Aisha works in tandem with the field team to generate a quality control process, pre-punch list and punch list.

Aisha thrives in fast paced projects where safety and detailed coordination is critical. She has received several training certifications including OSHA 30, Autocad, Revit, Bluebeam and Procore

SELECTED PROJECTS

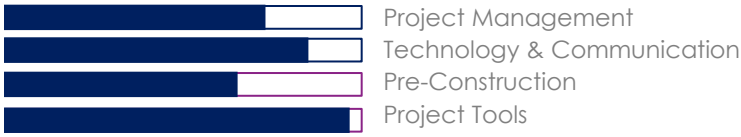
- Howard University Blackwood Student Center Renovation
- North Carolina State University Talley Student Center
- Atlanta Hartsfield Jackson Airport Expansion
- Department of Transportation I-75 & I575 Highway Redesign and Reconfiguration.

EDUCATION

GEORGIA INSTITUTE OF TECHNOLOGY
MS Building Construction & Facilities

GEORGIA INSTITUTE OF TECHNOLOGY
BA Architecture

SKILLS



MAVEN CONSTRUCTION
Building Quality at Every Scale



MARCUS LUCAS

SUPERINTENDENT

Marcus Lucas joined Maven Construction, as a project superintendent in 2017. From the onset, Marcus has demonstrated exceptional field leadership for ll mixed use and multifamily products. Marcus direct field management includes an average project size of $25M-$45M, Marcus has demonstrated experience with private market rate developers and housing authorities and community developers on mid-rise projects. Marcus holds a Construction Supervisors License (CSL), OSHA 30, LEED GA. Marcus has also led major renovation projects that include roof restorations, HVAC modernizations, elevator installations, playground replacements, exterior window and door Replacements, along with other programmatic renovations. Included within work includes the support of planning, site management and delivery strategy with the pre-construction and project management teams. Marcus runs a safe site without any safety violations while leading a field of more than over 20+ field foremen at one time.

SELECTED PROJECTS

Ward 7 Short Term Family Housing,
Washington D.C.
Ward 8 Short Term Family HousingWashington, D.C.

EXPERIENCE

Marcus has deep understanding of housing. Successfully delivering a new short term family housing project for the District of Columbia, Maven partnered with other general contractors to expedite the delivery of three other facilities designed to provide homes for the homeless. Co-developer of the Facilities Turnover Management Plan for this product type for our District of Columbia client, Department of General Services which established a comprehensive plan for the facilities unit intersection points within a capital construction project, the training requirements for the operations and maintenance units, document transition package including CDs, Operations & Maintenance manuals and Warranty information.

Prior to joining Maven Construction, Marcus was an essential member of Trammel Crow Residential, Baltimore, Maryland.

EDUCATION

UNIVERSITY OF MD UNIVERSITY COLLEGE
BS Management Studies

UNIVERSITY OF MD UNIVERSITY COLLEGE
Management Foundations Certificate

MAVEN CONSTRUCTION
Building Quality at Every Scale

NEW ECOLOGY

NEW ECOLOGY

WHO WE ARE

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



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

~Frank Alvarez, Sr. Vice President, Beacon Communities

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

WHAT WE DO

NEI's services include:

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

Orient Heights

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

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



EAST BOSTON, MA • TRINITY FINANCIAL

- LEED v2010 Platinum for Midrise certifiable, LEED for Homes v2008 certifiable for townhomes
- Energy Star v3.1 certification for townhomes
- Enterprise Green Communities certifications (anticipated)

Finch Cambridge

A newly-constructed, 98-unit affordable apartment building, completed in 2020. It is the largest new affordable housing development built in Cambridge in 40 years, and the first Passive House affordable, multifamily housing development in Massachusetts.

- $147,000 in incentives from MassCEC through the Passive House Design Challenge
- Living spaces and mechanical and electrical equipment elevated above 2070 flood level
- Systems-level utility monitoring and comprehensive IAQ monitoring



CAMBRIDGE, MA • HRI

- PHIUS+ 2015 Certified
- Awarded PHIUS Design Awards 2020 prize for Best Affordable Project

HOW WE GET RESULTS

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

NEW ECOLOGY
Community-Based Sustainable Development

BOSTON | PROVIDENCE | BALTIMORE | WILMINGTON
15 Court Square, Suite 420 | Boston MA 02108 | 617-557-1700 | www.newecology.org

THOMAS CHASE, LEED AP, CPHC

New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
chase@newecology.org 617-557-1700 x7061

SUMMARY

Thomas Chase, Senior Project Manager, LEED AP BD+C, Homes, CPHC, joined New Ecology, Inc. in 2014. At NEI he provides sustainable design guidance for new construction and existing building projects including LEED, Enterprise Green Communities, ENERGY STAR, and Passive House certification and oversees internal project teams. He is also the climate change resilience lead, with extensive experience in resilience planning and design. Mr. Chase developed NEI's a climate change resiliency assessment protocol and tool to improve building performance and occupant health during and after extreme events and continues to build on that work from the project up to the portfolio, state, and national level. He also provides clients with solar photovoltaic, solar thermal, battery storage, and virtual net metering, power purchase agreement, and electric vehicle charging station analysis. Prior to joining NEI, he most recently served at the U.S. Department of Housing and Urban Development on the Secretary's Energy Policy staff in tracking multifamily building energy use nationwide, updating energy code adoption for the agency, and contributing to multiple HUD climate change resilience initiatives. Mr. Chase has a background in ecology and urban environmental management and holds Bachelor's and Master's degrees in Biology from Wesleyan University and a Master's of Environmental Management from the Yale School of the Environment. He is a LEED AP BD+C and Homes, a CPHC (Certified Passive House Consultant), and a Massachusetts State Certified Municipal Vulnerability Preparedness Provider.

EXPERIENCE

New Ecology, Inc.
Boston, MA
Senior Project Manager 2014 – Present

- Works with senior staff in all areas of New Ecology's operations and with project owners and developers including providing green building services, providing energy efficiency and renewable energy services, developing means of monitoring and testing building systems and operations, analyzing the success and shortcomings of projects, documenting case studies, and developing new lines of business.
- Developed tools for and leads projects assessing and improving building climate change resilience with various state and local government clients.
- Performs new product development including a life cycle cost analysis tool for a university client and a rapid climate change resilience assessment overlay for NEI's energy and water audit process.

U.S. Department of Housing and Urban Development
Hartford, CT
Portfolio Management Specialist/Region 1 Energy and Green Building Liaison 2011 – 2014

- Represented HUD to the New England Partnership for Sustainable Communities Climate Change Resiliency Working Group and to Connecticut energy efficiency and green building programs and staff member on HUD Resilience Council.
- Drafted multiple sections of the HUD Climate Change Adaptation Plan and building energy regulations.
- Provided facilities management technical assistance, grant management, and sustainable housing and communities support across HUD program areas.
- Organized energy efficiency and green building events for HUD stakeholders on HUD sources and alternative sources of energy efficiency financing.

THOMAS CHASE, LEED AP, CPHC

New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
chase@newecology.org 617-557-1700 x7061

Center for Industrial Ecology, Yale School of the Environment
New Haven, CT
Research Assistant 2009 – 2011

- As part of a student group, created framework for assessing and evaluating the criticality of metals essential to modern technology.
- Prepared weekly presentations, assembled data sets, and designed research framework.
- Assisted in the operation of an international academic society, speaker series, and accompanying publications. Participated in conference planning and management.

City of New Haven, Office of Sustainability
New Haven, CT
Policy Intern 2010

- Assisted in drafting a city-wide sustainability plan, focusing on waste management.
- Drafted an environmentally preferable purchasing policy for city departments, and initiated a ten-year update of the City's greenhouse gas emissions inventory.
- Assisted on the City's first building deconstruction demonstration and completed a dynamic systems analysis of the project, culminating in a master's thesis and policy proposal.

EDUCATION AND TRAINING

Yale School of the Environment, New Haven, CT May 2011
Master of Environmental Management, Urban Environmental Management

Yale School of Architecture, New Haven, CT Fall 2008 – Spring 2009
Coursework towards Master of Architecture I

Wesleyan University, Middletown, CT
Master of Arts, Biology May 2007
Bachelor of Arts, Biology May 2006

AWARDS AND PUBLICATIONS

Journal Article, Multifamily Housing Resiliency Audits, *Proceedings of the ACEEE Summer Study on Energy Efficiency in Buildings*, August 2016.

Report, U.S. Department of Housing and Urban Development, Co-Author, "HUD Climate Change Adaptation Plan," October 2014.

Journal Article, Environmental systems dynamics work cited in Carlisle, S., "Productive Filtration: Living System Infrastructure in Calcutta," *Landscape Urbanism*, Spring 2013.

Report, U.S. Department of Housing and Urban Development, Co-Author, "Affordable Green: Renewing the Federal Commitment to Energy-Efficient, Healthy Housing, Biennial Report to Congress," December 2012.

Journal Article, Graedel, T.E., Barr, R., Chandler, C., Chase, T., Choi, J., Christoffersen, L., Friedlander, E., Henly, C., Jun, C., Nassar, N.T., Schechner, D., Warren, S., Yang, M., Zhu, C., "Methodology of Metal Criticality Determination," *Environmental Science and Technology*, January 2012.

Journal Article, Smilanich, A.M., Mason, P.A., Sprung, L., Chase, T.R., Singer, M.S., "Complex Effects of Parasitoids on Pharmacophagy and Diet Choice of a Polyphagous Caterpillar," *Oecologia*, April 2011.

Presidential Management Fellow, Federal leadership development program.

MACIEJ KONIECZNY, CPHC, LEED AP BD+C, C.E.M., CBCP
New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
konieczny@newecology.org 617-557-1700 x 7024

SUMMARY

Mr. Konieczny joined New Ecology, Inc. in 2013. At NEI he manages the energy efficiency and sustainability components of NEI's retrofit, rehabilitation, and new construction projects, including LEED, Enterprise Green Communities and Energy Star certification processes as well as securing utility rebates. He has extensive experience with private and public sectors, having worked with multiple engineering and architectural firms, contractors, city, state and federal agencies. Previously, he worked for the Energy Efficiency and Sustainable Buildings Group for the Commonwealth of Massachusetts where he managed energy efficiency and renewable energy projects. Mr. Konieczny managed the sustainability office for the city of Newton, MA where he managed the planning, development and implementation of capital and energy efficiency projects, as well as energy management and procurement. He holds a Bachelors in Science in chemistry from Colorado College and a Masters in Landscape Architecture from UMass Amherst.

EXPERIENCE

New Ecology, Inc. June 2013–Present
Boston, MA
Senior Project Manager, Project Manager
Sustainability consultant and technical assistance provider for high performance, green affordable housing

- Technical assistance and certification for LEED New Construction, Homes and Mid-Rise and Energy Star Homes and utility rebates
- Analysis and technical assistance for renewable and alternative energy
- Analysis and technical assistance for sustainable, energy efficient, high performance new construction and renovation/retrofit projects

City of Newton 2011–June 2013
Newton, MA
Sustainability Project Manager – Public Buildings Department

- Responsible for managing projects focused on energy efficiency
- Technical review of designs and specifications to assure compliance with high performance building guidelines
- Performing energy audits and implementing appropriate ECMs
- Building benchmarking, BMS operation, commodity purchase, energy modeling

Commonwealth of Massachusetts 2009–2011
Boston, MA
Project Manager/Planner – Division of Capital Asset Management, Energy Efficiency and Sustainable Buildings Group

- Responsible for managing capital improvement projects focused on the reduction of energy consumption and greenhouse gas emissions at multiple state facilities
- Completed energy and water conservation construction projects across the Commonwealth through all phases of energy performance contracts
- Project phases included planning, study, procurement, investment grade audit, construction, commissioning, and measurement and verification

City of Boston 2008–2009
Boston, MA
Project Manager – Capital Improvements Division

- Responsible for the oversight of the design and construction of capital improvements across the City of Boston
- Accountable for representing the City of Boston during capital improvement projects by managing designers and contractors, and by interfacing with non-profit "friends" groups and the public

Foliaire, Inc. 2006–2008
Boston, MA
Project Manager/Designer

- Experienced in all aspects of small business management, including staff and subcontractor recruitment, development and supervision; project estimation, budgeting, and cost analysis; client relations and community networking; quality control, organizational and efficiency assessment, training, and evaluation of staff.

EDUCATION AND TRAINING

Colorado College, Colorado Springs, CO 1998
Bachelor of Science, Chemistry, Physics

University of Massachusetts, Amherst, MA 2005
Master of Landscape Architecture

CERTIFICATIONS

Association of Energy Engineers (AEE) – Certified Building Commissioning Professional (CBCP)
Association of Energy Engineers (AEE) – Certified Energy Manager (C.E.M.)
Passive House Institute US – PHIUS Certified Builder
Passive House Institute US – Certified Passive House Consultant
US Green Building Council – LEED Accredited Professional Building Design and Construction (BD+C) and Homes rating systems
U.S. Department of Labor OSHA – Ten-Hour Certification
State of Massachusetts – Certified Public Purchasing Program
State of Massachusetts – Pesticide Applicator License: Commercial – L

TECHNICAL PROFICIENCIES

Microsoft Office Suite, Adobe Suite, QuickBooks, Delta Controls (BMS), AutoCAD, eQuest, Dialux, Rhino, Microsoft Projects, Primavera, ArcGIS

FRANK STONE, LEED AP
New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
stone@newecology.org 617-557-1700 x7086

SUMMARY

Mr. Stone joined New Ecology, Inc. in 2019. As Project Manager he manages green building projects from pre-design through construction to operations optimization, including facilitating and documenting compliance with Green Building best practices and certifications and/or regulatory requirements. He also has helped state and national organizations prepare for the challenges of climate change by assessing risks, assembling best practices and developing options to increase resilience in the built environment.

EXPERIENCE

New Ecology, Inc. October 2019-Present
Boston, MA
Project Manager

- Mass. DHCD Climate Hazard Adaptation & Resilience Masterplan project (CHARM)
  - Updated DHCD building design guidelines with resilience best practices, conducted risk and vulnerability assessments of public housing developments at risk due to climate change
- Fannie Mae – Building Resilience in the US Housing Sector
  - Assembled detailed research on 46 current resilience standards and conducted interviews with specialists to assemble and report on best practices to help Fannie Mae improve resilience in the housing sector
- LISC/Mass Housing - Opportunity and Resilience Assessments
  - Assessed existing multifamily buildings for climate change vulnerabilities including extreme heat, sea level rise/storm surge, and flooding due to precipitation. Developed detailed reports with recommended strategies to mitigate risks, increase resilience, and reduce operating expenses at properties.

A-List Education Co. June 2017-September 2019
Shanghai, China
Program Consultant

- Taught economics at the high school and college level using Zoom while pursuing a master's degree in sustainability/environmental management

SCIS International School December 2010-June 2017
Shanghai, China
Instructor and Facilitator

- Experienced Communicator - 7 years of experience communicating highly technical subject matter and policy detail in Shanghai, China and produced the highest outcomes in the 20-year history of the program with very high customer satisfaction ratings from 2011 to 2017
- Successfully raised funds, staffed and facilitated the only English Language Literature festival in China from 2013 to 2018
- Delivered cutting edge technology research training to 50+ coworkers

New Horizons Co. July 2010-February 2011
Shanghai, China
Instructor: SAT Test Prep

FRANK STONE, LEED Green Associate

Smart Water Meter Projects March 2003- October 2009
Boston, Cambridge, Somerville, Worcester MA
Technical Professional:

- Upgraded water meter systems to remote metering technology in 4 major cities in Massachusetts
- Collaborated with and trained government representatives in water infrastructure management in 4 major Massachusetts cities from 2003 to 2009

EDUCATION AND TRAINING

Harvard University
Bachelor of Liberal Arts with a concentration in Economics, with honors Dean's List 2007

Master of Liberal Arts in Sustainability/Environmental Management 2019
Coursework: Renewable Energy Design, Urban Policy, Sustainability Leadership, Watershed Management
Project based work including:
• Solar PV - Developed, scoped and presented 1MW+ PV solar projects and environmental management plans in Shanghai and the New England area in 2018 and 2019. Calculated impacts of GHGs and the Disability Adjusted Life Years (DALYs) associated with coal-fired power plant emissions.
• Sustainability - Assessed needs, organized and coordinated with all stakeholders to develop a long-term maintenance plan and secure a successful handover of a $1.1 million stormwater management program to Boston Public Schools in 2018-2019

CERTIFICATIONS

Certified Associate in Project Management – PMI CAPM
US Green Building Council - LEED AP Homes
Green Building and Community Sustainability Certification – Harvard University
OSHA 10 Hour General Industry

LANGUAGES

English
Spanish
Mandarin Chinese

PROFESSIONAL ORGANIZATIONS

City of Boston Greenovate Action Coordinator & Trainer
Environmental Business Council of New England
Project Management Institute
US Green Building Council
US Green Building Council of MA
Water Environment Federation
New England Water Works Association
National Groundwater Association
Boston Cyclists Union

J. MICHAEL BROD, CPHC, LEED AP Homes
New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
brod@newecology.org 617-557-1700 ext. 7064

SUMMARY

Mr. Brod joined New Ecology, Inc (NEI) in October 2014. As Project Manager he manages the sustainability scopes for a variety of new construction and rehab projects. This work includes achieving LEED and Enterprise Green Communities certifications, securing compliance with zoning regulations related to sustainability, coordinating applications for financial incentives, and advising owners of existing buildings on pathways to greater efficiency. He also has considerable experience managing energy/water audits and existing conditions assessments, in which he develops recommendations for cost-effective green upgrades for existing multifamily buildings throughout the region. Prior to NEI, Mr. Brod was an EDF Climate Corps Fellow at the Boston Housing Authority, where he analyzed utility and work order savings in two public housing developments that were recently renovated using green design principles. While completing a master's degree at the Yale School of Forestry & Environmental Studies (F&ES), he and colleagues developed a proposal to improve municipal energy management for the U.S. Department of Energy's Better Buildings Case Competition, winning the "Best Proposal" award for its category. Mr. Brod holds Certified Passive House Consultant (CPHC), LEED AP Homes, and BPI Multifamily credentials.

EXPERIENCE

New Ecology, Inc. October 2014-Present
Boston, MA
Project Manager

- Executes 3rd party peer reviews of design drawings, develops RFPs for efficiency-related building upgrades, and coordinates client applications for utility program incentives.
- Manages teams of engineers, auditors and field staff developing recommendations on sustainability for multifamily buildings in New England and throughout the country.
- Responsible for the completion of more than ten ASHRAE Level II energy audits and more than 15 other energy and water efficiency assessments within the past year.

