

# DEVELOPMENT SUBMISSION



PROJECT NO. MASS. R-56

## 151 LENOX STREET, ROXBURY, PARCEL 22A, SOUTH END URBAN RENEWAL AREA

REQUEST FOR PROPOSALS | FEBRUARY 1, 2018



Tenants'  
Development  
Corporation

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## Tenants' Development Corporation

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Ms. Teresa Polhemus  
Executive Director/Secretary  
Boston Planning and Development Agency  
Room 910, Boston City Hall  
One City Hall Square  
Boston, MA 02210

February 1, 2018

Dear Ms. Polhemus:

Tenants' Development Corporation (TDC) is pleased to submit this response to the Boston Planning and Development Agency's (BPDA) Request for Proposals for the development of the parcel of land (22a) located at 151 Lenox Street in Lower Roxbury. TDC, a 501(c)(3) nonprofit corporation, has been searching, for the past six years, for an appropriate site for its resident services and programming. TDC is the owner of 346 units of affordable housing throughout the South End of Boston. As part of being a responsible owner of affordable housing, TDC offers extensive services to its residents (for a full description, please refer to TDC's information in Attachment A). In an effort to identify sites at which we can provide these services to our own residents, and in discussions with other tenant groups, we have discovered a substantial unmet need for programming space among the affordable housing developments in the neighborhood.

As one of the oldest minority developers and advocates for affordable housing in the City of Boston, we felt it was our civic duty to assume a leadership role and work with these developments and their resident groups to provide more centralized and expanded programming space in which to offer services to the community. Our proposal for 151 Lenox Street does exactly that.

TDC is proposing to construct a 20,513-square-foot building on the corner of Lenox and Tremont Streets. The building will be four stories above grade with a full basement. The structure will house a gymnasium, computer lab, food pantry, commercial kitchen, community dining area and youth programming space. The top two floors will be offices for TDC and administrative space for the building's operations and programming.

The services and programming in the building will be open to the entire community and determined by an advisory committee made up of representatives of the affordable housing tenant organizations in the immediate area. TDC will manage the building, and be responsible for organizing and applying for operational funding for the building programming.

TDC has assembled a development team of long-standing collaborators of the organization to undertake the development work. To learn more, please see our development team roster at the end of this letter, and refer to their qualifications in Attachment B.

TDC will be the sponsor and developer, as well as the building manager, of the facility. TDC has developed, owned and managed affordable housing in the South End for over 40 years. TDC is a minority-controlled organization with a long and illustrious history of working for the overall betterment of the South End and its low-income residents (please see TDC's profile in Attachment A).

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To undertake this venture, TDC has engaged the services of Robert E. Goldstein Development Consulting. Mr. Goldstein and his associates have been consulting to TDC for over 25 years. During that time, he has refinanced and renovated almost all of the properties in TDC's portfolio in an effort to preserve the long-term affordability housing asset. More recently, in the City of Boston he oversaw the development of Project Place's building at 2201 Washington Street (also a BRA vacant parcel), renovated 58 and 66 Berkeley Street into office and childcare space, and is currently developing office and programming space at 200 Bowdoin Street in Dorchester for the Family Nurturing Center (see R.E. Goldstein Development Consulting's resume in Attachment B).

On this project, Mr. Goldstein will be sharing the project management, development and financing duties with Sharon Loewenthal, also an existing consultant to TDC. Ms. Loewenthal has extensive residential and commercial development experience both inside and outside of Boston. She is an expert in New Market Tax Credits, a major component of the financing of this project (see Sharon Loewenthal's resume in Attachment B). She also has recent experience in the City of Boston through her involvement in the Ropewalk development in Charlestown, and the BPDA Parcel 25 project in Mission Hill.

Davis Square Architects (DSA) has been engaged as project architect for Lenox Street. DSA was founded in 1984, and has been delivering architectural services to TDC for the past 25 years on projects, including the redesign and renovation of almost all of the properties in TDC's portfolio. In addition, over the past five years DSA has worked with the BPDA on the design of significant mixed-use developments in Mattapan (on the former Cote Ford site on Cummins Highway) and on a large city-owned parcel on the Fairmount Line just outside of Upham's Corner, Indigo Block. Currently under construction is a mixed-use structure (60 units of housing and a supermarket) on Washington Street on the 8.6-acre Bartlett Place site. All three of these projects were permitted under Article 80 Large Project Review.

DSA's recently completed Article 80 Small Project review projects include Lucky Strike Apartments and Bloomfield Gardens, both in Fields Corner. Currently on the boards are three other projects requiring BPDA Small Project review: Morton Street Housing (in collaboration with the Planning Office for Urban Affairs & Caribbean Integration Community Development); Geneva Avenue Housing, also on the Indigo Line; and Bartlett Building A, the next major project to be undertaken on the Bartlett Place site. Principal Cliff Boehmer (DSA's President) and Paul Warkentin, an Associate at DSA, will head up the design team for the Lenox Street development.

Legal services will be provided by Klein Hornig LLP, one of the nation's premier firms concentrating exclusively on affordable housing and community development. The firm focuses exclusively on structuring, managing and closing affordable housing projects and community development projects. In addition to affordable housing, they are active in other community development activities, including commercial and mixed-use developments, New Markets Tax Credits, historic tax credits, and renewable energy credits. They specialize in representing nonprofit organizations. They have been working with TDC and this development team on development and refinancing projects for the past ten years. Their list of projects in Boston over the past five years is quite extensive, and can be found in Attachment B.

TDC is very knowledgeable about the Boston Jobs policy and as part of the required Attachment C, we have provided BPDA with a statement of TDC's mission. In addition, TDC has a long-standing reputation and philosophy of ensuring that we seek out and engage the services of contractors of color as part of our management practices. We have won a substantial number of commendations from MassHousing, Massachusetts Housing Finance Agency, and Harvard Community Health Plan as well as several other acknowledgements of TDC's Founder, Mary Longley, recognizing our accomplishments in this area (see Attachment D). Currently, 96% of the TDC work force is minority, 53% are women and 35% live in Boston.

TDC is proposing to develop the building primarily for community use. The 20,513-square-foot structure will house a variety of community and residential services. The basement's 4,425 square feet will house a food pantry, communal dining area, fitness space, and a commercial kitchen. The first floor, consisting of 3,792 square feet, and the centerpiece of the building will house a gymnasium with a three-quarter size basketball court. The second level will be a 642-square-foot partial floor mezzanine that will overlook the gymnasium space. The third floor, 4,071 square feet, will house social service programming space, a computer lab, classrooms and workshop space. The upper two floors of 3,792 square feet per floor will house TDC's offices as well as administrative space for the building's services and programming. The fourth floor is also set up to be partially used as programming space as the needs arise. There will be no provision for parking on the property.

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There are a number of programs run by TDC in support of our commitment to offer services and programs that inspire personal growth, empowerment and enrichment. Some of those programs include the Peer Leaders Program, a youth leadership program; ballet and hip-hop dance classes; the Scholars' College Prep Program; arts and culture workshops and events; martial arts classes; Connections, the senior lunch, health and wellness program; and the Senior Homeowner Services program, as well as other workshops to assist people in all aspects of their lives. For a more detailed description of these programs and services, please refer to Attachment A.

TDC has formed partnerships with many donors who help support our ongoing programs and services. We understand the need to expand our fundraising efforts and are constantly making new relationships with donors, and have secured a fundraising consultant to assist in this endeavor.

TDC's proposal for the site supports and benefits the surrounding neighborhood in a variety of ways. Recently, The Boston Globe chronicled a week-long series on racial disparities in housing, individual and family equity, education, and healthcare in the City of Boston. There was a distinct common theme of differences between the "haves" and "have-nots" in the City of Boston. One of the most surprising articles of the week-long series focused on development and housing in Boston; more specific was affordable housing and available resources for low-income residents of Boston. It became apparent for all reading the articles that affordable housing and lack of resources have continued to dwindle in Boston's thriving economic boom and real estate industry.

In the South End and Lower Roxbury area of Boston between Massachusetts Avenue, Washington Street and Melnea Cass Boulevard, there are thousands of low-income residents and affordable housing units available to some of most underserved people of color in Boston. Most of these individuals reside in Camden/Lenox, Camfield Gardens Estates, Roxse Homes, Mandela Holmes and Grant Manor. In order for single- and two-parent households to generate appropriate incomes, working two and three jobs is crucial to their day-to-day quality of life. This sometimes takes parents out of the households and leaves older siblings accountable for the nurturing of their younger brothers and sisters. With the prevalent issues of youth violence and turf issues that exist in neighboring communities, this situation makes it almost impossible for young people to access resources in neighboring communities safely, for example, Orchard Gardens, Vine Street, Blackstone and Mission Hill Community Centers. This also is directly related to the decades-long issue of drug distribution and addiction in the centers of these neighborhoods.

TDC has a multi-level approach to dealing with all of the above-mentioned issues. Recent opinion polls reveal that the public is concerned about the nation's young people and supports programs that help schools and families provide the guidance that young adolescents need. For example, a 1998 poll revealed that 93% of parents and nonparents support expansion of afterschool activities, and more than 80% said they would be willing to have tax dollars used for this purpose. Similarly, a wide majority of individuals surveyed recently by Public Agenda expressed worry that American society does not offer enough constructive activities or meaningful roles to its young people, and 60% said they viewed afterschool programs as an effective way to help young people.

TDC has identified a need and now has been presented with an opportunity to provide and build a safe place where youth can learn, grow and thrive by offering programs and hosting events that address training needs and entrepreneurial opportunities through partnerships with organizations that align with our goals and mission. We will strengthen our community through a collaborative approach, and provide an opportunity for greater input from our youth and seniors. The expected outcome is to provide access to innovative and much-needed resources.

Our community center will not only benefit youth, but thousands of low-income residents with quality and age-appropriate programming from youth to seniors. We will also provide a space for community events held by a number of non-profit organizations, churches and residents who cannot afford to rent spaces for these events. Our project will also support and partner with organizations aligned with Mayor Walsh's future agenda of a better and more inclusive Boston for all of its residents.

TDC's proposed community center project will support and encourage racial harmony and a discussion of racial disparities and injustices in our great city. Through the proposed community center, we will bring together all races and ethnicities of all ages to work together to support Mayor Walsh's agenda; and we would like to be the organization that spearheads programs and events where residents lead the efforts. TDC will provide resources, opportunities, racial and cultural partnerships, and a space for collective dialogue for the very same issues and population The Boston Globe criticized leadership for not addressing.

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Our project will also be supporting sustainable design technology and practices. Davis Square Architects is committed to the greening of communities, and brings deep expertise in the design of healthy and sustainable buildings. Their projects have been honored for excellence in smart growth, sustainable design, revitalization of an urban brownfield site, green community, energy efficiency, and excellence in design. They have also achieved distinction for their high efficiency. For more information on their sustainable experience, see their qualifications in Attachment B. As part of their interest in the project's long-term sustainability, the building will be LEED-Silver Certifiable.

In terms of employment and jobs, the community center will take one year to construct and will generate the equivalent of 21 full-time construction jobs. Once up and running the facility will require a full-time administrator, a full-time custodian and 12 part-time program staff.

TDC has constructed a development schedule/timeline for project implementation, and is included as Attachment F. TDC is aware of two regulatory approvals required as part of the development of 151 Lenox Street: zoning approvals and BPDA small projects review. For purposes of clarity we have included the regulatory approvals in the timeline.

We are attaching all the other information requested in your Request for Proposals for 151 Lenox Street in the format outlined in your document. We hope that the BPDA will look favorably on our proposal.

Sincerely,



Donald Ward  
Executive Director, Tenants' Development Corporation

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# 151 LENOX STREET DEVELOPMENT TEAM

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## Sponsor/Owner/Building Manager

### Tenants' Development Corporation

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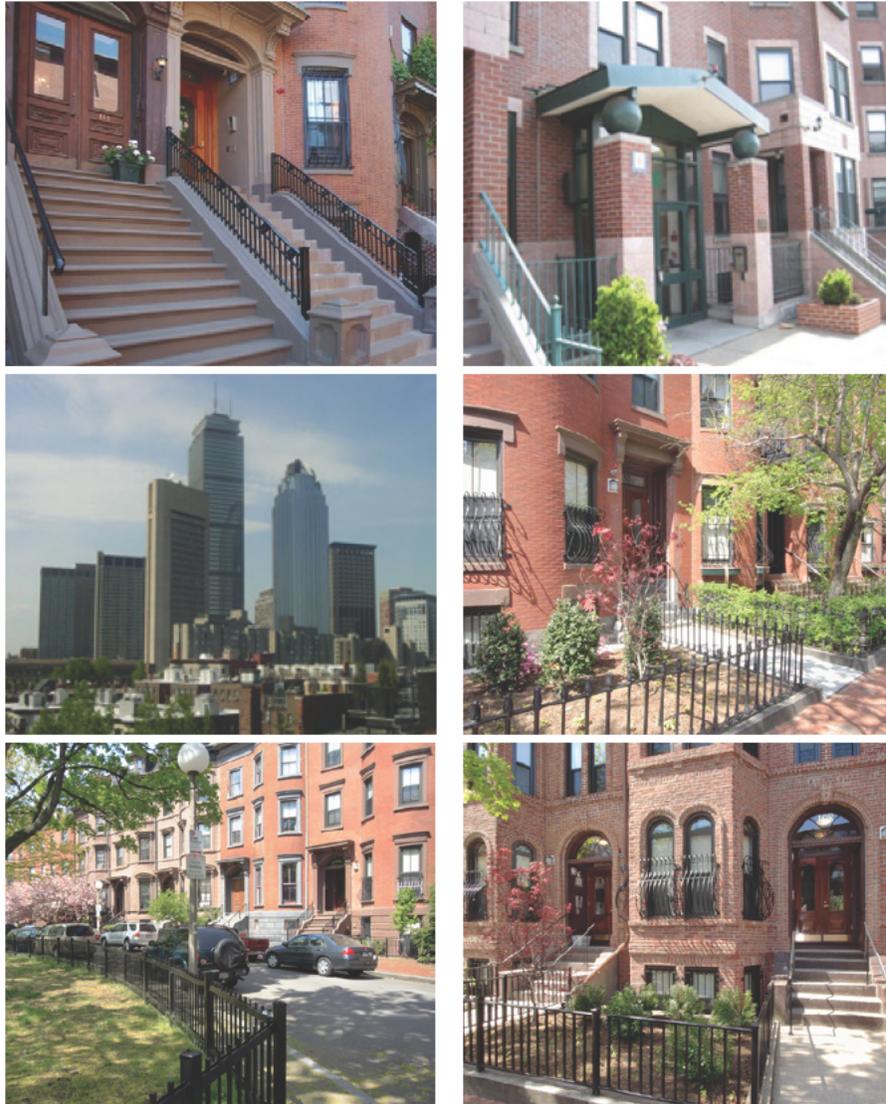
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## Tenants' Development Corporation

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### Corporate Resume

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## Tenants' Development Corporation

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### **Mission**

The mission of Tenants' Development Corporation, Inc. (TDC) is to preserve and maintain safe and affordable housing for low- to moderate-income people of diverse backgrounds. We achieve this through:

- Property Management
- Construction
- Rehabilitation
- Delivery of Services to TDC Residents
- Community Activism and Advocacy

### **History**

TDC prides itself on being one of the oldest grassroots, community-based organizations in the country dedicated to defending the right to quality, affordable housing for people of diverse races and cultures, as well as promoting tenant empowerment through active tenant participation in leadership and management of TDC.

TDC was conceived and organized by low-income renters, principally African-American tenants, who were distressed over the sub-standard and hazardous housing conditions in which they were subjected to live in many areas of the South End.

In 1968, TDC was established as a tax-exempt public charitable corporation under the laws of the Commonwealth of Massachusetts. TDC became the first community organization in the nation to be named developer of a housing development project holding mortgage insurance through the U.S. Department of Housing and Urban Development (HUD).

TDC has been operating for over 40 years, developing affordable housing in Boston's historic South End neighborhood. Since that time the organization has been active in housing rehabilitation and management. TDC is particularly proud to have restored the building at 397 Massachusetts Avenue, where The Reverend Dr. Martin Luther King, Jr. lived during the early years of his doctoral studies at Boston University's School of Theology.

After successfully negotiating with the City of Boston and community groups, TDC rehabilitated the "Old Harry the Greek" block located on East Berkeley Street. This project — The Romey Marc Tyler Condominiums — is a mixed-income affordable housing development.

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### **TDC Makes National History**

TDC made national history when it became the first housing organization in the country to win a case on the side of a tenant in a tenant vs. landlord case, by creatively and strategically organizing tenants in an unprecedented way. Tenants organized and formed South End Tenants Council (now Tenants' Development Corporation) and campaigned against major slumlords in the South End of Boston. In this famous case, the tenants won against the landlord by using the Rabbinical Council System (Jewish Ecclesiastical Court). Eventually, the buildings were sold to the tenants and many were renovated.

This precedent-setting case spearheaded a movement, and other housing organizations soon followed in the path of South End Tenants Council (TDC). Out of this came tenants' rights and housing courts were formed. This historic case was covered by a number of national newspapers and magazines; *The Wall Street Journal*, *Newsweek*, *Boston Globe*, *Look Magazine* and many more. TDC's case is still used today by several law schools as part of their case studies.

### **The Future**

TDC has developed into a more comprehensive property management organization. Our goal is to increase the number of affordable housing units available for low- to moderate-income individuals and families.

Our secondary goal is to expand TDC's role in the community by increasing the number of programs, events and services offered to the TDC residents, neighbors and the community.

Tenants' Development Corporation is committed to bringing together the assets of TDC residents, neighbors, community leaders and the organization to promote the well-being of youth, adults, seniors and families that are underserved or at-risk by offering services and programs that inspire personal growth, empowerment and enrichment.

We believe that building a strong community that supports residents and neighbors must begin by improving the safety, living conditions, health, education, lifestyle and economic conditions of low-to moderate-income TDC residents and neighbors in Boston's historic South End and Greater Boston.

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## Tenants' Development Corporation

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### Programs and Services

#### Community Events

- National Night Out Celebration
- Teen Summit

#### Partnerships

- Boston Alliance for Community Health
- Fair Foods
- Massachusetts College of Art and Design SPARC Partnership
- MassHousing
- South End Healthy Boston
- South End/Lower Roxbury Safety Taskforce Committee
- Triple SSS

#### Youth Development

- Peer Leaders Program
- The Scholars College Prep Program
- After-School Homework Tutoring
- Computer Lab
- Karate Classes
- Ballet Classes
- Hip-Hop Dance

#### Adult

- Tech Goes Homes Computer Classes

#### Senior

- Retail and Grocery Shopping
- City of Boston, Senior Homeowner Services Program
- Connections Senior Health & Wellness Program:
  - City of Boston/Kit Clark Lunch Program
  - Senior Fitness Program

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## Tenants' Development Corporation

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### **1. Resident Services**

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Through our resident services program, we offer a range of services, programs and events. Our programs cover all age groups from school-aged youth to seniors; everyone is included to ensure that we are building strong relationships which equal strong residents, strong families and strong communities.

We also own a community center, which TDC residents and neighbors can use for enrichment programs, community events, and family celebrations. The center is used most heavily by youth and provides them with a safe place to gather and to participate in the various enrichment programs and community events. Each year, TDC directly serves approximately 1,500 residents and neighbors through our programs and services activities.

### **2. Peer Leaders Program**

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The Peer Leaders program is an after-school enrichment and leadership program, designed to train young leaders and to inspire youth involvement in our community. The program provides various leadership development opportunities to TDC's youth residents and youth from the South End and Lower Roxbury neighborhoods and beyond. The youth are exposed to academic tutoring assistance, job skill training, art and culture as well as technology. It is important to empower young people to achieve social and academic excellence in their community. We are building future leaders. We are building strong leaders. We are building smart leaders.

### **3. The Scholars College Program**

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College awareness and planning in the earlier years of high school can put students on a successful path to college attainment and graduation. The Scholars College program will include:

- Encouraging students to see themselves as college-bound
- Instilling the belief that college is accessible for everyone
- Building a strong foundation for students in and outside of the classroom by helping students choose a college preparatory course schedule in high school, and encouraging extracurricular involvement
- Putting together a plan for standardized testing
- Building a student's self-motivation to pursue college and helping him or her build a support network of adult mentors to help reach that goal
- Helping students assess their career interests and aspirations, and begin researching colleges to pursue those goals.

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## Tenants' Development Corporation

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### 4. Senior Services Program

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TDC's Senior Services Program offers programs and activities to ensure that seniors are living active, healthy and engaging lives. We believe inclusion of the elderly population in community, cultural, and recreational activities builds a healthy spirit, mind and body for all.

Our goal is to expand programs and activities and to offer a more comprehensive health and wellness program to prevent chronic disease, while promoting healthy aging and increased awareness of the benefits of physical activities for older adults. The expansion of programming would include:

- Delivering additional classes and a variety of activities such as: yoga, tai chi, weight training, stretching and strengthening programs, as well as walking programs
- A host of workshops that focus on healthy aging, arthritis, depression, diabetes prevention, fall prevention, memory, nutrition, osteoporosis, relaxation and stroke prevention.

**The Senior Homeowners Services Program**, in partnership with the City of Boston's Department of Neighborhood Development (DND), this program assists low- to moderate-income homeowners to affordably manage minor and major repairs and home improvements that address an immediate threat to health and safety, and also addresses some aging-in-place for seniors.

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## Tenants' Development Corporation

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### Staff

#### **Donald Ward, Executive Director**

Donald Ward grew up in affordable housing and has been in the affordable housing field since the early 1990s. He joined Tenants' Development Corporation (TDC) in 2002, served in several leadership roles and, in 2005, he was asked to take on the role of Executive Director. Donald has extensive experience in management, rehabilitation and development and has played a leadership role on multiple projects. Prior to joining TDC, he was with Mobil Oil and a Canadian company, Qwest Enterprises, where he served in a management role.

#### **Jeannetta Williams, Senior Property Manager**

Jeanetta Williams has worked in the affordable housing industry for the past 30 years. Her career in affordable housing began at Tenants' Development Corporation, where she has had the opportunity to work in a number of areas within the organization.

Jeannetta has participated and lead in the areas of management, rehabilitation and development and has played a leadership role in multiple projects. She holds several housing-related designations, including Certified Tax Specialist, Certified Credit Compliance Professional, and Site-Based Budget Specialist just to name a few.

#### **Anita Huggins, Asset Manager**

Anita Huggins has worked in the affordable housing industry for the past 48 years. Her career in affordable housing began at Mass Housing Finance Agency. Her property management experience spans a 40-year period.

Anita's experience with Tenants' Development Corporation began when she was employed by Cornu Management Company as the Regional Property Manager assigned to the oversight of TDC's property, South End Tenants House II, in 1983. She joined TDC in the role of Asset Manager in 2011. She has also worked for Independent Managers, Inc.; Cruz Management Co., Inc.; Maloney Properties, Inc.; and HallKeen Management Co., Inc.

Anita attended the University of Massachusetts Boston's College of Public and Community Service Housing & Urban Development Center from 1973-1975. She holds several housing-related designations including MIT's Minority Property Management Executive Program, Spectrum's C5P, Certified Occupancy Specialist, and Certified Manager of Maintenance. She is currently working on her professional designation of Certified Housing Asset Manager.

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### **Arnesse Brown, Corporate Relations Manager**

Arnesse Brown has over 25 years of experience in program management, planning, development and implementation. A former investment and corporate banker, she was approached to take on the role of implementing a workforce development program for one of the nation's largest transportation projects, the Central Artery Project at United South End Settlements. Later, she was recruited to work at the Federal Reserve Bank of Boston.

In her role at the Federal Reserve Bank, she developed and launched several bank-wide programs, which included diversity outreach and recruitment efforts targeting professionals of color to increase visibility, and identifying qualified candidates for internships and full-time employment. Arnesse was instrumental in developing relationships for the bank with the National Association of Black MBAs and the National Society of Hispanic MBAs. She spearheaded and launched several programs and events including national conferences, symposiums, candidate forums and consumer education seminars, as well as youth, community and employment programs.

