

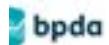


# REIMAGINING THE AUSTIN STREET PARKING LOTS

Community • Sustainability • Transformation

Response to the Boston Planning & Development Agency Request for Proposals for the Austin Street Parking Lots

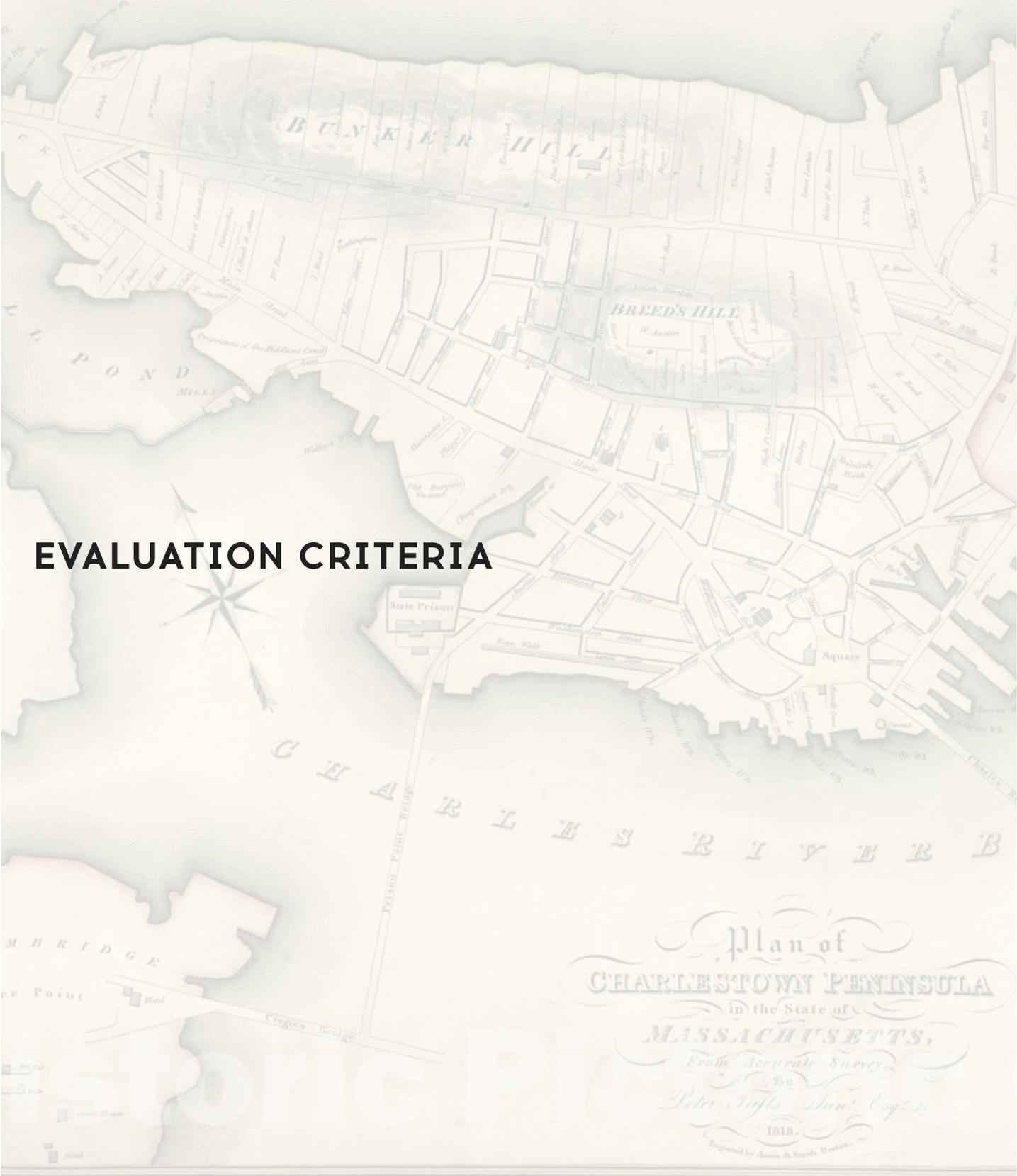
**Development, Design, Sustainability, Disclosures and Checklist Submission**



TRINITY  
FINANCIAL

July 10, 2023

M Y S T I C R I V E



# EVALUATION CRITERIA

Plan of  
 CHARLESTOWN PENINSULA  
 in the State of  
 MASSACHUSETTS,  
 From Accurate Survey  
 By  
 Peter Swift Surveyor  
 1818.  
 Engraved by Austin & Smith, Boston.