Boston Housing Authority June-September 2014
Boston, MA
EDF Climate Corps Fellow/Graduate Research Assistant

- Analyzed housing development utility consumption data to support grant-funded study assessing the impact of green buildings on the health and well-being of public housing tenants
- Drafted RFP documents, managed procurement process for solar net-metering credits purchased by BHA
- Assisted Energy Manager in the planning process for meeting energy audit and reporting mandates from HUD and the City of Boston, respectively

EnerNOC, Inc. Summer 2013
Boston, MA
Regulatory Affairs Intern

- Managed the development of a comprehensive database of statistics to support EnerNOC's Regulatory Affairs team in its advocacy efforts before legislators and regulators
- Developed models quantifying economic impacts of EnerNOC's business operations nationwide
- Researched electric tariff structures to assess viability of new product development initiatives
- Analyzed data on customer participation in demand response programs in support of a company white paper on the value of capacity payments for emergency demand response

Environmental Law and Policy Center of the Midwest June 2009–May 2012
Chicago, IL
Assistant to Public Interest Attorney

- Managed database tracking USDA-funded clean energy projects for ELPC's Energy Team
- Researched and drafted comment letters advocating ELPC's policy positions in rulemaking processes held by EPA, FTC and the Illinois state government

EDUCATION AND TRAINING

Yale University, New Haven, CT 2014
Master of Environmental Management, concentration in Energy & Environment

Northwestern University, Evanston, IL 2009
Bachelor of Arts, Political Science, minor in Environmental Policy and Culture

CERTIFICATIONS

Passive House Institute US – Certified Passive House Consultant
US Green Building Council – LEED AP Homes
Building Performance Institute – Building Analyst, Multifamily Analyst

TECHNICAL PROFICIENCIES

CRM Salesforce, Helioscope, Mavenlink, Microsoft Office

MCPHAIL ASSOCIATES, LLC

March 26, 2021

Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110

Attention: Ms. Sienna DeSantis

Reference: Crescent Parcel; Boston, Massachusetts
McPhail Associates, Inc. Company Profile

Ladies and Gentlemen:

In accordance with your recent request, we have enclosed a Company Profile for McPhail Associates, LLC giving a brief background of our firm, a listing of some major projects, and resumes for key personnel that would be assigned to this project.

McPhail Associates, LLC has been responsible for providing geotechnical and geoenvironmental engineering services on in-fill projects in Boston and, in particular, in the Roxbury neighborhood. In addition, McPhail Associates, LLC is currently providing geotechnical and geoenvironmental design phase services for Whittier Street Housing, which abuts the Crescent Parcel.

I am sure that your review of our experience will speak for itself concerning our qualifications to fulfill your geotechnical and geoenvironmental requirements for the proposed Crescent Parcel. We believe that our reputation for practical, cost-effective services would be invaluable to the developer of this property.

We trust that the above is sufficient for your present requirements. Should you have any questions, please call us.

Very truly yours,

McPHAIL ASSOCIATES, LLC

Ambrose J. Donovan, P.E., L.S.P.

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KEH/ajd

Statement of Qualifications

Firm Profile

Since 1976 McPhail Associates has been providing geotechnical engineering services to architects, owners, contractors, institutions and developers. Over the years our services have expanded to include geoenvironmental, geothermal energy and below-grade waterproofing consultation. In addition, we offer a wide variety of contractor support services including design of temporary and permanent excavation support systems, pile and specialty foundations, and construction dewatering systems. We remain true to the vision of our founder, Robert E. McPhail, and continue to be creative, practical, respected problem solvers, always keeping our clients' best interest and vision in mind.

The ownership of McPhail consists of three principals who collectively have more than 80 years of consulting experience. Our professional staff consists of approximately fifty-five (55) individuals with backgrounds in Civil Engineering, Geotechnical Engineering, Environmental Engineering and Geology. The senior engineering staff has advanced degrees in the geotechnical or geoenvironmental engineering discipline. Our key engineers have had extensive experience in subsurface explorations, geotechnical analysis and design, geoenvironmental site evaluation and remediation, design assistance to structural engineers and architects, and construction monitoring for more than 6,000 building, environmental, waterfront, and heavy construction projects.

We understand the role of the geotechnical engineer in performing the subsurface design of construction projects in terms of both the geotechnical and geoenvironmental considerations. We are oriented towards providing timely design assistance to the design team which assists in the proper implementation of the geotechnical design recommendations and geoenvironmental requirements into the Contract Documents.

Equity, Diversion, Inclusion

Our people come from a wide variety of backgrounds whether it be race, color, age, sex, national origin, or basis of disability. The diverse background of our people makes McPhail stronger and we seek new employees that can further diversify our team. This diversity benefits both McPhail and our clients by fostering a close-knit community that encourages new thoughts and perspectives on old problems, leading to new and innovative solutions.

Relevant Experience

McPhail Associates, LLC has provided geotechnical and/or geoenvironmental engineering consulting services for numerous housing projects in the Boston area including the following:

- 225 Centre Street; Roxbury
- Academy Homes; Roxbury
- Brook Avenue Housing; Roxbury
- Beryl Gardens Housing; Roxbury
- Davenport Commons; Roxbury
- Dudley Triangle Development; Roxbury
- Garrison Trotter Housing; Roxbury
- Jackson Commons; Roxbury
- Mission Main; Roxbury
- Orchard Park Housing Redevelopment; Roxbury
- Shawmut Estates; Roxbury
- Mattapan Heights; Mattapan
- Mattapan Station; Mattapan
- 100 Shawmut Avenue; Boston
- ArtBlock 731; Boston
- Lowell Square; Boston
- Mandela Homes; Boston
- Mei Wah Village; Boston
- Northampton Square; Boston
- Robert McBride House; Boston
- Old Colony (Anne M. Lynch Homes); South Boston
- Franklin Park Apartments; Dorchester
- Lucerne Gardens 2; Dorchester
- The Carruth; Dorchester
- Trinity Terrace; Dorchester
- Alexander Magnolia Cooperative Housing; Dorchester
- Carlton Wharf; East Boston
- Chapman House Apartments; East Boston
- Maverick Landing; East Boston
- Blake Estates; Hyde Park
- Georgetown Homes; Hyde Park
- Back of the Hill Apartments; Jamaica Plain
- 250 Centre Street; Jamaica Plain
- Roslindale Senior Housing; Roslindale
- Washington Beech; Roslindale

Geotechnical Services

Our geotechnical consulting services include:

- Subsurface Exploration Programs
- Foundation Recommendations
- Geotechnical Analysis and Design
- Evaluation of Existing Foundation Conditions
- Foundation Drainage Design
- Geotechnical Instrumentation Installation and Monitoring
- Construction Quality Assurance/Quality Control (QA/QC) Observation
- In-place (Compaction) Density Testing
- Construction Vibration Monitoring
- Hydrogeologic Groundwater Flow/Mounding Analysis
- Slope Stability Analysis
- Soil Laboratory Testing
- Soil Permeability Testing
- Peer Reviews and Expert Witness Testimony

Geoenvironmental/Licensed Site Professional (LSP) Services

Our geoenvironmental/LSP consulting services includes the following:

- Property Due Diligence; Environmental Site Assessments
- Geoenvironmental Analysis (Soil, Groundwater, Soil Gas, and Indoor Air)
- Design and Contracting of Environmental Remediation
- State and Federal Regulatory Compliance Including Licensed Site Professional (LSP) Services
- Remediation Quality Assurance (QA)/Quality Control (QC) Observation
- Dewatering Permit Applications and Regulatory Compliance
- Air and Dust Monitoring
- Radon Testing and Radon Mitigation Design
- Soil Disposal Pre-Characterization
- Aboveground Storage Tank (AST)/Underground Storage Tank (UST) Environmental Assessment and Closure
- Soil Disposal Facility Profile Preparation

Geothermal Services

Our geothermal consulting services includes the following:

- Preliminary Evaluations of Geothermal Well Systems
- Test Well Installation and Thermal Conductivity Testing
- Well Field Design
- Well Field Quality Assurance/Quality Control (QA/QC) Observation
- MassDEP Underground Injection Control (UIC) Permitting

Project Team Structure

Our success is due to our extremely knowledgeable staff and experienced leadership who work with unparalleled collaboration to deliver comprehensive solutions to our client's development plans.

The following are the key personnel that will be assigned to this project:

- Principal-in-Charge: Ambrose J. Donovan, P.E., L.S.P.
- Geotechnical Engineer: Fatima Babic-Konjic, P.E.
- Environmental Scientist: Kathryn Hanrahan

Resumes are attached herein.

AMBROSE J. DONOVAN, P.E., L.S.P

PRINCIPAL

Education

Trinity College; Dublin, Ireland
Bachelor of Arts in Mathematics
Bachelor of Engineering in Civil Engineering

Northeastern University
Master of Science in Geotechnical Engineering

Professional Registration

Registered Professional Engineer: Massachusetts

Licensed Site Professional: Massachusetts

Professional Affiliations

American Society of Civil Engineers
Boston Society of Civil Engineers
Licensed Site Professional Association
NAIOP Massachusetts



Mr. Donovan has acquired over 30 years of extensive geotechnical and geoenvironmental engineering experience covering a wide range of projects in Massachusetts.

Mr. Donavan's experience also includes performing geotechnical analysis and design, preparing construction documents, construction monitoring and project coordination with other design professionals. His geoenvironmental experience includes performing site assessments for the presence of oil and hazardous materials, characterization of soil and rock for off-site disposal, preparation of site remediation plans, monitoring of site remediation operations, and preparation of reports documenting the completion of remedial actions in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000).

Representative Experience:

Florida Ruffin Ridley School; Brookline, MA
Clark Avenue School; Chelsea, MA
Newton North High School; Newton, MA
The Fan Pier; South Boston, MA
Van Ness and 1325 Boylston Street; Boston, MA
SixTen Main Street; Cambridge, MA
Waterfront Residences and Marriott Hotel; South Boston, MA
The Intercontinental - 500 Atlantic Avenue; Boston, MA
Westin Boston Waterfront Hotel; South Boston, MA
Trilogy Mixed Use Development; Fenway, MA
Liberty Hotel (formerly Charles Street Jail); Boston, MA
M.G.H. Inpatient Facility; Boston, MA
University Park at M.I.T.; Cambridge, MA
Novartis Institute for Biomedical Research; Cambridge, MA
Boston Police Headquarters; Boston, MA

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GEOENVIRONMENTAL ENGINEERS
2269 Massachusetts Avenue
Cambridge, Massachusetts 02140
(617) 868-1420

FATIMA BABIC-KONJIC, P.E.

PROJECT MANAGER

Education

University of Massachusetts – Lowell; Lowell, Massachusetts
Bachelor of Science in
Civil Engineering (2007)

University of Massachusetts – Lowell; Lowell, Massachusetts
Master of Science in
Civil Engineering (2010)

Professional Registration

Registered Professional Engineer:
Massachusetts



Ms. Babic-Konjic has acquired over 12 years of extensive geotechnical and geoenvironmental engineering experience and has served as a field engineer and project manager for variety of geoenvironmental and geotechnical projects.

Ms. Babic-Konjic's experience includes coordination of subsurface exploration programs, geotechnical analysis and design, geotechnical instrumentation, design assistance in preparing construction documents, and project coordination with other disciplines. Her foundation construction experience includes both design and field monitoring of shallow and deep foundations including spread footing systems, drilled and driven piles, pressure injected footings, underpinning, vibration monitoring, settlement analysis for building projects. Her geoenvironmental experience includes preparation of soil disposition plans and monitoring of site remediation operations in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000).

Representative Experience:

Edward M. Kennedy Institute for the U.S. Senate; Boston, MA
Copley Square Hotel; Boston, MA
Vita Development; Jamaica Plain, MA
Dover High School; Dover, NH
Jamaica Plain Branch Boston Public Library; Jamaica Plain, MA
Dudley Branch Boston Public Library; Boston, MA
Lyman Terrace Redevelopment; Holyoke, MA
Roosevelt Towers Development; Cambridge, MA
The Meadowbrook School-Learning Center; Weston, MA
95 St. Alphonsus Street; Boston, MA
Lt. Eleazar Davis School; Bedford, MA
Fuller Middle School; Framingham, MA
Malden Catholic High School - Additions; Malden, MA
Walpole Central Fire Station; Walpole, MA
Southborough Public Safety Building; Southborough, MA
Washington Village Phase 3; Norwalk, CT

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Cambridge, Massachusetts 02140
(617) 868-1420

KATHRYN E. HANRAHAN

PROJECT ENVIRONMENTAL SCIENTIST

Education

University of Connecticut –
Storrs, CT
Bachelor of Science
in Environmental Science

Trinity College of Dublin –
Dublin, Ireland
Master of Environmental Science

Professional Affiliations

Licensed Site Professional
Association



Since 2015, Ms. Hanrahan has acquired extensive experience in monitoring soil borings and test pit explorations and classifying soil and rock samples. Ms. Hanrahan also has extensive experience performing geoenvironmental sampling of air, soil gas, soil, and groundwater.

Ms. Hanrahan has served as a geoenvironmental engineer at McPhail Associates since 2017 and her responsibilities have included planning and monitoring of subsurface explorations, completion of American Society of Testing and Materials (ASTM) Phase I and Phase II Environmental Site Assessments for the presence of oil and hazardous material in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000), performance of geoenvironmental analysis based on data obtained through exploration programs, and preparation of dewatering permit applications.

Representative Experience:

Former Van Brodie Building; Lawrence, MA
Beryl Garden Apartments; Boston, MA
Bayside Doubletree Hotel Expansion; Boston, MA
Cate Street Development; Portsmouth, NH
530 Wellington Avenue; Cranston, RI
100 Shawmut Avenue; Boston, MA
Kenmore Square North Development; Boston, MA

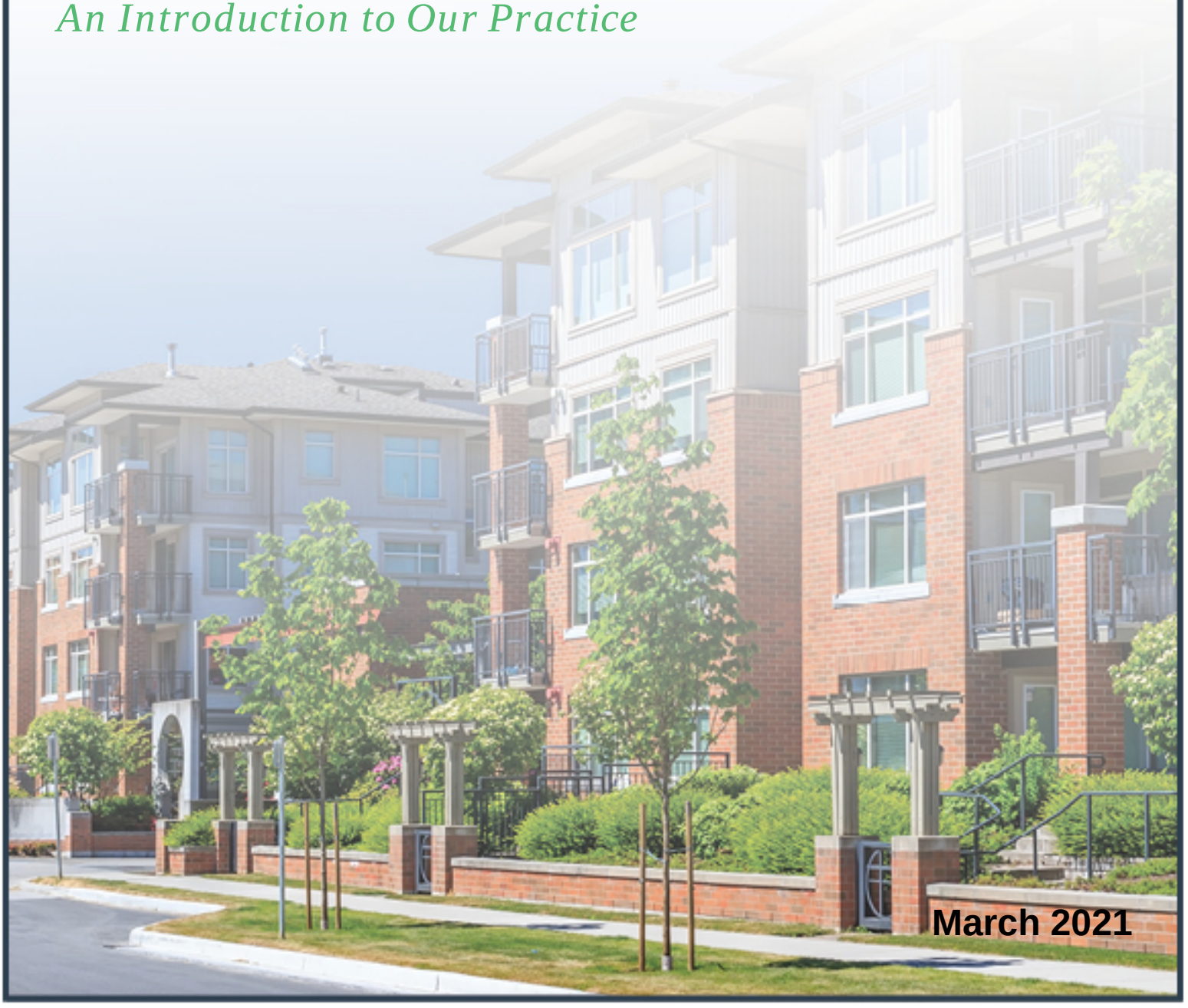
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ROBINSON + COLE

Robinson+Cole

Affordable Housing + Finance

An Introduction to Our Practice



March 2021

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Affordable Housing and Finance

Robinson+Cole's real estate practice encompasses a spectrum of real estate transactional and related matters. We represent a range of clients, including multinational corporations; institutional, public, and private lenders; retailers; state agencies; bonding authorities; schools; commercial and multifamily developers; health care institutions; hotel chains; and manufacturers.

The senior attorneys in the Affordable Housing Practice Group each have over 25 years of experience in the affordable housing industry and have developed long standing working relationships with housing agencies, bond issuers, Freddie Mac, Fannie Mae, HUD and various governmental agencies.

Our Services and Our Team

In the area of affordable housing and finance, Real Estate + Development Group lawyers offer representation in these three areas: Development, Finance, and Public Finance.

Development

Robinson+Cole advises for-profit developers, nonprofit organizations, housing authorities, and redevelopment agencies on acquisition, development, management, and financing of affordable housing projects. Our lawyers proactively work with clients to provide the following services:

+ applying for allocations and incentives
+ drafting and negotiating acquisition and partnership agreements
+ facilitating and negotiating financing terms
+ integrating subsidies
+ preparing relevant documentation

To help our clients develop creative strategies to achieve their objectives, we collaborate with lawyers of these Robinson+Cole practice groups:

+ Corporate
+ Tax + Exempt Organizations
+ Construction
+ Environmental, Energy + Telecommunications
+ Land Use

Finance

Robinson+Cole is a premier firm in representing lenders and other participants in complex affordable housing financing transactions. Our lawyers have closed over $2 billion in financings annually over the past several years ($4 billion in 2020) on behalf of these entities:

+ commercial banks
+ investment banks
+ mortgage banks
+ letter of credit issuers
+ private funds
+ Fannie Mae and Freddie Mac sellers/servicers

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Utilizing federal, state, and local subsidy and incentive programs, we apply cutting-edge structures for the following:

+ conventional loans
+ construction loans
+ tax-exempt bond financings
+ MBS transactions
+ credit enhancement transactions
+ low-income housing tax credit financings
+ forward loan commitments
+ Fannie Mae M.TEB and M.TEM transactions

Our strong working relationships with governmental housing authorities and housing finance agencies across the country have proven to be instrumental in facilitating these complicated transactions. Group members are also committed to helping clients meet their affordable housing objectives and fulfill their obligations under the Community Reinvestment Act.