While at the Federal Reserve Bank of Boston, she received numerous awards and achievements:

- Selected to develop, lead and implement a community engagement program
- Led and developed the project plan for the South End Lower Roxbury Children Thrive Initiative, a component of the Boston Children Thrive Initiative
- Earned her Consulting Certification, Linkage, Inc. from the University of Chicago
- Obtained her Community Development Finance Certification
- Received the President's award for taking the lead role in executing the bank's annual Federal Reserve System's Community and Economic Research Conference, which attracted over 700 attendees
- Selected to be the Federal Reserve Bank of Boston's 2002 Black Achiever and 2004 Fellow for the Partnership, Inc.
- Published three articles for *Communities and Banking*, a Federal Reserve Bank of Boston Publication:
  - *Y2K and Its Impact on Small Businesses*, Summer 1999
  - *The Venture Center: Venture Capital for Women Owned Businesses*, Winter 1998
  - *The Good News Garage: Getting People Moving in Rural Vermont*, Fall 1998

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## Tenants' Development Corporation

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She was brought back into the non-profit world by United South End Settlements, where she took over the Senior Director's roles overseeing the Arts, Education and Community Programs. In this role, her primary responsibility was the development and implementation of new and expanded arts, education, senior and community engagement programming. Arnesse was recently selected to lead one of the City of Boston and United Way of Massachusetts Bay and Merrimack Valley's most aggressive initiatives, the "Thrive in Five, Boston's Promise to its Children" for the South End/Lower Roxbury neighborhood of Boston.

She was the Vice President of Administration of the National Black MBA Association's Boston Chapter and served in this role for over eight years. Arnesse has had the opportunity to serve under three Boston Chapter Presidents, and while in this leadership role, she assisted in the growth and increased visibility of the chapter, launching a number of professional development events and initiatives. She looks forward to working with the current president and board in furthering the growth of the Boston Chapter.

Arnesse holds a Certificate in Computer Science as well as a B.S. in Business Management and Political Science from Lesley University, and is currently pursuing a Master of Science in Corporate and Organizational Communication/Policy and Law Degree at Northeastern University.

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## Tenants' Development Corporation

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### Programs

TDC is committed to bringing together the assets of TDC residents, neighbors, community leaders and non-profit organizations to promote the well-being of youth, families, adults and seniors that are underserved or at risk by offering services and programs that inspire personal growth, empowerment and enrichment. We believe that building a strong community that supports residents and neighbors must begin by improving the safety, living conditions, health, education, lifestyle and economic conditions of low- to moderate-income TDC residents and neighbors in Boston's historic South End and Greater Boston.

Our comprehensive approach to addressing the needs of our target population includes, but is not limited to:

- **The Peer Leaders Program**, which is an after-school enrichment and leadership program designed to train young leaders and to inspire youth involvement in our community. The program provides various leadership development opportunities to TDC's youth residents and youth from the South End and Lower Roxbury neighborhood and beyond. The youth are exposed to academic tutoring assistance, job skill training, art and culture and technology.
- In partnership with American Student Assistance and the United Negro College Fund, we have a **Scholars' College Prep Program** where youth from the area have the opportunity to assess their skills and strengths while learning about "college life" from the various workshops and guest speakers.
- **The Arts and Culture Program**, from youth artists, to dance and recital performances, plays a very important role in the lives of our youth and allows them to pursue their passions.
- Building confidence, gaining the ability to manage disappointment in healthy ways and discipline is achieved through our **Martial Arts Class**.
- We also offer workshops for adults about finance, health and wellness, providing leadership opportunities, civic engagement, education, tax and financial management.
- For our most active and most vocal participants, our seniors who participate in the recently acquired senior services programs from the United South End Settlements, the City of Boston/Kit Clark Lunch and Fitness program, we have **Connections**, a health and wellness program.
- The City of Boston's **Senior Homeowner Services Program** is run to assist low- and moderate-income homeowners to affordably manage minor and major repairs and home improvements that address an immediate threat to health and safety. The program also addresses some aging in place issues for seniors.
- Our **Road Warriors** is a group of seniors who love to travel and go on multiple trips throughout the New England area to various grocery stores and retail shopping malls, musical and arts performances and more.
- TDC's **Senior Services Program** also offer programs, services and activities that ensure that seniors are living active, healthy and engaging lives. We believe inclusion of the elderly population in community, cultural, and recreational activities builds a healthy spirit, mind and body for all.



## Tenants' Development Corporation

### Programs and Events

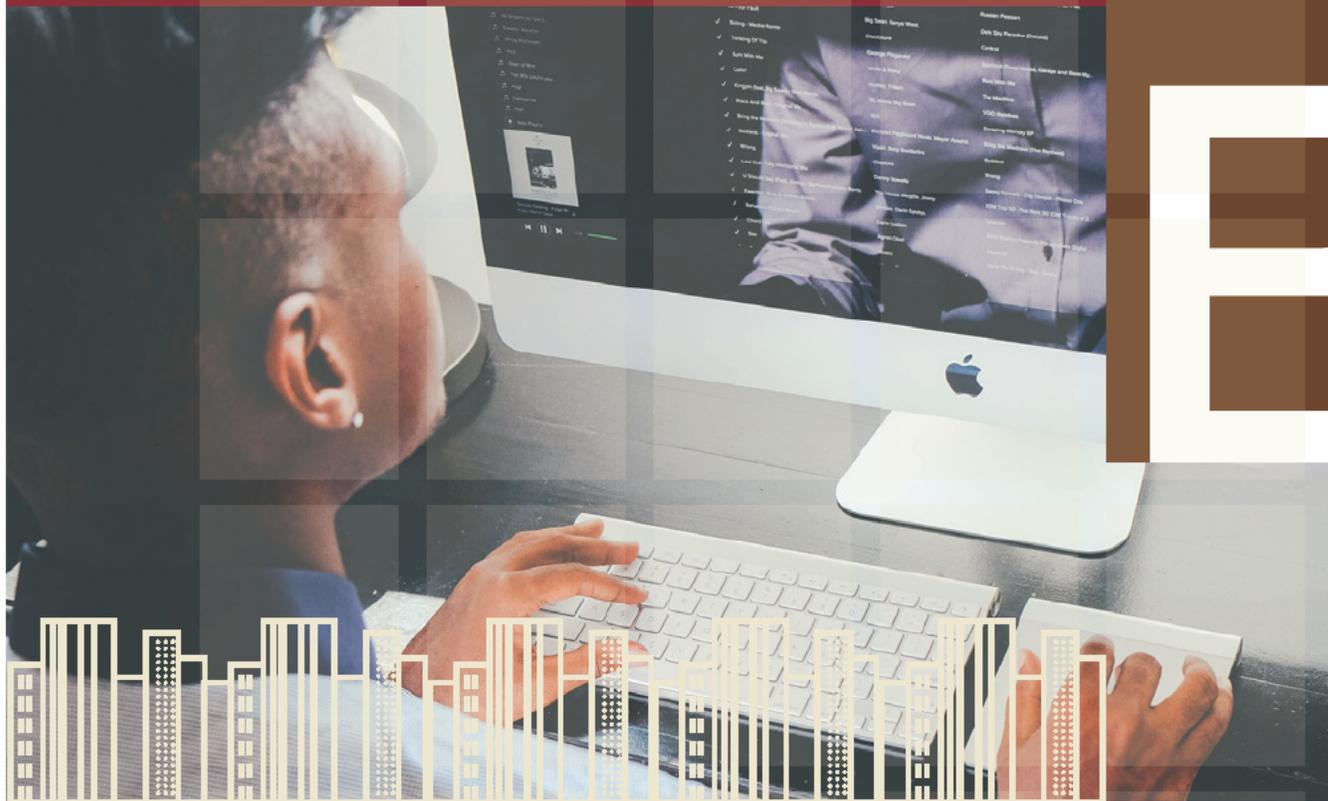
TARGET POPULATION	CURRENT PROGRAMS AND EVENTS	FUNDING SOURCE
<b>Youth</b>	Peer Leaders	Masshousing RAP Program
	Ballet and Hip-Hop Dance Classes	Resident Services
	The Scholars College Prep Program	Resident Services/American Student Assist.
	Karate Classes/Program	Resident Services
	TDC Summer Works	Resident Services
<b>Seniors</b>	Connections: Senior Lunch Program	City of Boston/Kit Clark/MassHousing
	Connections: Health & Wellness Fitness	Resident Services/MassHousing
	Retail, Social & Grocery Shopping Activities	Resident Services
	Senior Homeowners Service Program	City of Boston/Private Funders
	Funday Fridays	Resident Services
	Dana Farber, Open Doors to Health	Dana Farber/Private
<b>Adults &amp; Families</b>	Art Recreational	Masshousing TAP Program
	Finance and Consumer Education	Partnership
	Thanksgiving Turkey Give-Away	Resident Services/Partnership
	Christmas Celebration	Resident Services
	Women's and Men's Day	Resident Services
	AA Meetings	Resident Services
<b>Communities</b>	National Night Out	Corporate
	Fair Foods	Partnership/Resident Services
	Food Pantry	Partnership/Greater Boston FoodBank
	Local Artists and Vendors Exhibit	Partnership/Corporate
	Basketball Tournaments	Residence Services/Partnership
<b>Technology</b>	Computer Lab/Steadfast	Resident Services/Corporate
	Tech Goes Home	City, State, Private Funding
<b>Partnerships</b>	Boston Alliance for Community Health	In-Kind Donations
	Dana Farber, Open Doors to Health	In-Kind Donations
	Fair Foods	In-Kind Donations
	Massachusetts College of Art and Design	In-Kind Donations
	MassHousing	In-Kind Donations
	Security Service Specialist (Triple SSS)	In-Kind Donations
	South End Healthy Boston	In-Kind Donations
	South End/Lower Roxbury Safety Taskforce	In-Kind Donations



Tenants' Development Corporation

**New Programs and Events, Partnerships and Previous**

TARGET POPULATION	PROGRAM/EVENT	FUNDING SOURCES	NEW	PREVIOUS
<b>Youth</b>	Boston Police Youth Program	Boston Police/City, State, Private Funding	X	
	Youth Enrichment Services (YES)	City, State, Private Funding	X	
	No Books No Balls (Basketball)	City, State, Private Funding	X	
	First Tee (Golf)	City, State, Private Funding	X	
	The Bass (Baseball)	City, State, Private Funding	X	
	South End Soccer	City, State, Private Funding	X	
	Youth Enrichment Services (YES)	City, State, Private Funding	X	
	Vibrant Boston	City, State, Private Funding	X	
	Basketball Tournaments and Clinics	City, State, Private Funding	X	X
	Harvard University Keylatch Program	Harvard/Private Funding/ City,State		X
	Teen Summit	Resident Services		X
<b>Events &amp; Community Rentals</b>	Community Conferences	City, State, Private Funding		
	Community Rentals	Non-Profits, Churches, Local Businesses		
	Health and Wellness Fairs and Others	Non-Profits, Churches, Local Businesses		



# B

## QUALIFICATIONS

- Klein Hornig LLP
- R.E. Goldstein Development Consulting
- Sharon Loewenthal Real Estate Development Consulting
- Davis Square Architects, Inc.
- Delphi Construction
- K. Weill Consulting Group, LLC





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### **Introduction to Klein Hornig LLP**

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

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

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

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

### **New Market Tax Credit Transactions**

An important piece of community revitalization involves commercial spaces, community facilities, and rehabilitating our historic buildings. Our clients are actively utilizing New Markets Tax Credits (NMTCs), State and Federal Historic Tax Credits (HTCs), and Renewable Energy Tax Credits – often in combination with each other and with other tax credit incentives – in their development projects. Klein Hornig lawyers represent developers, tax-exempt organizations, tax credit investors, leverage lenders, qualified active low-income community businesses (QALICBs), and community development entities

(CDEs) in structuring and closing transactions utilizing these tools combined with conventional (and unconventional) mortgage financing.

Our past NMTC projects have included charter schools, health centers, adult education facilities, community centers, YMCAs, Boys and Girls Clubs, commercial and retail space, performing arts centers, a science center for a small college, and more. Our past HTC projects have included the rehabilitation of historic theatres, hotels, brownstones, and mill buildings. In addition to complex tax structuring, these projects often involve challenging real estate issues, including multiple layers of leases, air rights and condominiums. While we always aim for the simplest possible tax and real estate structure that meets the project's needs, Klein Hornig's extensive experience is critical in designing – and implementing – the complex structures needed to develop these important projects.

Some of the Boston transactions our attorneys are presently working on or have participated in are listed below.

**Rehabilitation of Sewall Building, Boston MA:** Klein Hornig represented the Dimock Center in the NMTC-financed rehabilitation of the Lucy Sewall Acute Treatment Center, a treatment center for addicts in need of urgent care. The Dimock Center is an institution of long-standing importance in Boston's Roxbury neighborhood. Founded in 1862 by Dr. Marie Zakrzewska as the New England Hospital for Women and Children. Dimock was the first hospital in New England opened and operated by women for women, and only the second in the country. Noted prominently for its role in the history of women in medicine, Dimock became a leader in American healthcare. It was the only hospital in New England that combined medical, surgical, obstetrical, and pediatric services in a single institution. The Dimock Center was the first hospital in the country to establish a school for nurses and graduated America's first trained nurse, Linda Richards in 1873, and the country's first black nurse, Mary Eliza Mahoney in 1879. The NMTC financing involved 2 CDEs, Capital One and MassDevelopment, with Century Bank as senior leverage lender. Capital One is also the NMTC investor.

**Jackson Commons, Boston MA:** We represented Urban Edge in the development of Jackson Commons, the first Urban Edge project in the multi-phased multi-developer Jackson Square redevelopment effort. This project houses Urban Edge's headquarters on the ground floor and includes 37 rental apartments on the upper stories. The project, which was funded by LIHTC, NMTC and State HTC, incorporates the historic F.W. Webb Building, and utilized a complex condominium structure to facilitate the use of the different kinds of credits. MHIC is the NMTC allocate, and Citizens Bank is both the LIHTC investor and the NMTC investor. Funds leveraged through the NMTC structure include State housing subsidy (to fund the 8 rental units included within the NMTC project) and MassDevelopment Brownfields funds. Massworks grant funds were also used for site work outside the NMTC structure.

**270 Centre Street and Blessed Sacrament, Boston MA:** Klein Hornig served as NMTC counsel to the Jamaica Plain Neighborhood Development Corporation ("JPNDC") in connection with the ground-floor retail element of 270 Centre Street in Jamaica Plain, Boston, and also served as counsel to the joint venture of the JPNDC and New Atlantic Development Corporation in the overall redevelopment of the former Blessed Sacrament campus in Jamaica Plain, which included an NMTC component along with



several residential projects financed with low-income housing tax credits and/or so-called TCAP or TCX funding in lieu of low-income housing tax credits. We closed several phases, including the combined NMTC financing of the 270 Centre Street and Blessed Sacrament commercial projects. This project involved the leveraging through the NMTC financing structure of City of Boston Section 108 funds. LISC was the NMTC allocatee and US Bancorp the investor.

**Excel Academy Charter Schools, Boston MA:** We recently assisted Excel Academy Charter Schools and its affiliated foundation with the acquisition and development of a new high school facility financed with tax-exempt bonds with the anticipation of future additional NMTC financing.

**Brooke Charter Schools, Boston MA:** We have closed several different financings on three Boston campuses for this Massachusetts public charter school, most recently a second NMTC financing which was twinned with Federal and State Historic Tax Credits, and have represented the school and its affiliated foundation on related matters, including obtaining 501(c)(3) status, public procurement, environmental matters and construction disputes. In the most recent financing, National Trust Community Investment Corporation allocated NMTC and J.P. Morgan Chase was the NMTC investor. Boston Private Bank & Trust Company provided the financing which was leveraged through the NMTC transaction. East West Bank was the Federal Historic Tax Credit investor.

**Joseph M. Smith Community Health Center, Alston-Brighton MA:** We represented Joseph M. Smith Community Health Center in the redevelopment of property owned by the Commonwealth of Massachusetts and ground leased to the health center for use as a 48,000 square foot community health center. The project involved grant funds from HRSA and NMTC allocation from MassDevelopment, Capital Impact, the Nonprofit Finance Fund and J.P. Morgan Chase. Chase was also the investor. Property and Casualty Initiative, LLC and RBS Citizens, N.A. made leveraged loans.

**Renovation of Goodwill Headquarters, Boston MA:** Klein Hornig represented Morgan Memorial Goodwill Industries, Inc. in the financing of the rehabilitation of Goodwill's 100,000 square foot headquarters facility in Boston, MA. The facility includes a job training center, career center, administrative offices, a large atrium used for multiple programming purposes, a commercial kitchen used in connection with a food service training program, a retail store, and a distribution center for sorting donated goods and training program participants. We formed a new single-purpose 501(c)(3) corporation to serve as the QALICB. At closing, the parent corporation conveyed title to the QALICB entity, which immediately leased the property back to the parent, which operates its programs at the site. The upper-tier financing included a senior leverage loan from Wainwright Bank and a junior leverage loan from the nonprofit parent, the latter being sourced with proceeds of the sale of the property and charitable dollars, along with NMTC equity. A "one-day loan" from Wainwright was necessary to bridge the sale proceeds.

**Huntington Avenue YMCA, Boston MA:** Klein Hornig attorneys served as NMTC counsel to the YMCA of Greater Boston in connection with a \$30 million renovation of its Huntington Avenue facility, the oldest YMCA in the United States. There were two NMTC closings, several months apart, featuring one CDE at the initial closing and two additional CDE's at the second closing. The same investor purchased the credits at each closing. The YMCA also served as a leverage and direct lender using the



proceeds of tax-exempt 501(c)(3) to fund its loans. The second closing featured the refinancing of direct loans with the proceeds of QLICs. Legal services also included obtaining a determination letter for a tax-exempt support organization which we formed to be the QALICB, to own the facility and to lease it to the YMCA.

**Bornstein & Pearl Food Production Small Business Center, Boston MA:** We represented Dorchester Bay Economic Development Corporation in the redevelopment of the former Pearl Meat plant in Boston’s Dorchester neighborhood as a 36,000 square foot shared-use commercial kitchen and multi-tenant food production small business center. Among the various sources leveraged through the NMTC structure were City of Boston Section 108 funds, Choice Neighborhoods funds, a Massworks grant and various Federal and State grant funds. The project received NMTC allocation from both LISC and PNC Bank, and PNC Bank was also the investor.

**Dudley Square Center, Boston MA:** Klein Hornig attorneys served as NMTC counsel to the City of Boston and Section 501(c)(3) affiliates for the financing of a 175,000 square foot state-of-the-art facility in the former Ferdinand’s building to be leased to the City of Boston, which will house the Boston School District administrative offices. The project has received to date more than \$40 million of NMTC financing from four CDE’s including Bank of America which is also the NMTC investor. Our lawyers formed and obtained determination letters for two Section 509(a)(3) support organizations.



**JOSEPH S. LIEBER**

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**PRACTICE AREAS**

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

**EDUCATION**

University of Michigan Law School, JD, 1996, *magna cum laude*  
University of Michigan, BA, 1986, *Class Honors*

**EXPERIENCE**

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

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

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

**BAR ADMISSIONS**

- Massachusetts



## TRANSACTIONS

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



- Represented several Massachusetts municipalities and regional HOME consortia in connection with HOME funding to developers of affordable housing and the negotiation of intercreditor arrangements with other project funders
- Represented national developer in multi-phased HOPE VI revitalization of public housing in Frederick, MD
- Represented partnership of for-profit developer and Boston CDC in connection with three successive rental phases of a multi-phased redevelopment of a large former State hospital site in Boston (Mattapan), MA

#### ACTIVITIES

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

#### EVENTS

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

**DANIEL J. KOLODNER**

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**PRACTICE AREAS**

- Historic Rehabilitation Tax Credits
- New Markets Tax Credits
- Low-Income Housing Tax Credits
- Tax Credit Finance & Syndication
- Renewable Energy Tax Credits

**EDUCATION**

Georgetown University Law Center, JD, 2001  
Harvard University, BA, 1997, *cum laude*

**EXPERIENCE**

Dan Kolodner focuses his practice on community development projects utilizing tax credit financing. He specializes in complex deal structuring, combining tax incentives – such as New Markets Tax Credits, Historic Tax Credits, Low-Income Housing Tax Credits, and Renewable Energy Tax Credits – with state tax credits and other financing sources in a variety of community development transactions. He regularly represents both for-profit and nonprofit developers, qualified low-income community businesses (QALICBs), and community development entities (CDEs), as well as institutional tax credit investors. Dan regularly shares his expertise at conferences on both the national and local level, speaking on the topics of Historic Tax Credits, New Markets Tax Credits, Low-Income Housing Tax Credits and other Federal and state tax incentives.

In 2014 Dan was awarded the Paul E. Tsongas Award by Preservation Massachusetts for his work on historic tax credit projects across Massachusetts. The Paul E. Tsongas Award is given annually and honors “those who have played an extraordinary role in promoting historic preservation in the Commonwealth of Massachusetts.”

Dan was also recently recognized by *The National Law Journal* as a “Boston Rising Star”. The Boston Rising Stars are selected as the region’s 40 most promising lawyers under age 40 who have “wielded influence in their practice areas, demonstrated strong leadership qualities, developed unique practice niches, showed expertise in litigation or transactional work, and committed themselves to pro bono work.” Dan was honored for his community development legal practice and his pro bono work.

Before joining Klein Hornig, Dan was an attorney in the Syndication Department at Nixon Peabody, where he focused his practice on community development finance.

**BAR ADMISSIONS**

- Massachusetts



#### REPRESENTATIVE TRANSACTIONS

- Represented multiple community health centers as QALICB/Borrower counsel in New Markets Tax Credit transactions, including a NMTC transaction utilizing a “targeted population” transaction structure
- Represented a New York-based bank in connection with Historic Tax Credit and New Markets Tax Credit investments throughout Upstate New York
- Represented a national hotel developer in connection with the rehabilitation of a large historic hotel in Portland, ME, utilizing both Federal and state Historic Tax Credits
- Represented Boston Properties in connection with the development of the Atlantic Wharf project, the historic rehabilitation of the former Russia Wharf Building along the Rose Kennedy Greenway in Boston, MA
- Currently representing People Incorporated Financial Services, a community development entity based in Virginia, in connection with multiple New Markets Tax Credit projects throughout Virginia, West Virginia, Kentucky, North Carolina, South Carolina, and Tennessee
- Represented a Dallas-based developer rehabilitating a historic building in downtown Dallas into residential apartments, utilizing the HUD 221(d)(4) mortgage program
- Currently representing multiple developers utilizing Federal Historic Tax Credits, Low-Income Housing Tax Credits and related State Tax Credits in Massachusetts, New York, Kansas, Connecticut, Rhode Island, Maine and North Carolina

#### ACTIVITIES

- Preservation Massachusetts, *Executive Committee and Board of Directors*
- Lawyers Clearinghouse on Affordable Housing and Homelessness, *Volunteer*

#### EVENTS

- “Finance 101” 2015 Massachusetts Historic Preservation Conference – August 2015
- “Legal Issues in Historic Preservation: Preservation Restrictions and Other Tools” 2015 Historic Preservation Conference – August 2015
- “Real Estate Development Tax Credits: Using Tax Incentives to Develop Challenging Projects, with a focus on Low Income Housing Tax Credits, Historic Tax Credits, New Markets Tax Credits and Renewable Energy Tax Credits” Lorman Education National Webinar – September 2014
- “Using Tax Incentives to Invest in Historic Properties, including a focus on the 2014-12 Revenue Procedure” Lorman Education National Teleconference – January 26, 2014
- "Historic Tax Credits: Federal Issues for Investors and Developers," Strafford Publications CLE/CPE national webinar – November 2012
- "Laying the Foundation: The Basic Tax Rules Governing Historic Tax Credits," Housing Tax Credits 101 plus Historic Tax Credits Conference, Boston, MA – April 2012



- "Using Tax Incentives to Invest in Historic Properties," Lorman Education National Teleconference – February 15, 2012
- "Getting it Built: Using Historic Tax Credits, New Market Tax Credits and Solar Tax Credits," Build Boston 2011, Boston, MA – November 2011
- "Introduction to Historic Tax Credits (with a focus on tax-exempt issues)," Historic Tax Credits for Developer's Conference, Philadelphia, PA – October 2011
- "Introduction to Historic Tax Credits (with a focus on tax-exempt issues)," Historic Tax Credits for Developer's Conference, Philadelphia, PA – October 2010
- "Combining Green Buildings and Historic Tax Credits: A Roundtable Discussion," The Municipal Art Society of New York City, New York, NY – April 2010
- "Intro to Tax Credits and Tax-Exempt Use Issues," National Conference of State and Historic Preservation Officers, National Historic Tax Credit Conference, Washington, DC – March 2010
- "Main Street Revitalization: New York State Tax Incentives," American Planning Federation (Upstate NY Chapter), Annual Conference – October 2009
- "The Tax Rules Governing Historic Tax Credits," Using Historic Tax Credits in New York Conference, New York, NY, June 2009
- Guest Lecturer, "New Markets Tax Credits and Real Estate," MIT Center for Real Estate, Boston, MA – May 2009
- "The Nuts and Bolts of Syndication: Historic Tax Credits," Traditional Building Exhibition and Conference, Boston, MA – March 2009
- "Combining Historic Tax Credits and Low-Income Housing Tax Credits," Housing Tax Credits 101 Conference, Boston, MA – October 2008



## **Robert E. Goldstein**

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### **EDUCATION**

1981	M.S. Urban Planning, Columbia University New York City, New York
1973	B.A. Social Science, Hampshire College Amherst, Massachusetts

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### **EMPLOYMENT**

1989 - Present	Principal, R.E. Goldstein Development Consulting Belmont, Massachusetts
2008 - Present	Executive Director, Franklin Square House Foundation Belmont, Massachusetts
1990 - 2008	Acting Executive Director, Franklin Square House Boston, MA
1984 - 1989	Project Manager, Allston Brighton Community Development Corporation Allston, Massachusetts
1983 - 1984	Coordinator of Housing Rehabilitation Programs, Watertown Community Development Department Watertown, Massachusetts
1982 - 1983	Coordinator of Housing Rehabilitation Programs, Everett Community Development Department Everett, Massachusetts
1981 - 1982	Weatherization Coordinator, Tri-City Community Action Program Malden, Massachusetts
1978 - 1979	VISTA Volunteer, Citizens Housing and Planning Association Boston Massachusetts

1973 - 1979

Various Carpentry and Contracting Positions  
Both in the New Haven Connecticut and  
Boston area

**Robert E. Goldstein**

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## **EXAMPLES OF CONSULTING ACTIVITIES**

The firm of R.E. Goldstein Development Consulting is a sole proprietorship specializing in real estate development consulting and project management for nonprofits. Recent project management consulting on residential projects consists of the rehabilitation of four affordable housing developments in various neighborhoods of the City of Boston. These projects: Warren Avenue Apartments, Mishawum Park Apartments, South End Tenants Housing I, and South End Tenants Housing II comprise nearly 700 units of housing with an aggregate development cost in excess of \$75,000,000.