Robinson+Cole's attorneys have closed transactions for its lending clients, including the following programs, and have been instrumental in working with the agencies as the programs evolved:

+ HOME Loan Programs
+ Community Development Block Grant Disaster Recovery Program (CDBG-DR)
+ Federal Home Loan Banks' Affordable Housing Program (AHP)
+ Mental Health Services Act Housing Program (MHSA)
+ NYC HDC New Housing Opportunity Program (New HOP)
+ California Infill Infrastructure Grant Program (IIG)
+ Low-Income Affordable Marketplace Program (LAMP)
+ NYC HPD Participation Loan Program (PLP)
+ Housing Development Grant Programs
+ HUD's Rental Assistance Demonstration Program (RAD)

The mortgage loans provided by our lender clients have resulted in the construction and preservation of thousands of units of affordable housing and the renaissance of many neighborhoods that include single and multifamily homes, condominiums, cooperatives, condos, limited equity cooperatives, retail sites, and charter schools. Several of the developments that Robinson+Cole handled on behalf of its lender clients have been recognized by industry wide organization and publication including Mortgage Banking, Affordable Housing Finance Magazine and the New York Times.

Robinson+Cole's attorneys have represented Fannie Mae DUS Lenders and Freddie Mac Program Lenders since 1993. Robinson+Cole is also a member of the Fannie Mae Legal Issues Forum.

We also have the same long standing relationships with affordable housing developers. We understand that the goal of both our lending clients and their customers is to bring each transaction to closing and ultimately completion and repayment. Robinson+Cole's attorneys are facilitators of transaction but at the same time carefully protect the rights of their lender clients.

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We are frequently asked by developers for referrals to various lenders and have successfully made introductions that have resulted in long term working relationships and business arrangements. We have also helped forge successful relationships between our lending clients and permanent lenders, LIHTC and NMTC syndicators and investors, DUS lenders and other parties in the affordable housing industry.

Public Finance

Robinson+Cole has provided bond counsel services for securities offerings by states, municipalities, public authorities, and agencies for more than 60 years. As one of the first recognized bond counsel firms in the country, we have been listed in The Bond Buyer's Municipal Marketplace (Red Book) since the early 1940s. Our lawyers rank among the leaders, nationally and regionally, as bond counsel and underwriter's counsel. Using multiple sources of funding, the Public Finance Group has served as bond counsel to housing authorities throughout the country on many financings, including capital funds revenue bonds and credit-enhanced transactions.

REPRESENTATIVE MATTERS

+ Representation of a national affordable housing lender on a $188 million portfolio of 16 loans including 6 Fannie Mae M.TEM loans and 10 Freddie Mac cash loans covering projects in Texas, Florida and South Carolina. The projects had numerous regulatory agreements, property tax abatements and a cash management system was required for the Fannie Mae portfolio.
+ Representation of a national bank in a $53 million construction to permanent loan for a 200-unit affordable family and senior apartment complex in Louisville, CO. Project financing included a “CHIF” loan and a “DR” Loan from the Colorado Department of Local Affairs, a loan from the Housing Authority of the County of Boulder, Worthy Cause Grants from Boulder County, City of Louisville Impact and Permit Grants and a Boulder Builder Consortium HOME Loan. The project also benefitted from a Section 8 Housing Assistance Payments Contract.
+ Representation of a Fannie Mae DUS Lender providing financing for a portfolio of 6 properties in Hawaii. The properties are owned by Hawaii Housing Finance and Development Corporation and the borrowing entities hold leasehold interests. The projects are undergoing significant rehab during the term of the Fannie Mae loans.
+ Representation of a national bank as construction lender and Freddie Mac Seller/Servicer concerning the financing of a project in New York City. The $65 million mixed income project was developed on excess property formerly owned by the New York City Housing Authority and was financed with tax exempt bonds issued by the New York City Housing Development Corporation and subsidy loans provided by the New York City Housing Development Corporation, the City of New York Department of Housing Preservation and Development and the New York City Housing Authority. The project benefits from a tax exemption pursuant to Section 421a of the New York Real Property Tax Law.
+ Representation of a national bank concerning a $5.4 million Freddie Mac immediate funding cash loan provided by the client under the Freddie Mac Mod-Rehab Targeted Affordable Housing product line to finance acquisition and rehabilitation of a 100-unit rental property in Carson City, Nevada. All units at the property are covered by a long-term Section 8 Housing Assistance Payments Contract. In addition to the loan, the transaction was financed with $4.2 million of 9 percent low-income housing tax credit equity. The $5.4 million loan was under a bifurcated structure consisting of a real estate loan, underwritten at low-income housing tax credit rents and amortized over 35 years, and a Housing Assistance Payments overage loan underwritten with the additional Housing Assistance Payments over the low-income housing tax credit rents and amortized over 20 years.

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+ Represented a national bank in its role as a lender for the Cambridge Housing Authority's (CHA) first four Rental Assistance Demonstration (RAD) conversion deals. The bank closed the tax-exempt bond financing for 511 units of public housing conversions under HUD's RAD program. The RAD program was created to give public housing authorities a tool to preserve and improve public housing properties by restructuring HUD subsidies into long-term contracts that facilitate the private financing of improvements. These first four transactions were part of a long-term project to convert all 2,129 of CHA's public housing units to RAD.
+ Represented a national lender providing a construction loan in the amount of $7.2 million to finance the development of 66 units of mixed-income rental units on property ground leased from a local housing authority in Massachusetts. This transaction involved several sources of subordinate financing sources, Low Income Housing Tax Credits, state grants, and local financing.
+ Represented a national lender providing a construction loan in the amount of $32 million to finance the acquisition and rehabilitation of 190 units of multifamily low-income housing in a suburb of Boston, Massachusetts. The loan structure involved a tax-exempt bond financing as well as multiple sources of subordinate financing from the state and local government. Additionally, the project involved negotiating complex zoning and permitting issues related to the property's preexisting nonconforming zoning status.
+ Representation of a national bank as construction and permanent lender for the $100 million development of a transit-oriented affordable housing project on a former commuter parking lot in Miami, Florida. The development was financed with conventional loan proceeds, Federal Low Income Tax Credits, American Recovery and Redevelopment Act stimulus funds provided through the Florida Housing Finance Corporation, and a subsidy loan from Miami-Dade County.
+ Two phase redevelopment of Clippership Wharf in East Boston, MA. Phase 1 involved the acquisition of parcel from the Boston Redevelopment Authority and new construction of a mixed income condominium project using workforce housing proceeds from Massachusetts Housing Finance Agency. Phase 2 involved a ground lease of property from the Boston Redevelopment Authority and new construction of a mixed use affordable housing project involving federal and state Low Income Housing Tax Credits and loan proceeds from Massachusetts Housing Finance Agency, as well as subordinate debt from multiple local and state sources.
+ Acquisition and financing of historic school building in Southbridge, MA utilizing financing from numerous state and local sources including DHCD HOME funds, Affordable Housing Trust Funds, Facilities Consolidation Funds and Housing Stabilization Funds as well as State and Federal Low Income and Historic Tax Credits.
+ Multi- phase redevelopment of one million square foot historic department store in Rochester, NY into mixed use condominium involving retail, restaurant, innovation labs, market rate housing, workforce housing and affordable housing. Redevelopment involved a seven (7) phase historic project. Two phases included the use of new market tax credits combined with an historic lease pass-through, two phases involved the development of affordable housing utilizing Low Income Housing and Historic Tax Credits and one phase involved the use of tax exempt bond financing, work force housing proceeds and Historic Tax Credits. Two additional phases involved the use of opportunity zone fund investments.
+ $48MM HUD financing of an occupied multi-family housing project in Jackson, MS that included a joint venture with the local housing authority ground lease from the housing authority, RAD conversion and syndication of Low Income Housing Tax Credits.
+ Acquisition and financing of historic mill building using condominium structure to bifurcate a single project into a 4% project and 9% project using construction financing from Rhode Island Housing Finance Agency and Citizens Bank.

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Because of issues related to the transferability of the state Historic Tax Credits, I created a new ownership structure that allowed the tax credit investor to be admitted as a sole member of each of the condominium owners which allowed each owner to be treated as a disregarded entity for the purposes of the tax credits.

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Affordable Housing Team



Deirdre Robinson
Partner
Boston, MA

dmrobinson@rc.com
617-557- 5928

Deirdre Robinson represents developers in the Northeast and across the country in all aspects of affordable housing development with an emphasis on syndication of tax credits including low income housing, historic and new markets. She represents for-profit and nonprofit organizations owners and developers in complex, mixed-use and multi-family housing projects, utilizing creative financing structures that combine private and subsidy loan programs and various tax-credit programs. Deirdre specializes in complicated transactions that frequently involve historic preservation.

She works with her clients to develop creative solutions to complicated structuring and financing problems faced by owners and developers that involve a wide array of private, state and federal funding sources, tax-exempt bond financing and equity investment from the syndication of federal and state Low Income Housing Tax Credits, federal and state Historic Tax Credits, New Markets Tax Credits, Solar Energy Tax Credits and Brownfields Credits. Deirdre is committed to working with her clients to address the need for safe, quality affordable housing and community development.



Debbie Gezon
Partner
Manhattan Beach, CA

dgezon@rc.com
310-321-7666

Debbie Gezon's real estate practice encompasses affordable housing and multifamily lending, real estate finance, commercial leasing, and real estate development transactions. While based in the firm's Los Angeles office, she handles real estate matters throughout the country.Debbie has extensive experience in all types of affordable housing lending transactions, including construction and permanent financing, tax-exempt bond financing, tax credit transactions, Fannie Mae and Freddie Mac loan and credit enhancement transactions, Affordable Housing Program (AHP) loan transactions, 236 decouplings, and other mortgage lending programs. Debbie was formerly inhouse counsel at Fannie Mae.

She has assisted lenders with financing transactions for affordable housing projects throughout the United States, including a $132 million development of a multi-use tower project in San Francisco, a $28 million development of a multifamily project in Denver, a $38 million mixed use development under a ground lease from the City of Los Angeles, and a $66 million Freddie Mac bond credit enhancement transaction for a project in Honolulu.

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Andrew Kramer
Partner
New York, NY

akramer@rc.com
212-451-2904

Andrew Kramer, chair of the firm's Real Estate + Development Group, concentrates his practice on real estate finance and affordable housing finance.

Mortgage financings for affordable housing transactions are an important aspect of Andy's business practice and include tax-exempt bond transactions, bond credit enhancement, Fannie Mae and Freddie Mac executions, and government-subsidized mortgage lending programs.

Andy has assisted lenders with financing transactions for affordable housing projects throughout the country, including for a $27 million redevelopment of a former public housing project site in Washington, D.C., a $65 million mixed-income project in New York City and the $66 million rehabilitation of Hawaii's largest public housing project.



Candace Cunningham
Partner
Hartford, CT

ccunningham@rc.com
860-275-8376

Candace Cunningham practices commercial real estate finance law, with an emphasis on Fannie Mae and Freddie Mac financing for apartments, senior housing, and affordable housing nationwide. Candace represents commercial and institutional lenders, and private financiers in complex structured financings of multifamily properties and affordable housing loan programs. She handles a range of loan structures, including fixed and floating rate debt, tax-exempt bonds, commercial mortgage-backed securities (CMBS) executions, affordable forwards, and credit facilities.

Candace has handled several multi-million dollar loans in connection with projects nationwide. She represented a national bank, which was construction and permanent lender, for a $100 million transit-oriented affordable housing project in Florida, and a $64 million affordable housing redevelopment project in Colorado.

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Matthew Lawlor
Partner
Boston, MA

mlawlor@rc.com
617-557-5948

Matthew Lawlor focuses his practice on real estate disposition for public agencies, affordable housing finance, development, permitting, land use, and urban planning matters. He regularly represents public authorities and agencies, lenders, developers, nonprofit organizations, and commercial landlords and tenants. In addition to his law degree, he has a master's degree in regional planning.

Matt represents major lenders in affordable housing financing for the construction and major rehabilitation of residential developments. This representation includes drafting all construction loan documentation, undertaking legal due diligence, and closing the loan transactions. He has handled numerous affordable housing finance transactions on behalf of a major national bank, including a public housing redevelopment in East Boston, Massachusetts, and the rehabilitation of several public housing developments in Cambridge, Massachusetts.



Krista Patterson
Partner
New York, NY

kpatterson@rc.com
212-451-2994

Krista Patterson is an experienced real estate attorney with a broad practice including financings, acquisitions and dispositions, joint ventures and leasing. She has extensive experience handling multi-million dollar transactions on behalf of a range of clients, such as financial institutions, investors, developers, operators, landlords and tenants.

Affordable housing financing makes up a substantial amount of Krista's practice, including tax credit transactions and other executions. Krista is well versed in the complexities of these types of transaction, including working with governmental issuers and fiscal agents, understanding the regulatory regimes that govern these projects, and integrating unique aspects of affordable housing transactions such as Housing Assistance Program contracts. Representative matters include in a $278MM loan secured by property in California, a $130MM loan secured by a portfolio of property in Illinois and a $24.1MM loan secured by property in Colorado. In addition, Krista represents a firm client in its successful new program securitizing affordable housing loans.

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Roger Peters
Partner
Providence, RI

rpeters@rc.com
401-709-3312

Roger Peters focuses on commercial real estate development, condominium formation, general real estate, hotel management and hospitality, leasing, and complex finance. Roger represents local and national developers, real estate investment trusts (REITs), funds and lenders in developing and financing commercial, residential, and mixed-use office buildings; shopping centers; apartment complexes; and residential and mixed-use condominiums.

He represents national lenders and borrowers in connection with commercial mortgage-backed securities (CMBS), franchise, affordable housing, and general commercial real estate loans and bond financing. He drafts and negotiates loan documents and provides advice regarding financing options.



Matthew Dolan
Counsel
Stamford, CT

mdolan@rc.com
203-462-7527

Matthew Dolan counsels national banks, mortgage lenders, and developers in complex-structured real estate finance transactions secured by commercial properties throughout the United States, including multi-family and student housing, manufactured housing communities, shopping and corporate centers, industrial parks, and homeless shelters. He is a member of the firm's Real Estate + Development Group.

Matt has extensive nationwide experience handling loans secured by heavily-regulated multi-family affordable housing projects financed through government-sponsored enterprise (GSE) programs with Fannie Mae, Freddie Mac, and Federal HOME Loan Banks, commercial mortgage-backed securities (CMBS) and balance-sheet loans, the State and City of New York, and other federal, state, and municipal regulatory, housing, and community development programs and agencies.

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Jerome Garciano
Counsel
Boston, MA

jgarciano@rc.com
617-557-5944

Jerome Garciano focuses his practice on real estate transactions and financing, affordable housing, renewable energy, green building, sustainability, and tax credits. Jerome, a member of the firm's Real Estate + Development Group, represents a range of clients, including lenders, equity investors, owners, and developers, for real estate and project finance transactions.

Jerome represents for-profit and non-profit organizations in affordable housing and community development project finance transactions. He assists in coordinating financing from multiple income sources, enabling projects to succeed. He recently represented a local housing authority developer on a $24 million transaction, utilizing low-income housing tax credits, state housing finance agency financing, and state department of housing subordinate debt.

Jerome advises clients in real estate project and finance structuring, and he conducts all related due diligence and transaction documentation. He has extensive experience in assisting clients with finance matters related to development, including handling complex, multi-million dollar loans. He recently represented a national affordable housing lender in connection with a $13 million loan for a 120-unit senior housing U.S. Housing & Urban Development (HUD) Rental Assistance Demonstration (RAD) conversion transaction.



Michele Maresca
Counsel
Hartford, CT

mmaresca@rc.com
860-275-8364

Michele Maresca handles the full range of commercial real estate transactions, including representation of borrowers and lenders in financings, dispositions, acquisitions, and development agreements. She routinely represents developers, businesses, non-profit organizations, municipalities, and housing authorities. Throughout her varied and multi-layered practice, Michele leverages her training and experience as a land use planner to assist clients in structuring agreements to address their unique development, title, and land use issues. In addition to her law degree, she has a master's degree in Natural Resource Planning, which allows her to engage with development projects with that valuable perspective.

Michele has more than a decade of experience helping clients with their real estate transactions, negotiating, documenting, and closing complex real estate deals, including acquisitions, dispositions, and financings. She routinely counsels clients in the structuring, negotiation, and documentation of mortgage loans and real estate transactions; conducts due diligence; and handles all matters related to title.

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Thomas Sweeney
Counsel
New York, NY

tsweeney@rc.com
212-451-2983

Thomas Sweeney has more than 25 years of experience as a commercial real estate lawyer, working on a broad scope of real estate transactions. Tom focuses his practice on finance, affordable housing, joint ventures, acquisitions, dispositions, multifamily housing bonds, and leasing.

Tom handles a variety of commercial real estate finance transactions on behalf of originators, servicers, conduits, mortgage and mezzanine lenders, as well as borrowers, with a focus on financing affordable housing and mixed-use projects using tax credits and multifamily housing bonds. He represents institutional lenders in originating construction, permanent, and mezzanine loan facilities on multifamily, retail, office, hospitality, mixed-use, medical, mining, and other property types.

Tom handles all aspects of closing commercial mortgage finance transactions on all classes of real estate. He provides advice regarding New York mortgage laws to lenders involved in multistate secured lending transactions. He has extensive experience with handling sophisticated commercial real estate financings, and he counsels clients in the structuring, negotiation, and documentation of mortgage loans.



Matthew McElroy
Associate
New York, NY

mmcelroy@rc.com
212-451-2922

Matthew McElroy concentrates his practice in the representation of banks, private equity funds, and other institutional investors in broad range of commercial real estate finance transactions. He is a member of the firm's Real Estate + Development Group.

Matthew has extensive experience representing lenders and borrowers in the origination of mortgage, mezzanine, construction, and other financings secured by interests in various real estate asset classes across the country, including hotels, condominiums, office buildings, apartment complexes, ground leased properties, single tenant properties, multi-state portfolio transactions, and various non-income producing properties. A substantial portion of his practice also involves counseling lenders with respect to loan sales, purchases, and syndications, including inter-creditor and co-lender arrangements. Matthew has assisted lenders and borrowers in the origination of over $10 billion in loans and loan commitments for projects located throughout the country. He also handles servicing matters with respect to performing and non-performing loans. His experience includes advising lenders, borrowers and equity owners with respect to debt and equity restructurings.

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Kathryn Mullin
Associate
Hartford, CT

kmullin@rc.com
860-275-6414

Kathryn Mullin concentrates her practice on commercial real estate development, general real estate matters, affordable housing, and finance. Her clients include businesses of all sizes, lenders, developers, builders, and organizations. She is a member of the firm's Real Estate + Development Group.

Kathryn represents lenders in real estate transactions, and advises clients in the structuring, negotiation, and documentation of mortgage loans. She conducts due diligence and handles title and survey matters. She recently helped represent a national bank lender in three transactions, totaling $49 million. She also recently helped with the sale of a former industrial site for a chemical company



Austin Provost
Associate
Hartford, CT

aprovost@rc.com
860-275-6420

Austin Provost concentrates his practice in commercial real estate which includes the representation of clients in financing transactions, leasing transactions and in acquisitions and dispositions of commercial real estate. He is a member of the firm's Real Estate + Development Group.

Austin represents lenders in commercial lending transactions for all mortgage asset classes, including affordable housing projects. He assists clients in structuring and documenting mortgage loans and reviews title, survey and due diligence materials.

Austin regularly assists clients in acquisitions and dispositions of commercial real estate. In this role he works closely with clients to structure, negotiate, and document transactions through the preparation of purchase and sale agreements, negotiation of loan documents, and the review of due diligence, title and survey.

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Noel Vales
Associate
New York, NY

nvales@rc.com
212-451-2960

Noel Vales focuses his practice on real estate finance and affordable housing finance. He is a member of the firm's Real Estate + Development Group.

Noel assists lenders with financing transactions for affordable housing projects throughout the country, including mortgage financings, tax-exempt bond transactions, bond credit enhancement, Fannie Mae and Freddie Mac executions, low-income housing tax credits (LIHTC), and government-subsidized mortgage lending programs.

Noel has represented institutional equity investors and real property owners in over 25 closings relating to the construction, rehabilitation and/or operation of housing developments that utilize the federal low-income housing tax credit program and other government-assisted programs. He has drafted and negotiated limited partnership and limited liability company agreements involving equity investors, developers, and non-profit partners.

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Introduction to the Firm

Robinson+Cole, an Am Law 200 firm, provides legal solutions to businesses, from start-ups and Fortune 50 companies to nonprofits, educational institutions, municipalities and state governments.

CLIENTS FIRST

By cultivating a thorough understanding of your industry, the nature and structure of your business, your risk tolerance level and your budget, our more than 220 lawyers tailor legal strategies that align with the overall business needs of your company. Since our founding in 1845, commitment to our clients and their success has distinguished the firm. Our goal is to help our clients achieve their objectives at the cost they expect.

GLOBAL REACH

Many of our clients' interests span the country and the globe. By nurturing a robust network of relationships, we've expanded our capabilities to serve our clients wherever their needs arise. We actively participate in ADVOC, a leading international network of independent law firms; SCG Legal, which extends our global relationships through its network of 140 law firms; and the U.S. Law Firm Group, a national network of law firms, each headquartered in a major U.S. city.

FOCUSED SERVICE

We strive to be trusted legal advisors, not vendors. With us, you won't go through layers of lawyers to get an answer or to learn a matter's status. We staff efficiently, with a senior lawyer directly involved in all aspects of each matter.

Because clients expect responsiveness and accessibility, we respond to inquiries wherever we are. We view managing costs and exceeding expectations as paramount considerations. We constantly seek ways to use technology to the best advantage. Our in-house technology team provides support and access for our lawyers to use products and services such as document management, e-learning, Internet-based communications, and courtroom support to our clients. We are skilled in using extranets, which allow our clients to access every facet of pending matters day or night, including matter status, billings to date, key contact information, documents, and other useful tools and information.

ENGAGED PEOPLE

Not only are our lawyers experienced practitioners, they are also leaders in the profession, active in local and national bar associations, trade organizations, and local community service organizations. They speak at seminars, author substantive articles and are often quoted in the press. We are further strengthened by the team spirit our culture fosters through a broad range of pro bono and community service initiatives. In addition, our Diversity Committee promotes diversity, acceptance, and a positive work environment.

COMMITMENT TO DIVERSITY, EQUITY + INCLUSION

As a Mansfield-Rule certified firm, we are committed to fostering a welcoming and inclusive work environment in which the diverse backgrounds of our lawyers and other professionals are respected and each individual is empowered to succeed. At Robinson+Cole, diversity refers to the full spectrum of people who comprise our firm, our clients, and the communities we serve. Diversity reflects a culture of inclusion that welcomes all people, no matter their ethnicity, culture, race, color, gender, religion, national origin, ancestry, age, sexual orientation, disabilities, marital status, or veteran status, as well as people of diverse opinions, perspectives, lifestyles, and ideas.

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PRO BONO

As our firm has grown in size and geographic reach, so has the profile of our pro bono program and the breadth of pro bono matters in which we are involved. While the partners, counsel and associates and other professionals in all our offices participate in a wide variety of pro bono matters, much of our pro bono effort has focused on assisting women and children in crisis as well as veterans. Through active involvement with community organizations, government officials and agencies, and numerous nonprofit organizations, our lawyers and staff have worked successfully to improve the quality of life for those individuals and their families.

A FLEXIBLE FIRM

A modern law firm must be flexible to thrive. This means more than simply adapting to the changing legal landscape; it requires taking the initiative to ensure mutually rewarding business relationships with our clients. Alternative fee arrangements are a permanent part of the conversation between law firms and their clients, and even when they might not fit a particular set of circumstances, they warrant consideration. We welcome these conversations. Likewise, we work to add value for clients through no-cost services such as electronic newsletters and educational roundtables.

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Robinson+Cole



PARTNER

dmrobinson@rc.com
One Boston Place
Boston, Massachusetts, 02108
617-557-5928

ADMISSIONS

Commonwealth of Massachusetts
U.S. District Court, District of Massachusetts

EDUCATION

Boston College Law School
J.D.
Boston University
B.A.
cum laude

DEIRDRE M. ROBINSON

Deirdre M. Robinson represents developers in the Northeast and across the country in all aspects of affordable housing development with an emphasis on syndication of tax credits including low income housing, historic and new markets. She represents for-profit and nonprofit organizations owners and developers in complex, mixed-use and multi-family housing projects, utilizing creative financing structures that combine private and subsidy loan programs and various tax-credit programs. Deirdre is a member of the firm's Real Estate + Development Group.

Affordable Housing Real Estate Development

Deirdre specializes in complicated transactions that frequently involve historic preservation. She works with her clients to develop creative solutions to complicated structuring and financing problems faced by owners and developers that involve a wide array of private, state and federal funding sources, tax-exempt bond financing and equity investment from the syndication of federal and state Low Income Housing Tax Credits, federal and state Historic Tax Credits, New Markets Tax Credits, Solar Energy Tax Credits and Brownfields Credits. Deirdre is committed to working with her clients to address the need for safe, quality affordable housing and community development.

Professional Associations

+ Massachusetts Bar Association
+ Boston Bar Association
+ CREW Network
+ National Housing & Rehabilitation Association
+ Citizens' Housing and Planning Association (CHAPA)

Awards

+ *Massachusetts Lawyers Weekly* 2015 Top Women of Law Honoree
+ The Legal 500 US (2019), Real Estate

MCKENZIE & ASSOCIATES, P.C.



McKenzie & Associates, P.C.
Counselors at Law

183 State Street
Boston, MA 02109
(617) 723-0400
www.mckenzielawpc.com

Proposal to Represent

Trinity Financial LLC

in the redevelopment of

SOLDIERS' HOME IN CHELSEA DOMICILIARY CAMPUS

Chelsea, MA 02150

January 27, 2021

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I. Introduction & Firm Overview

McKenzie & Associates, P.C. ("M&A") is pleased to join the development team and provide zoning-related legal services to Trinity Financial LLC ("Trinity") in connection with the proposed redevelopment of the Soldiers' Home in Chelsea Domiciliary Campus, in Chelsea, MA 02150 (the "Project"). We understand that Trinity is submitting an RFP response to the Commonwealth of Massachusetts, Division of Capital Asset Management & Maintenance ("DCAMM") for the Project. If Trinity is designated the developer, the Project contemplates a long-term lease and the development of new and existing buildings at "Domiciliary Campus" portion of the Soldiers' Home.

McKenzie & Associates is New England's oldest African-American owned law firm. Since 1984, we have served the legal needs of individuals, families and their businesses; in addition, government agencies, non-profits and private corporations throughout Boston, New England, the United States, and the world. Our practice includes: Business Litigation; Bankruptcy & Creditors Rights; Corporate Counseling, Transactions & Commercial Lending; Estate Planning & Probate; Real Estate & Development; Zoning & Licensing; and representation of Faith-based & Non-profit Organizations.

Conveniently located at 183 State Street in the heart of Boston's Financial District, since 2002 Boston Magazine has recognized the firm as "one of the City's most successful and socially responsible minority-owned law firms." M&A is certified in Massachusetts as a Minority Business Enterprise (MBE). We are guided by the simple but proven philosophy that in making important decisions, there is no substitute for quality, affordable legal advice. By carefully listening to our clients and gaining a thorough understanding of their goals, we successfully guide them through the complexities of statutory, judicial & administrative laws, assist them with their entrepreneurial ventures, help them navigate complex real estate transactions, and serve as general legal counsel on their various other needs.



McKenzie & Associates' State Street offices, in the heart of Boston's Financial District.

II. Firm Qualifications

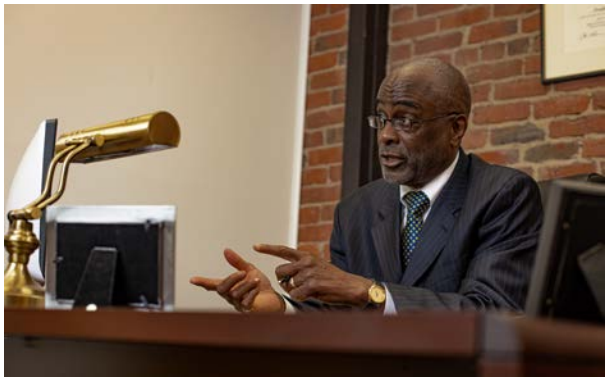
A. Real Estate & Zoning Practice

McKenzie & Associates, P.C. has served as legal counsel to borrowers, purchasers, and lenders in residential and commercial real estate transactions across Massachusetts. During the course of our 35 years in business, we are pleased to count numerous for-profit and non-profit developers both large and small, as among our valued clients. We have been involved in the ongoing representation of some of the most active and reputable developers of inner-city properties in the Boston area. We advise developers on all aspects of financing, refinancing, land acquisition, sales and leasing, zoning, community processes, construction, and sale to property owners.



We have significant experience in zoning and licensing, representing clients before both state and local administrative bodies such as the Zoning Board of Appeal, Boston Planning & Development Agency (BPDA), Inspectional Services Department (ISD), the Licensing Board, the Alcoholic Beverages Control Commission, the Cannabis Control Commission, and the Consumer Affairs Division.

The firm's experience in zoning and licensing matters is unrivaled particularly in the City of Boston and surrounding communities. We have provided representation to clients before the Board of Appeal, Boston Planning & Development Agency (formerly the Boston Redevelopment Authority (BRA)), the Inspectional Services Department (ISD), the Licensing Board, and the Consumer Affairs and Licensing Department. We also have extensive experience with City-owned parcels, and have guided our clients through development of parcels acquired from the Department of Neighborhood Development from the RFP stage through occupancy.



Joseph D. Feaster, Jr., who formerly served on the Boston Board of Appeal for 11 years (3 of which he served as Chair), leads the firm's Zoning & Licensing practice. Attorney Feaster has over 20 years of zoning and licensing practice experience.

We are fortunate to have Joseph D. Feaster, Jr. to lead our Zoning and Licensing practice. Attorney Feaster formerly served on the Boston Board of Appeal for 11 years, 3 of which he served as Chair. He has over 20 years of zoning and licensing practice experience. Attorney Feaster has also served as Interim Administrator of the Boston Housing Authority and is widely regarded as an expert on zoning and affordable housing matters. Throughout his many years of practice, he has developed an unparalleled understanding of the zoning process, as well as invaluable contacts in the various state, local government and agencies. From a simple addition of a roof deck to the construction of a hotel, Attorney Feaster has successfully represented a wide variety of development interests throughout the City of Boston and its surrounding communities. This experience provides an invaluable advantage to Trinity in getting this Project through the zoning approval process.

* * *

II. Firm Qualifications



B. Representative Clients & Transactions

Below are some of the real estate development and zoning projects on which we have represented developers large and small, and of all experience levels throughout the years:

- ***Boston Redevelopment Authority Parcel P3.*** We guided our client through the zoning and community processes for a multi-use development project on Boston Redevelopment Authority Parcel P3 for retail, hotel, office, daycare, entertainment space, housing, and parking.
- ***Boston Redevelopment Authority Parcel 9.*** We represented the developer of a mixed-use development comprised of a 145-room hotel, 50 residential units, ground floor retail/commercial space, and on-site accessory parking for 122 vehicles on Boston Redevelopment Authority Parcel 9, Boston MA.
- ***Cruz Development Corporation.*** For over 20 years we have served the Cruz Companies in the acquisition, development, and zoning & permitting matters. Most recently, we handled zoning and other legal matters for the construction of an approximately 82,800 ft.^{2}, 55 Unit, residential project with two levels of commercial space, and two levels of parking in Dudley Square, Boston (Roxbury) MA. We are currently representing Cruz on the proposed construction of a 150 Unit, mixed-income housing project, also in Roxbury.
- ***Cummins Development LLC.*** We represented Cummins Development LLC before the Boston Redevelopment Authority in their efforts to construct scattered site housing on several parcels in Boston.
- ***Harbor Health Services, Inc.*** We represented Harbor Health Services, Inc. in the Boston Redevelopment Authority's Article 80 development review process and before the Board of Appeal and Inspectional Services Department in connection with the construction of an Adult Day Center and offices.
- ***JP Parcel U, LLC.*** We represented the developer in a $40 million project on a mixed-use development consisting of 48 condominium units and 76 affordable housing units, community space, and parking for 90 vehicles.
- ***Long Bay Commercial Properties.*** We represent the developer of a proposed 25-story, 241 Unit residential project in Dudley Square, Boston (Roxbury) MA.
- ***Madison Park Development Corporation.*** We represent the developer of a proposed multi-family residential development with 20 Units of affordable housing and ground floor commercial space in Dudley Square, Boston (Roxbury) MA. We also represent this developer in a Project Change for its proposed Parcel 10 project, which was originally proposed for commercial (retail/office) use, but is now proposed as a 6-story 144-unit mixed-use residential development.
- ***Melbourne Street Partners, LLP.*** Years ago we began representing three young real estate entrepreneurs in the acquisition of City-owned and distressed properties. We continue to represent the partnership and its now-multimillion dollar portfolio in development, zoning & permitting matters, condominium conversions, and conveyancing to buyers.

(cont'd.)

II. Firm Qualifications (cont'd.)

B. Representative Clients & Transactions (cont'd.)

- ***Navy Blue LLC.*** We represent the proposed developer in its proposed acquisition, developer designation, and subsequent development of various private and City-owned properties in Boston (Charlestown), Massachusetts.
- ***Vaughan Avenue Group LLC.*** We represent the developer of a proposed multi-family residential development with 55 Units and 20 garage spaces in Boston (Dorchester) MA.

* * *

C. Attorney Bios

The attorneys primarily responsible for this engagement are Joseph D. Feaster, Jr. and Timothy A.M. Fraser.

Attorney Joseph D. Feaster, Jr. has been practicing law for nearly 45 years, during which time he has developed an expertise in numerous areas of the law, including corporate, employment and labor, real estate, contracts, licensing and zoning, and probate. Presently, he is the court-appointed Receiver for Roxbury Comprehensive Community Health Center.



JOSEPH D. FEASTER, JR.
Of Counsel

Email: jfeaster@mckenzielawpc.com
Phone: (617) 778-0012

Attorney Feaster previously served as Interim Town Manager of the Town of Stoughton, as a member and Chairman of the City of Boston's Board of Appeal, as President of the Massachusetts Community and Banking Council, as Acting Director of Real Estate for the Massachusetts Turnpike Authority, as Interim Administrator of the Boston Housing Authority, one of the largest public housing authorities in the country; as Assistant Secretary and General Counsel in the Commonwealth's Executive Office of Administration and Finance, as Associate Counsel in Prudential Insurance Company's Northeast Home Office, and as an attorney at the National Labor Relations Board's Boston Regional Office. His professional affiliations are numerous, as his expertise is sought within the City of Boston and nationally. Attorney Feaster previously served as the Senior Vice President of Victory Group, a government and community relations firm, and is also President of Feaster Enterprises, a strategic planning, organizational development, and community outreach consulting firm. He has served as an adjunct professor in Northeastern University's Master in Public Administration program, and as a research associate at the William Monroe Trotter Institute at the University of Massachusetts at Boston.

Attorney Feaster received his Juris Doctor from Northeastern University School of Law. He has also completed programs at the Massachusetts Institute of Technology's Center for Real Estate Development and Harvard University's John F. Kennedy School of Government. Attorney Feaster is admitted to practice before the courts in Massachusetts, the U.S. District Court of Massachusetts, the First U.S. Circuit Court of Appeal, and the U.S. Supreme Court.

Attorney Timothy Fraser is an Associate Attorney with over 15 years of experience as a transactional attorney. He is a graduate of Hampton University in Hampton, VA and received his Juris Doctor in Taxation from Suffolk University Law School, attending the evening program while working full-time as a legal

II. Firm Qualifications (cont'd.)

C. Attorney Bios (cont'd.)



TIMOTHY A.M. FRASER
Associate Attorney
Email: tfraser@mckenzielawpc.com
Phone: (617) 778-0015

legal assistant at McKenzie & Associates. Since graduating Suffolk Law and being admitted to the Massachusetts Bar, Attorney Fraser has specialized in corporate mergers & acquisitions, most recently with the tax practice at global consulting firm PricewaterhouseCoopers LLP. Prior to PwC, he worked in the M&A practice at Deloitte & Touche LLP. During this time, Attorney Fraser concentrated his practice on the purchase, sale, and other transactions involving companies in the food, beverage, apparel, and lifestyle industries. Attorney Fraser returned to McKenzie & Associates in 2019. His practice includes corporate transactions, estate planning & administration, and real estate & zoning. Attorney Fraser is a resident of Chelsea and serves as Secretary of the City's Economic Development Board, where he assists in the preparation of real estate development, industrial and economic development, and other plans and strategies for the redevelopment of the City's the Everett Avenue economic development zone and other areas.*

* Attorney Fraser will obtain an ethics opinion from the City Solicitor to represent Trinity in this development, and will recuse himself from all City votes involving the Project.

* * *

Our remaining team of attorneys offers a collective 150 years of experience across a diversity of legal disciplines. We collaborate as a team and leverage our combined talents to provide solutions for our clients. Our ability to provide successful outcomes has enabled us to develop long-term relationships with our clients, often serving as trusted advisors to them on both business and personal matters.