Recent commercial experience consists of renovating a 50,000 square foot office building in Dudley Square, Roxbury for Madison Park Development Corporation. The Woolworth Building also known as 2201 Washington Street has a total project cost of nearly eight million dollars. The building is the new home to The City's Empowerment Zone Youth Employment Training Program. In addition to EDIC the 2201 Washington Street will house the Private Industry Council, Boston Connects, The City's Office for Business and Development as well as office and performance space for the Citywide Arts In Progress Program.

Other consulting experience consists of training and research in the field of housing asset management. Assignments have consisted of compiling and analyzing data on affordable housing operating costs, designing and teaching workshops on asset management, and working with individual nonprofit housing groups on portfolio management issues.

As a project manager I provide client oriented services for nonprofits such as: project feasibility analysis; hiring and supervision of architects and engineers; hiring and monitoring of property management; development of the scope of renovation work; identifying and negotiating potential sources of financing; obtaining needed public approvals; contractor bidding and selection; value engineering; contract negotiation. Other services include: review and monitoring of work force and hiring requirements; preparation of requisitions; attendance at weekly job meetings; oversight of architects and contractors; attendance at

inspections by regulators and lenders; monitoring the payment process; preparing project status reports for owners; and overall asset management.

## **CLIENT LIST**

- Family Nurturing Center
- Beverly Children's Learning Center
- Community Resources Group
- G.H. Verry Development and Construction
- Granite Cooperative Bank
- Affirmative Investments
- New England Communities Inc.
- Charlesbank Apartments inc.
- Casa Myrna
- City of Chelsea
- Ellis Memorial and Eldredge House
- Franklin Square Apartments
- Franklin Square House
- Ebenezer Homes
- Housing Investments
- Saint Paul's Episcopal Church
- Family Nurturing Center
- Hamilton, Rabinovitz, and Alschuler
- Haley House
- Hope House
- Jewish Community Housing for the Elderly
- National Equity Fund
- Local Initiatives Support Corporation
- Neighborhood Development Support Collaborative
- Dorchester Bay Community Development Corporation
- Boston Council of Elders
- Project Place
- Unitarian Universalist Urban Ministries
- Union Neighborhood Assistance Corporation
- Mishawum Park Tenants Association
- Warren Avenue Tenants Association
- Massachusetts Alliance of HUD Tenants
- Neighborhood Reinvestment Corporation

- Tent City Corporation
- Twin Cities Community Development Corporation
- Warren Apartments Limited Partnership
- Tenants' Development Corporation
- Development Training Institute
- Indianapolis Housing Partnership
- Watertown Community Housing
- Madison Park Development Corporation
- Lincoln Homes Corporation
- YMCA Southcoast
- Aspire Developmental Services

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## **OVERVIEW**

Sharon Loewenthal began consulting in 1985 to provide private, public, and non-profit clients with a broad range of professional services essential to the successful completion of housing and commercial real estate ventures. She has assisted in the development of thousands of newly constructed and renovated housing units, as well as commercial and retail space. Residential developments have included conventional apartments, single family homes, condominiums, and cooperatives, which house special needs, AIDS, homeless, elderly, artist, low and moderate income, and market rate renters and buyers. Commercial and retail developments have centered on the redevelopment of buildings in older urban commercial districts and technical assistance to small businesses. Comprehensive services are currently offered in the areas of site acquisition, market research, feasibility analysis, mortgage underwriting, grant procurement, proforma preparation, project and construction management, fiscal impact studies, refinancing options, retail and commercial leasing, small business plans, and tax syndication analysis.

A successful real estate development starts with a well-planned and designed concept. This concept becomes a reality only through the coordinated efforts of the members of a development team. As a consultant, Sharon Loewenthal offers an understanding of all aspects of the real estate development process. She has served not only as a mortgage underwriter and market researcher for private developers, but also as a full service developer for a variety of non-profit clients. Her skills bridge the gap between the concept and a reality which meets the needs of the client, the market, and the community. She provides a cost-effective way to bring professional real estate skills and coordination to the development process. She specializes in the intricacies and constraints of both public and private regulatory and financing agencies. As a consultant, she strives to create a cooperative environment among development team members, a smooth transition from planning to construction completion and occupancy, and cost conscious financial solutions which meet the client's needs in a timely manner.

Sharon Loewenthal has had over 35 years of experience in the planning, financing, and construction of real estate developments. She became a consultant after having held positions of increasing responsibility in both the public and private sectors related to the development of affordable housing and inner city commercial developments. As Assistant Director of Development for the City of Boston in the early 80's, she created financing programs which are still used today to assist public and private developers with their inner city ventures. As a development consultant, she has continued her efforts in the formulation of innovative solutions to the problems and obstacles encountered by real estate ventures.

**Sharon Loewenthal**  
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**RESUME**

**DEVELOPMENT CONSULTANT**

1985 to present

Principal

Founded real estate consulting firm which provides a broad range of services essential to the successful completion of residential, commercial, and retail developments for private, public, and non-profit clients. Comprehensive services are offered in the areas of acquisition and site selection, construction monitoring, development team coordination, feasibility studies, financial analysis, fiscal impact studies, grant applications and fundraising, market research, mortgage underwriting and procurement, proforma preparation, project management and planning, rentup and retail leasing, small business plans, and syndication analysis. Developments have ranged from retail / commercial complexes and infrastructure improvements to conventional apartments, single family homes, condominiums, and cooperatives to special needs, AIDS, homeless, elderly, artist, and low and moderate income housing.

**CARABETTA ENTERPRISES, INC.**

1985 to 1988

Director of Development

Responsible for the redevelopment of a mile of beachfront in Asbury Park, New Jersey. Completed first phase consisting of restoration of historic Berkeley-Carteret Hotel, which was vacant and abandoned for over 40 years into a 248 room luxury hotel, renovation of the retail boardwalk, and 75,000 sf historic Convention Hall. Secured financing, procured all permits and environmental approvals, monitored construction, recruited new exhibitors, conventions and shows, negotiated retail leases, and supervised project completion and initial operations. Completed feasibility analysis of subsequent phases which were to involve the construction of over 3,000 residential rental and condominium units and the renovation of the historic Casino into an aquarium. Also managed new construction of two high-rise, mixed income developments containing 266 rental units and 25% low income occupancy in Malden, MA.

**NEIGHBORHOOD DEVELOPMENT & EMPLOYMENT AGENCY**

1983 to 1985

Assistant Director of Development

Managed and reorganized the Development Division of City's major development agency. Supervised and trained 15 person staff. Created several financing programs, still used today by the City, for residential and commercial developments on City owned tax title and surplus property, as well as privately owned sites. Developed underwriting criteria, implemented innovative loan agreements with local banks, negotiated loan terms, coordinated closings with private conventional lenders, and instituted system for monitoring loan portfolio and regulatory compliance. Committed over \$20 million in public resources to both private and non-profit developers. Assisted neighborhood organizations in the development of redevelopment strategies. Consistently awarded increases in all financing programs in recognition of the department's strong performance in meeting the expenditure and policy goals of the agency.

**BOSTON FINANCIAL GROUP**

1981 to 1983

Portfolio Manager

Analyzed the financial operations of 100 residential and commercial real estate developments nationwide which were syndicated by BFG. Monitored and projected each development's performance with respect to revenues, expenses, cash flow, and tax benefits. Projected tax impacts of sale and resyndication proposals to the limited partners. Counseled managing general partners of troubled real estate developments as to necessary changes in management policy or practices.

**MASSACHUSETTS HOUSING FINANCE AGENCY**

1979 to 1981

Mortgage Officer

Performed mortgage underwriting of prospective real estate developments. Conducted extensive financial analysis in conjunction with management and design staff members, as well as investment counsel and Board members. Negotiated mortgage financing terms, coordinated loan closing, monitored construction, and assisted in rent up. Also responsible for negotiating workout agreements for financially troubled real estate developments to resolve operating and compliance problems. Analyzed the effects of various workout options on the future tax shelter benefits to the syndicated partnerships. Monitored the implementation of the approved workout plan by owners, property managers, and syndicators.

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**OFFICE OF STATE PLANNING**

1978 to 1979

Regional Liaison

Served as a liaison between western Massachusetts, the Governor, and the Development Council on major commercial and residential real estate developments. Coordinated the efforts of local, state, and federal agencies to expedite the development of key downtown commercial and residential real estate ventures. Encouraged private developers to relocate their real estate developments in downtown revitalization districts in older urban centers throughout the state.

**EDUCATION**

**HARVARD UNIVERSITY - KENNEDY SCHOOL OF GOVERNMENT**

Cambridge, Massachusetts

Master of Public Administration

Concentration in City and Regional Planning

Awarded Environmental Protection Agency full scholarship through competition.

**DARTMOUTH COLLEGE**

Hanover, New Hampshire

Bachelor of Geology / Urban & Regional Studies

Minor degree program in Environmental Science

Cum laude & Dean's list honors

Dartmouth Alumni Club past president

**PROFESSIONAL AFFILIATIONS**

Citizens Housing & Planning Association (CHAPA)

Massachusetts Board of Registration of Real Estate Brokers

Accreditation Council for Accountancy and Taxation (ACAT)

Accredited Tax Advisor (ATA) & Accredited Tax Preparer (ATP)

Certified Financial Planner (CFP®)

Chartered Financial Consultant (ChFC®)

Chartered Life Underwriter (CLU®)

Certified Mutual Fund Specialist (CFS)

National Association of Enrolled Agents (NAEA)

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## **CLIENTS**

### **Private Developers**

Abrams Management Company, Boston, MA  
A. J. Lane Corporation, Natick, MA  
Assets Resolution Corporation, Washington, DC  
Bergmeyer Associates, Inc., Boston, MA  
Brownstone Development, Boston, MA  
Carabetta Enterprises, Inc., Meriden, CT  
Cornerstone Corporation, Westwood, MA  
Crosswind Enterprises, Inc., Boston, MA  
Crowninshield Management Corporation, Peabody, MA  
Depot Village, LLC, Hanson, MA  
Development Group, Inc., Newton, MA  
Diversified Funding Incorporated, Boston, MA  
E. Denis Walsh & Associates, Boston, MA  
Fafard Real Estate & Development, Inc., Ashland, MA  
Edward A. Fish Associates, Inc., Boston, MA  
First City Development, Beverly, MA  
Fox Properties, Weymouth, MA  
Frontier Enterprises, Inc., Boston, MA  
GBI Corporation (formerly Endeavor, Inc.), Newton, MA  
George H. Verry Company, Pembroke, MA  
The Glynn Company, Boston, MA  
Hamilton Development Partners, LLC  
H. Levenbaum Realty Inc., Boston, MA  
H. J. Davis Development Corporation, Newton, MA  
JDJ Housing Development, LLC, Osterville, MA  
Jefferson Development Partners, LLC, Taunton, MA  
John T. Eller & Associates, Boston, MA  
Long Associates, Boston, MA  
McGregor and Associates, Boston, MA  
McNeil Real Estate Group, Inc., Dedham, MA  
Meredith Management Corporation, Newton, MA  
Mount Holyoke Management LLC, Holyoke, MA  
National Development of New England, Newton, MA  
New Boston Housing Enterprises, LLC, Boston, MA  
Nordblom Company, Burlington, MA  
PADCO, Inc., Washington, DC  
Parencorp, Brookline, MA  
Paul Parks & Associates, Boston, MA  
Peabody Properties, Inc., Quincy, MA  
Princeton Properties, Inc., Lowell, MA  
Quincy Associates, Quincy, MA  
Quinn Associates, Peabody MA  
Related Housing, Boston, MA  
Research Triangle Institute, Washington, DC  
Robert F. Walsh & Associates, Boston, MA  
Stockard & Engler, Cambridge, MA  
Sullivan Properties, Inc., Boston, MA  
Sunset Properties LLC  
Taylor Properties, Boston, MA  
The Druker Company, Ltd.  
The Harbor Companies, Swampscott, MA  
Tise Diamond Associates, Boston, MA  
Universal Properties, Newton, MA  
Urban Access Group, Boston, MA  
Weston Properties Corporation, Wellesley, MA

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Winn Development Company, Boston, MA  
Windale Developers, Inc., Boston, MA  
York Bay Development Corporation, Boston, MA

### **Non-profit Organizations**

AIDS Action Committee of MA, Boston, MA  
Allston Brighton CDC, Boston, MA  
Artistspace, Inc., Boston, MA  
Asian American Civic Association, Boston, MA  
Bank of America CDC, Boston, MA  
Better Homes for Springfield, Inc., Springfield, MA  
B'nai Brith Housing New England, Boston, MA  
Boston Carpenters Union, Boston, MA  
Boston Center for the Arts, Boston, MA  
Boston Citywide Land Trust, Boston, MA  
Brickbottom Artists Development Corporation, Somerville, MA  
Bromley Heath Tenant Management Committee, Boston, MA  
Caritas Communities, Boston, MA  
Central Boston Elder Services, Boston, MA  
Charles H. Farnsworth Housing Corporation, Boston, MA  
Chinese Consolidated Benevolent Association, Boston, MA  
Chinese Economic Development Council, Inc., Boston, MA  
Cochituate Homes Cooperative, Inc.  
Codman Square NDC, Boston, MA  
Committee to End Elder Homelessness, Boston, MA  
Compass School, Boston, MA  
Cooperative Services, Inc, Malden, MA  
Council of Elders Housing Corporation, Boston, MA  
Covenant House Initiatives of B'nai B'rith, Boston, MA  
Elizabeth Stone House, Boston, MA  
Fellowship Realty Corp. of Massachusetts, Inc., Lincoln, RI  
Fenway CDC, Boston, MA  
Fenway Studios, Inc., Boston, MA  
Fields Corner CDC, Boston, MA  
Fort Point Arts Community, Boston, MA  
Forward, Inc, Boston, MA  
Franklin Square Apartments, Inc., Boston, MA  
Girls, Inc., Lynn, MA  
Grace Community Church, Boston, MA  
Greater Boston Chinese Golden Age Center, Boston, MA  
Greater Lawrence Community Action Council, Inc., Lawrence, MA  
Hale-Barnard Corporation, Boston, MA  
Home City Housing Development Corporation, Springfield, MA  
Homeowners Rehab, Inc., Cambridge, MA  
Hope House, Inc., Boston, MA  
Housing Assistance Corporation, Hyannis, MA  
Housing Corporation of Arlington, Arlington, MA  
Interseminarian Project Place, Boston, MA  
Jewish Community Housing for the Elderly, Boston, MA  
Kwong Kow Chinese School, Boston, MA  
La Alianza Hispana, Inc., Boston, MA  
Lena Park CDC, Dorchester, MA  
Liberty Affordable Housing, Inc., Rome, NY  
Local 254 of Service Employees International Union, Boston, MA  
Main South CDC, Worcester, MA  
Marlborough CDC, Marlborough, MA  
Medfield Affordable Housing Corporation, Medfield, MA  
Merrimack River Valley House, Lowell, MA  
Millers River Self-Help Network CDC, Athol, MA

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Milton Residences for the Elderly, Inc., Milton, MA  
Mishawum Park Tenants Association, Boston, MA  
Mission Hill Artists Housing Cooperative, Boston, MA  
Mission Hill Neighborhood Housing Services, Boston, MA  
Mt. Pleasant Home, Boston, MA  
Mystic Studios Trust, Boston, MA  
Neighborhood Development Corporation of Jamaica Plain, Boston, MA  
Neighborhood of Affordable Housing, Inc. (NOAH), East Boston, MA  
Newton Community Development Foundation, Newton, MA  
NewVue Communities, Inc., Fitchburg, MA  
Northeastern Connecticut CDC, East Brooklyn, CT  
Nuestra Comunidad Development Corporation, Boston, MA  
On Luck Housing Development, Inc., Boston, MA  
Pine Street Inn, Inc., Boston, MA  
Revere 2000, Revere, MA  
Rogerson Communities, Boston, MA  
Roslindale Village Market Cooperative, Boston, MA  
Rural Homes, Ltd., Danielson, CT  
Salem Harbor CDC, Salem, MA  
South Shore Housing Development Corporation, Kingston, MA  
Social Justice for Women, Inc., Boston, MA  
South Boston Betterment Trust, Boston, MA  
St. Mary's Center for Women & Children, Boston, MA  
Tenants Development Corporation, Boston, MA  
Tent City Corporation, Boston, MA  
The Caleb Foundation, Inc., Swampscott, MA  
The Community Builders, Inc., Boston, MA  
The Planning Office for Urban Affairs, Boston, MA  
Twin Cities Community Development Corporation, Fitchburg, MA  
Urban League of Eastern Massachusetts, Boston, MA  
Vinfen Corporation, Cambridge, MA  
Vineyard House, Inc., Vineyard Haven, MA  
We Care About Homes, Beverly, MA  
WEIR Corporation, Taunton, MA  
Waterfront Area Historic League (WHALE), New Bedford, MA  
Women of Color AIDS Council, Boston, MA  
YMCA Southcoast, Fall River, MA

### **Public & Quasi-Public Agencies**

Alexandria Redevelopment & Housing Authority, Alexandria, VA  
Architectural Conservation Trust, Boston, MA  
Ashland Affordable Housing Committee, Ashland, MA  
Boston Affordable Housing Coalition, Boston, MA  
Boston Housing Authority, Boston, MA  
Boston Redevelopment Authority, Boston, MA  
City of Boston, Assessing Department, Boston, MA  
City of Boston, Public Facilities Department, Boston, MA  
City of Gloucester, Gloucester, MA  
City of Lawrence, Lawrence, MA  
City of Marlborough, Marlborough, MA  
Community Economic Development Assistance Corporation, Boston, MA  
Cooperative Housing Task Force, Boston, MA  
Executive Office of Environmental Affairs, Boston, MA  
Fitchburg Housing Authority, Fitchburg, MA  
Hingham Housing Authority, Hingham, MA  
Holliston Housing Partnership, Holliston, MA  
Local Initiatives Support Corporation (LISC), Boston, MA  
Massachusetts Alliance of HUD Tenants, Boston, MA

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Massachusetts Bays Program, Boston, MA  
Massachusetts Community Development Finance Corporation (CDFC), Boston, MA  
Massachusetts Housing Finance Agency (MHFA), Boston, MA  
Massachusetts Housing Investment Corporation (MHIC), Boston, MA  
Massachusetts Housing Partnership (MHP), Boston, MA  
Medfield Housing Partnership, Medfield, MA  
Medway Affordable Housing Trust, Medway, MA  
National Equity Fund (NEF), Chicago, IL  
Newton Housing Authority, Newton, MA  
Pembroke Housing Authority, Pembroke, MA  
Pew Charitable Trust, Philadelphia, PA  
Town of Ashland, MA  
Town of Blackstone, Blackstone, MA  
Town of Brookline, Brookline, MA  
Town of Chester, Chester, MA  
Town of Dartmouth, Dartmouth, MA  
Town of Holliston, Holliston, MA  
Town of Marlborough, Marlborough, MA  
Town of Medfield, Medfield, MA  
Town of Medway, Medway, MA  
Town of Ware, Ware, MA  
Town of Winchester, Winchester, MA  
Town of Yarmouth, Yarmouth, MA  
Yarmouth Housing Authority, Yarmouth, MA

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## **REPRESENTATIVE DEVELOPMENTS**

### **Union Block, Taunton, MA**

Substantial historic renovation of 26,000 sf ground floor commercial and 36 units of upper story, larger family affordable and market rental housing, including 9 units of rental subsidy for extremely low income homeless.. \$16 million total development cost, including local CDBG/HOME, DHCD HOME, HSF and AHTF, NMTC, 9% and MA LIHTC and federal and state historic tax credits. Proforma projections and financial guidance to development team from award towards closing. Non-profit developer: Neighborhood of Affordable Housing, Inc. (NOAH).

### **BF Brown, Fitchburg, MA**

Substantial historic renovation of the BF Brown Middle School into 55 units of larger family affordable rental housing geared towards those with artistic inclinations with common area studio space and including 14 units of rental subsidy for extremely low income homeless. \$20 million total development cost, including local CDBG/HOME, DHCD HOME, HSF, CATNHP and AHTF, 9% and MA LIHTC and federal and state historic tax credits. Proforma projections and coordination of development team towards closing. Non-profit developer: NewVue Communities, Inc., formerly Twin Cities Community Development Corporation.

### **Carter School, Leominster, MA**

Substantial historic renovation of the Leominster High School into 38 units of larger family affordable rental housing, including 10 units of rental subsidy for extremely low income homeless. \$14.5 million total development cost, including local CDBG/HOME, DHCD HOME, HSF, and AHTF, 9% and MA LIHTC and federal and state historic tax credits. Proforma projections and coordination of development team towards closing. Non-profit developer: NewVue Communities, Inc., formerly Twin Cities Community Development Corporation.

### **Greater Lawrence Community Action Council, Lawrence, MA**

New construction of 20,000 sf child care center to replace existing adjacent facility and 24 units of low income, larger bedroom affordable rental units on two floors above. \$16 million total development cost, including 9% and MA LIHTC, NMTC, local and State HOME, HSF, EEOST and other State resources. Project management, including proforma projections, financing applications, lender and syndication commitments, and coordination of development team towards closing. Non-profit minority developer: Greater Lawrence Community Action Council, Inc.

### **Knitting Mill, Fall River, MA**

Substantial historic renovation of former knitting mill into a 103 unit low and moderate income elderly rental development. \$30 million total development cost, including 9% and MA LIHTC, federal and state historic tax credits, local HOME, and DHCD HOME, HIF, HSF, and AHTF. Ongoing proforma and One Stop preparation, including strategic consulting assistance to project management staff. Non-profit developer: Liberty Affordable Housing, Inc. of Rome, NY.