Denzil D. McKenzie
Founder & Managing Director



Linda M. Davidsor
Of Counsel



Joseph D. Feaster, Jr.
Of Counsel



Timothy A.M. Fraser
Associate Attorney



Deonee S. High
Associate Attorney



Sathima K. Jones
Associate Attorney



Andrea M.A. Osborne
Of Counsel

III. Proposed Services

A. Proposed Services – Zoning Counsel

We understand that Trinity is submitting an RFP response to the Commonwealth of Massachusetts, Division of Capital Asset Management & Maintenance ("DCAMM") for the Project. If Trinity is designated the developer, the Project contemplates a long-term lease and the development of new and existing buildings at "Domiciliary Campus" portion of the Soldiers' Home.

Like most major cities, the City of Chelsea has adopted Zoning Ordinances (the "Zoning Code"), which divides the City into various zones in which certain land uses are permitted or prohibited, and regulates the sizes, bulk, and placement of buildings. Because of the unique size and scope of this Project, in addition to compliance with the City's Zoning Code and a hearing (if required) before the Zoning Board of Appeals, the City's Permitting and Land Use Planning Department likely has additional review processes and procedures for the development of a project of this size, which often do not fit neatly within the Zoning Code.

III. Proposed Services (cont'd.)

A. Proposed Services – Zoning Counsel (cont'd.)

Thus, the Zoning process will include liaising with various City departments and agencies, as well as community organizations and stakeholders, and elected officials. Once Trinity is designated as the developer, McKenzie & Associates proposes to provide the following zoning-related legal services to Trinity in connection with its development of the Project:

- Initiating contact with City of Chelsea Permitting & Land Use Planning Dept., elected officials, and community stakeholders to introduce the Project Team and the proposed Project, and obtaining the City's preliminary thoughts on the development.
- Liaising with Client team (architect, etc.) in connection with the submission of the Application for Building Permit. Includes a review of the City Inspectional Services Department's ("ISD") "Zoning Code Refusal" letter and filing of Client's Notice of Appeal/Application with the City Clerk, and commencement of the Zoning Board of Appeals process.
- Attendance at development team meetings. Attend meetings with community and governmental (e.g., political and agencies) authorities regarding the Project.
- Assisting with any further required review process (e.g., Permitting and Land Use Planning Department, Economic Development Board, etc.). Includes preparation/review of application(s) for project review and assistance with other required documents, and attendance at all meetings required for City approval.
- Coordinating the necessary Community Process, including: Engagement with the abutters and organizing the abutters' meeting; Attendance at abutters' meeting; Connect with the community/neighborhood association(s) in the area and attending association meeting(s); Engage City Councilors and other local politicians and elected officials to garner their support for the Project.
- Scheduling hearing date for Zoning Board of Appeals and present at Zoning Board of Appeals Hearing with Project team.
- Drafting the Zoning Board of Appeal decision on Client's behalf and monitor City's progress in securing the Zoning Board of Appeal signatures.
- Involvement in any further Project or design review process stipulated by the Zoning Board of Appeal.
- Preparing the Zoning Opinion for the Project lender (if applicable).

* * *





III. Proposed Services (cont'd.)

B. Budgeting and Financial Arrangement

McKenzie & Associates has a collective 150 years of experience among our attorneys who range in practice from two years of experience to over forty years. However, we offer a fee schedule to our clients that is more competitive than our competitors, staffing Projects such that a client only pays for forty years of experience when necessary, and fewer years of experience when appropriate.

Our hourly rates for representing Trinity on this Project are as follows:

Senior Attorneys (Joseph Feaster, Jr.)	$450.00 per hour
Intermediate Associates (Timothy Fraser)	$350.00 per hour
Junior Associates	$250.00 per hour
Paralegals	$125.00 per hour

Once Trinity is designated as developer, the Firm requires a retainer before commencing work on this matter, which we apply to the costs and fees for legal services to be provided by the Firm. We can stage the retainer to coincide with phases of the Project.

IV. Summary

During the course of over 35 years in business, McKenzie & Associates, P.C. has represented for-profit and non-profit developers large and small, and of all experience levels, advising them on all aspects of residential and commercial real estate transactions: financing; commercial & residential property and land acquisitions; development; zoning & community processes; permitting; construction; refinancing; and sales & leasing.

Attorney Joseph D. Feaster, Jr., who leads our Zoning and Licensing practice, formerly served on the Boston Board of Appeal for 11 years, 3 of which he served as Chair. He has over 20 years of zoning and licensing practice experience and is widely regarded as an expert on zoning and affordable housing matters. Timothy A.M. Fraser has worked with Attorney Feaster for years on zoning, permitting, and real estate development matters and is familiar with the personnel and workings of Chelsea City government, serving as Board Secretary of the City's Economic Development Board. Our remaining team of attorneys offers a collective 150 years of experience across a diversity of legal disciplines. We collaborate as a team and leverage the combined talents of all our attorneys to provide solutions for our clients, and our ability to provide successful outcomes has enabled us to develop long-term relationships with our clients.

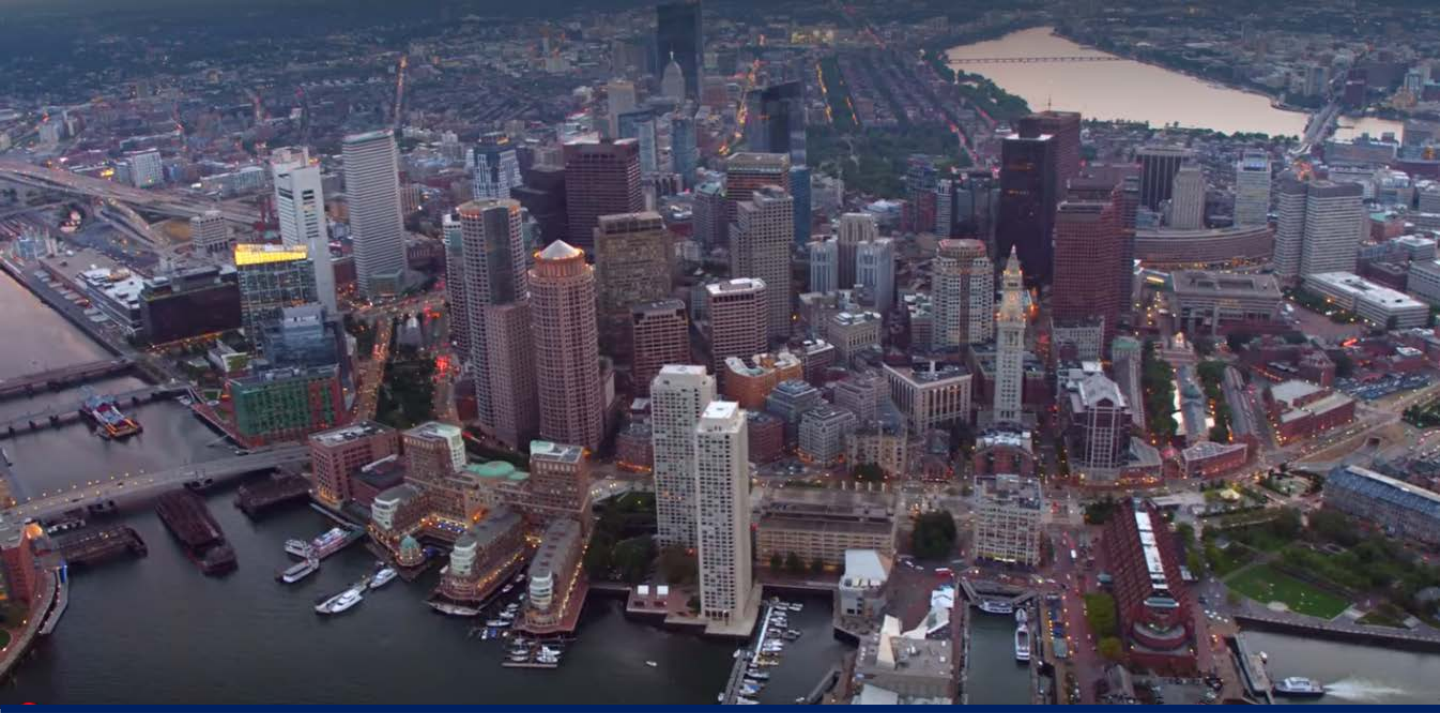
We thank you for taking the time to discuss the Soldiers' Home development project with us, as well as for the opportunity to join the Trinity development team on this Project. We welcome any questions or requests for additional information you may have.

Warmest regards,

McKenzie & Associates, P.C.

JOSEPH D. FEASTER, JR.
Of Counsel
jfeaster@mckenzielawpc.com
(617) 778-0012

TIMOTHY A.M. FRASER
Associate Attorney
tfraser@mckenzielawpc.com
(617) 778-0015



McKenzie & Associates, P.C.
Counselors at Law

183 State Street
Boston, MA 02109
(617) 723-0400
www.mckenzielawpc.com

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BYRNE MCKINNEY & ASSOCIATES, INC.

REAL ESTATE COUNSELING and VALUATION SERVICES

Byrne McKinney & Associates, Inc. provides professional real estate counseling and valuation assistance to property owners, lenders, developers, investors, for-profit and not-for-profit corporations, and public agencies faced with diverse real estate issues and opportunities. Utilizing the firm's years of experience, skilled professionals employ advanced analytic techniques to provide clients with strategic inputs to complex real estate situations throughout the country. Real estate counseling and valuation services are tailored to each client's individual needs and objectives. The assignments undertaken, therefore, are as varied as the issues faced. The principle real estate services offered by the firm include the following:

Real Estate Counseling
BMA represents the real estate interests of its clients by solving a myriad of real estate related problems. Counseling assignments include market studies for residential, retail, office, hotel, industrial and special purpose property, highest and best use analyses, development master planning studies, neighborhood and city-wide economic-base and revitalization studies, financial feasibility analyses for public and private sector development plans, fiscal impact studies, real estate investment strategies and a wide variety of other issues.

The firm's real estate counseling clients include public sector agencies and government, non-profit institutions and private sector interests of all sorts. Both principals hold the Counselor of Real Estate (CRE) designation of the Society of Real estate Counselors and are founding members of the Boston Chapter of Lambda Alpha International, a prestigious land economics society.

Real Estate Valuation Services
Institutional, private, corporate and public clients are provided with a full range of real estate valuation services, spanning the spectrum of client requirements from the management of the asset valuation process for plan sponsors and fund advisors; to the conducting of appraisal reviews for lenders and the federal government; to the preparation of fully researched and documented field appraisals in accordance with the prescribed procedures and standards of the Appraisal Institute and federal USPAP and FIRREA requirements.

BMA's extensive valuation practice includes the analysis of improved office, hotel, residential (market rate and affordable), retail, industrial, and special purpose properties nationwide as well as land valuations. In addition, the firm has experience with the broad scope of valuation objectives including investment portfolio reporting, collateral evaluation, foreclosure and bankruptcy actions, development or renovation funding analyses, real estate tax abatements and assessments, eminent domain proceedings and acquisition or disposition due diligence.

The firm's principals are both designated Members of the Appraisal Institute (MAI). All of the firm's senior professionals are licensed Certified General Real Estate Appraisers in the Commonwealth of Massachusetts.

607 Boylston Street ♦ Boston, MA 02116 ♦ (617) 578-9777 ♦ FAX (617) 578-9778
E-MAIL byrnemckinney@byrnemckinney.com

SELECTED CLIENT LIST

FINANCIAL INSTITUTIONS AND REALTY ADVISORS

AFL/CIO
AMB Institutional Investors, Inc.
Andes Capital
Bank of America
Barclays International
Bentall Kennedy
Boston Capital Partners
Boston 5 Cent Savings Bank
Boston Safe Deposit and Trust
Boston Trade Bank
Boylston Capital Advisors (The New England)
Chase Bank
Chemical Bank of New York
Citizen's Bank Corporation
Continental Bank of Chicago
Equitable Life Insurance Co.
Federal Deposit Insurance Corporation (FDIC)
Federal Reserve Bank
Fidelity Bank
Fleet Bank of Massachusetts
Fleet Bank of Rhode Island
GE Capital Corporation
Great American Federal Savings Association
Greenock Capital Group, Inc.
Holiday Fenogio Fowler, LLP
John Hancock Mutual Life Insurance Co.
JP Morgan
Key Bank
Manulife Financial
Mellon Bank
Metropolitan Life Insurance Company
National Electrical Benefit Fund (NEBF)
Phoenix Mutual Life Insurance Company
Pacific Life
PNC Financial (Pittsburgh National Bank)
Prudential Finance
Rockwood Capital
Shawmut National Corporation
Sun Life of Canada
Teachers Insurance and Annuity Association
The Boston Bank of Commerce
The Boston Company Real Estate Counsel
The Boston Financial Group
The Boston Private Bank
The Carlysle Group
The Travelers Insurance Company
Transamerica Commercial Real Estate Finance
United States Trust Company
Wainwright Bank and Trust
Wells Fargo Bank

ATTORNEYS AND ACCOUNTANTS

Bernkopf Goodman
Choate, Hall & Stewart
Foley, Hoag & Eliot
Freidman and Atherton
Goodwin Procter & Hoar
Greenberg Traurig
Goulston & Storrs
Wilmer Hale (Hale & Dorr)
Mintz, Levin, Cohn, Ferris, Glovsky & Popeo
Nixon Peabody
Piper Rudnick
Peabody & Arnold
Peabody & Brown
Reimer & Braunstein
Ropes & Gray
Sassoon & Cymrot

DEVELOPERS AND PROPERTY OWNERS

Archon Group
AW Perry
Boston Development Group
Boston Properties
Beacon Company
Beacon Capital Partners
Beacon Communities
Benchmark Assisted Living
Berkshire
Cabot Cabot & Forbes
Continental Wingate, Inc.
Corcoran Jennison, Inc.
DivcoWest
Drew Company
Emerik Properties Corporation
Equity Office
Equity Residential
Fallon Company
General Electric Co.
Gravestar, Inc.
HYM Investmetn Co.
Intell Management & Investment Company
Jones Lang LaSalle
Lincoln Property Company
Leggat McCall Properties
Live Nation
National Development of New England
New England Development Company
New Balance
Procter & Gamble (Gillette)
Redgate
Samuels & Associates
Simon Property Group
Skanska NA
Spaulding & Slye Investments
The Community Builders
The Davis Companies
The Druker Company
The Grossman Company
The Mugar Group, Inc.
The Northland Co.
The Raymond Group
The Related Companies
Thomas Lee
Trinity Financial
Vornado Realty Trust
WS Weiner & Weiner Ventures
Winn Development Company

ARCHITECTS AND ENGINEERS

Arrowstreet, Inc.
Beals and Thomas, Inc.
Cambridge Systematics, Inc.
CBT/Childs, Bertman, Tseckares
Cecil Group
Crosby|Schlessinger|Smallridge
David Dixon & Associates, Inc.
Fay, Spofford & Thorndike Inc.
Finegold Alexander & Associates, Inc.
Goody Clancy & Associates, Inc.
Haley & Aldrich, Inc.
HMM Associates, Inc.
Howard Needles Tammen & Bergendoff, Inc.
ICON Architects
Kohn Pedersen Fox
PB World
Perry Dean Rogers & Partners
Rizzo Associates, Inc.
Sasaki Associates, Inc.
Seeley Stevenson Value & Knecht
Skidmore, Owings & Merrill, Inc.
Stockard & Engler, Inc.
Stull & Lee, Inc.
URS Consultants, Inc.
Vanasse Hangen Brustlin, Inc.
Vollmer Associates, Inc.

NON-PROFIT AGENCIES AND INSTITUTIONS

Atlanticare Hospital
Associated Day Care Services of Boston
B'Nai B'rith
Boston Citywide Land Trust, Inc.
Boston College
Boston University
Boston and Cambridge YWCA
Boy Scouts of America
Brandeis University
Bunker Hill Community College
Christian Science Church
CareGroup Health Care System
Combined Jewish Philanthropies
Community Development Corp of Boston
Dana Farber Cancer Institute
Dimock Health Center
Episcopal Diocese of Massachusetts
First Lutheran Church of Boston
Greater Boston Real Estate Board
Harvard University
Historic Boston, Inc.
Jamaica Plain Arts Counsel
JCHE
Lesley University
Mission Hill Neighborhood Housing Services
Massachusetts Institute of Technology/MITMCo
Partners HealthCare
Planning Office for Urban Affairs
Roxbury Latin Academy
Salvation Army
Tufts University
Wellesley College

PUBLIC AGENCIES AND GOVERNMENTS

Boston Planning & Development Agency (BPDA)
Boston Water & Sewer Commission
Community Development Finance Corporation (MA)
City of Bangor, ME
City of Boston, MA
City of Birmingham, AL
City of Braintree, MA
City of Cambridge, MA
City of Lawrence, MA
City of Lynn, MA
City of Miami, FL
City of Peabody, MA
City of Providence, RI
City of Quincy, MA
City of Somerville, MA
Exec. Office of Communities & Dev. (MA)
General Services Administration (GSA)
Dept. of Environmental Management (MA)
Div. of Capital Planning & Operations (MA)
Massachusetts Convention Center Authority
Massachusetts Turnpike Authority
Massachusetts Port Authority
Massachusetts Bay Transit Authority
Massachusetts Development Finance Agency
Massachusetts Housing Finance Agency
Neighborhood Dev. and Employ. Agency (Boston)
New Hampshire Housing Finance Agency
Town of Brookline, MA
Town of Framingham, MA
United States Postal Service
Worcester Regional Transit Authority
Worcester Business Development Corp.

AFFIRMATIVE ACTION STATEMENT

Byrne McKinney & Associates, Inc., a Massachusetts corporation founded in 1989, is an equal opportunity employer. The Firm does not discriminate on the basis of race, color, religion, sex, or national origin. The Firm takes affirmative action to ensure that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. This includes, but is not limited to employment, promotion, demotion, transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation and selection for training.

WORK FORCE COMPOSITION

Employment Categories	Total Males	Total Females	Total Employment
Principals	1	1	2
Senior Associates	0	1	1
Support Staff	0	1	2
Total	**1**	**3**	**4**
Percent	**25%**	**75%**	**100%**

Byrne McKinney & Associates, Inc. is a 51% woman-owned business.

PAMELA S. McKINNEY, MAI

Pamela S. McKinney, MAI, has conducted a broad range of consulting and valuation assignments over her 40+ year career. Her background includes public, institutional and private sector experience with an emphasis on commercial, hospitality, large-scale residential, industrial, maritime and other special purpose property.

Notable assignments undertaken by Ms. McKinney include: master planning, asset management and disposition/acquisition counseling for public agencies, Fortune 500 companies and institutional investors; market and financial feasibility studies for large scale waterfront developments; development feasibility and marketing implementation studies for both downtown and suburban office, industrial, bio-medical research parks and retail malls; development consulting for major mixed-use developments; hotel valuation and feasibility analyses nation-wide; adaptive re-use, redevelopment planning and disposition studies for surplus public, corporate and institutional properties; residential condominium, rental apartment and senior housing analyses for market rate and affordable projects; retail district revitalization planning, affordable housing and fiscal impact studies to support policy development at the state and local levels; and the evaluation of investor-held properties nationwide. Ms. McKinney has qualified as an expert witness in the Middlesex, Norfolk and Suffolk County courts in Massachusetts as well as the Massachusetts Land Court, the Court of Chancery of the State of Delaware and the Federal bankruptcy and tax courts.