### **Council Tower II, Boston, MA**

New construction of a 60 unit elderly development behind the existing 144 unit Council Tower. \$19 million total development cost, including MassDevelopment tax exempt bonds, 9% LIHTC, local HOME, and DHCD HOME, HIF, HSF, and AHTF. Project management, including proforma projections and financing applications, as well as coordination of development team. Non-profit developer: Rogerson Communities.

### **Memorial Parish, Springfield, MA & Nueva Vida & South Canal, Holyoke, MA**

Analyzed and projected the future cash flow at each development to support a request for term extension and/or accrued interest forgiveness on outstanding City and State loans on Memorial Parish and Nueva Vida and MHFA and HUD loans on South Canal, including Section 236 decouple, RAD conversion, and resyndication. Transfer of limited partner interests to the current general partner and withdrawal of limited partners. Memorial Parish and Nueva Vida contain 23 and 24 larger bedroom family units originally syndicated by MHIC in 1994 and 1995, respectively. South Canal contains 127 larger bedroom family units originally syndicated by MHIC in 1997. For-profit general partner and management agent: Mount Holyoke Management LLC. Memorial Parish and Nueva Vida closed 2012. South Canal ongoing.

### **Oxford Ping On, Boston, MA**

New construction of a 67 unit low income rental development in the heart of Chinatown. \$26 million total development cost, including 4% LIHTC, HOME, HSF, CBH, AHTF, and linkage from The Hudson Group's 120 Kingston Street and 45 Stuart

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Street developments. Project management, including proforma projections, financing applications, lender and syndication commitments, coordination of development team towards closing, construction requisitions and final closing. Non-profit minority developer: Chinese Economic Development Council, Inc. Completed 2017.

**51-53 & 55-57 Beals Street, Brookline, Boston, MA**

Substantial renovation of two lodging houses with 31 SRO units of permanent housing for the chronically homeless. \$9 million total development cost, including 9% and MA LIHTC, local CDBG, HOME, and AHT and DHCD HOME, HIF, HSF, AHTF, HPSTF and MRVP rental subsidies. Project management, including proforma projections, financing applications, lender and syndication commitment, and coordination of development team to closing. Non-profit developer: Pine Street Inn, Inc. Completed 2017.

**Harbor Lofts Apartments, Lynn, MA**  
**King's Beach Towers, Lynn, MA**  
**Tannery II Apartments, Peabody, MA**  
**Wilson Gardens, Lynn, MA**

Refinancing of three developments - Harbor Lofts (358 units of which 210 units are Section 8 and 148 units are former 13A, now market) in Lynn, Kings Beach Towers (183 units of Section 8 elderly) in Lynn and Tannery II Apartments (172 units of Section 8 elderly) in Peabody - for Crowninshield Management Corporation and one development - Wilson Gardens (26 units of Section 8) in Lynn - for The Harbor Companies - under the MassHousing Risk Share with U.S. Treasury Investment Program. Proforma projections and coordination of MassHousing processing through closing of approximately \$52 million in new permanent loans. Completed 2016 & 2017.

**4 Leighton Street, Fitchburg, MA**

Substantial renovation of 12 units and the creation of 3 units of permanent housing for the chronically homeless with substance abuse issues, plus 1 manager unit. \$2 million total development cost, including local CDBG and HOME, HUD McKinney, MHFA CCRI, and DHCD HIF, HSF, HPSTF and MRVP rental subsidies. Proforma projections and coordination of development team towards closing. Non-profit developer: NewVue Communities, Inc., formerly Twin Cities Community Development Corporation. Completed 2016.

**Roxbury Crossing Senior Building, Boston, MA**

New construction of a 40 unit low income elderly rental development as the first phase of the larger \$100 million Parcel 25 redevelopment. \$16 million total development cost, including 4% LIHTC, HUD Section 202, local HOME, NHT, and IDP, and DHCD HOME, HIF, HSF, and AHTF. HUD Section 202 preliminary ranking, FY 2010 NOFA application, HUD DPG application, ongoing proforma and One Stop preparation, syndication negotiations, construction closing, and HUD final closing, including strategic consulting assistance to project management staff. Non-profit developer: Mission Hill Neighborhood Housing Services. Completed 2016.

**10-12 Wales Street, Boston, MA**

Exterior renovation of foreclosed condominium units into 12 units of permanent housing for the chronically homeless. \$3 million total development cost, including only DHCD HPSTF and MRVP rental subsidies. Balance of costs to be funded by Ending Homelessness Capital Campaign. Proforma projections, financing applications, and lender negotiations. Non-profit developer: Pine Street Inn, Inc. Completed 2015.

**St. Mary's Clinic Building, Boston, MA**

Substantial renovation of former clinic building on St. Mary's campus into a 12 unit low income transitional rental development for the homeless, children aging out of foster care, and victims of domestic violence. \$4 million total development cost, including a \$3 million grant from Massachusetts Maternity and Foundling Hospital, DND CDBG/HODAG/HOME and DHCD HPSTF and MRVP. Project management, including proforma projections, financing applications, lender commitments, and coordination of development team towards closing. Non-profit developer: St. Mary's Women and Children's Center, Inc. Completed 2015.

**Hong Lok House, Boston, MA**

New construction of 75 unit mixed financed, low income elderly housing development including an Adult Day Health Center and renovation of three historic facades in the heart of Chinatown. \$36 million total development cost, including former HUD Section 202, MassDevelopment, 4% LIHTC, HOME, NHT, HSF, HIF, CBH, AHTF, and linkage. Proforma projections,

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financing applications and negotiations, as well as coordination of development team as sub-consultant to Rogerson Communities. Non-profit minority developer: Greater Boston Chinese Golden Age Center. Completed 2015.

**Forward, Inc., Boston, MA**

New construction and adaptive reuse of former Elizabeth Carlton House office and service campus in Egleston Square, including three historic buildings into 161 units of low and moderate income elderly, special needs, and working poor rental housing, plus a 5,400 sf Adult Day Health Center. \$45 million total development cost for four separate developments. Proforma projections and financing applications including two HUD Section 202 developments, MHP, FHLB AHP Direct Subsidy, LIHTC, federal and state historic tax credits, and HOME, HIF, FCF, HSF, and AHTF, as well as coordination of development team. Non-profit developers: Rogerson Communities and Forward, Inc. Completed 2015.

**Beacon House, Boston, MA**

Non-profit corporation purchase of 135 unit historic low and moderate income rental development which reached the end of its mortgage and LIHTC terms. Refinance to permit purchase of syndicated limited partnership interests by general partner affiliate of non-profit. \$16.6 million refinance through MHFA first and subordinate mortgages. Proforma projections, One Stop financing application, and coordination of refinancing and closing with MHFA. Non-profit developer: Rogerson Communities. Completed 2014.

**YMCA Southcoast, Fall River, MA**

Renovation and expansion of current 50,000 sf historic facility with new wing for Education Achievement Center. \$13 million total development cost, including NMTC, state historic tax credits, local and DHCD HOME, HIF, and AHTF. NMTC proforma and projections, including strategic consulting assistance as sub-consultant to Robert E. Goldstein Development Consulting. Non-profit developer: YMCA Southcoast. Completed 2013.

**Paige Apartments, Lowell, MA**

Renovation of a 10 unit rental apartment building into housing for youth aging out of foster care. \$1.1 million total development cost, including Boston Community Capital loan, HIF, HSF, AHTF, City of Lowell HOME, private fundraising, and 8 Section 8 Project Based Vouchers. Department of Children and Families will provide supportive services to assist in the transition to independent living. Proforma projections and One Stop financing applications, including strategic consulting assistance to project management staff. Non-profit developer: The Caleb Foundation. Completed 2013.

**Quincy Commons, Boston, MA**

New construction of a 40 unit mixed financed, low income elderly rental development, including 35 HUD Section 202 units, 5 Section 8 units, and 5,500 sf of ground floor commercial space. \$14 million total development cost, including HUD Section 202, HOME, NHT, HIF, CBH, AHTF, OCS, Neighborhood Reinvestment Corporation, Neighborhood Housing Trust, and energy grants. HUD firm preparation, including strategic consulting assistance to project management staff. Non-profit minority developer: Nuestra Comunidad. Completed 2012.

**Whitney House, Leominster, MA**

Renovation of the historic Whitney Building located in the Comb and Carriage neighborhood into 40 unit low income rental development. \$15 million total development cost, including 9% LIHTC, federal and state historic tax credits, HOME, HSF, AHTF, CBH, Neighborhood Reinvestment, MHP permanent loan, and energy grants. Proforma projections and One Stop financing applications. Non-profit developer: Twin Cities Community Development Corporation. Completed 2012.

**Shillman House, Framingham, MA**

New construction of a 150 unit Chapter 40B mixed income rental development for the elderly in Nobscot Village consisting of 90 low and 60 market rental units. Mixed financed with HUD Section 202 Supportive Housing for the Elderly and MHFA tax-exempt bonds with 4% LIHTC, solar, and geothermal credits. \$42 million total development cost. Proforma projections and financing applications including HUD Section 202, MHFA, Priority Development Funds, HOME, HSF, HIF, CBH, and AHTF, as well as co-ordination of development team as sub-consultant to Robert E. Goldstein Development Consulting. Non-profit developer: Jewish Community Housing for the Elderly. Completed 2012.

**Mercantile Wharf Building, Boston, MA**

Refinancing and preservation of a 122 unit historic rental apartment building. \$7 million total development costs, including an MHFA tax-exempt bond mortgage with 4% LIHTC, resyndication proceeds, and Section 8 Enhanced and Project Based

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Vouchers. For-profit developer: Sullivan Properties, Inc. MHFA mortgage and resyndication negotiations, proforma projections, and One Stop financing applications. Completed 2011.

**572 Centre Street, Brockton, MA**

New construction of a 40 unit low income elderly rental development. \$8 million total development cost, including HUD Section 202 and private fundraising: FY 2009 and FY 2010 NOFA application reviews and exhibit preparation. Non-profit developer: CSI Support & Development Services, Inc.. Completed 2011.

**YWCA, Berkeley Street, Boston, MA**

Renovation of 55 SRO rental units and 127 hostel rooms in the historic YWCA in Back Bay. \$28 million total development cost, including Leading the Way, linkage, HSF, HIF, AHTF, and federal and state historic tax credits. Proforma projections and One Stop financing applications, including strategic consulting assistance to project management staff. Joint venture of non-profit and private developers: Caritas Communities & Maloney Properties. Completed 2011.

**Hamilton Canal Lofts, Lowell, MA**

Substantial renovation of former historic mill buildings into approximately 150 rental and condominium units, as well as 50,000 sf of commercial space. \$55 million total development cost, including 9% LIHTC, HOME, HSF, CBH, TOD and federal and state historic tax credits. Proforma projections, feasibility analysis, and One Stop financing applications. Non-profit developer: Bank of America CDC. Completed 2010.

**Girls, Inc., Lynn, MA**

Historic renovation of former Old Lynn High School into a 30,000 sf headquarters and program space for its after school and summer activities. \$10 million total development cost, including NMTC, City of Lynn EDIC, private fundraising, and Wainwright Bank bridge and permanent financing. Proforma projections, financing applications and lender negotiations, as well as strategic consulting assistance to project management staff. Non-profit developer: Girls Incorporated of Lynn. Completed 2010.

**The Community Green, Sandwich, MA**

New construction of a 57 unit low income, Chapter 40B rental development, including 16 units for the formerly homeless. \$15 million total development cost, including 9% LIHTC, HOME, HIF, AHTF, HUD McKinney, local CPA, and energy grants. Community center including culinary arts training, community garden, horse stables, and five single family homes to be completed in later phase. Proforma projections and strategic consulting assistance to project management staff. Non-profit minority developer: Housing Assistance Corporation. Completed 2009.

**461 Walnut Avenue, Boston, MA**

Substantial renovation of the upper two floors of the Barbara McInnis House into 40 SRO units of permanent housing for the chronically homeless. \$13 million total development cost, including 9% LIHTC, HOME, HSF, McKinney and Section 8 Certificate and MRVP rental subsidies. Project management, including proforma projections, financing applications, and lender negotiations. Non-profit developer: Pine Street Inn, Inc. Completed 2009.

**Peter Faneuil House, Boston, MA**

Non-profit general partner purchase of syndicated limited partnership interests in 48 unit low income development that had reached the end of its 15 year LIHTC term. Negotiated and refinanced existing MassDevelopment debt through MHP. Non-profit developer: Proforma projections, One Stop financing application, and coordination of refinancing closing with MHP. PFDG Properties, Inc., an affiliate of Rogerson Communities. Completed 2009.

**68-70 Wyman Street, Newton, MA**

Acquisition of a 10 unit rental development next to Waban Green line stop from private owner using the Build America Bond loan program. \$3.3 million total development cost, including Village Bank loan and City of Newton CPA funds. Project management, initial feasibility analysis, DHCD acquisition approval, coordination with bond and other legal counsel, proforma projections, financing applications and lender negotiations. Non-profit developer: Newton Housing Authority. Completed 2009.

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**Merrimack River Valley House, Lowell, MA**

Renovation of 28 room existing rest home and new construction of a new wing to increase capacity to 48 rooms. \$7 million total development cost. Procurement and placement of tax-exempt bond construction and permanent financing through MassDevelopment. Proforma projections and One Stop financing application. Non-profit developer: Merrimack River Valley House, Inc. Completed 2009.

**Beacon House, Boston, MA**

Non-profit corporation purchase of 135 unit historic low and moderate income rental development that had reached the end of its 15 year LIHTC term. Analyze restructure of existing MHFA debt to permit repurchase of syndicated limited partnership interests by general partner affiliate of non-profit. Proforma projections, One Stop financing application, and coordination of refinancing with MHFA. Limited partners would not agree to refinance. Non-profit developer: Rogerson Beacon Corporation, an affiliate of Rogerson Communities. Completed 2009.

**Chinatown Community Education Center, Boston, MA**

New construction of 6 story, 34,000 sf building in Chinatown as the permanent home for the supportive service programs, a daycare center, and offices of its joint sponsors. \$12 million total development cost, including NMTC and private fundraising. Project management including coordination of sponsors and development team, proforma projections and financing applications including MHIC, NMTC, Wainwright Bank, and private fundraising, and construction monitoring and requisition preparation. Non-profit minority developers: Asian American Civic Association and Kwong Kow Chinese School. Completion 2008.

**Meadowbrook & Prence Grant, Carver & Marshfield, MA**

Joint refinancing of two HUD Section 202 developments consisting of 70 units in total. \$4.2 million mortgage loan through MHFA. Proforma projections, One Stop financing application, and coordination of refinancing closing with HUD and MHFA. Non-profit developers: Housing for Independent Living, Inc. with South Shore Housing Development Corporation. Completed 2007.

**Village Green, Barnstable, MA**

New construction of 148 unit Chapter 40B rental development with 40 units committed to low and moderate income occupancy at or below 80% of median income and 11 units committed to workforce housing at 81% to 120% of median income. Preparation of One Stop application for \$1 million in AHTF assistance. Private developer: JDJ Housing Development, LLC. Completed 2007.

**Vineyard House, Tisbury, MA**

New construction of 39 bed sober house to replace three existing homes. \$5 million total development cost, including private fundraising, HIF, HSF, AHTF and MRVP rental assistance. Project management, proforma projections, financing applications and lender negotiations. Non-profit developer: Vineyard House, Inc. Completed 2007.

**Hope House, Boston, MA**

New construction of 22 unit SRO and 80 bed sober house for Hope House, one of the oldest recovery organizations for male alcohol and substance abusers in Boston. Renovation of an adjacent existing warehouse structure to include the commercial kitchen, dining room, lounge and storage areas. \$11 million total development cost, including HOME, NHT, HIF, AHTF and FHLB AHP. Proforma projections, One Stop application and FHLB AHP grant application as sub-consultant to Robert E. Goldstein Development Consulting. Non-profit developer: Hope House. Completed 2007.

**Waterford Place, Boston, MA**

Non-profit corporation purchase of a low and moderate income development that had reached the end of its 15 year LIHTC term. Negotiated and restructured existing MHFA debt to permit repurchase of syndicated limited partnership interests in 40 unit highrise rental development by general partner affiliate of non-profit. \$7 million in MHFA debt. Original project manager in 1990. Non-profit minority developer: Chinese Consolidated Benevolent Association. Completed 2006.

**A B & W Building, Boston, MA**

Renovation of existing one story 28,000 sf structure into 14,000 sf of commercial space and indoor parking for 40 cars, and new construction above of 40 new apartments for low and middle income occupancy. \$15 million total development cost, including NMTC, LIHTC, OCS, TOD, HOME, NHT, and AHTF. Feasibility analysis, proforma projections, financing applications and negotiations, as well as strategic consulting assistance to project management staff. Non-profit minority developer: Codman

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Square Neighborhood Development Corporation. Completed 2006.

**Oceanside, Marston Mills, MA**

Moderate renovation of a single family home into a 4 bedroom, 3 bath group home for 5 residents who formerly occupied a rental home. Supportive services and operations funded through resident contributions and a Department of Mental Health contract. Staff is available on site 24 hours a day, 7 days a week. \$625,000 total development cost, including FCF and Bank Rhode Island loan. Proforma projections, One Stop application, and coordination with architect of contractor bid process. Non-profit developer: Fellowship Realty Corp of Massachusetts, Inc. Completed 2006.

**Farnsworth House, Boston, MA**

Refinancing of HUD Section 202 development consisting of 75 units in Jamaica Plain. \$5 million mortgage loan through MHFA. Proforma projections, One Stop financing application, and coordination of refinancing closing with HUD and MHFA. Non-profit developers: Charles H. Farnsworth Housing Corporation with Rogerson Communities. Completed 2006.

**Mount Pleasant Home, Boston, MA**

Renovation of 36 existing and new construction of 24 Level IV rest home rooms, including 8,870 sf of office space for Urban Medical Group. \$11 million total development cost, primarily financed with privately placed tax-exempt bonds issued by MassDevelopment. Proforma projections and financing applications including One Stop to City of Boston's HOME and NHT programs and State's HIF and AHTF programs. Non-profit developer: Mount Pleasant Home, Inc. Completed 2006.

**Central Boston Elder Services, Boston, MA**

New construction of a 57 unit HUD Section 202 development for low income elders. \$13 million total development cost, including City of Boston HOME and NHT and state HOME, HIF, AHTF, and TOD. HUD Section 202 review and preparation. Non-profit developer: Central Boston Elder Services. Completed 2006.

**Winter Valley Residences I & II, Milton, MA**

Refinancing of two HUD Section 202 development consisting of 160 units. \$8.5 million mortgage loan through MHFA. Proforma projections, One Stop financing application, and coordination of refinancing closing with HUD and MHFA. Non-profit developers: Milton Residences for the Elderly. Completed 2006.

**Depot Crossing, Wareham, MA**

Closing of Housing Stabilization Fund and Rockland Trust permanent loans subsequent to renovation of 32 unit rental development. Evaluated possibility of \$2.5 million mortgage refinancing through MHFA or Massachusetts Housing Partnership Match Program. Proforma projections, One Stop financing application, development timeline and coordination of refinancing closings with attorneys and lenders. Non-profit developers: South Shore Housing Development Corporation. Completed 2006.

**Project Place, Boston, MA**

New construction of 14 unit SRO development with 18,000 gsf ground floor retail and upper floor office and program space. \$11 million total development cost, including NMTC, HOME, HIF and AHTF. Proforma projections, One Stop and FHLB AHP applications as sub-consultant to Robert E. Goldstein Development Consulting. Non-profit developer: Project Place. Completed 2006.

**Roslindale House, Boston, MA**

Refinancing of HUD Section 202 development consisting of 84 units in Roslindale Square. \$4.7 million mortgage loan through MHFA. Proforma projections, One Stop financing application, and coordination of refinancing closing with HUD and MHFA. Non-profit developers: Roslindale Senior Housing Corporation with Rogerson Communities. Completed 2005.

**Council Tower, Boston, MA**

Refinancing of HUD Section 202 development consisting of 144 units in Egleston Square. \$11 million mortgage loan through MHFA including \$3 million mortgage increase for capital improvements. Proforma projections, One Stop financing application, and coordination of refinancing closing with HUD and MHFA. Non-profit developers: Council of Elders Housing Corporation with Rogerson Communities. Completed 2004.

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**The Meadows, Eastham, MA**

New construction of a single family home, Chapter 40B development on two sites off of Route 6A, consisting of 10 affordable and 8 market rate homes. \$5 million conventional construction financing. Proforma projections, Local Initiative Program site approval application, and negotiation of mortgage terms and sale prices. Private developer: New Boston Housing Enterprises, LLC. Completed 2004.

**Blue Hill Village Apartments, Braintree, MA**

New construction of a three building, Chapter 40B development consisting of 185 units of rental housing with 20% low income occupancy. \$28 million tax-exempt bond permanent loan through MHFA. Proforma projections, One Stop financing application, negotiation of mortgage terms, and coordination of financing closing with MHFA. Private developer: Diversified Funding Incorporated. Completed 2004.

**Beacon Park, Brookline, MA**

Mortgage increase for MHFA Section 236 development consisting of 80 residential rental units, 22,000 sf of commercial space, and a 2 level, 96 space parking garage. \$4.25 million mortgage increase through MHFA. Proforma projections, One Stop financing application, and negotiation of financing terms with MHFA. Private developer: The Druker Company, Ltd. Completed 2004.

**Casselman House, Newton, MA**

Refinancing of HUD Section 202 development consisting of 43 units in Newton Centre. \$2.5 million mortgage loan through MHFA including a \$600,000 mortgage increase for capital improvements. Proforma projections, One Stop financing application, and coordination of refinancing closing with MHFA and HUD. Non-profit developer: Newton Community Development Foundation. Completed 2004.

**Oxford Place, Boston, MA**

Refinancing of 39 unit low income, family development in Chinatown. Processing involved capital needs assessment, Section 8 rental assistance increase and contract renewal, replacement reserve analysis, limited partner approval, and 121A tax agreement negotiations. Proforma projections and financing applications including MHFA One Stop, as well as coordination of refinancing process. Non-profit developer: Chinese Economic Development Council (CEDC). Completed 2003.

**Julian / Woodville New Housing Initiative, Boston, MA**

New construction of 11 homes – 8 duplex, 1 single, and 2 two family (each with a low income rental unit) homes - on scattered sites in the Dudley Triangle area of Roxbury. 4 homes to be sold to households at or below 50% of median and 7 homes to households between 60% and 80% of median. \$3.2 million total development cost. Preparation of HOME and FHLB applications. Joint venture of non-profit and for-profit developers: Dudley Neighbors, Inc. and New Boston Housing Enterprises, LLC. Completed 2003.

**Angela Westover House, Boston, MA**

Renovation and refinancing of an 11 unit occupied congregate rental development reaching the end of its HUD Section 202 mortgage term. \$1 million total development cost. Investigation of potential refinancing sources, including MHFA, Massachusetts Housing Partnership, and FHLB banks. Non-profit developer: NDC of Jamaica Plain. Completed 2003.

**Julia Martin House, Boston, MA**

Renovation of former Boston Housing Authority development located within the Bromley-Heath campus into 56 units of low income elderly rental housing. \$10 million total development cost. Assistance with proforma projections and advice on HUD Section 202 firm commitment processing and subordinate grant procurement. Non-profit developer: Neighborhood Development Corporation of Jamaica Plain working in conjunction with Committee to End Elder Homelessness and Bromley Health Tenant Management Corporation. Completed 2003.

**Legacy House, Boston, MA**

Renovation of a Victorian house and carriage house in Ashmont Hill into a 7 unit transitional housing facility for homeless women with AIDS. \$1 million total development cost. Assistance with neighborhood resistance, locating a joint venture partner, and procurement of CEDAC and Multicultural AIDS Coalition (MAC) front money. Non-profit developer: Women of Color AIDS Council (WCAC). Completed 2002.

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**Dover Lofts, Boston, MA**

New construction of a six-story structure containing 16 loft-style residential condominium units, including two units for moderate-income households at or below 80% of median with at least one BRA Certified Artist member. \$5 million total development cost. Negotiated and wrote Affirmative Fair Housing Marketing Plan for both affordable and market condominium units. Private developer: New Boston Housing Enterprises, Inc. Completed 2002.

**Summer Street, Haverhill, MA**

Renovation of former Elks club into 33 units of low income rental housing for frail elders. \$5 million total development cost. HUD Section 202 application preparation and review. Non-profit developer: The Caleb Foundation, Inc. Completed 2002.