Ms. McKinney is the President and a Principal of Byrne McKinney & Associates, Inc., which she founded in 1989. BMA is nationally recognized for its expertise in commercial development, real estate finance and valuation. In 2009, Ms. McKinney formed an affiliation with the Pinnacle Advisory Group, a specialty hospitality consulting firm with offices in Boston, Florida, New York, Washington, DC and California and serves as its Director of Valuation Services. Prior to founding Byrne McKinney & Associates, Inc. Ms. McKinney was Senior Vice President of Leggat McCall Advisors, Inc., the national consulting arm of the Leggat McCall Companies. Before joining Leggat McCall, she served as Senior Vice President of Minot, DeBlois & Maddison, Inc., the nation's oldest real estate firm, where she was a principal in the consulting group and a director of the firm. Early in her career, Ms. McKinney worked as an economic development planner and market analyst for metropolitan Boston's Regional Planning Agency (MAPC) where she managed major land use projects and authored several planning manuals for local officials.

Ms. McKinney has taught courses in real estate development and investment analysis for Harvard University Graduate School of Design, the MIT Center for Real Estate, the Boston University School of Management and Metropolitan College and Tufts University and lectures widely on the topics of real estate finance, valuation and development and the economics of smart growth.

Ms. McKinney holds the MAI designation of the Appraisal Institute, is a former member of the Society of Real Estate Counselors, was on the Board of Directors of the Greater Boston Chapter of the Appraisal Institute and has been elected to Lambda Alpha International, an honorary land economics society. She is a State Certified General Real Estate Appraiser holding Massachusetts license number 745. Ms. McKinney is a founding director of New England Women in Real Estate (NEWIRE, now CREW) and of the Massachusetts Chapter of the Assisted Living Facilities Association of America (Mass ALFA). She is a former trustee of the Boston Latin School Association, a past-chair of the Board of the YWCA Boston and a past-chair of the Board of the Advent School in Boston. She has been a resident of Boston for over 35 years.

607 Boylston Street (Mailroom:361LL) ♦ Boston, MA 02116 ♦ (617) 578-9777
E- MAIL: pmckinney@byrnemckinney.com

LARGE SCALE DEVELOPMENT COUNSELING AND VALUATION EXPERIENCE
Emphasis on Mixed Use (Re)Developments

Location & Property Type	Assignment Description	Client
Arsenal Yards; Watertown, MA	*Arsenal Yards* Market, financial and valuation counseling to inform a real estate tax strategy for the Arsenal Mall redevelopment in Watertown, MA.	Boylston Properties
Assembly Square; Somerville, MA	*Assembly Square/Somerville* Market, financial and valuation counseling to inform the financings associated with the redevelopment of the Assembly Square Mall in Somerville, MA. Work included analysis to support infrastructure financings under Commonwealth's I-Cubed program.	Federal Real Estate Investment Trust and MassDevelopment
Cambridge Crossing East Cambridge, MA	*Cambridge Crossing* Market, financial and valuation studies to support development of the remaining commercial and residential parcels at Cambridge Crossing (formerly North Point). Work included analysis to support infrastructure financings under Commonwealth's I-Cubed program.	DivcoWest, EF Education and MassDevelopment
Fort Point Channel Boston, MA	*Gillette Campus – Necco Street* Market, financial and valuation counseling to inform the conveyancing of redevelopment sites on the Gillette Campus. Project area includes office, residential, and retail uses.	Gillette Corp. & General Electric
North Station; Boston, MA	*HUB on Causeway* Market, financial and valuation counseling to inform the financings associated with the development of the HUB on Causeway at North Station. Work included analysis to support infrastructure financings under Commonwealth's I-Cubed program.	Boston Properties and Delaware North

Location & Property Type	Assignment Description	Client Name or Type
Union Square; Somerville, MA	***Union Square Redevelopment*** Market, financial and valuation counseling to inform the implementation of the redevelopment of the Union Square and Boynton Yards area in Somerville, MA. Project area includes office, residential, hotel and retail uses.	Union Square Station Associates LLC (US2)
East Boston, MA	***Suffolk Downs*** Market studies to support development of the Phase 1 redevelopment at Suffolk Downs. Work included analyses of rental apartment, condominium, retail and hotel uses.	HYM Investments
South Boston, East Boston, Bedford, Worcester; MA	***MASSPORT Portfolio*** •Redevelopment feasibility analysis, development solicitation marketing and management and negotiation support for development and ground lease agreements for the redevelopment of the Boston World Trade Center (Fidelity HQ/Commonwealth Pier), East & West Office Building, Seaport Hotel, Summer Street HQ Hotel (Omni), Parcel K (Hilton Hotel & ORA Apartments), Fargo Terminal, Boston Harbor Industrial Park, Waterside Place (Commonwealth Flats), Constitution Plaza (Hoosac Pier), Mass Technology Center (Bird Island Flats), Portside Place and Boston Shipyard (East Boston Piers), and Hanscom Field & Worcester Airports.	Massachusetts Port Authority
South End Boston, MA	***Harrison-Albany Site*** Market analyses to inform the redevelopment of a large block bounded by Harrison, East Canton, and Albany Streets in Boston's South End. Project includes 700+ units of residential apartments, and retail uses.	Leggat McCall Properties
Kendall Square, Cambridge	***Kendall Square/MIT*** Various market, financial, economic and valuation counseling studies for MIT-owned sites and for the proposed acquisition and redevelopment of the Volpe site in Kendall Square. Proposed uses included new academic and life-sciences space for MIT & private users as well as condominium and rental housing, hotel, retail, lab and office uses.	MIT Investment Management Co.

Location & Property Type	Assignment Description	Client Name or Type
Boston Landing; Boston, MA	***New Balance HQ Campus*** Market, financial and valuation counseling to inform the financings associated with the redevelopment of the Boston Landing project in Boston (Brighton), MA. Project includes HQ office, hotel, retail and sports complex uses. Work included analysis to support infrastructure financings under Commonwealth's I-Cubed program.	New Balance Corp. and MassDevelopment
Seaport Square; Seaport, Boston, MA	***Seaport Square Site*** Market and financial studies to support the underwriting for an acquisition of the remaining Seaport Square parcels in Boston's Seaport neighborhood. Anticipated uses included a mix of over 3.0M SF of residential, hotel, office and retail space.	WS Development
Government Center, Boston, MA	***Government Center Garage*** Various market, financial, economic and valuation counseling studies for the 3.0M+ SF redevelopment of the Government Center Garage site.	HYM Investments, Pension Fund and Debt Investor
Innerbelt Industrial Park; Somerville, MA	***Innerbelt/Somerville*** Market, financial and redevelopment counseling for the proposed redevelopment of the Innerbelt Industrial Park to support mixed-use development including a construction of a professional soccer stadium.	The Kraft Group and the City of Somerville
South Boston Boston, MA	***Mary Ellen McCormack Housing Project*** Market, development and ground lease counseling to support the private sector redevelopment of a large public housing site for 2,500+ units of mixed income housing development.	Boston Housing Authority
South End; Boston, MA	***Ink Block*** Rental apartment, condominium, and co-housing market studies to inform the financings associated with the redevelopment of the former Boston Herald printing plant on Harrison Avenue.	National Development & Institutional Investor

Location & Property Type	Assignment Description	Client Name or Type
Bunker Hill Charlestown, MA	***One Charlestown (Bunker Hill Housing Project)*** Market, development and ground lease counseling to support the private sector redevelopment of a large public housing site for 2,500+ mixed income housing development.	Boston Housing Authority
Downtown Haverhill, MA	***Downtown Haverhill Development Plan*** Market, financial and strategic development counseling to inform development plans for Downtown Haverhill, MA under the MassDevelopment TDI program. Project area uses explored included office, residential, hotel and retail.	City of Haverhill and MassDevelopment
Downtown Quincy, MA	***Downtown Redevelopment Project*** Market, financial and strategic development counseling to inform the implementation of the redevelopment of the former Streetworks project in Downtown Quincy, MA. Project includes office, residential, hotel and retail uses.	City of Quincy and Redgate
North Point; East Cambridge, MA	***North Point/East Cambridge*** Market, financial and economic development counseling studies for the proposed mixed-use development (planned for 5,000 units, 1,000,000 SF office development) of the former Guilford rail yard in East Cambridge, Massachusetts. Later work on behalf of the developer included preparation of detailed market analyses for the Phase 1 development and a complete valuation of the land proposed for redevelopment.	JLL/Spaulding & Slye Investments and the City of Cambridge
Commonwealth Flats; Seaport, Boston MA	***Commonwealth Flats*** Highest & best use, land development and valuation counseling studies for the 100-acre Commonwealth Flats properties in South Boston, Massachusetts. The uses include Class A office, hotel, parking garage and residential apartments.	Massachusetts Port Authority

Location & Property Type	Assignment Description	Client Name or Type
Fan Pier; Boston, MA	***Fan Pier/Boston*** Market, financial and valuation counseling to inform the financings associated with the redevelopment of the Fan Pier project in Boston, MA. Project includes office, hotel, condominium, retail, laboratory/life sciences and water transportation uses. Work included analysis to support infrastructure financings under Commonwealth's I-Cubed program.	The Fallon Company and MassDevelopment
North Allston; Boston, MA	***North Allston/Harvard University*** Various market, financial, economic and valuation counseling studies for the proposed acquisition and redevelopment of over 250 acres of CSX rail yards and other industrial and commercial lands in the North Allston neighborhood of Boston, Massachusetts. Proposed uses included a new academic and life-sciences research campus for Harvard University, condominium and rental housing, retail and other commercial uses.	Boston Redevelopment Authority and Harvard University
Commonwealth Center; Midtown Boston, MA	***Commonwealth Center*** Highest & best use and land valuation for the multi-parcel Commonwealth Center property in Boston's Midtown, neighborhood (a.k.a Ritz Millennium/Avery Street parcels). Anticipated uses included a mix of over 2.3 M SF of office with residential apartments and condominiums.	Chase Bank
Extell Site; Kendall Square, East Cambridge, MA	***Extell Site*** Highest & best use, market and land valuation for the Extell property in Kendall Square, in east Cambridge, Massachusetts. The use concept included 580 residential condominiums with ground floor retail.	Wells Fargo
West Fenway; Boston, MA	***Fenway Park*** Valuation counseling for the proposed redevelopment of Fenway Park.	City of Boston/Boston Red Sox
Westwood Business Center; Westwood, MA	***Westwood Business Center*** Market and development counseling for the proposed redevelopment of the 500-acre Westwood Business Center in Westwood, Massachusetts to a new mixed-use transit-oriented development program including housing, retail and other commercial uses.	CC&F/New England

Location & Property Type	Assignment Description	Client Name or Type
	Boston Marine Industrial Park	
Boston Marine Industrial Park; South Boston, MA	Highest & best use, development and valuation counseling for the 200-acre Boston Marine Industrial Park property in South Boston, Massachusetts. Uses included a cruiseship terminal, fish processing facilities, Class B office and manufacturing space, cement plant, water cargo-related warehouse and berthing, a design center and parking garage.	City of Boston
	Seaport Square Site	
Seaport Square; Seaport, Boston, MA	Highest & best use and land valuation for the Seaport Square property in Boston's Seaport neighborhood. Anticipated uses included a mix of over 4.0M SF of office and retail space.	Southmark Corp
	Boston Crossing	
Boston Crossing; Downtown Crossing Boston, MA	Highest & best use and land valuation for the former Jordan Marsh property in Boston's Downtown Crossing, neighborhood. Anticipated uses included a mix of over 1.0M SF of office and retail space.	Gale International and Vornado RE Investment Trust
	Hinge Block	
Hinge Block; Midtown Boston, MA	Highest & best use and land valuation for the multi-parcel Hinge Block property in Boston's Midtown, neighborhood. Anticipated uses included a mix of over 1.0M SF of office with residential apartments and condominiums.	Fleet Bank
	South Bay	
South Bay; Boston, MA	Market, financial and valuation counseling for the proposed redevelopment of over 50 acres of land and air-rights over the Massachusetts Turnpike in the South Bay neighborhood of Boston, and area bounded by Chinatown, The Leather District and the South End. Proposed plans include a diverse mix of residential and commercial uses along with civic and community space.	City of Boston/ Massachusetts Turnpike Authority

Location & Property Type	Assignment Description	Client Name or Type
	Columbus Center	
Back Bay, South End, Bay Village; Boston, MA	Market, financial and valuation counseling for the proposed redevelopment of over 1.3 million square feet of new development to be located within the air-rights over the Massachusetts Turnpike in the Back Bay, South End and Bay Village neighborhoods of Boston. The proposed plan includes hotel, condominium, retail and garage uses along with extensive civic and community space.	City of Boston
	Stop & Shop Distribution Center	
Stop & Shop Distribution Center; Dedham/Hyde Park, MA	Market and development counseling for the proposed redevelopment of the Stop & Shop Distribution Center in Dedham, Massachusetts for a new mixed-use program to include up to 1,400 units of new housing, and 100,000 SF of new retail space.	Campanelli Company

BYRNE MCKINNEY & ASSOCIATES, INC.
Real Estate Consultants and Appraisers

SELECTED VALUATION, MARKET & FINANCIAL FEASIBILITY EXPERIENCE
URBAN MIXED USE AND RESIDENTIAL PROJECTS

LOCATION	PROJECT DESCRIPTION	CLIENT
	250 Centre Street	
Jamaica Plain Boston, MA	Proposed Mixed Income New Construction Market Study (Affordable, Workforce & Market Rate)	Private Developer
	Whittier Choice	
Lower Roxbury Boston, MA	Proposed Mixed Income New Construction Market Study (Market Rate)	Private Developer
	Arsenal Yards	
Watertown, MA	Proposed Large Scale Mixed Use New Construction Market Study (Apartment, Lab, Retail and Hotel)	Private Developer
	Suffolk Downs	
East Boston, Boston, MA	Proposed Large Scale Mixed Use New Construction Market Study (Apartment, Condominium and Hotel)	Private Developer
	Mildred Hailey Phase 1	
Jamaica Plain Boston, MA	Proposed Large Scale Mixed Income New Construction Market Study (Public Housing, LIHTC, Market Rate)	Private Developer
	125 Amory Street	
Jamaica Plain Boston, MA	Proposed Mixed Income New Construction Market Study (Affordable & Market Rate)	Private Developer
	1000 Boylston Street	
Back Bay, Boston, MA	Proposed Large Scale Residential New Construction Valuation Study (Condominiums)	Private Developer
	50 Dalton Street	
Back Bay, Boston, MA	Proposed Large Scale Residential New Construction Market Analysis (Apartments & Condominiums)	Private Developer & Land Owner
	Rio Grande	
Roxbury Boston, MA	Proposed Mixed Use New Construction Market Study in Nubian Square (Office, Retail &Market Rate Apartments)	Private Developer & Land Owner

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E-MAIL pmckinney@byrnemckinney.com

	MIT Grad Housing	
Kendall Square, Cambridge, MA	Proposed Large Scale Residential New Construction Market Analysis (Apartments)	Educational Institution
	Harrison Supply/Parcel 8	
Roxbury Boston, MA	Proposed Mixed Income New Construction Market Study (Affordable & Market Rate)	Private Developer
	Bunker Hill Public Housing Redevelopment	
Charlestown, Boston, MA	Proposed Large Scale Mixd Income Residential New Construction Financing Study (Apartments)	Public Housing Authority
	Flower Market Rental Apartments	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Study	Private Land Owner
	Fenway Center Air-Rights Development	
Fenway, Boston, MA	Proposed Large Scale Residential New Construction Valuation Study (Apartments)	Institutional Investor
	Harvard Off-Campus Portfolio	
Harvard Square, Cambridge, MA	Portfolio Analysis Annual Market Rent Setting (Apartments)	Educational Institution
	Bulfinch Place	
Financial District, Boston, MA	Proposed Large Scale Residential New Construction Construction Underwriting (Apartments and Condominiums)	Instititutional Lender (Life Company)
	Queensbury Street	
Fenway., Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments & Co-Housing)	Private Developer and Institutional Investor
	The Hub on Causeway	
North Station, Boston, MA	Proposed Large Scale Mixed Use New Construction Financing Study (Apartment, Hotel, Office & Retail)	REIT Owner/Develope r
	Cambridge Crossing Parccel I	
North Point., East Cambridge, MA	Proposed Large Scale Residential New Construction Market Study (Apartment)	Private Developer and Institutional Investor
	Mezzo Lofts	
Sullivan Sq., Charlestown, MA	Proposed Large Scale Residential New Construction Valuatiuon Study (Apartment)	Instututional Owner (Life Co.)
	River's Edge Apartments	
Wellington Square., Medford, MA	Large Scale Residential New Construction Valuatiuon Study (Apartment)	Instututional Owner (Life Co.)

	Third Square	
East Cambridge, Cambridge, MA	Proposed Class A Rental Apartment Market Study and Valuation	Commercial Lender
	Commonwealth Flats – Parcel K	
Seaport, Boston, MA	Proposed Large Scale Residential New Construction Market and Valuation Study (Apartments with Hotel)	Private Developer
	Ink Block-Cohousing	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Study	Institutional Investor (Investment Bank)
	St. James Court	
South End, Boston MA	Existing Rental Apartment Market & Valuation Study	Institutional Lender (Pension Fund)
	The Pointe	
Fenway/Kenmore, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Luxury Apartment/Condominium Analysis Market & Valuation Study	Commercial Lender
	1330 Boylston Street	
Fenway/Kenmore, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Apartment and Condominium Analysis Market & Valuation Study	Commercial Lender
	Radian	
Mid-Town, Boston, MA	Proposed Large Scale Residential Tower Construction Residential Market and Valuation Study (Apartments)	Private Investor (Private Equity)
	Commonwealth Flats – Waterside Place Phase 1 & 2	
Seaport, Boston, MA	Existing and Proposed Large Scale Residential New Construction Valuation/Proforma Study	Private Developer
	Simmons Disposition	
LMA/Fenway, Boston, MA	Proposed Large Scale Mixed Use New Construction Land Valuation/Acquisition Study (Apartments, Condos, Dorm, Lab, Office and Retail)	Private Developer
	Bulfinch Place	
Financial District, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments and Condominiums)	Private Developer
	1575 Tremont (Phases 1 and Phase 2)	
Mission Hill, Boston, MA	Proposed Large Scale New Construction Market and Valuation Study (Apartments and Condominiums)	Private Developer

	Ink Block-Rental Apartments and Condominiums	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Study	Private Developer
	150 Seaport Boulevard	
Seaport, Boston, MA	Proposed Large Scale Residential New Construction Market and Valuation Study (Uber Luxury Condominium)	Private Developer
	Chestnut Hill Square	
Chestnut Hill, Newton, MA	Proposed Large Scale Residential New Construction Market Study (Apartment and Condominium)	Private Developer
	Boston Cab/Kilmarnock & Queensbury Street	
Fenway, Boston, MA	Proposed Large Scale Residential New Construction Market and Valuation Study (Apartments and Condominiums)	Private Developer
	171 Tremont	
Mid-Town, Boston, MA	Proposed Luxury Residential New Construction Market Study (Condominium)	Private Developer
	Waldo Garage & Holiday Inn Sites	
Coolidge Corner, Brookline, MA	Proposed Large Scale Residential New Construction Market and Finance Studies (Apartments, Hotel and Retail)	Public Sector
	Mass & Main	
Mid-Cambridge, Cambridge, MA	Proposed Large Scale Residential New Construction Market Study (Apartments)	Private Developer
	St. Gabriel	
Brighton, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments)	Private Developer
	Harrison-Albany Block Rental Apartments	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Study	Private Developer
	North Point Parcel I	
East Cambridge Boston, MA	Proposed Large Scale Residential New Construction Market and Valuation Study (Apartments)	Private Developer
	600 Washington Street	
Financial District, Boston, MA	Proposed Large Scale Mixed Use New Construction Market Study (Apartments, Condominiums, Office, Retail and Hotel)	Private Developer
	Seaport Square	
Seaport, Boston, MA	Proposed Large Scale Mixed Use New Construction Market and Valuation Study (Apartments, Condominiums and Hotel)	Private Developer

	345 Harrison-Rental Apartments	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Study	Private Developer
	New Balance Campus	
Brighton, Boston, MA	Proposed Large Scale Residential New Construction Market and Valuation Study (Apartments)	Private Developer
	St Cecelia	
Back Bay, Boston, MA	Proposed Large Scale Residential New Construction Valuation Study (Apartment and Condominiums)	Private Developer
	Boston East	
East Boston, Boston, MA	Proposed Large Scale Mixed Use New Construction Market Study (Apartment, Live-Work & Condominium)	Private Developer
	Volpe Site	
East Cambridge, Cambridge, MA	Proposed Large Scale Mixed Use New Construction Market Study (Apartment, Condominium, Hotel, Office/R&D)	Institutional Investor/Developer (University)
	P-3	
Roxbury, Boston, MA	Proposed Large Scale Mixed Use New Construction Land Valuation (Apartments and Student Housing)	Private Developer
	DOT Block	
Dorchester, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments)	Private Developer
	Kendall Square/Alexandria	
East Cambridge, Cambridge, MA	Proposed Large Scale Residential New Construction Market Study (Apartment and Condominium)	Private Developer
	Olmsted Place	
Jamaica Plain, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments)	Private Developer
	Rio Grande	
Roxbury (Dudley Sq), Boston, MA	Proposed Large Scale Residnetial New Construction Market Study (Apartments and Retail)	Private Developer
	North Point – Parcel I	
North Point, Cambridge, MA	Proposed Large Scale Residential New Construction Market Study (Apartment)	Private Developer
	Serenity	
Jamaica Plain, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments)	Private Developer

	Back Bay Station/Dartmouth Street	
Back Bay Station, Boston, MA	Proposed Large Scale Mixed Use New Construction Valuation and Public Benefits Studies (Apartment, Retail, Hotel and Office)	Private Developer
	Harrison-Albany Block	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartments)	Private Developer
	North Station/Causeway Street	
North Station, Boston, MA	Proposed Large Scale Residential New Construction Valuation and I-Cubed Studies (Apartment, Retail, Hotel and Office)	Private Developer
	Government Center Garage Redevelopment	
Government Center, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartment Towers and Hotel/Condominiums)	Private Developer
	One Franklin (Filene's Site)	
Downtown Crossing Boston, MA	Proposed Large Scale Residential New Construction Land Valuation (Market Rate Luxury Condo/Hotel/Office)	Private Developer
	5 Copley Place	
Copley Square Boston, MA	Proposed Highrise Residential Tower Residential Market Study (Apartments, Retail and Condominiums)	Private Developer
	South Boston Postal Annex	
Downtown Waterfront, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Apartment and Condominium Analysis Market & Land Valuation Study	Property Owner
	Christian Science Church Condominiums - Belvidere Street	
Back Bay, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Hotel/Condominium)	Private Developer
	Christian Science Church Apartments - Dalton Street	
Back Bay, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartment)	Private Developer
	Seaport Square (B/C)	
Seaport, Boston, MA	Proposed Large Scale Residential New Construction Market Study (Apartment/Condominium)	Private Developer
	NorthPoint – Twenty-20	
East Cambridge, Cambridge, MA	Proposed Large Scale Residential New Construction Market Study (Apartment Tower)	Private Developer
	Millbrook	
Somerville, MA	Proposed Large Scale Residential Rehab Market Study (Apartment)	Private Developer

	Kendall Square	
East Cambridge, Boston, MA	Proposed Large Scale Residential New Construction Residential Market Study (Apartments and Retail)	Non-Profit Land Owner
	319A Street	
Fort Point Channel, Boston, MA	Proposed Residential Rehab Market Study (Condominium Conversion)	Private Developer
	Trinity Place	
Back Bay, Boston, MA	Proposed Large Scale Residential New Construction Valuation Study (Hotel/Condominium)	Private Developer
	Watermark Seaport	
Seaport, Boston, MA	Proposed Large Scale Residential Tower and Loft Construction Residential Market Study (Apartments and Garage)	Private Developer
	The Merano	
North Station, Boston, MA	Proposed Large Scale Residential Air-Rights Construction Residential Market Study (Apartments and Garage)	Private Developer
	One Canal Street	
North Station, Boston, MA	Proposed Large Scale Residential Air-Rights Construction Residential Market Study (Apartments and Garage)	Private Investor
	Parcel K – Commonwealth Flats	
Seaport, Boston, MA	Proposed Large Scale Mixed Use New Construction Market Study (Apartments, Hotel, Retail, Garage)	Public Land Owner
	Parcels S, T, A, B and M	
North Point, Boston, MA	Proposed Large Scale Residential New Construction Residential Market Study (Apartments and Condominiums)	Private Developer
	Nashua Street	
North Station, Boston, MA	Proposed Large Scale Residential New Tower Construction Residential Market Study (Apartments and Garage)	Private Developer
	One Fenway	
Kenmore Square, Boston, MA	Proposed Large Scale Residential Air-Rights Construction Residential Market Study (Apartments, Lofts, Garage and Retail)	Private Developer
	Parcel 24	
Chinatown Air Rights Boston, MA	Proposed Mixed Use/Mixed Income Development Residential Market Study (Apartments, Retail and Condominiums)	Private Developer
	Parcel 13	
Back Bay Air Rights Boston, MA	Proposed Mixed Use/Mixed Income Development Residential Market Study (Dormitory, Apartments, Retail and Condominiums)	Private Developer

	Northampton Square	
BU Medical Center Area, Boston, MA	Proposed Large Scale Mixed Use Redevelopment Residential Market Study (Apartments, Retail and Condominiums)	Private Developer
	Core Block North	
Seaport Boston, MA	Proposed Large Scale Residential New Construction Residential Market Study (Apartments)	Private Developer
	425 Washington Street (Filene's Site)	
Downtown Crossing Boston, MA	Proposed Large Scale Residential New Construction Residential Market Study (Apartment and Condominium)	Private Developer
	Watermark Place	
East Cambridge, Cambridge, MA	Existing Class A Rental Apartment Market Study and Valuation	Private Developer
	Trilogy Apartments	
Fenway/Kenmore, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Rental Analysis Market Study	Private Developer
	Fan Pier	
Seaport, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium Analysis Market Study	Private Developer
	Park Square W	
Park Square, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium Analysis Market Study	Private Developer
	Vesta West End	
West End, Boston, MA	Existing Class A Rental Apartment Market Study and Valuation	Private Developer
	Russia Wharf	
Waterfront, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium and Rental Apt Analysis Market Study	Private Developer
	Kensington Place	
Midtown, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium &Rental Analysis Market Study	Private Developer
	601 Albany Street	
South End, Boston MA	Proposed Residential New Construction Market Rate Apartment and Condominium Analysis Market & Land Valuation Study	Commercial Lender

	501 Dorchester Avenue	
South Boston, MA	Proposed Large Scale Residential New Construction Market Rate Apartment and Condominium Analysis Market & Land Valuation Study	Private Developer
	Boston Wharf Portfolio	
Fort Point Channel, MA	Proposed Large Scale Mixed Use New Construction Market Rate Apartment and Condominium Analysis Market & Land Valuation Study	Private Investor
	Bulfinch Triangle	
North Station, MA	Proposed Large Scale Residential New Construction Market Rate Apartment, Condominium & Hotel Analysis Market & Land Valuation Study	Private Developer
	Rollins Square	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium and Apartment Analysis Market and Valuation Study	Commercial Lender
	45 Province Street	
Midtown, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium Analysis Market Study	Private Developer
	Downtown Crossing	
Downtown Crossing, Boston, MA	High-Rise Mixed Use-Residential New Construction Mixed Use Development Site Valuation Study	Private Developer/Investor
	Nashua Residences	
North Staton, Boston, MA	Proposed Large Scale Residential New Construction Mixed Use Development Site Valuation Study	Private Developer
	Jake Werth Site	
Midtown, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Rental and Condominium Analysis Market Study	Private Developer
	95 Berkeley Street	
South End, Boston, MA	Potential Large Scale Residential Conversion Market Rate Condominium Analysis Land Pricing Study	Private Owner
	285 Columbus Avenue (Former Red Cross)	
South End, Boston, MA	Potential Large Scale Residential Conversion Market Rate Condominium Analysis Shell Pricing Study	Private Owner

	147 Columbus Avenue (Salvation Army Site)	
South End, Boston, MA	Potential Large Scale Residential Redevelopment Market Rate Condominium Analysis Land Pricing Study	Private Owner
	Parcel 8-9-10	
Kenmore Square, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Condominium Analysis Market Study	BRA
	Laconia Lofts	
South End, Boston, MA	Proposed Large Scale Residential New Construction Market Rate Loft Development Analysis Market and Valuation Study	Commercial Lender
	World Trade Center	
Seaport District, Boston, MA	New Construction, Conversion and Expansion Feasibility Market Rate Rental and Condominium Analysis Highest and Best Use/Masterplanning Study	Private Developer
	Existing Commercial Office Development	
Waterfront District, Boston, MA	Proposed Mid-Rise Residential Conversion Market Rate Condominium Analysis Market Study	Private Developer
	Existing Industrial Site	
Concord-Alewife, Cambridge, MA	Large Scale Mixed Type Residential New Construction Market Rate Rental and Condominium Analysis Market Study	Private Developer
	Existing Stop & Shop Warehouse & Distribution Site	
Hyde Park/Dedham, Boston, MA	Large Scale Mixed Type Residential New Construction Market Rate Rental and Condominium Analysis Market Study	Private Developer
	Bay State Paper Site	
Hyde Park/Milton, Boston, MA	Large Scale Residential New Construction Market Rate Condominium Analysis Market Study	Private Developer
	Park Lane Apartments	
Seaport District, Boston, MA	High-Rise Residential New Construction Mixed Income Rental Apartments Narrative Appraisal	Commercial Lender
	North Point	
Eastern Cambridge, MA	Mixed Use Development Market Rate Loft and Conventional Condominiums Market Study	Private Developer

	The Penmark	
South End, Boston, MA	Large Scale Residential Rehab Condominium Analysis Market Study	Institutional Investor Lender
	American Brewery Lofts	
Mission Hill, Boston, MA	Large Scale Residential Rehab Condominium Analysis Market Study	Institutional Investor Lender (Pension Fund)
	Emerson Place	
West End, Boston, MA	Mid-Rise and Townhouse Residential New Construction Mixed Income Apartment/Condo Analysis Market Study	Private Developer
	Olmsted Green – Boston State Hospital Site	
Mattapan, Boston, MA	Large Scale Mixed Type Residential New Construction Mixed Income Rental and Condominium Analysis Market Study	Private Developer
	110 Second Street	
East Cambridge, Camridge, MA	Mid-Rise Residential New Construction Mixed Income CondominiumAnalysis Narrative Appraisal	Commercial Lender
	Covenant House	
Brighton, Boston, MA	Mid-Rise Residential Mixed Income Rental Apartments Narrative Appraisal	Public Sector Lender
	1365 Brookline Ave Site	
Fenway/Kenmore, Boston, MA	Mid-Rise Residential New Construction Market Rate Rental Apartment Analysis Land Pricing Study	Prospective Buyer
	500 Atlantic Avenue Site	
Waterfront Boston, MA	High-Rise Luxury Condo-Hotel Market Rate Condominium Analysis Full Market Study and Financial Analysis	Private Developer
	Russia Wharf	
Waterfront Boston, MA	Mixed Use Development Market Rate Loft Condominium Analysis Market Pricing Study	Private Developer
	Haviland Candy Factory	
Lechmere Canal, Cambridge,MA	Mid-Rise Residential Adaptive Reuse Market Rate Loft Condominium Analysis Market Pricing Study	Private Developer

	303 Third Street Site	
Kendall Square, Cambridge,MA	Mid-Rise Residential New Construction Market Rate Rental Apartment Analysis Full Market Study and Financial Analysis	Private Developer
	Atheneum Site	
Kendall Square Cambridge, MA	Market Rate High-Rise Luxury Residential Rental Apartment Analysis Full Market Study	Private Developer
	300 Third Street	
Kendall Square Cambridge, MA	Market Rate High-Rise Luxury Residential Rental Apartment Analysis Full Market Study	Private Developer
	Seven Cambridge Center	
Kendall Square Cambridge, MA	Market Rate High-Rise - MIT Affinity Residential 55+ Condominium Analysis Full Market Study	Private Developer
	Parmalee Court	
South End, Boston, MA	Mid-Rise Residential Affordable Rate Rental Apartment Analysis Narrative Appraisal	Public Sector Lender
	Park Square Condo-Hotel Development	
Park Square, Boston, MA	Market Rate High-Rise Residential Above Luxury Hotel Condominium and Hotel Analysis Full Market Study	Private Developer
	Archstone Kendall	
Kendall Square, Cambridge, MA	Market Rate Mid-rise Residential Mill Rehab Renatal Apartment & Condominium Conversion Analysis Full Market Study and Narrative Appraisal	Commercial Lender
	Longwood Avenue Redevelopment Site	
Longwood Medical Area, Boston, MA	Market Rate High-Rise Luxury Residential Rental Apartment Analysis Full Market Study	Private Developer
	226 Causeway Street (Strada 234)	
North Station, Boston, MA	Market Rate Mid-Rise Luxury Residential Rental Apartment and Condominium Analysis Full Market Study and Narrative Appraisal	Commercial Lender
	160 Washington Street (Hoffman)	
North Station, Boston, MA	Market Rate Mid-Rise Luxury Residential Rental Apartment and Condominium Analysis Full Market Study and Narrative Appraisal	Commercial Lender

	Turnpike Air-Rights Parcels 8-9-10	
Kenmore Square, Boston, MA	Market Rate High-Rise Luxury Residential Rental Apartment and Condominium Analyses Development Proposal Review	Public Regulatory Agency
	Waterplace Park	
Capitol Center Providence, RI	Market Rate High-Rise Luxury Residential/Hotel Rental Apartment and Condominium Analyses Full Market Study	Private Developer
	Bowdoin Place (100 Cambridge Street)	
Government Center, Boston, MA	Mixed-Income Mid-Rise Luxury Residential Condominium Analyses Market and Financial Projections	Quasi-Public Developer
	The Piano Factory	
Lower Roxbury, Boston, MA	Mixed-Income Mid-Rise Residential Conversion Market Rate Rental and Condominium Analyses Full Market Study and Narrative Appraisal	Public Sector Lender
	91 Sidney Street	
University Park, Cambridge, MA	Market Rate Mid-rise Residential New Construction Rental Apartment Analysis Full Market Study and Narrative Appraisal	Commercial Lender
	Rollins Square	
South End, Boston, MA	Mixed-Income Mid-Rise Luxury Residential Condominium Analyses Full Market Study and Narrative Appraisal	Public Sector Lender
	600 Albany Street	
South End, Boston, MA	Mid-Rise Luxury Residential Loft Apartment Analyses Full Market Study and Narrative Appraisal	Commercial Lender
	The Metropolitan	
Chinatown, Boston, MA	Mixed Income High-Rise Luxury Residential Rental Apartment Analyses Full Market Study	Public Sector Lender
	Pier 4	
South Boston Waterfront, MA	Market Rate Mid-rise Luxury Residential/Hotel Rental Apartment and Condominium Analyses Full Market Study	Private Developer
	Lovejoy Wharf	
North Station Waterfront, MA	Market Rate Mid-rise Luxury Residential Rental Apartment and Condominium Analyses Full Market Study and Narrative Appraisal	Commercial Lender

	Columbus Center (Turnpike Air-Rights)	
Back Bay/South End, Boston, MA	Market Rate Mid-rise Luxury Residential/Hotel Condominium and Hotel Analyses Development Proposal Review	Public Regulatory Agency
	Portside Place	
East Boston Waterfront, MA	Market Rate Mid-rise Luxury Residential Rental Apartment and Condominium Analyses Development Proposal Review & Ground Lease Analysis	Private Land Owner
	Constitution Quarters	
Charlestown, MA	Mixed Income Mid-rise Residential Rental Apartment and Condominium Conversion Analyses Full Market Study and Narrative Appraisal	Public Sector Lender
	The Burrage House	
Back Bay, Boston MA	Market Rate Mid-rise Residential Assisted Living and Condominium Conversion Analyses Full Market Study and Narrative Appraisal	Commercial Lender
	Jamaicaway Towers and Townhouses	
Jamaica Plain, Boston, MA	Market Rate High-rise Residential Cooperative Analysis Full Narrative Appraisal	Commercial Lender
	Clippership Wharf	
East Boston Waterfront, MA	Market Rate Mid-rise Residential Rental Apartment and Condominium Analyses Market Study	Private Developer
	Battery Wharf	
North End/Waterfront, Boston, MA	Market Rate Mid-rise Residential Rental Apartment and Condominium Analyses Full Narrative Appraisal	Commercial Lender
	Trinity Place (25 Huntington Ave)	
Copley Square, MA	Market Rate High-rise Residential Rental Apartment and Condominium Analyses Full Market Study and Narrative Appraisal	Institutional Lender
	Burrough's Wharf	
North End/Waterfront, Boston, MA	Market Rate Mid-rise Residential Condominium Analysis Full Narrative Appraisal	Institutional Lender
	Lincoln Wharf	
North End/Waterfront, Boston, MA	Market Rate Mid-rise Residential Condominium Analysis Full Market Study and Narrative Appraisal	Commercial Lender