**Coffin Press Lofts, New Bedford, MA**

Historic renovation of former mill building in downtown New Bedford. 27 loft style studio and one bedroom low income rental units. \$4 million total development cost. FHLB AHP application preparation and review. Private developer: Edward A. Fish Associates, Inc. with Waterfront Area Historic League (WHALE). Completed 2001.

**Quincy SRO Development, Quincy, MA**

Renovation and refinancing of 51 occupied low and moderate income SRO rental units in four scattered site buildings. \$1.1 million total development cost. MHP construction and permanent financing applications. Private developer: Brisk, Inc. Completed 2001.

**Riley House, Boston, MA**

New construction and adaptive reuse of former convent into 50 units of Section 202 elderly rental housing in Hyde Park. All 49 resident units rented low income elders, with 5 units set-aside for very low income homeless elders. \$5.5 million total development cost. One Stop gap financing applications to City for CDBG and state for HOME funds, as well as FHLB AHP application and Affordable Housing Trust. Non-profit developer: The Planning Office for Urban Affairs. Completed 2001.

**Jamaica Plain Cooperative Apartments, Boston, MA**

New construction of 62 units of Section 202 elderly rental housing in Jamaica Plain. All 61 resident units rented to low income elders, with 6 units set-aside for very low income homeless elders. \$7 million total development cost. One Stop gap financing applications to City for CDBG and state for HOME funds, as well as Affordable Housing Trust. Non-profit developer: Cooperative Services, Inc. Completed 2001.

**South Boston Neighborhood Housing Initiative, Boston, MA**

New construction of 27 homeownership units on 15 scattered sites in South Boston. 14 units sold to moderate income households at or below 80% of median, with the remaining 13 units sold to households at or below 120% of median. \$4 million total development cost. Preliminary submission for developer designation. Non-profit developer: South Boston Betterment Trust. Completed 2000.

**Parkway Plaza, Chelsea, MA**

Redevelopment of a 35 acre site into retail, commercial, and residential uses. Located along Mill Creek, the redevelopment will also include a wetlands park to be developed by the Metropolitan District Commission or the Department of Environmental Management. Preliminary site planning with the City of Chelsea. Private developer: The Glynn Company. Completed 1999.

**South End Tenants Housing II, Boston, MA**

Renovation of a 184 unit scattered site Section 236 rental development in the South End. Development is 100% occupied by low income households. \$2 million renovation financed with an FHLB grant, HUD replacement reserve, and City of Boston's Neighborhood Housing Trust linkage. FHLB AHP application. Non-profit developer: Tenants Development Corporation (TDC). Completed 1999.

**Pond Home, Wrentham, MA**

Renovation and expansion of an existing Level III rest home into 30 assisted living units and 13 infirmary beds, as well as adjacent new construction of 66 independent living condominiums financed by a private lender. \$17 million total development cost. Proforma preparation and negotiation of financing terms with Wainwright Bank and MIFA. Non-profit developer: Pond

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Home. Completed 2001.

**Amy Lowell House, Boston, MA**

Acquisition of an existing 151 unit elderly Section 236 rental development owned by a private developer. Refinancing to be provided by MHFA with all units receiving Section 8 enhanced vouchers to maintain long term affordability to low and moderate income elders. \$10-14 million acquisition value. Proforma projections. Private developer decided to sell to another non-profit. Non-profit developer: Rogerson Communities. Completed 1999.

**Longfellow House, Boston, MA**

Rehabilitation of a historic former public school into 44 low income elderly rental units, including 4 units for the homeless, funded through the HUD Section 202 program and various public and private grants. \$5 million total development cost. Proforma projections and financing applications. Non-profit developer: Rogerson Communities, Inc. Completed 1999.

**Laurel Grove, Dedham, MA**

New construction of 80 units of assisted living rental units for frail elders. \$8 million total development cost financed through MHFA Elder Choice Program, with 20% low income occupancy achieved through the state's Group Adult Foster Care (GAFC) program. Preliminary proformas. Private developer: McNeil Real Estate Group, Inc. Completed 1999.

**350-358 Columbus Avenue, Boston, MA**

New construction of 12 condominium units, of which 3 were affordably priced for moderate income households at or below 80% of median. \$5 million total development cost, which was privately financed. Prepared preliminary proformas for RFP response and procurement of financing. Private developer: New Boston Housing Enterprises, Inc. Completed 1999.

**Hale House, Boston, MA**

Renovation of 56 unit Level IV rest home located in an historic brownstone in Boston's Back Bay. Funding sources included FHLB and Massachusetts Historic Commission, as well as private individual and foundation grants. 29 units retained as low income, with 6 targeted to formerly or at-risk of homeless elders. \$350,000 total development cost. FHLB application. Non-profit developer: Hale-Barnard Corporation. Completed 1998.

**Mishawum Park Apartments, Boston, MA**

Preparation of FHLB AHP Direct Subsidy application for renovation of 337 unit expiring use development. One of first nationwide to be acquired solely by its tenants, without partnership with a private development entity. \$30 million acquisition and renovation partially funded with one of largest Title VI LIPHRA Preservation Grants. FHLB application. Non-profit developer: Mishawum Park Tenants Association, Inc. Completed 1998.

**Boston Alzheimer's Center, Boston, MA**

Rehabilitation of a former office and adult day care facility into a 64 bed Alzheimer assisted living development, with a 24 client adult day care center. First facility dedicated entirely to Alzheimer care in Boston and generated 20 full and part time jobs. \$10 million total development cost financed through FHA insured HUD 232 program. Proforma projections, financing applications, and procurement of all financing. Non-profit developer: Rogerson Communities, Inc. Completed 1998.

**Mei Wah Village, Boston, MA**

New construction of approximately 100 units of subsidized and market rental housing on an urban renewal site in Chinatown. First phase of 41 low income elderly rental units financed through the HUD Section 202 program and various public and private grants. \$4 million first phase development cost. Project manager. Non-profit minority developer: Chinese Economic Development Council, Inc. Completed 1998.

**Tropical Foods International, Inc., Boston, MA**

Expansion of retail grocery food operation, primarily serving an ethnic customer base, to a second 25,000 sf inner city location. Leasehold improvements and equipment to be funded through a combination of private and public resources. New store to create 50 full and 35 part time jobs. \$1.2 million total development cost. Preliminary proformas. Postponed pending site location. Private minority developer: Tropical Foods International, Inc. Completed 1997

**Roslindale Village Market Cooperative, Boston, MA**

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Rehabilitation of the former Kelleher Supermarket and new construction of an adjacent addition into a 9,000 sf natural foods cooperative. Market generated more than 50 new permanent jobs in a neighborhood with few employment opportunities. \$2.8 million total development cost. Project manager. Renovated by private developer due to hazardous waste cleanup required on site. Private cooperative developer: Roslindale Village Market Cooperative, Inc. Completed 1996.

**Peter Faneuil House & Joy Street Residence, Boston, MA**

Adaptive reuse of historic school into affordable and special needs housing. 40 single room occupancy units for the homeless and 8 family units. New construction of 21 units of rental housing for persons with AIDS financed through the HUD Section 811 program. \$10 million total development cost. Proforma projections, financing applications, and procurement of all financing. Joint venture of AIDS Action Committee of MA, Rogerson House, and Hale Barnard House. School completed 1994 and new construction completed 1995.

**Park Cinema, Boston, MA**

Rehabilitation of former Cinema into 38 single room occupancy rental units for the homeless and working poor, as well as 17,000 sf of ground floor retail and commercial space. \$2.3 million total development cost. Proforma projections, financing applications, and negotiation with City on gap financing. Private developer: H. Levenbaum Realty, Inc. Completed 1995.

**The Lucille, Boston, MA**

Rehabilitation of old hotel into 6 rental units of housing for persons with AIDS and 19 rental units for persons with mental health problems. \$2 million total development cost. Non-profit minority developer: Tent City Corporation with AIDS Action Committee of MA, Latino Health Center, and Department of Mental Health. Completed 1995.

**Tai Tung Village, Boston, MA**

Purchase of limited partners' interest by Chinese Consolidated Benevolent Association with subsequent intended sale to Tai Tung Village Tenant Association. Development contains 214 units originally built in 1973 and financed by HUD under the Section 221(d)(3) program. Proforma projections and negotiations with HUD and syndicator. Non-profit minority developer: Chinese Consolidated Benevolent Association. Completed 1994.

**Vernon Court, Newton, MA**

Rehabilitation of former apartment complex and adjacent new construction into 115 assisted living units for the frail elderly. \$14.5 million total development cost. First Elder Choice development financed by MHFA, with 20% low income occupancy achieved through the state's Group Adult Foster Care (GAFC) program. Proforma projections and assistance with MHFA financing application. Private developer: National Development of New England. Completed 1994.

**SRO Collaborative, Boston, MA**

Rehabilitation of four scattered site buildings into single room occupancy and special needs rental housing. \$5 million total development cost. Proforma projections. Collaborative effort of four non-profits: Boston Citywide Land Trust, Inquilinos Boricuas en Accion, Allston Brighton CDC, and Nuestra Comunidad. Completed 1993.

**Carol Avenue Cooperative, Boston, MA**

Rehabilitation of three apartment buildings into a 33 unit mixed income limited equity cooperative. \$4 million total development cost. Proforma projections, financing applications, and procurement of all financing. Non-profit developer: Allston Brighton CDC. Completed 1992.

**Waterford Place, Boston, MA**

New construction on an urban renewal site of 40 unit high-rise rental development, with two-thirds low income and one-third market occupancy. \$8 million total development cost. Project manager. Non-profit minority developer: Chinese Consolidated Benevolent Association. Completed 1991.

**Hazel Parks Estates, Boston, MA**

New construction of 48 townhouse condominiums of which 80% were sold to moderate income and 20% to market buyers. \$6 million total development cost. Proforma projections and financing applications. Private minority developer: Paul Parks & Associates. Completed 1990.

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**Parmelee Court Homes, Boston, MA**

New construction of 74 unit rental housing development, with low, moderate, and market occupancy. \$10 million total development cost. Proforma projections and MHFA financing application. Private minority developer: Urban Access Group. Completed 1990.

**Lorne Street Development, Boston, MA**

New construction of 60 unit townhouse rental development, with low, moderate, and market occupancy. \$7.5 million total development cost. Proforma projections and MHFA financing application. Non-profit minority developer: Lena Park CDC. Completed 1990.

**Lithgow Development, Boston, MA**

Mixed use residential and commercial development involving rehabilitation of historic 25,000 sf retail / commercial structure and new construction of 31 units of rental housing with low and market occupancy. \$7 million total development cost. Project manager. Non-profit minority developer: Codman Square Housing Development Corporation. Completed 1990.

**Brickbottom Artists Cooperative, Boston, MA**

Rehabilitation of 250,000 sf industrial warehouse into 91 limited equity live / work cooperatives for moderate income artists and 55 market condominiums. \$14 million total development cost. Proforma projections and financing applications. Private developer: Brickbottom Artists Development Corporation. Completed 1988.

**Josselyn Farms, Pembroke, MA**

New construction of 42 townhouse condominiums for 20% affordable and 80% market ownership. \$4 million total development cost. Proforma projections and financing applications. Private developer: George H. Verry Company. Completed 1988.

**Malden Gardens & Pleasant Plaza, Malden, MA**

New construction of two high-rise rental developments with 25% low income and 75% market occupancy. \$23 million total development cost for 266 units. Project manager. Private developer: Carabetta Enterprises, Inc. Completed 1987.

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## **MARKET AND FEASIBILITY STUDIES**

### **20 Westminster Avenue, Arlington, MA**

Substantial renovation of a three-level brick commercial building containing 8,031 sf into 9 units of affordable, including 3 Section 8 units. The building was originally constructed as a church in 1950 and then was used as a school/daycare center. Proforma preparation for MHP pre-development grant and proposed local and State financing sources for \$4.1 million total development cost. Non-profit developer: Housing Corporation of Arlington. Completed 2015.

### **Jackson Gardens, Newton, MA**

New construction of 32 units of low income and homeless elderly rental housing, including a community center and underground parking. Analyzed preliminary proforma feasibility. Proposed local and State financing sources for \$12.2 million total development cost. Discussed assumptions with representatives and responded to questions. Non-profit sponsor: Newton Housing Authority. Completed 2015.

### **Chestnut Square, Lowell, MA**

Substantial renovation of 42 units of existing low income, large bedroom affordable rental housing for families. Analyzed preliminary feasibility of resyndication using 4% LIHTC and State and Federal historic tax credits. Proposed local and State financing sources for \$4.3 million total development cost. Researched tax issues and responded to questions on analysis. Non-profit developer: The Caleb Foundation. Completed 2015.

### **Legion Hall, Medway, MA**

Substantial renovation of former Legion Hall and adjacent new construction into 8 units of low and moderate income affordable rental housing for families. Analyzed preliminary feasibility of private developer RFP for Town and Affordable Housing Trust. Proposed local and State financing sources for \$2.7 million total development cost. Met with representatives to explain analysis and respond to questions. Non-profit sponsor: Town of Medway Affordable Housing Trust. Completed 2014.

### **Groop Townview, Fitchburg, MA**

Restructure of a 96 unit elderly rental development owned by the Fitchburg Housing Authority (FHA). Revised Section 8 Administrative Plan to incorporate a PBV program. Drafted PBV public notice, RFP, application form, and selection criteria for 38 Section 8 PBV units. Assisted FHA staff in implementation of the plans and RFP. Non-profit sponsor: Fitchburg Housing Authority. Completed 2010

### **Forest Road, Yarmouth, MA**

New construction of a 40 unit elderly rental and future family development on land owned by the Yarmouth Housing Authority. Evaluated financial feasibility of various development options proposed by team architect and based on a market demand study. Recommendations made to the Yarmouth Housing Authority and Town of Yarmouth as to financial feasibility and RFP considerations and terms. Non-profit sponsor: Yarmouth Housing Authority. Completed 2010.

### **45 Pelham Street, Newton, MA**

Restructure of a 10 unit rental development owned by the Newton Housing Authority (NHA). Designed management plan, tenant selection plan, marketing advertisements, and Section 8 PBV RFP and application for 7 of the units. Negotiated with HUD on RFP design, application process, and selection criteria. Assisted NHA staff in implementation of the plans and RFP, as well as the ranking of RFP submissions. Non-profit sponsor: Newton Housing Authority. Completed 2010

### **68-70 Wyman Street, Newton, MA**

Acquisition of a 10 unit rental building in the Waban section of Newton by the Newton Housing Authority (NHA). Selection and coordination of team determining acquisition value, market, physical conditions, relocation, and projection of rental income and expenses. Recommendations made to the NHA Board of Commissioners as to financial feasibility and offer pricing. Secured DHCD transaction approval, negotiated financing terms with Village Bank, assisted in Build America Bond interest rebate, and monitored closing progress. Non-profit sponsor: Newton Housing Authority. Completed 2009.

### **Oak Hill Estates & 125 Front Street, Ashland, MA**

New construction of Oak Hill Estates, 64 elderly rental units and 24 multi-family townhouses permitted by the Town of Ashland under a Comprehensive Permit, and 125 Front Street, 14 rental units and 7 retail spaces approved by the Ashland Planning

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Board. Prepared proforma projections to determine initial feasibility, showing estimated total development cost, potential financing sources, net syndication raise, rental income, operating expenses, and supportable debt. Financing options considered were HUD Section 202, MHP permanent financing, 4% and 9% LIHTC, HOME, HSF, HIF, CATNHP and AHTF. Study funded by MHP. Non-profit sponsor: Ashland Affordable Housing Committee. Completed 2008.

#### **Tai Tung Village, Boston, MA**

Proposed sale of development by Chinese Consolidated Benevolent Association to Tai Tung Village Tenant Association. Development contains 214 units originally built in 1973 and financed under the HUD Section 221(d)(3) program. Review of purchase offer methodology, proforma analysis, and negotiations with consultant to purchaser and HUD. Non-profit minority developer: Chinese Consolidated Benevolent Association. Completed 2008.

#### **Father Walter J. Martin Homes Cooperative, Boston, MA**

Non-profit coop purchase of a low and moderate income development that had reached the end of its 15 year syndication term. Reviewed original closing documents for purchase rights and presented next steps to coop. Development contains 34 units originally built in 1993. Analyzed and presented purchase options, negotiated with Limited Partners and obtained approval of BRA and other public lenders. Non-profit developer: Father Walter J. Martin Homes Cooperative Corporation. Completed 2007.

#### **Fuller House, Melrose, MA**

Refinance of a 113 unit elderly development, with 65 Section 8 units. Originally financed under a FNMA mortgage with FHA interest reduction payments. Examined possibility of 4% LIHTC with volume cap tax-exempt financing through MHFA. Proforma projections including capital needs and replacement reserve analysis as sub-consultant to Robert E. Goldstein Development Consulting. Non-profit developer: Congregational Retirement Homes II, Inc. Completed 2006.

#### **Waterford Place, Boston, MA**

Refinance of a SHARP development that had reached the end of its 15 year term with MHFA. Development contains 40 units originally built in 1991. Analyzed and presented refinancing options, proposed management change and sale and purchase options for current owner under MHFA and BRA regulatory agreements. Negotiated non-profit purchase, refinancing terms with MHFA, exit of Limited Partners and BRA approval of transaction. Non-profit minority developer: Chinese Consolidated Benevolent Association. Completed 2007.

#### **Whittenton Mills, Taunton, MA**

Renovation of five historic mill buildings into 150 units of predominately large bedroom, low income rental housing. \$58 million total development cost. Prepared proforma projections to determine feasibility of tax-exempt bond financing through MHFA. Delineated total development cost, potential financing sources, net syndication raise, rental income, operating expenses, supportable debt, as well as rental absorption and 15 year operating projections. Considered various design options, as well as federal and state historic tax credit eligibility. Private developer: Hamilton Development Partners, LLC. Completed 2006.

#### **Franklin Square Apartments, Boston, MA**

Sale of development from non-profit current owner to for-profit private developer. Development contains 146 units and 175 parking spaces and was originally built in 1966 with affordability governed by a Boston Redevelopment Authority ground lease. Analyzed and presented potential sale options given affordability restrictions to assist in negotiation of purchase price with private developers and BRA. Non-profit developer: Franklin Square Apartments, Inc. Completed 2006.

#### **Tai Tung Village, Boston, MA**

Purchase by Tai Tung Village Tenant Association of the ownership interest of Chinese Consolidated Benevolent Association. Development contains 214 units originally built in 1973 and financed under the HUD Section 221(d)(3) program. Analyzed and presented sale and refinancing options for current owner under HUD regulations to assist in negotiations with tenant association. Non-profit minority developer: Chinese Consolidated Benevolent Association. Completed 2006.

#### **Merrimack River Valley House, Lowell, MA**

Renovation of a 28 room existing rest home and new construction of a new wing to increase capacity to 48 rooms. \$7 million total development cost. Prepared proforma projections to determine initial feasibility of various design options, showing estimated total development cost, potential financing sources, rental income, operating expenses, supportable debt, as well as 15 years of operations. Considered financing from HUD Section 232, MHFA and MassDevelopment tax-exempt bond financings.

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**Development Consultant**  
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**sharonloewel@gmail.com**

Non-profit developer: Merrimack River Valley House, Inc.. Completed 2006.

**264 Main Street, Marlborough, MA**

Renovation of a mixed rental housing and commercial building in the downtown area. Prepared proforma projections to determine feasibility, showing estimated total development cost, potential financing sources, net syndication raise, rental income, operating expenses, supportable debt, as well as 15 years of operations. Considered various purchase options with current owner, as well as financing options including historic tax credits. Non-profit developer: Marlborough CDC. Completed 2005.

**Covenant House Initiative of B'nai B'rith, Canton, MA**

New construction of a 75 unit elderly housing development in the downtown area. \$16 million total development cost. Prepared proforma projections to determine initial feasibility, showing estimated total development cost, potential financing sources, net syndication raise, rental income, operating expenses, supportable debt, as well as 15 years of operations. Financing options considered were a mixed financed HUD Section 202 with MHFA tax-exempt bond financing and 4% LIHTC, as well as possible taxable bond financing with 9% Low Income Housing Tax Credit allocation from the state. Non-profit developer: Covenant House Initiative. Completed 2005.

**Dartmouth Elderly Housing, Dartmouth, MA**

New construction of a 23 unit elderly housing development to be managed by the Dartmouth Housing Authority. \$5 million total development cost. Prepared proforma projections to determine feasibility, which showed estimated total development cost, potential financing sources, net syndication raise, rental income, operating expenses, supportable debt, as well as 15 years of operations. Non-profit sponsor: Dartmouth Housing Authority. Completed 2005.

**Depot Village, Hanson, MA**

New construction of a 70 unit townhouse development approved under a Chapter 40B Comprehensive Permit and located in the heart of South Hanson adjacent to the Commuter Rail Station. \$4.2 million mortgage loan through MHFA. Proforma projections and One Stop financing application to determine feasibility for MHFA tax-exempt financing with 4% Low Income Housing Tax Credits and Priority Development Funds (PDF). Private developer: Kenneth Marston, Depot Village, LLC. Completed 2005.

**Nu Life Proforma Analysis, Boston, MA**

New construction of 16 condominium units, including 3 units targeted below 60% of median, and 5 units targeted below 80% of median, and 4,000 sf of commercial / retail space. \$4.5 million total development cost. Reviewed preliminary proformas and market study, suggested revisions, developed revised proforma projections, presented findings, and worked with developer on restructuring. Non-profit developer: Neighborhood Development Corporation of Grove Hall. Completed 2003.

**Glebe Park Feasibility Study, Alexandria, VA**

Renovation of 152 units of public housing for families owned by the Alexandria Redevelopment & Housing Authority. \$20 million total development cost. Principal consultant: Tise Diamond Associates. Reviewed preliminary proformas and market study, suggested revisions, supervised study team members, presented findings, and edited final feasibility report. Non-profit sponsor: Alexandria Redevelopment & Housing Authority. Completed 2003.

**The Highlands at Blue Hills, Randolph & Canton, MA**

New construction of 300 units of affordable and market rental housing for families in a garden style development. \$56 million total development cost. Reviewed developer proformas, suggested revisions, and opined as to development feasibility for Chapter 40B process in Town of Randolph. Private developer: Roseland Property Company. Completed 2003.

**Hillside Village, Ware, MA**

New construction of 80 units of affordable and market rental housing for families in a mid-rise development. \$10 million total development cost. Reviewed developer proformas, suggested revisions, and opined as to development feasibility for Chapter 40B process in Town of Ware. Private developer: Meredith Management Corporation. Completed 2003.

**Robertson Curtain Mill, Taunton, MA**

Preliminary feasibility analysis of the renovation of the 115,000 sf historic mill building into residential rental housing. Entailed discussions concerning their objectives for the site, review of existing materials and feasibility studies on the site, a site visit with

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an architect, and a brief market analysis of comparable residential developments both existing and proposed in the surrounding area. Non-profit sponsor: WEIR Corporation. Completed 1999.

#### **BRA Parcel 9, Boston, MA**

Review of preliminary proformas for a prospective RFP response to the City of Boston for BRA Parcel 9. Included suggestions of alternative financing sources, discussion of the application requirements for the financing sources, and revisions to proforma assumptions. Non-profit sponsors: Nuestra Comunidad and Tent City Corporation. Completed 1999.

#### **15 Beacon Street, Boston, MA**

Acquisition analysis of the feasibility of renovating the building into a permanent location for the union's regional service center. Prepared proformas based on commercial real estate market data and utilizing various private financing sources to determine the building's acquisition value. Drafted formal response for union to RFP of the Public Facilities Department of the City of Boston. Non-profit sponsor: Local 254 of the Service Employees International Union. Completed 1996.

#### **Striar Jewish Community Center, Stoughton, MA**

Acquisition analysis of the feasibility of the construction of 100 units of elderly housing on land owned by Combined Jewish Philanthropies (CJP) and located adjacent to their community center. Prepared proformas based on market data and utilizing various financing sources to determine land acquisition value. Drafted formal offer to purchase for presentation to CJP in response to their RFP. Non-profit sponsor: Jewish Community Housing for the Elderly. Completed 1995.

#### **Mystic School Reuse Study, Winchester, MA**

Assessment of reuse potential of a surplus school into an elderly assisted living complex and adult intergenerational day care center. Analyzed economic feasibility of several design schemes given the market, comparable developments, and financing alternatives. Non-profit sponsor: Town of Winchester. Completed 1994.

#### **Indian Hill Development, Marlborough, MA**

Financial analysis to determine whether there was an amount of money which the Marlborough City Council should agree to accept in lieu of the construction by Fafard Real Estate & Development Corporation of 56 affordable units at their Indian Hill development. Included an assessment of the change in projected costs, market sale prices, and projected profits to Fafard should the affordable units not be required by the city. Non-profit sponsor: City of Marlborough. Completed 1994.

#### **100 Summer Street, Holliston, MA**

Feasibility study of reuse options for a vacant seminary building and adjacent new construction. Analyzed and projected market area, condominium prices, market rents, rehab costs, absorption rates, and appropriate site acquisition prices. Joint venture with Bergmeyer Associates, Inc. who evaluated the reuse from an architectural perspective. Non-profit developer: Holliston Housing Partnership. Completed 1993.

#### **Three Rows, North Grosvenordale, CT**

Market study for mortgage lenders, which analyzed and projected market area, market rents, operating costs, absorption rate, and lease up schedule for a 45 unit rehabilitation of mill worker housing into low and moderate income apartments. For-profit developer: Rural Homes, Ltd. Completed 1993.

#### **Comprehensive Housing and Affordability Strategy (CHAS), Gloucester, MA**

Assessment and projection of current and future affordable housing needs for the City of Gloucester through analysis of demographic data and trends, real estate markets, vacancy and absorption rates, and current housing stock conditions. Joint venture with Urban Resource Group. Non-profit sponsor: City of Gloucester. Completed 1991.

#### **Blackstone Arcade & Chester Railroad Station, Blackstone & Chester, MA**

Feasibility study of proposed reuse of two historic structures with funding from the Department of Interior, National Parks Service, and Massachusetts Historical Commission. Analyzed market and community needs, prepared proforma analysis of reuse options, and proposed a development strategy. Joint venture with Bergmeyer Associates, Inc. who evaluated the buildings from an architectural and historical perspective. Non-profit sponsor: Architectural Conservation Trust. Completed 1990.

#### **Reuse Valuation Study, Brookline, MA**

**S h a r o n L o e w e n t h a l**  
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**Development Consultant**  
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**sharonloewel@gmail.com**

Estimated disposition values for five surplus schools and buildings owned by the Town of Brookline. Determined highest and best reuse option and valuation for each site based on location, market, zoning, and development proforma analysis. Joint venture with Bergmeyer Associates, Inc. Non-profit sponsor: Town of Brookline. Completed 1989.

# FIRM PROFILE



WAVERLEY WOODS



SIMON-KUCHER & PARTNERS



HISTORIC SOUTH END APARTMENTS



FIRST CHURCH OF ROXBURY  
EDUCATION & JUSTICE CENTER



BRIGHT HORIZONS BROOKLINE

**W**e are an award-winning architectural design and planning studio with a simple mission: to produce excellent design, to develop long-term relationships with clients, and to help build viable communities.

### OUR CURRENT AREAS OF EXPERTISE INCLUDE:

- Multi-family housing
- Renovation and historic preservation
- Smart growth planning
- Feasibility and needs assessment
- Corporate interiors
- Childcare centers
- Academic facilities
- Community service buildings

### PRINCIPALS:

- Clifford J. Boehmer, AIA
- Brooks A. Mostue, AIA, LEED AP BD+C
- Ross A. Speer, AIA
- Iric L. Rex, AIA, LEED AP



Founded in 1984, Davis Square Architects, Inc. is a medium-sized firm organized into project-specific teams. We maintain the same team from schematic design through construction, under the direction of a Principal. As a result of this continuity, our clients come to know and rely on individual staff members over time, seeking them out for subsequent projects.

Our best work is achieved in collaboration with demanding, involved clients. Design solutions evolve through careful consideration of our clients' needs, constraints, and dreams.

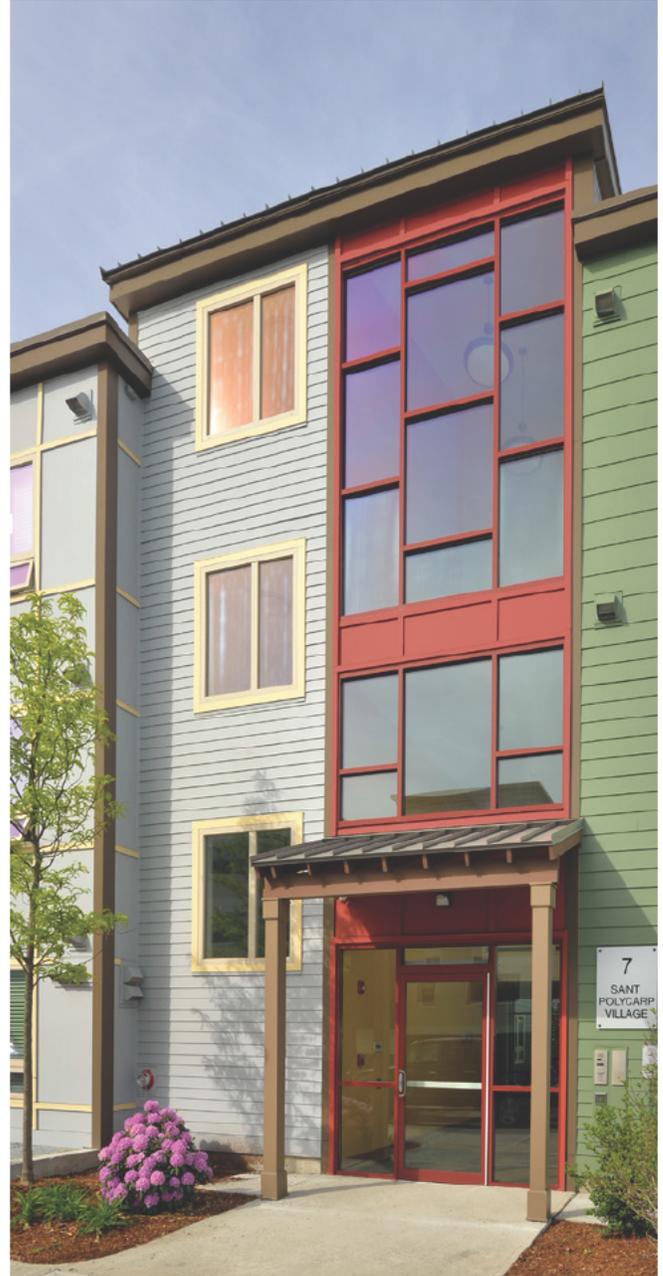
To this we add a commitment to architecture that is both beautiful and respectful of its surroundings.

Working within the design studio tradition, we have created an open collegial work environment where education is highly valued; where the exchange of ideas, informed by experience, is encouraged; and where the most advanced technology supports the design process. Our success has allowed us to contribute a portion of our profits to worthy community service organizations, in the belief that strong communities and great architecture are mutually dependent. ■

FIRM PROFILE  
[davissquarearchitects.com](http://davissquarearchitects.com)

DAVIS SQUARE ARCHITECTS INC.

# SUSTAINABLE DESIGN



**COMMITTED TO THE  
GREENING OF OUR  
COMMUNITIES**



**W**e are committed to understanding the true costs and benefits of green design, as well as studying the effectiveness of those measures. At the outset of projects, we perform green design charrettes as well as feasibility studies to identify and develop achievable sustainable design goals. Our firm has also completed post-construction testing, commissioning and post-occupancy energy performance studies on several of our projects, working in cooperation with engineers and green design consultants. The results have shown low initial costs for green design measures and a rapid payback in lower energy costs.

“...I go to nature every day for inspiration in the day’s work. I follow in building the principles which nature has used in its domain. —Frank Lloyd Wright

## CONTINUED GREEN SUCCESS

**DAVIS SQUARE ARCHITECTS, INC.’s** sustainable buildings have been honored for excellence in smart growth, sustainable design, revitalization of an urban brownfield site, green community, energy efficiency, and excellence in design. They have also achieved distinction for their high efficiency. Below is a list of some of the many organizations from which we have received recognition for our environmentally-friendly design:

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

## GREEN ACCOMPLISHMENTS

### SAINT POLYCARP VILLAGE

At this LEED-Platinum certified development in Somerville, MA, we used double-wall construction to achieve high efficiency ratings. Rooftops have photovoltaic arrays, solar thermal collectors, and planted areas.

### CROSS TOWN CORNERS

At this affordable multifamily development located in Springfield, MA, we laminated interior walls and foundations with rigid foam panels to enhance the energy efficiency of four masonry buildings.

### TROLLEY SQUARE

At this new construction, affordable mixed-use community, storm water retention tanks installed beneath the corner park reduce the flow of storm water into the City’s system. Clean storm water from the tanks is used to irrigate the planters in the central plaza. This project includes a 45-KW photovoltaic array.

### COLUMBIA TERRACE APARTMENTS

At this affordable development located in Cambridge, MA, demolition and construction debris was salvaged for other uses, including landscaping.

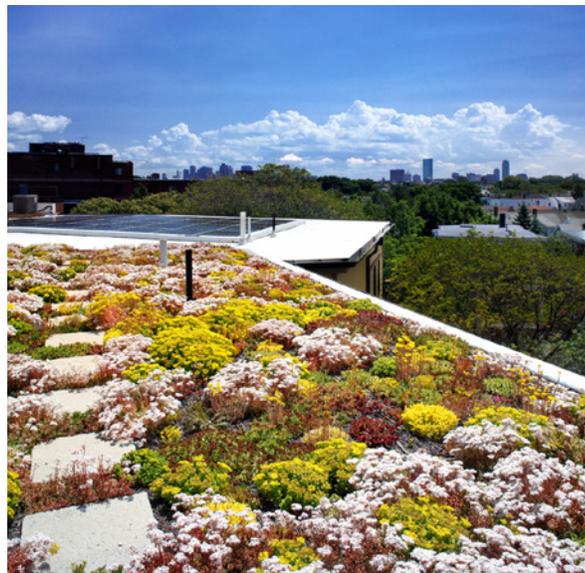
### GREEN CONSULTING

Davis Square Architects is currently a green consultant to the Massachusetts Department of Housing & Community Development, the Massachusetts Technology Council, Enterprise Foundation’s Green Communities Program, and the Community Economic Development Assistance Corporation.

## OUR GREEN SERVICES

The following are steps that Davis Square Architects can provide to ensure sustainability:

- 1. Green Screen:** evaluating programming plans to determine the most promising green opportunities on a particular site or building.
- 2. Green Charrette:** a meeting early in the design process in which all stakeholders brainstorm ideas for energy and resource efficiency, generating goals and development strategies to accomplish them.
- 3. Capital needs assessment:** a study focused on energy-saving opportunities and sustainable improvements.
- 4. LEED documentation services:** meeting LEED certification requirements throughout the LEED certification process.
- 5. Lifecycle analysis:** reviewing prioritized design goals to assist in the design-making process.
- 6. Partnerships:** working with LEED-accredited consultants, clerks and contractors for the most effective green project team.
- 7. Commissioning:** verifying that the building’s envelope and systems operate as intended.
- 8. Post-occupancy assessment:** measuring and reviewing actual energy savings after the project’s completion and move-in. ■



**SUSTAINABLE DESIGN OVERVIEW**  
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# GEORGETOWNE HOMES COMMUNITY CENTER

Davis Square Architects reinvented drab and dark existing conditions into this colorful, spacious community center at Georgetowne Homes, an affordable rental community consisting of nearly 1,000 units located in Boston's Hyde Park neighborhood.

Originally built in the early 1970s, the community center was in dire need of a makeover. The new facility not only provides space for hosting functions with a community/events room, but is also home to leasing and management offices, a reception/seating area, meeting rooms, staff lounge, as well as a pantry and kitchenette. The project

was part of phased renovations to the development that spanned over six years, and has become a valuable resource for residents. ■

## LOCATION

Hyde Park, MA

## DEVELOPER

Beacon Communities LLC

## SCOPE

Renovation  
6,300 sf



COMMUNITY & CHILDCARE CENTERS  
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# GREENFIELD GARDENS COMMUNITY CENTER

Greenfield Gardens is an affordable apartment community located in Greenfield, Massachusetts. The steep hill that topographically divides Greenfield Gardens became an opportunity for a community building in the hands of our designers. Working closely with the client, Davis Square Architects led an extensive process to understand the needs of residents and to respond to the demands of an unyielding site.

The resulting community center perches on the edge of the hill and then extends downward, linking the two halves of this 202-unit residential development. An open lobby featuring exposed trusses and accent pendant lighting links the spaces and offers a

commanding view of the Berkshire Mountains. The lobby also serves as a link to the food bank, computer learning center, and meeting area. A kitchen and playroom facilitate neighborhood functions and provide indoor play space during inclement weather. ■

## LOCATION

Greenfield, MA

## DEVELOPER

Homeowner's Council of Greenfield Gardens

## SCOPE

New construction  
4,500 sf



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# MYSTIC RIVER ACTIVITY CENTER

Placed against the buzzing traffic of Interstate-93 entering Boston, the Mystic Activity Center takes its inspiration from the streaming flow of vehicles and matches the highway's curves in its lined masonry block wall. At night, the light fixtures accentuate the curve and texture of the wall, echoing the headlights and drawing the attention of the passing cars. The high, thick wall facing the highway buffers the sunny brick-faced interior courtyard with its enclosed wings and gently curving interior entrance canopy.

The only common building for over 1,000 residents of two public housing developments, the Center provides meeting areas, a

computer education facility, childcare space, security offices, and room for a variety of service agencies under the auspices of the Somerville Housing Authority. ■

## LOCATION

Somerville, MA

## DEVELOPER

Somerville Housing Authority

## SCOPE

New construction  
7,000 sf



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## INDIGO BLOCK DEVELOPMENT

Davis Square Architects is currently working on the Indigo Block development, a new mixed-use project consisting of 80 affordable and moderate-income rental apartments, 8 market-rate condominiums, and a standalone 20,000 sf building for light industrial and office use located in Dorchester, Massachusetts. Originally home to a bread factory, the redevelopment of the site at

65 East Cottage Street will create new opportunities and growth for the Uphams Corner neighborhood, and will provide a more direct link to the MBTA commuter rail station conveniently located next to the property. The project is named after the future Indigo Line, which is the anticipated expansion of the commuter rail. ■

### LOCATION

Dorchester, MA

### DEVELOPERS

Dorchester Bay Economic Development Corporation, Boston Capital, Escazú Development

### SCOPE

New construction  
 Transit-oriented design  
 80 affordable/moderate income apartments  
 8 market-rate condominiums  
 20,000 sf commercial space



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# BARTLETT PLACE

Bartlett Place is a joint venture proposal for 313 units of affordable, moderate and market rental and homeownership housing, senior housing, and commercial/retail space. Situated on a former MBTA lot just outside Dudley Square, this transit-oriented development will offer public and private greenspaces complete with outdoor seating and dining areas, tot lots, and generous planted walkways. The project is designed to be both a comprehensive community and form a nexus between the surrounding neighborhoods.

The project is registered with the LEED-ND pilot program, targeting a Gold or Silver rating. The team envisions a broadly sustainable development to include a variety of sustainable elements and technologies. ■

## LOCATION

Roxbury, MA

## DEVELOPERS

Nuestra Comunidad Development Corporation  
Windale Developers

## SCOPE

New construction  
Masterplanning  
Transit-oriented design  
313 units  
20,000 sf commercial and retail space

## SUSTAINABLE DESIGN

Project is pursuing LEED-ND certification



HOUSING & MIXED-USE  
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## THE COHEN RESIDENCES

Davis Square Architects is currently working on The Cohen Residences, an affordable senior community owned by Hebrew SeniorLife. A national services leader redefining the aging experience by providing complete and integrated high-quality healthcare, services and housing for seniors, Hebrew SeniorLife encourages the idea of reshaping and redefining the aging experience.

The project is an exciting and transformative renovation of a 98-unit high-rise in Brookline's Coolidge Corner neighborhood. As the building has not been renovated since its construction in 1976, renovation work will include system upgrades, a full replacement of the 12-story façade, new and improved units and common areas, and HC accessibility upgrades. ■

### LOCATION

Brookline, MA

### DEVELOPERS

Hebrew SeniorLife

### SCOPE

Renovation  
High-rise  
Senior living



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# GORHAM STREET APARTMENTS

Situated on a former vacant lot in downtown historic Lowell, Gorham Street Apartments is a new construction, 24-unit building providing affordable housing for limited-income working families. Apartments range from one to three bedrooms in addition to six townhouses, and amenities include an elevator, community room, laundry facilities and management office.

Using energy-efficient design and materials, the project is seeking LEED certification. The design also had to be in compliance with Downtown Lowell Historic District guidelines and approved by the Lowell Historic Board. As the site had been empty for some time, the building brings new life to the neighborhood

and is convenient to public transportation, with a bus stop across the street and just an eight-minute walk to the MBTA Commuter Rail. The project was funded with low-income housing tax credits as well as state subsidies. ■

## LOCATION

Lowell, MA

## DEVELOPER

Coalition for a Better Acre

## SCOPE

New construction  
24 units; 6 of which are townhouses

## SUSTAINABLE DESIGN

Project is seeking LEED certification



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# CLIFFORD BOEHMER AIA

## PRINCIPAL

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### PROFESSIONAL EXPERIENCE

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Clifford Boehmer is a co-founder and President of Davis Square Architects and a Principal of its predecessor, Mostue & Associates Architects. In 1991, he was a founder of Dirigo Design, a small Fort Point firm specializing in single-family homes.

Cliff's current responsibilities focus on site and project feasibility analysis, conceptual and schematic design, master planning and programming, project advocacy with government and funding agencies, neighborhood engagement, permitting, and renovation/adaptive reuse of historic buildings. He reviews state-funded housing proposals for the Massachusetts Department of Housing & Community Development (DHCD) and consults with many communities and developers in Massachusetts and Rhode Island.

Before pursuing a full-time architectural career, Cliff was known throughout the Early Music world as a maker of historically informed keyboard instruments. He has taught studios at the Graduate School of Design (Harvard), Massachusetts Institute of Technology, the Museum of Fine Arts (Boston), and the National Conservatory in San Sebastian, Spain. His housing designs, musical instruments, and architectural photographs have been published in magazines, journals, and city guides. He sits on boards of the Cambridge Society for Early Music and the Boston Clavichord Society.

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### EDUCATION

Harvard Graduate School of Design  
Master in Architecture, 1987

Massachusetts Institute of Technology  
Bachelor of Science in Art and Design, 1974

### REGISTRATION

Architect: Massachusetts #10697

### AFFILIATIONS

American Institute of Architects  
Boston Society of Architects



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# PAUL WARKENTIN RA, LEED AP

## ASSOCIATE

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### PROFESSIONAL EXPERIENCE

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Paul Warkentin is an Associate at Davis Square Architects, Inc., and has been employed with the firm since 2003. He has fifteen years of professional experience in the design and development of a variety of building projects, including historic properties.

Paul often assists owners and property managers by providing evaluations of existing properties for renovations. He makes site visits, investigates the buildings' systems, and coordinates with engineers in their evaluations. Paul uses his experience in renovation projects to establish the needed scope of work and budget for each potential project.

Additionally, Paul has extensive knowledge of state and federal accessibility standards. He has conducted seminars on accessibility code compliance for the Commonwealth of Massachusetts Department of Housing & Community Development (DHCD), as well as assisted DHCD in developing accessibility review guidelines, community-based housing standards and Universal Design requirements.

Paul worked on Back of the Hill Apartments, the renovation of an eleven-story mixed-use elderly development that required significant building envelope work. The exterior skin was entirely replaced with a new metal panel system as well as new windows and storefronts. Interior work included upgrades to life safety systems, ventilation systems, and new finishes.

Paul also worked on the adaptive reuse of the Whitney Building, the transformation of a mill building in Leominster's historic Comb and Carriage District, for residential and community use.

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### EDUCATION

Cornell University  
Bachelor of Architecture, 1991

### REGISTRATION

Architect: Massachusetts: #30254  
Architect: California: #27997

### AFFILIATIONS

LEED Accredited – Leadership in Energy  
and Environmental Design



## FIRM OVERVIEW



### History and Market Focus

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

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

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

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

### Firm Organization

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

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

### The Senior Management Team

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

Delphi currently employs 73 full time personnel

### Financial Strength

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

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

Providing Comprehensive Construction Management  
Services Throughout New England since 1992