	Houghton Place	
Putnam Circle, Cambridge, MA	Market Rate Mid-rise Residential Rental Apartment Analysis Full Market Study and Narrative Appraisal	Private Developer & Commercial Lender
	Auburn Court	
University Park, Cambridge, MA	Mixed income residential mid-rise Rental Apartment Analysis Full Market Study and Narrative Appraisal	Private Developer & Commercial Lender
	628-632 Massachusetts Avenue	
Central Square, Cambridge, MA	Market Rate Mid-rise Residential Rental Apartment Analysis Full Market Study and Narrative Appraisal	Commercial Lender
	Longfellow Place	
West End, Boston, MA	Market Rate High-rise Residential Rental Apartment Analysis Full Narrative Appraisal	Commercial Lender
	Thomas Graves Landing	
East Cambridge, Cambridge Waterfront, MA	Market Rate Mid-rise Residential Condominium Analysis Full Narrative Appraisal	Commercial Lender
	River Court	
East Cambridge Waterfront, Cambridge MA	Market Rate High-rise Residential Condominium Analysis Full Narrative Appraisal	Commercial Lender
	The Esplanade	
East Cambridge Waterfront, Cambridge MA	Market Rate High-rise Residential Condominium Analysis Full Narrative Appraisal	Commercial Lender
	The Park Side	
Mid-Town Cultural District, Boston, MA	Market Rate High-rise Residential Condominium Analysis Full Narrative Appraisal Report	Commercial Lender
	Four Seasons Condominiums	
Back Bay, Boston, MA	Market Rate High-rise Residential Condominium Analysis Full Narrative Appraisal Report	Commercial Lender
	The Ritz Carleton Condominiums	
Back Bay, Boston, MA	Market Rate High-rise Residential Condominium Analysis Full Narrative Appraisal Report	Commercial Lender

	Franklin Square	
Mission Hill, Boston, MA	Mixed Income High-rise Residential Rental Apartment and Condominium Conversion Analyses Full Market Study and Narrative Appraisal	Private Property Owner
	St Alphonsis Development Proposal	
Mission Hill, Boston, MA	Market Rate Mid-rise Residential Rental Apartment and Condominium Analyses Full Market Study	Private Property Owner
	Charlesgate and Fensgate	
Fenway, Boston, MA	Market Rate Mid-rise Residential Rental Apartment and Condominium Conversion Analysis Full Market Studies and Narrative Appraisals	Private Developer and Commercial Lender

TRINITY MANAGEMENT

TRINITY
MANAGEMENT







270 employees

7,600 units under management / 350,000 sf retail + commercial

Communities located in NY, CT, MA & RI

Headquarter offices in Boston & Manhattan

TRINITY MANAGEMENT

Trinity Management, LLC was established February 24, 2012 by the principles of Trinity Financial, Inc., to provide exceptional property management services for real estate investment partnerships, condominiums, cooperatives and resident associations, community development corporations, and non-profit and for-profit developers. Since inception, Trinity Management, LLC (TMLLC) has consistently demonstrated a breadth of expertise in managing properties during all phases of the development process - from providing valuable input in the conceptual stage to marketing in the lease-up period to successful management of stabilized properties.

Trinity Management provides management services for a wide array of ownership entities in Massachusetts, Rhode Island, Connecticut and New York. We presently have more than 7,600 residential units, of which approximately 21 percent are market-rate and home-ownership, along with more than 350,000 square feet of commercial and retail space.

The residential portfolio consists of a mix of affordable, mixed-income and market-rate units, and various homeownership programs. Our affordable and mixed-income communities use a variety of subsidy programs, including state and federal low-income housing tax credits, public housing operating and capital funds, Section 8 subsidies, and HOME and CDBG resources, among others.



The lobby at Boston East, one of the many amenity areas that residents enjoy.

Professional Affiliations

- Citizens' Housing and Planning Association
- Community Associations Institute
- Institute of Real Estate Management
- National Affordable Housing Management Association
- National Apartment Association
- National Association of Housing Cooperatives
- New England Affordable Housing Management Association
- Rental Housing Association, Greater Boston Real Estate Board

Services

- Apartments
- Condominiums
- Resident Associations
- Cooperatives
- Affordable Housing
- Market-Rate Housing
- Commercial Properties
- Low-Income Housing Tax Credits (LIHTC)
- Public Housing
- Transit-Oriented Housing

Lead-Safe Certified Firm, U.S. Environmental Protection Agency

- Better Buildings Challenge Partner, U.S. Department of Energy

TRINITY
MANAGEMENT

Our Mission

The mission of Trinity Management, LLC is to meet the programmatic and financial goals of our owners by providing exceptional customer-focused property management services. We specialize in managing properties in urban communities. Our aim is to aid in revitalizing these communities, enhancing the lives of our residents and neighbors, strengthening local commerce and fostering opportunities for positive growth.



The exterior at Appleton Mills in Lowell, MA.

A Company For All Reasons

Trinity Management, LLC offers a full range of real estate services, including effective marketing, careful applicant screening and eligibility determinations, rent collections, resident/management relations, maintenance and repairs, and accounting and compliance services. The procedures and systems of accounting and compliance for our entire portfolio, regardless of individual property size, are identical: we apply the highest level of scrutiny and integrity to all. Our maintenance program is proactive and stresses preventative maintenance. The properties we manage are assets to the communities in which they are located, and they encourage other property owners to take pride and interest in the well-being of the neighborhood.

Winning Recognition

In the first year of operation, Trinity Management LLC was designated a Specialist in Housing Credit Management Company (SHCM) - a difficult benchmark for a property management company to reach, and one that indicates a high level of expertise.

Three national organizations sponsor this certification: the National Affordable Housing Management Association, the National Apartment Association Education Institute, and the Leading Age (formerly The American Association of Housing and Services for the Aging).

The award recognizes excellence among management companies involved with the Low-Income Housing Tax Credit (LIHTC) program. At least 30 percent of the management portfolio must be LIHTC; each of these properties must have at least one SHCM professional with daily supervision of the LIHTC population; at least 50 percent of the staff must be SHCM certified; at least one executive of the management company must be SHCM certified; and all must abide by the SHCM Code of Ethics.

The code includes: exercising the highest level of integrity; reasonable compliance with all federal, state and local laws; providing equal employment and housing opportunities; professionally managing the properties by avoiding disclosure of confidential information, maintaining accurate records, maintaining fiduciary obligations to clients and protecting all clients' assets; and using professional means if seeking to influence legislation, regulations or public opinion.

TRINITY
MANAGEMENT

Our Employees Make All the Difference



Members of Trinity Management's Accounting Department staff. *Photos by Josh Behan*

Trinity Management's corporate philosophy includes a dedication to a personal, hands-on approach regarding all the details of management, which we believe fosters good relationships with tenants and owners and, ultimately, success for the property.

At TMLLC, every member of our staff of 265 is thoroughly engaged and committed to realizing their full potential by effectively using their talents, creativity and professionalism on each client project. Our effectiveness is based firmly on the success of each property we manage, using our greatest asset - our employees.

The diversity of our personnel matches the diversity of our portfolio. As residential real estate managers, we manage new construction, established properties, conventional housing, condominiums, historic properties, low-income housing tax credit developments, public housing units and government-assisted housing for multifamily and elderly residents.

What differentiates us from other real estate management companies is our unique ability to effectively combine our skill in providing detailed management and financial services with our demonstrated commitment to fulfilling the needs of residents and contributing to the success of the communities in which we operate.

TRINITY MANAGEMENT

Trinity Principals



James Keefe, *Principal*

Jim Keefe is a principal at Trinity Financial, Inc., a New England based real estate development company with offices in Boston and New York. In almost 32 years of successful development, Trinity has specialized in ground-up construction and historic restoration in urban infill locations. The company has developed and manages over 9,000 units of mixed income rental and for-sale housing and over 600,000 square feet of neighborhood office and retail. With $3 billion in total development, the company's portfolio includes supportive housing, student housing, transit-oriented development, HOPE VI/CNI public housing redevelopments, live/work space for artists, and most recently, Passive House technology. The company has won numerous local and national awards, with transformative development work in Massachusetts, Rhode Island, Connecticut, and New York. Prior to joining Trinity, Mr. Keefe was Vice President for Development at Renaissance Properties in Boston, and prior to that he was a Commercial Loan Officer for the Bank of Boston. He is a former member of the Boston Landmarks Commission, a founding member of the Codman Square Housing Development Corporation (now NDC), and has taught at Tufts University in the Urban and Environmental Policy Department. He has a Bachelor's degree from Fordham University and a Master's degree in Business Administration from Boston University.



Patrick Lee, *Principal*

Patrick Lee is one of the founders and owners of Trinity Financial, Inc. and Trinity Management, LLC. Trinity Financial is a 31-year old development company, and with its management affiliate, Trinity Management, the two Trinity companies have more than 250 employees and central offices in Manhattan and Boston. The companies' experience includes work developing more than 9,000 units of housing and 500,000 sf of commercial space, at a cost of over $3 billion. The two Trinity companies develop and manage affordable and market rate housing communities throughout the Northeast, from Massachusetts to New York. Prior to co-founding Trinity Financial, Inc. in 1987, Mr. Lee served as Special Assistant to the Secretary of Administration and Finance for the Commonwealth of Massachusetts. Mr. Lee was the Secretary's representative on a number of State boards and agencies including the Massachusetts Housing Finance Agency, Community Development Finance Corporation, Massachusetts Industrial Finance Agency, and the State's Public Auditorium and Civic Center Grant Program. Mr. Lee has served as a member of the Board of Directors of the Massachusetts Government Land Bank, the Roxbury Neighborhood Council, the Greater Boston Chamber of Commerce, the Boston Center for the Arts, and Federated Dorchester Neighborhood Houses. He is currently a member of the Board of Trustees of Wellesley College and the Board of Overseers for the Boys and Girls Clubs of Boston. Mr. Lee holds a Bachelor's degree from Harvard University and is a Massachusetts Institute of Technology-trained city planner.

TRINITY
MANAGEMENT

The Trinity Team

Adam Ameden, CPA, ***Senior Vice President of Administration and Finance***



Mr. Adam Ameden leads the company's financial services group. He brings over 20 years of accounting experience to TMLLC. Prior to joining TMLLC, Adam was with Barkan Management Company, where he was responsible for managing all the financial aspects of that company's growing multifamily real estate company along with providing accounting services to the Ritz Carlton. He has a Bachelor of Science degree in Accounting from Bentley College, and he is a licensed Certified Public Accountant in Massachusetts. He is also a Chartered Global Management Accountant.

Maribel Concepcion, ***CPM, Chief Operating Officer***



Ms. Concepcion began her career in property management 20 years ago, quickly winning promotions to site management and multi-site management. Maribel's expertise is in property finances, budgeting, and facilities management. Prior to joining Trinity, Maribel was the Director of Property Management for National Investment, LTD. Maribel has earned the designations of Certified Property Manager, Accredited Residential Manager, National Affordable Housing Professional Executive, Registered Cooperative Manager, Specialist in Housing Credit Management, and Fair Housing Certification. Maribel has a degree in Criminal Justice and is a retired member of the Rhode Island Army National Guard.

Linda Cribben, ***Senior Director of Compliance***



Linda Cribben has over 25 years of property management and compliance experience. Linda's primary responsibility is to focus on protecting the owner's interests by ensuring compliance with federal and state programs, including Low-Income Housing Tax-Credit (LIHTC), Section 8, HOME, and other programs. Responsibilities include implementation and ongoing oversight of corporate rules for standardized compliance procedures, quality assurance, internal controls, reporting, and audit preparation and response.

TRINITY MANAGEMENT

Deidre Wyman, ***Director of Public Housing***



After over 30 years in property management, Ms. Wyman has developed proficiency in Public Housing developments. She expertly prepares and presents Admissions and Continuing Operating Plans ("ACOP"), Management Plans, Affirmative Fair Marketing Plans, and other governing policies or documents. Deirdre also ensures that all policies and procedures of the Public Housing Authorities are communicated and followed at the site level. Her additional responsibilities include achieving occupancy goals while maintaining compliance with all federal, state and local laws and regulations. She is the chairman/ president of the Maverick Landing Community Services Board, and a member of the Board of the New England Affordable Housing Management Association, and also serves on their Charity Committee.

Brad Iappini, ***Director of Information Technology***



Mr. Iappini joined Trinity Management in 2013 as the Director of Information Technology, bringing 20 years of systems experience to the team. Being a CompTIA and Microsoft Certified Systems Administrator, he ensures the global operation from the ground up is working properly and brings new initiatives to information technology in property management.

Mr. Iappini utilizes an innovative and streamlined approach to technology and is always excited to learn new systems and techniques for managing the everchanging IT landscape.

Erin Reed, ***Portfolio Director Portfolio***



Erin has been in the Property Management industry for 20 years. She joined Trinity Management in 2010 as a Community Manager and was quickly promoted to Senior Community Manager where she managed a mixed portfolio consisting of Affordable and Market units. Erin was promoted to Portfolio Director in February 2020. She has many professional designations including, Accredited Residential Manager (ARM), C3P (Certified Credit Compliance Professional), Specialist in Housing Credit Management (SHCM), and is working on obtaining her CPM.

TRINITY
MANAGEMENT

Laura Francis, *Portfolio Director*



Laura Francis joined Trinity Management, LLC in 2013 as a Community Manager, responsible for overseeing all aspects of operations of a 216 unit mixed-income multi-family housing community located in Mattapan, MA. After demonstrating unequivocal excellence in managing a property with a diverse financial and affordability structure, she was promoted in 2016 to Senior Community Manager. Due to exemplary performance, Laura was promoted again in 2020 to the Portfolio Director position. With more than 25+ years of experience in the affordable housing industry, Laura has acquired many industry related accreditations throughout her career from the Institute of Real Estate Management, New England Affordable Housing Association and the National Center for Housing Management, which include the ARM, NAHP, C5P, CPO, SCHM and CFS designations.

Aida Pertsch, *Portfolio Director*



Aida joined Trinity Management team as a Portfolio Director on April, 2020. With over 10 years of experience in the property management industry, Aida led several projects in the Miami, FL area including high end and luxury condominiums and mixed used properties. She received her Community Association Manager License (CAM) and Real Estate Sales Associate License from Gold Coast Schools and holds professional designations including C3P (Certified Credit Compliance Professional) and CFS (Certified Financial Specialist).

Scott Chakoutis, *Portfolio Director*



Scott came to Trinity Management in September of 2020 after working in Property Management for 17 years. In his tenure in property management, Scott worked for 5 years in Maintenance and 12 years in Management. He has experience with several property management companies including Peabody Properties, Weston Associates Management Company, Hinch-Crowley Realty Associates, among others.

TRINITY MANAGEMENT

Richard Maygua, *Portfolio Director*



Richard Maygua was named Portfolio Director of the New York City and Connecticut portfolio effective Monday August 24, 2020. He will collaborate expanding the NYC office and business. Richard is a strong advocate of wider development and access to affordable housing and joins Trinity to continue working on this commitment. He brings experience in programs such as LIHTC, Rural Development (USDA), HOME, Section 236, Project Based Section 8, Special Needs Housing, New HOP (NYC), Mixed Developments, Market, and others. Richard has a Bachelor of Business Administration in Real Estate Investment from Bernard Baruch College and a Master of Business Administration from the Zicklin School of Business, both part of the City University of New York.

Christopher Amenta, *Portfolio Director*



Chris Amenta joined Trinity Management in February of 2021. While operating as a Regional Director, Chris brings the proficiency of an experienced strategist of enterprise transformation to property management. Along with his background in property and project management, he brings a unique type of skill set to Trinity. With his main focus being time management, and continuous process improvement, he is able to push the boundaries of encouraging, and inspiring his teams to re-think, and further develop what's possible in empowering them to reach their personal, and professional goals.

Patricia Jewkes, *Portfolio Director*



Patty Jewkes joined Trinity Management, LLC in 2021 as a Portfolio Director, responsible for overseeing all aspects of operations of the Washington Beech, Mass Pike, Oxford, Northampton and Capstone communities. With more than 25+ years of experience in the affordable housing industry, Patty has acquired many industry related accreditations throughout her career from the Institute of Real Estate Management, New England Affordable Housing Association and the National Center for Housing Management, which include the NAHPe, C10P, CPO, SCHM and CAPS designations. Prior to joining TMLLC, Patty successfully managed a diverse portfolio throughout the Greater Boston area which encompassed a wide range of affordability programs including LIHTC, HOME, Project-based Section 8, and Rural Development.

TRINITY
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Hanna Wolsfelt, ***Director of Marketing***



As Marketing Director, Hanna Wolsfelt brings a wealth of marketing experience to the Trinity Management team. With a background both in property management and design, Hanna meshes these two worlds to create a visually pleasing and homey experience for residents and prospects alike. Hanna is also passionate about customer service and making all clients feel welcome and resident retention (providing residents with exemplary service and events in order to maintain a community that residents want to stay at).

Trinity Management Awards and Accomplishments

Top 100 Affordable Property Management Company.

Vanguard Award, Glenark Mills/Oaks, in the major rehabilitation category, from the National Affordable Housing Management Association (NAHMA).

Vanguard Award, Bristol Commons/Lenox Green, in the New Construction, More than 100 Units category by NAHMA. Vanguard Award for a major rehab, Glenark Mills/ Glenark Oakswon by NAHMA.

Community of Quality designations, Washington Beech (Boston, MA), Appleton Mills (Lowell, MA), The Blakeley (Lawrence, MA), and Newport Heights (Newport, RI) by NAHMA.

Washington Beech was named a Community of Quality by NAHMA and an Exemplary Family Development by New England Affordable housing Management Association (NEAHMA).

Community of Quality designations, Forest Hills (Boston, MA), Countryside Village (Oxford, MA), The Rowe (New Haven, CT) and Franklin Hills (Boston, MA) by NAHMA.

Exemplary Family Development Award, Washington Beech, by NEAHMA.

MassHousing, Company Awards, Multi-Million Dollar MBE and Million Dollar WBE (contracts with minority and women-owned businesses).

TRINITY MANAGEMENT

Certifications

Certifications
Certified Apartment Manager
Certified Public Accountant
Certified Property Manager
Accredited Resident Manager
Real Estate Broker
Real Estate Salesperson
Certified Occupancy Specialist
Housing Credit Certified Professional
Certified Apartment Housing Manager
National Affordable Housing Professional
National Affordable Housing Professional – Executive
Spectrum C 3/5/7/9/14 P
Specialist in Housing Credit Management Company
Tax Credit Specialist
Certified Professional of Occupancy
OSHA 10 & 30
Register Cooperative Manager
National Apartment Leasing Professional
Licensed Social Worker
Tax Credit Compliance Systems

Trinity Management Company LLC.
75 Federal Street, 4th Floor
Boston, MA 02110
P 617-542-3019 • F 617-542-2213
www.trinitymanagementllc.net
info@trinitymanagementllc.net

Trinity Management Company LLC.
1350 Broadway, Suite 1700
New York, NY 10018
P 212-267-8400 • F 617-542-2213
www.trinitymanagementllc.net
info@trinitymanagementllc.net