**DELPHI™** Building  
CONSTRUCTION INC. Responsibly.

# FIRM OVERVIEW



## BONDING REFERENCE

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

## FINANCIAL REFERENCES

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

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

## Delphi Construction Services

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

### Pre-Project Planning

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

- Cash Flow Analysis
- Develop Project Delivery Options

### Preconstruction

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

### Construction

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

COST TO DATE SUMMARY REPORT  
XXXXXXXXXXXX XXXX

DIVISION	APPROVALS/OWNER CHANGE ORDERS		REMOVED	SUBCONTRACTOR			REWORK	PROJECTED COSTS	TOTAL PROJECT COST	VARIANCE
	BIDDING	CHANGES		CONTRACTS	CHANGE ORDERS	OTHER COSTS				
General	\$ 205,777.00	\$ 205,777.00	\$ -	\$ 231,833.60	\$ 60,000.00	\$ -	\$ 103,275.24	\$ 28,142.42	\$ 304,418.02	\$ 6,000.00
Demolition	\$ 42,510.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 32,807.50	\$ 3,762.20	\$ 42,510.00	\$ -
Concrete	\$ 187,328.00	\$ -	\$ 197,328.00	\$ 188,143.80	\$ -	\$ 3,220.88	\$ 162,583.08	\$ 28,076.32	\$ 1,85,640.00	\$ 888.00
Masonry	\$ 18,478.00	\$ -	\$ 36,719.00	\$ 18,478.00	\$ -	\$ -	\$ 18,478.00	\$ 2,300.00	\$ 182,768.00	\$ 10,000.00
Steel	\$ 147,509.00	\$ -	\$ 147,509.00	\$ 148,220.80	\$ -	\$ -	\$ 336.00	\$ 141,200.00	\$ 4,488.00	\$ 147,509.00
Carpentry	\$ 602,835.00	\$ -	\$ 602,835.00	\$ 591,973.00	\$ 1,100.00	\$ 38,236.37	\$ 501,623.27	\$ 247,241.75	\$ 598,762.12	\$ 4,912.88
Roofing	\$ 32,816.00	\$ -	\$ 32,328.00	\$ 38,300.00	\$ -	\$ -	\$ 34,800.00	\$ 275.00	\$ 8,475.00	\$ (2,659.00)
Window/Door/Finishing	\$ 23,843.00	\$ -	\$ 23,412.00	\$ 21,659.82	\$ -	\$ -	\$ 21,659.82	\$ 5,345.88	\$ 2,142.88	\$ (4,722.25)
Aluminum & Glass	\$ 41,202.00	\$ -	\$ 45,207.00	\$ 35,174.30	\$ -	\$ -	\$ 35,174.30	\$ -	\$ 13,714.30	\$ 8,437.00
Doors & Hardware	\$ 54,801.00	\$ -	\$ 34,901.00	\$ -	\$ -	\$ -	\$ -	\$ 24,275.00	\$ 24,275.00	\$ 8,926.00
Electrical	\$ 177,850.00	\$ -	\$ 177,850.00	\$ 113,632.50	\$ 8,862.50	\$ -	\$ 122,815.25	\$ 8,626.00	\$ 130,611.25	\$ (2,268.75)
Plumbing	\$ 18,000.00	\$ -	\$ 50,000.00	\$ 8,810.00	\$ -	\$ -	\$ 8,810.00	\$ 3,995.00	\$ 9,810.00	\$ 1,810.00
Paint	\$ 42,085.00	\$ -	\$ 42,085.00	\$ 35,000.00	\$ -	\$ -	\$ 35,000.00	\$ -	\$ 15,000.00	\$ 7,085.00
Flooring	\$ 84,288.00	\$ -	\$ 80,328.00	\$ -	\$ -	\$ -	\$ -	\$ 84,288.00	\$ 80,328.00	\$ -
Specialties	\$ 8,253.00	\$ -	\$ 8,253.00	\$ 8,669.00	\$ -	\$ -	\$ 4,208.00	\$ 2,880.00	\$ 9,850.00	\$ -
Special Construction	\$ 134,800.00	\$ -	\$ 134,800.00	\$ -	\$ -	\$ 39,344.00	\$ 39,344.00	\$ 34,285.00	\$ 134,690.00	\$ -
Construction Contingency	\$ 80,000.00	\$ -	\$ 80,000.00	\$ 80,000.00	\$ -	\$ -	\$ 80,000.00	\$ -	\$ 80,000.00	\$ 2,000.00
Painting	\$ 64,700.00	\$ -	\$ 64,700.00	\$ 60,608.00	\$ 839.00	\$ -	\$ 60,608.00	\$ 2,500.00	\$ 62,308.00	\$ 2,370.00
Fire Protection	\$ 62,000.00	\$ -	\$ 62,000.00	\$ 62,000.00	\$ -	\$ -	\$ 62,000.00	\$ -	\$ 62,000.00	\$ -
HVAC	\$ 233,000.00	\$ -	\$ 233,000.00	\$ 204,408.00	\$ 17,500.00	\$ 722.50	\$ 722,722.50	\$ 18,000.00	\$ 240,722.50	\$ (7,713.50)
Electrical	\$ 207,444.00	\$ -	\$ 207,444.00	\$ 184,939.00	\$ 3,809.00	\$ -	\$ 187,000.00	\$ 22,000.00	\$ 209,000.00	\$ 2,200.00
Subtotal	\$ 2,728,000.00	\$ -	\$ 2,728,000.00	\$ 1,795,425.80	\$ 90,847.84	\$ 148,425.20	\$ 2,038,402.55	\$ 601,486.52	\$ 2,727,258.87	\$ 1,820.00
Buildings/Permit	\$ 19,850.00	\$ -	\$ 19,850.00	\$ -	\$ -	\$ -	\$ 19,850.00	\$ -	\$ 19,850.00	\$ -
Subtotal	\$ 2,747,850.00	\$ -	\$ 2,747,850.00	\$ 1,810,078.69	\$ 90,847.84	\$ 148,425.20	\$ 2,048,452.55	\$ 601,486.52	\$ 2,747,058.87	\$ 1,820.00
Preconstruction	\$ 10,000.00	\$ -	\$ 10,000.00	\$ 10,000.00	\$ -	\$ -	\$ 10,000.00	\$ -	\$ 10,000.00	\$ -
Subtotal	\$ 2,757,850.00	\$ -	\$ 2,757,850.00	\$ 1,820,078.69	\$ 90,847.84	\$ 148,425.20	\$ 2,058,452.55	\$ 601,486.52	\$ 2,757,058.87	\$ 1,820.00
General Reservations	\$ 355,000.00	\$ -	\$ 355,000.00	\$ 355,000.00	\$ -	\$ -	\$ 355,000.00	\$ -	\$ 355,000.00	\$ -
Subtotal	\$ 3,112,850.00	\$ -	\$ 3,112,850.00	\$ 2,175,078.69	\$ 90,847.84	\$ 148,425.20	\$ 2,413,452.55	\$ 601,486.52	\$ 3,112,058.87	\$ 1,820.00
Materials	\$ 20,130.00	\$ -	\$ 20,130.00	\$ 20,130.00	\$ -	\$ -	\$ 20,130.00	\$ -	\$ 20,130.00	\$ -
Subtotal	\$ 3,092,720.00	\$ -	\$ 3,092,720.00	\$ 2,154,948.69	\$ 90,847.84	\$ 148,425.20	\$ 2,393,322.55	\$ 601,486.52	\$ 3,092,058.87	\$ 1,820.00
Books	\$ 88,811.00	\$ -	\$ 88,811.00	\$ 88,811.00	\$ -	\$ -	\$ 88,811.00	\$ -	\$ 88,811.00	\$ -
Subtotal	\$ 3,181,531.00	\$ -	\$ 3,181,531.00	\$ 2,243,759.69	\$ 90,847.84	\$ 148,425.20	\$ 2,482,133.55	\$ 601,486.52	\$ 3,181,339.87	\$ 1,820.00
Fee	\$ 150,000.00	\$ -	\$ 150,000.00	\$ 150,000.00	\$ -	\$ -	\$ 150,000.00	\$ -	\$ 150,000.00	\$ -
Subtotal	\$ 3,331,531.00	\$ -	\$ 3,331,531.00	\$ 2,393,759.69	\$ 90,847.84	\$ 148,425.20	\$ 2,632,133.55	\$ 601,486.52	\$ 3,331,339.87	\$ 1,820.00
Contingency	\$ 218,000.00	\$ -	\$ 218,000.00	\$ -	\$ -	\$ -	\$ -	\$ 258,887.00	\$ 258,887.00	\$ 11,000.00
TOTAL	\$ 3,549,531.00	\$ -	\$ 3,549,531.00	\$ 2,393,759.69	\$ 90,847.84	\$ 148,425.20	\$ 2,690,960.55	\$ 860,373.52	\$ 3,548,914.67	\$ 628.33

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## FIRM OVERVIEW



### Post Construction

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

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

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

### The Delphi Approach

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

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

### The Delphi Difference

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

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

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## DELPHI APPROACH



### Approach to Construction Management

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

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

### Phase One: Design Review, Cost Estimating, Schedule Development

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

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

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

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

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

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## DELPHI APPROACH



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

### Phase 2: Subcontractor Bidding

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

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

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

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

### Phase 3: Construction Management and Administration

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

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

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

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

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

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

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## JOSEPH F. MASTROMATTEO, VICE PRESIDENT



### Overview

Provide key leadership for our project delivery team, with primary executive control of the project to ensure client satisfaction, staff development and focus on implementing Delphi's corporate mission objectives at all levels. Responsible for oversight of preconstruction phase of projects including project planning and development, scope and budget development, design coordination, contract development, town approvals and permitting, project schedule development, and project start up planning. Responsible for management of construction team during construction phase of projects including client interactions, design team interactions, subcontractor contract negotiations and award oversight, budget oversight, schedule oversight, and overall project delivery. Other responsibilities include business development, client development, team development, and assisting in company growth management, and systems development and implementation.

### Project Experience



#### Cathedral Church of St. Paul - Boston, MA *Extensive Interior Church Renovations*

Major renovations project to the historic Cathedral Church on Boston Common. Work includes extensive preconstruction services with budget development, value engineering, schedule and phasing development and city permitting requirements. New work included installation of an integrated skylight feature, repairs to the main vaulted ceiling, new interior stairwell and elevator, and major improvements and upgrades to church function spaces and the Sanctuary.



#### Dolan Fieldhouse & Athletic Fields - Worcester, MA *New Construction of an Educational Athletic Center & Fields*

Construction of a new fieldhouse, tennis courts, an artificial turf ball field, and a soccer field for Clark University. This project had an aggressive timeline to be completed in just ten months so that student athletes did not miss a single season on their home field. Aggressive purchasing on the project saved the client \$150,000 that the client was later able to apply on project upgrades.



#### The Groves in Lincoln - Lincoln, MA *Independent & Assisted Living Facility*

A new 4 story, 235,562 square foot congregate care building, situated over a below ground parking garage, including a full service kitchen, swimming pool, athletic center, meeting rooms, hair salon, and outdoor patio dining. In addition, this project included 30 duplex or single family homes and a rental building separate from the congregate care building. The project site was well over 30 acres and included the relocation of Rt. 2 to accommodate the deceleration and acceleration zone for the property.

### Additional Project Experience

Deaconess Abundant Life Communities  
Clark University  
Riverbend Realty  
Red Lantern Restaurant

Newbury Court Phase 3  
Dolan Fieldhouse & Athletic Fields  
Riverbend  
Restaurant Conversion / Renovation

Concord, MA  
Worcester, MA  
Concord, MA  
Boston, MA

### Experience

- Joined the Delphi team in 1996
- Vice President - 6 years
- Sr. Construction Manager - 9 years
- Construction Manager - 7 years
- General Manager - 9 years
- Foreman - 2 years

### Certifications

- Sustained Continuing Education Program Member
- Senior Leadership Training Program
- OSHA-10 Certification
- OSHA-30 Certification
- CPR/AED Certified
- Construction Supervisor's License, unrestricted
- Cambridge Construction Supervisor's License

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## LARRY McHUGH, PROJECT EXECUTIVE



### Overview

Embracing the position as team leader, with the responsibility to oversee project team staff members to ensure successful completion of every project in alignment with Delphi's core mission statement. Responsibilities include team leadership, conflict resolution, maintaining project focus and ensuring the highest level of project success throughout project development and deployment. Supervision of the project manager, assistant project manager and administrative throughout the project to ensure quality of the work, adherence to project documents, integrity of the project schedule and project budget.

### Project Experience



#### **Commonwealth Glenville Apartments - Boston, MA** *Occupied Low-Income Residential Rehab.*

Renovations to 235 occupied, low-income residential apartments with work to include new interior finishes, kitchens, upgrades to bathrooms, common area improvements and MEP upgrades. To accommodate the tenants' needs, the project is being done in multiple phases.



#### **Leyden Woods - Greenfield, MA** *Affordable Housing Development*

This challenging and extensive project consists of the removal and replacement of 49 residential buildings containing 200 units, with the work performed over 8 interconnecting phases. Each phase involves the replacement of 5 to 6 buildings. As residents were relocated from their existing units, the construction team demolished the entire phase, installed new foundations, new site utilities and infrastructure as well as new, unique, modular buildings.



#### **The Groves in Lincoln - Lincoln, MA** *Independent & Assisted Living Facility*

A new 4 story, 235,562 sq. ft. congregate care building, situated over a below ground parking garage, including a full service kitchen, swimming pool, athletic center, meeting rooms, hair salon, and outdoor patio dining. In addition, this project included 30 duplex or single family homes and a rental building separate from the congregate care building. The project site was well over 30 acres and included the relocation of Rt. 2 to accommodate the deceleration and acceleration zone for the property.

### Additional Project Experience

Big Night Entertainment Group  
Cathedral Church of St. Paul  
The Haughey Corp.  
Boston Properties

Red Lantern Restaurant  
Cathedral Church Renovations  
Pure Hockey Tenant Fit-up  
1000 Winter Street Renovations

Boston, MA  
Boston, MA  
Burlington, MA  
Waltham, MA

### Experience

- Joined the Delphi team in 2007
- Project Executive - 1 year
- Senior Project Manager - 2 year
- Project Manager - 11 years
- Construction Manager - 4 years
- Assistant Project Manager - 2 years
- Developer - 1 year

### Education

- University of Maine
  - Bachelor of Science in Business Management - Finance and Marketing
- Sustained Continuing Education Program Member
- Leadership Training Program

### Certifications

- OSHA-10 Certification
- Construction Supervisor's License, unrestricted
- CPR/AED Certified

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# CHRISTOPHER THOMPSON, DIR. OF PROJ. DEVELOPMENT



## Overview

Responsible for all corporate estimating and budget development, leadership of estimating division, and major role in providing preconstruction services. Daily functions include prescreening and qualifying of prospective subcontractors and vendors; major role in developing client proposals; development, review, oversight and hands-on details for the creation, updating and deployment of project budgets and estimates during both preconstruction and construction phases of a project; collaboration with entire project team during the construction phase of the project for budget control and subcontractor buyout and award; oversee and manage estimating division staff during project take-offs and generation of scopes of work for all divisions; create value engineering options, project analysis and feasibility studies; conduct site walk throughs and investigative studies to determine true scope of work; and work closely with the owner, architect, engineers, and Delphi's project team to ensure a successful project from preconstruction through final construction.

## Project Experience



### **Commonwealth Glenville Apartments - Boston, MA** *Occupied Low-Income Residential Rehab.*

Renovations to 235 occupied, low-income residential apartments with work to include new interior finishes, kitchens, upgrades to bathrooms, common area improvements and MEP upgrades. To accommodate the tenants' needs, the project is being done in multiple phases.



### **Mashpee Village II - Mashpee, MA** *Renovations and Upgrades to Multi-Family Buildings*

Interior, exterior and site renovations and improvements to 145 residential units. Work was performed in phases to accommodate the ongoing tenant occupancy of the various buildings. Several handicapped accessible units were created, and a complete, new on-site waste water treatment facility was constructed.



### **Leyden Woods - Greenfield, MA** *Affordable Housing Development*

This challenging and extensive project consists of the removal and replacement of 49 residential buildings containing 200 units, with the work performed over 8 interconnecting phases. Each phase involves the replacement of 5 to 6 buildings. As residents were relocated from their existing units, the construction team demolished the entire phase, installed new foundations, new site utilities and infrastructure as well as new, unique, modular buildings.

## Additional Project Experience

Falmouth Housing Corp.  
Broder-Rindge, LLC  
Dennis Comm. Housing Pres. Assoc.  
Lionhead Apartments, LLC

Notantico Woods  
The Wyeth Apartments  
Melpet Farms Apartments  
Lionhead Apartments Renovations

Falmouth, MA  
Cambridge, MA  
Dennis, MA  
Dorchester, MA

## Experience

- Joined the Delphi Team in 2013
- Director of Project Development - 4 years
- Senior Estimator - 12 years
- Estimator - 7 years
- Assistant Project Manager - 1 year

## Education

- Wentworth Institute of Technology
  - Bachelor of Science in Construction Technology
  - Associates Degree in Construction Management
- AGC of Massachusetts - Young Contractors Professional Institute
- US Green Building Council - LEED AP Certification
- Sustained Continuing Education Program Member
- Leadership Training Program
- CPR/AED Certified

## Associations / Affiliations

### *(Past and Present)*

- Board Member – South Shore Habitat for Humanity
- AGC - Associated General Contractors of America
- AGC - Young Contractors Council / Leadership Role

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## DELPHI MBE WBE Methodology

- Delphi Construction, Inc. is not a certified MBE / WBE or Section 3 General Contractor. However, Delphi actively engages certified MBE / WBE and Section 3 subcontractors to participate in the goals of the project.
- Delphi was recently recognized by MassHousing as having the most WBE participation statewide on their Fiscal Year 2017 projects.
- Delphi's methodology for maximizing participation of MBE / WBE certified and Section 3 certified subcontractors is a multi-stage process:
  - Delphi has a pre-qualified subcontractor database that designates subcontractors who are MBE / WBE and / or Section 3 certified.
  - Once identified, the subcontractors from our database as well as other lender databases will be encouraged to bid this project.
  - Delphi will also utilize the HUD Section 3 Business Database to assist in meeting these goals. Delphi recently hired two subcontractors from this list on one of our projects in Boston.
  - Based on the location of this project, Delphi will also reach out to local subcontractors in the area who are MBE / WBE certified.
  - Delphi attends multiple MassHousing events that promote MBE / WBE subcontractors and markets Delphi as a company they would want to work with.
- Delphi welcomes input from the ownership team on preferred MBE / WBE subcontractors and suppliers.
- Delphi actively promotes the inclusion of MBE/WBE and local resident worker hours through its subcontracting language and requirements. Delphi also tracks participation of all worker hours on each project to ensure goals are being met and to highlight areas or trades that are in need of improvement or corrective measures.

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## **Delphi Construction Wins MassHousing Award for Hiring Women Owned Businesses**

*Multi-Market Construction Management and General Contractor Delphi Construction recognized by MassHousing for Highest Percentage WBE*

WALTHAM, Mass. ([PRWEB](#)) November 08, 2017 -- Delphi Construction, Inc. was honored by MassHousing for their achievement in hiring Women Business Enterprises in construction. The multi-market construction management, general contracting and specialized preconstruction services firm received an award for highest WBE dollar percentage among all recognized general contractors during the ceremony held on November 3 at One Beacon Street Boston.

Jake Simmons, CEO of Delphi Construction expressed his company's appreciation upon receiving the award from MassHousing. "Delphi has always had a strong commitment to diversity and inclusion. Both in terms of Women Business Enterprises and Minority Business Enterprises. We are pleased to be recognized by MassHousing for that commitment and honored to have received the General Contractor Award for Excellence."

The award ceremony featured welcoming remarks from Andrea Laing, Director of Diversity and Inclusion Division at MassHousing followed by remarks from Timothy Sullivan, Executive Director, MassHousing and MBE Owner Ricky Malrani. The award was presented to Delphi by James Fortune of the Diversity and Inclusion Division.

MassHousing is an independent, quasi-public agency created in 1966 and charged with providing financing for affordable housing in Massachusetts. The Agency raises capital by selling bonds and lends the proceeds to low- and moderate-income homebuyers and homeowners, and to developers who build or preserve affordable and/or mixed-income rental housing. MassHousing does not use taxpayer dollars to sustain its operations, although it administers some publicly funded programs on behalf of the Commonwealth. Since its inception, MassHousing has provided more than \$20 billion for affordable housing.

# THE WYETH APARTMENTS

Cambridge, Massachusetts

Winner of "ABC Excellence in Construction Award 2014" and "ABC Green Building Award 2014"



Renovated Building No.1

## Project Description

The Wyeth in Cambridge project comprised of a LEED Platinum Certified renovation and conversion of two existing brick and wood floor structure buildings on a 2.3 acre site. Nearly 55,000 square feet of abandoned buildings were converted into 44 luxury apartments. The project timeline was approximately 16 months of construction for both buildings along with 4 months of preconstruction services.

Site improvements included protection of existing mature trees while building 97 parking spaces, large common lawn area green space with extensive plantings and 32 bicycle spaces. Natural gas services were disconnected for these "all electric" buildings along with replacing the existing utilities while maintaining services and access to the occupied building on the site.

**Client:**  
BRODER-R NDGE, LLC  
Boston, MA

**Project Type:**  
Extensive Renovations, Addition and Complete Site Work Package

**Architect:**  
TOULOUK AN TOULOUK AN, NC.  
Boston, MA

**Delivery Method:**  
Construction Management, with Preconstruction Services

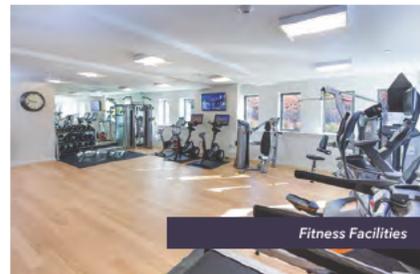
**Project Size:**  
54,791 sq. ft.



New Residential Kitchen



Environmental Commitment



Fitness Facilities

## BANK OFFICE BUILDING

Needham, Massachusetts



Main Entrance

### Project Description

After the successful completion of the initial phase of the project with the renovations to their occupied banking facility next door, Needham Bank moved forward with Delphi to construct their new office building. This project consists of an all-new, two story office building with full basement to house the client's corporate offices and administrative functions.

The project began with the demolition of several old wood frame buildings on two adjacent lots, and a complete clearing of the old lots prior to new work commencing. The new building is a steel frame structure with light gauge metal framing, a full hip roof, well detailed wood exterior and a fully developed site with extensive parking and carefully selected landscaping.

**Client:**  
NEEDHAM BANK  
Needham, MA

**Architect:**  
KN GHT, BAGGE AND  
ANDERSON, NC.  
Charlestown, MA

**Project Size:**  
15,871 sq. ft.

**Project Type:**  
New, 2-Story Office Building with  
Full Site Development

**Delivery Method:**  
Construction Management, with  
Preconstruction Services



Central Lobby and Stair



Cubicles in the Main Work Area



Conference Room

# DOLAN FIELDHOUSE & ATHLETIC FIELDS

Worcester, Massachusetts

Winner of the "Honor Award 2005" from Preservation Worcester, and AIA Central Massachusetts Chapter



Dolan Fieldhouse at Night

## Project Description

The fieldhouse was completed during the spring of 2003. Delphi was able to meet an aggressive timetable to complete the playing fields during 2002 with the entire project to be completed in ten months.

Careful phasing by Delphi ensured that Clark's athletes did not miss a single season on their home field. The client was able to apply \$150,000 cost savings from Delphi's aggressive purchasing on the project to various upgrades.

**Client:**  
CLARK UNIVERSITY  
Worcester, MA

**Architect:**  
CHAN-KR EGER & ASSOCIATES  
Cambridge, MA

**Project Size:**  
Fieldhouse - 29,600 sq. ft.  
Fields & Site - 463,000 sq. ft.

**Project Type:**  
Construction of a new field house, tennis courts, artificial turf baseball field and soccer field.

**Delivery Method:**  
Design-Build



Dolan Fieldhouse Main Entrance



Fieldhouse Exterior



Dolan Fieldhouse Gymnasium

# COMMONWEALTH GLENVILLE APARTMENTS

Allston, Massachusetts



Commonwealth Avenue Façade

## Project Description

**R**enovations to 235 occupied, low-income residential apartments in 17 buildings. To accommodate the tenants' needs, the project is being done in multiple phases over nearly 2 years.

The work involved renovating kitchens, bathrooms and common areas, while adding new fire protection to all units and buildings, new site utilities, masonry repointing and a massive storm water recharge system that takes rainwater that once flooded the entire area and converts it back into groundwater.

<p><b>Client:</b> ALLSTON-BRIGHTON COMMUNITY DEVELOPMENT CORP. Allston, MA</p>	<p><b>Project Type:</b> Occupied Renovations to Affordable Housing Apartments</p>
<p><b>Architect:</b> DAVIS SQUARE ARCHITECTS, INC. Somerville, MA</p>	<p><b>Delivery Method:</b> Construction Management, with Preconstruction Services</p>
<p><b>Project Size:</b> 235 Residential Units 212,978 sq.ft.</p>	



Glenville Avenue Façade



Updated Main Lobby



Newly Renovated Kitchen

**Kenneth S. (Kenny) Weill**  
205 Wolcott Road, Brookline, MA 02467  
617-680-2672

[kweill@kweillconsulting.com](mailto:kweill@kweillconsulting.com) [www.kweillconsulting.com](http://www.kweillconsulting.com)  
<https://www.linkedin.com/in/kenny-weill-86646a7>

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**CURRENT EMPLOYMENT:**

K. WEILL CONSULTING GROUP, LLC Brookline, MA 2002-Present  
Provide consulting services for nonprofit organizations in strategic fund development, Board development, CRM databases, individual giving, grant writing, prospect research, web and other promotional material content, copy editing. Conduct in-person and remote trainings and workshops. Founded NPO Connect - online skill-building and networking platform for nonprofit professionals.

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**PREVIOUS EMPLOYMENT:**

THE GREATER BOSTON FOOD BANK Boston, MA 2000-2002  
*Manager, Member Services*

CAMBRIDGE HEALTH ALLIANCE – NETWORK HEALTH Cambridge, MA 1996-2000  
*Director, Membership Department*

CHILDREN’S HOSPITAL (Boston, MA), MA DEPARTMENT OF PUBLIC HEALTH (Boston, MA),  
HARVARD SCHOOL OF PUBLIC HEALTH (Boston, MA), PERKINS SCHOOL FOR THE BLIND (Watertown, MA) 1989-1995  
*Research, Administrative and Direct Care Positions*

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**EDUCATION:**

HARVARD UNIVERSITY SCHOOL OF PUBLIC HEALTH 1994-1996  
M.S. Health Policy and Management, June 1996

WESLEYAN UNIVERSITY 1985-1989  
B.A. Biology-Psychology, May 1989. Limbach Award for Community Service

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**PRESENTATIONS/WORKSHOPS:**

Remote: Several webinars and online training series from 2012 to Present. Topics include “How to Position Your Nonprofit for Fundraising Success: The ‘5 Shifts’ Model,” “Grow Your Tent: How to Identify and Prioritize Potential Supporters,” “How to Create a Strategic Fundraising Plan,” “Introduction to Grant Writing,” “How to Create a Logic Model for Your Program,” “How to Launch a Monthly Sustainer Program,” “Tips for a Killer Grant Proposal.”

In Person:

“How to Position Your Nonprofit for Fundraising Success: The ‘5 Shifts’ Model.”

Associated Grantmakers. Boston, MA. May 10, 2017.

Massachusetts Nonprofit Network Annual Conference. Framingham, MA. November 2, 2016.

“How to Craft a Killer Foundation Grant Proposal.”

Boston Public Library. Boston, MA. May 30, 2017.

Associated Grantmakers. Boston, MA. April 5, 2017 and October 27, 2016.

Nonprofit Net. Lexington, MA. February 16, 2017.

Kenny Weill, *continued*

“How to Engage Your Board of Directors.” The Boston Foundation. Boston, MA. October 20, 2016.

“The Webinar: A Powerful Tool to Grow Your Business.” Nonprofit Consultants Network. Boston, MA. February 26, 2016.

“How to Create a Strategic Fund Development Plan.”

The Boston Foundation. Boston, MA. April 25, 2017.

Nonprofit Net Seminar. Lexington, MA. September 16, 2015.

Providers Council Annual Convention & Expo. Boston, MA. November 17, 2014.

Partners Benefits Group Sponsored Symposium. Framingham, MA. February 7, 2013.

Assess, Learn & Grow Conference. Institute for Nonprofit Development, Mount Wachusett Community College. September 29, 2010.

Annual Food Forum. South Shore Community Action Council. November 13, 2009 and December 1, 2008.

“The Healthy Harvest Initiative: Cost-Effective Program Design and Growth.” Ounce of Prevention Conference. Massachusetts Department of Public Health. October 6, 2009.

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**PUBLISHED WORK:**

Introduction to Grant Writing. Online module for the *New England Public Health Training Center* via Boston University School of Public Health. January 2016.

A checklist to make your compelling proposal a winner. Chapter in eBook, *The Nonprofit Advisor*. March 2014.

On Your Time: Innovations to Maximize the Impact and Sustainability of Online Training for the Public Health Workforce. Hope Worden Kenefick, Sharon Ravid, Kathleen MacVarish, Jennifer Tsoi, Kenny Weill, Elizabeth Faye, Anne Fidler. *Journal of Health Promotion*. Vol 15. Issue S1. March 2014. pp.48-55.

Is your organization “grant-ready?” *Nonprofit Direct: Nonprofit National Resource Directory*.

<http://www.nonprofit-direct.com/files/2783332/uploaded/Is%20Your%20Nonprofit%20Organization%20Grant-Ready-12-12.pdf> December 2012.

A checklist to make your compelling proposal a winner. *Massnonprofit.org*.

<http://massnonprofit.org/expert.php?artid=2252&catid=19>. June 27, 2011.

A nationwide survey of financing health-related services for special education students. Jack Rodman, Kenny Weill, Margaret Driscoll, Terry Fenton, Hillel Alpert, Susanne Salem-Schatz, Judith S. Palfrey. *Journal of School Health* April 1999 v69 n4 p133 (5207 words)

Schoolchildren with HIV infection: a survey of the nation’s largest school districts. Judith S. Palfrey, Terence Fenton, Alison T. Lavin, Stephanie M. Porter, Deirdre Shaw, Kenneth S. Weill, Allen C. Crocker. *Journal of School Health* Jan 1994 v64 n1 p22(5) (3632 words)

School health services in the age of AIDS. Alison T. Lavin, Stephanie M. Porter, Deirdre M. Shaw, Kenneth S. Weill, Allen C. Crocker, Judith S. Palfrey. *Journal of School Health* Jan 1994 v64 n1 p27(5) (3793 words)

Support for children with HIV infection in school: Best practices guidelines. Allen C. Crocker, Alison T. Lavin, Judith S. Palfrey, Stephanie M. Porter, Deirdre Shaw, Kenneth S. Weill. *Journal of School Health* Jan 1994 v64 n1 p32(3) (1745 words)

Creating an agenda for school-based health promotion: a review of 25 selected reports. Alison T. Lavin, Gail R. Shapiro, Kenneth S. Weill. *Journal of School Health* August 1992 v62 n6 p212(17) (9108 words)

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**UNPUBLISHED WORK:**

Massachusetts Public Health Regionalization Project: Status Reports. September 1, 2009 and February 19, 2008. Boston University School of Public Health.

Elderly Nutrition Needs Assessment: Greater Plymouth, Massachusetts. South Shore Community Action Council. September 16, 2005.

Literature Review Findings: Decreasing future alcohol and other drug use through effective prevention strategies with third- to fifth-grade children. Julia Gittleman, Ph.D. and Kenny Weill for The Medical Foundation (now Health Resources in Action). March 15, 2005.

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**VOLUNTEER ACTIVITIES:**

Youth Baseball and Basketball Coach, 2011-Present.

Future Chefs: Advisory Board Member, Fundraising Committee Chair, 2011-2015.

Community Servings: Meal delivery to people homebound with life-threatening illnesses, 2006-2010.

Big Brothers Big Sisters of Massachusetts Bay: "Big Brother" to Roxbury teenager, 1999-2006.

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**PROFESSIONAL AFFILIATIONS:**

Association of Fundraising Professionals, Nonprofit Consultants Network, Massachusetts Nonprofit Network, Independent Advancement Consultants.

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# BOSTON JOBS POLICY



# BOSTON JOBS POLICY

Tenants' Development Corporation (TDC) will comply with the City of Boston laws and regulations concerning hiring staff and workers in the development and construction phases of our proposed project as identified in this response to the RFP for 151 Lenox Street, Roxbury, Parcel 22a, South End Urban Renewal Area.

TDC will comply with City of Boston Chapter 30 of the Ordinance of 1983, the Mayor's Executive Order of July 12, 1985 and the Boston Employment Commission ordinance passed by the City Council on July 30, 1986.

TDC will adopt the Employment Standards as outlined in the Office of Boston Residents Jobs Policy. Specifically, the following Employment Standards:

The Boston Residents Construction Employment Standards as set forth in the Mayor's Executive Order of July, 1985 entitled the Executive Order Extending the Boston Residents Jobs Policy, attached hereto as Exhibit A and adopted by the Boston Planning and Development Agency on July 26, 1985. Specifically, the Executive Order required that the Developer's Construction Employment Plan shall ensure that on a craft-by-craft basis for construction employment for the Project, the following Boston Residents Construction Employment Standards are met:

1. At least fifty (50) percent of the total employee worker hours in each trade shall be by bona-fide Boston Residents.
2. At least twenty-five (25) percent of the total employee worker hours in each trade shall be by minorities; and
3. At least ten (10) percent of the total employee worker hours in each trade shall be by women.

The contractor(s) shall include persons filling apprenticeship and on-the-job training positions.

TDC shall incorporate in every general construction contract or construction management agreement an enumeration of the Standards and shall impose a responsibility upon the general contractor or construction management to take all steps enumerated in the Contractor's Best Efforts as outlined in the Boston Employment Commission Ordinance, Boston Residents Jobs Policy. TDC will meet with the contractor no less frequently than weekly throughout the period of construction to review the contractor's compliance with the Standards. TDC will maintain minutes of such meetings and shall forward a copy of the minutes to the Boston Residents Job Policy Office within ten days of the meeting.

TDC will comply with the escrow deposits as required by the Boston Employment Commission.

TDC will comply with the requirements of the Office of Boston Residents Jobs Policy process to provide to the Contractor guidelines which include the following material/documents:

1. Employment Plan/Quarterly Workforce Projection
2. Boston Resident Verification Form
3. Workforce Request Forms
4. Applicant Disposition Form
5. Electronic Weekly Utilization Report
6. Sample Letter Informing Subcontractors of Boston Residents Jobs Policy Obligations







# DIVERSITY AND INCLUSION PLAN



# DIVERSITY AND INCLUSION PLAN

TDC is committed to creating a diverse and inclusive culture with growth and development opportunities for everyone. Our strength as a property management organization draws from our wide range of experiences and perspectives. TDC has a long-standing reputation and a philosophy of ensuring that we seek out and engage the services of contractors of color as part of its management practices. We utilize the City of Boston's SLBE/MWBE/VOSBE Directory and MassHousing's Supplier Diversity Program as recruitment tools.

During the renovation of two TDC-owned properties, TDC was committed to ensuring compliance by the general contractor and subcontractors with the City of Boston Jobs Policy and Ordinance. TDC, as well as TDC's founder, Mary Longley, has won a substantial number of commendations from MassHousing, Massachusetts Housing Finance Agency, and Harvard Community Health Plan in recognition of their accomplishments in this area. (Please see TDC's awards on the following pages.) Currently, 96% of the TDC workforce is minority, 53% are women and 35% live in Boston.

Minority- and women-owned businesses are key players in every project. Davis Square Architects recognizes the importance of working with MBE/WBE-certified firms, and is committed to establishing strong partnerships and communities by supporting MBE/WBE participation. They are dedicated to diversity and inclusiveness, and make every effort to include MBE/WBE-certified firms on their project teams. For this project, they are proposing to use all MBE/WBE subconsultants.

Delphi Construction is an active promoter of the inclusion of MBE/WBE firms, and was recently recognized by MassHousing as having the most WBE participation statewide on their Fiscal Year 2017 projects. Engaging MBE/WBE-certified subcontractors to participate in the goals of their projects, Delphi is strongly committed to diversity and inclusiveness. For more information regarding their MBE/WBE methodology, please refer to their qualifications in Attachment B.



Presented to

MARY LONGLEY

With our heartfelt appreciation

for your 20 years

of continued loyal service

and contributions

on this Day March 14, 1987

T.D.C.

*Certificate of Special Recognition*

Be it known that  
this certificate is presented by

MASSACHUSETTS HOUSING FINANCE AGENCY

to

*Tenants Development Corp.*

For

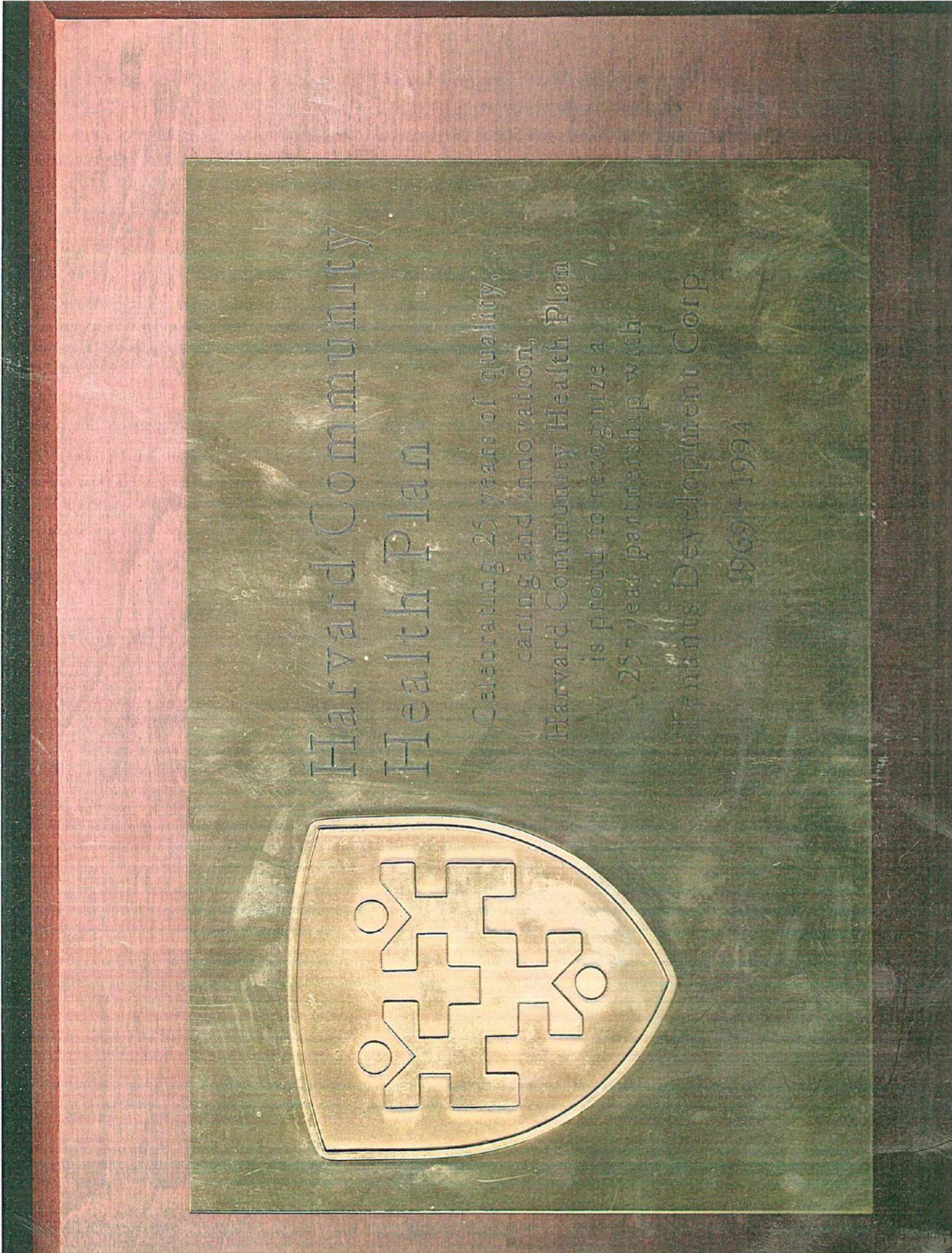
outstanding achievement in increasing MBE participation  
by exceeding the ten percent goal  
for fiscal year 1992

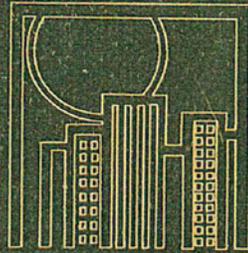
December 8, 1992

*Man Dely*  
Executive Director

*Wilson Henderson*  
Director, Equal Opportunity Division

© GOES 445





Mary Longley

Founder

Celebrating 30 Years  
of Exceptional Dedication

To The Growth Of  
*Tenants' Development Corporation*

Boston, Massachusetts

October 24, 1998

AWARD OF EXCELLENCE

Presented to

Tenants Development  
Corporation

For the Highest WBE  
Achievement in Linkage Area II  
during fiscal year 2002.

September 18, 2002



# AWARD OF EXCELLENCE

Presented to

Tenants Development  
Corporation

For the Highest MBE  
Achievement in Linkage Area II  
during fiscal year 2002.

September 18, 2002



THE  
MASSACHUSETTS HOUSING FINANCE AGENCY

Presents to

*Tenants Development Corporation*  
*Germa Belay, Executive Director*

its  
Outstanding MBE Performance Award

In Recognition of Meeting or Exceeding MHFA's  
Fiscal Year 1995 MBE Vendor Goal.



Steven D. Pierce  
Executive Director



Wilson Henderson  
Equal Opportunity Director

AWARD OF EXCELLENCE

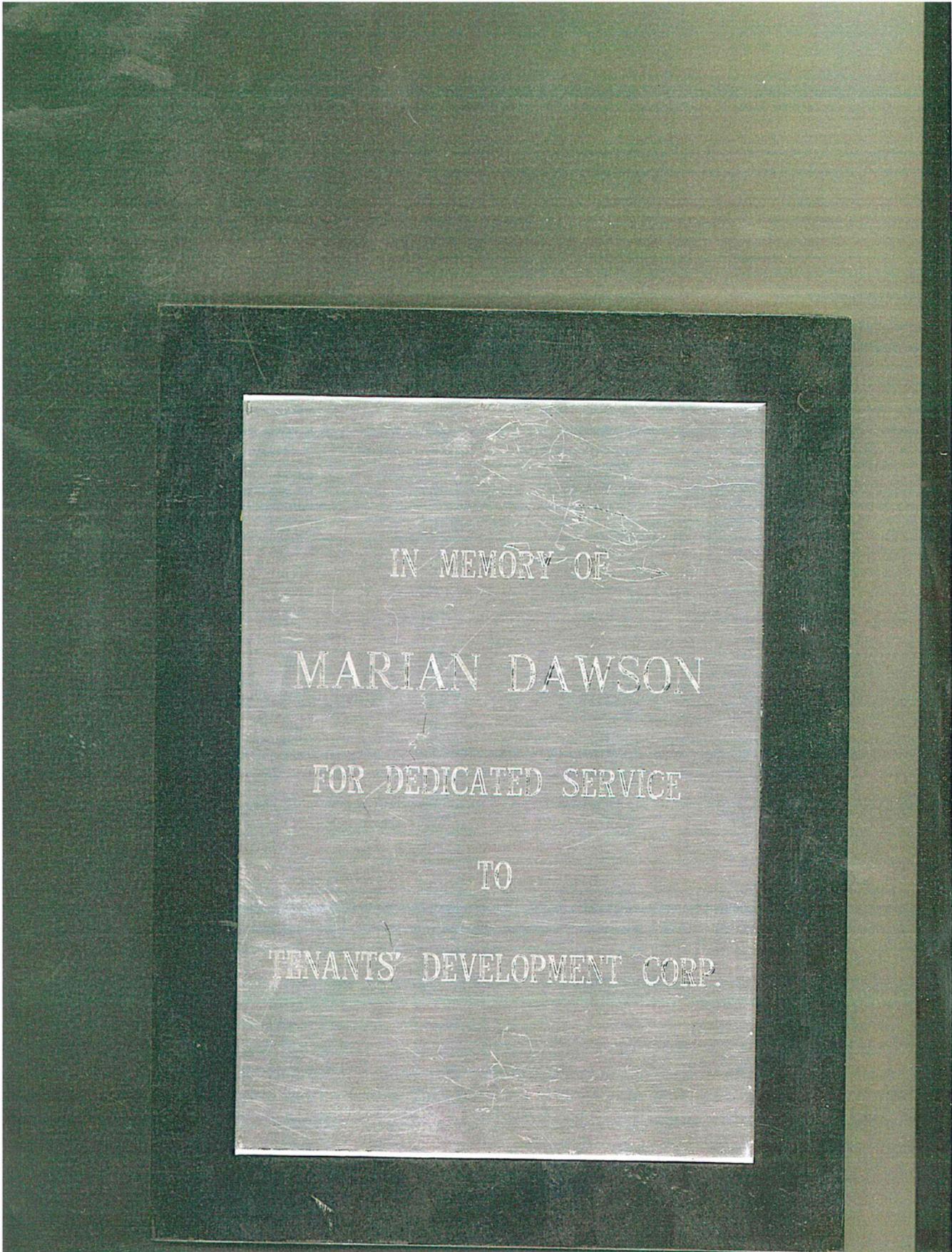
Presented to

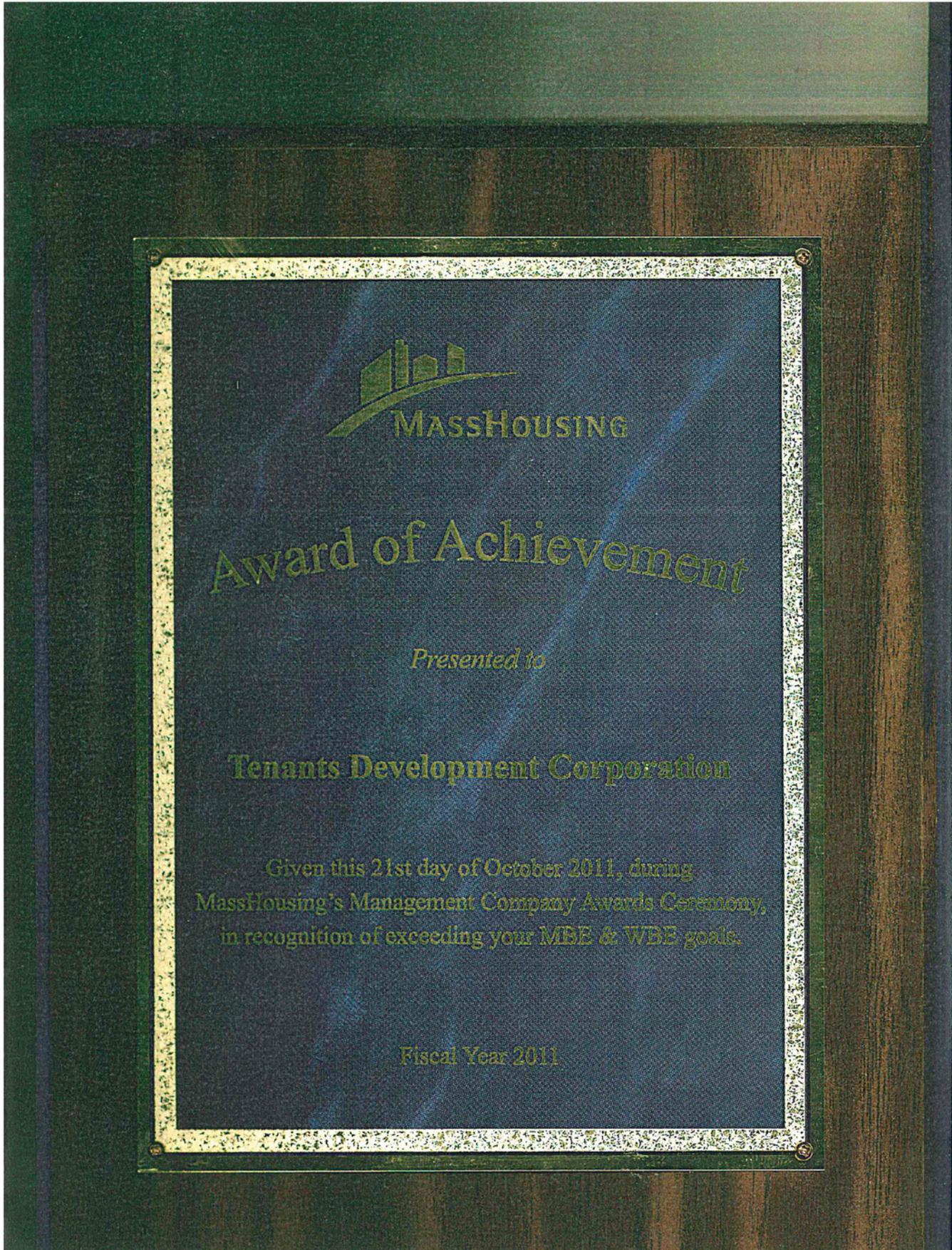
Tenants Development  
Corporation

For the highest MBE percentage  
achievement in Linkage Area II  
during fiscal year 2006.

*November 16, 2006*









# Award of Achievement

*Presented to*

**Tenants Development Corporation**

Given this 26th day of October 2012, during  
MassHousing's Management Company Awards Ceremony,  
in recognition for achieving your MBE & WBE goals.

Fiscal Year 2012





## Award of Achievement

*Presented to*

**Tenants' Development Corp.**

Given this 31st day of October 2014, during  
MassHousing's Management Company Awards Ceremony,  
in recognition for achieving your MBE & WBE goals.

Fiscal Year 2014



## Award of Achievement

*Presented to*

**Tenants' Development Corp.**

Given this 30th day of October 2015, during  
MassHousing's Management Company Awards Ceremony,  
in recognition for achieving your MBE & WBE goals.

**Fiscal Year 2015**



# Award of Achievement

Presented to  
**Tenants' Development Corp.**

Given this 3rd day of November 2017, during  
MassHousing's Business Partner Awards Ceremony,  
in recognition for achieving your MBE goal.

Fiscal Year 2017

  
Timothy C. Sullivan  
Executive Director

  
Andrea J. Ieding  
Director, Diversity and Inclusion Division



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# DEVELOPMENT SCHEDULE



# DEVELOPMENT SCHEDULE

Tenants' Development Corporation | 151 Lenox Street

★ milestone

2018												2019												2020												2021				
F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	

## Architecture & Engineering

- Schematic Design
- Design Development/Construction Drawings
- Construction Drawings out to Bid

## Bidding & Construction

- Bidding & Contractor Selection
- Construction Contract Complete
- File for Building Permit
- Building Permit Issued
- Construction**
- Start Construction
- Construction 50% Complete
- Construction 100% Complete
- Certificate of Occupancy Issued

## BPDA

- Submission to BPDA
- BPDA Designation
- Small Project Review
- BPDA Board Approval

## Public Approvals/Community Process

- Community Outreach Process
- File for Zoning Relief, at Boston ISD
- ZBA Hearing & Approval

## Capital Campaign

- Interview campaign consultants
- Engage Campaign Consultant
- Campaign Plan in place
- Begin Quiet Phase
- Secure LEED Campaign Gifts
- █ in pledges
- █ in pledges
- █ in cash for Construction Start
- █ in pledges
- █ in pledges
- █ Total cash in\*

## Financing

- Letters of Interest from MHIC (NMTC) and Eastern Bank
- Preliminary NMTC Application to MHIC
- Final package to MHIC on NMTC request
- Commitment from MHIC on NMTCs
- Commitment from Eastern Bank
- Closing of All Sources

\* The remaining \$1.7 million that has not come in in cash will be bridged as it comes in over the balance of 2021, 2022, & 2023.