HISTORIC PIC

**1. COMPARATIVE EVALUATION CRITERIA – TRINITY FINANCIAL’S PROPOSAL**

<p>i.      <b>Development Concept– Highly Advantageous</b></p>	<p><b>New Affordable Housing, Indoor and Outdoor Recreational Space, Open Space, Arts Components and Innovative Early Education Component Maximizes Community Benefits for the Charlestown Community</b></p> <ol style="list-style-type: none"> <li>1. Affordable rental and affordable homeownership housing comprises 60% of residential development program.</li> <li>2. Rental housing includes a mix of bedroom sizes-from studios to four-bedroom units with affordability across multiple income levels:             <ul style="list-style-type: none"> <li>• 30 units at 30% AMI</li> <li>• 70 units at 50% AMI</li> <li>• 67 units at 60% AMI</li> <li>• 29 units at 70% AMI</li> <li>• 50 units at 80% AMI</li> <li>• 146 units at market rents</li> </ul> </li> <li>3. For sale housing includes both affordable for sale housing and market rate for sale housing:             <ul style="list-style-type: none"> <li>• 166 affordable condominiums at 80% and 100% of Area Median Income (AMI)</li> <li>• 128 market rate condominiums</li> </ul> </li> <li>4. The inclusion of market rate units enhances the public benefits of the proposal and cross-subsidizes the affordable housing units.</li> <li>5. Proposal includes not only BPDA-required outdoor field space, but also includes indoor component, including a youth basketball court, for all-weather recreation.</li> <li>6. Proposal includes a significant arts component including live/work/sell affordable housing with a preference for artists, a community art gallery, a potential rehearsal/maker space and a Call for Artists, highlighting Trinity’s experience incorporating the creative economy into its developments.</li> <li>7. Trinity’s Proposal includes potential expansion of the neighborhood nursery school with potential partnerships that can expand its reach, impact and accessibility. The inclusion of an educational component allows the project to feel connected to the larger Charlestown community.</li> </ol>
<p>ii.     <b>Urban Design – Highly Advantageous</b></p>	<ol style="list-style-type: none"> <li>1. <b>Conforms to PLAN Charlestown Open Space Use</b> - Proposal includes the creation of two neighborhood-oriented open spaces. <b>“The Fields”</b> provides the required recreational fields in line with the requirements of the RFP. A new street bisects the fields allowing access and parking for families. <b>“The Common”</b> is a new landscaped greenspace fronting new proposed retail, live/work studios and arts gallery, creating an artistic urban plaza for picnics, gathering, farmers markets and food trucks.</li> <li>2. <b>Building Height, Massing and Character</b> – Trinity’s plan is appropriately scaled for the abutting residential neighborhood providing lower heights of six stories along Rutherford Avenue and scaling the buildings up as they approach Interstate 93. This proposed density is of a lower scale than nearby Cambridge</li> </ol>

	<p>Crossing, so as to respect the historic fabric of the Charlestown community.</p> <p>3. <b>Access &amp; Parking</b> – The development is in line with the RFP guide of a .4 parking ratio. The development maintains access for the Boston Sand &amp; Gravel and includes an additional access road to allow for safe drop off for the proposed fields and expanded nursery school.</p>
<p>iii. <b>Sustainability and Healthy Development- Highly Advantageous</b></p>	<p>1. Trinity has engaged a dedicated Air Quality specialist, Tech Environmental, on its team to study and monitor both indoor and outdoor air quality.</p> <p>2. Trinity has proposed four passive house buildings as part of its development. Trinity has just completed the largest passive house building in the country and brings the experience and expertise to this development. The buildings proposed for the Austin Street development are also proposing the use of geothermal and photovoltaic energy as part of this development.</p>
<p>iv. <b>Developer Demonstration of the Ability to Execute the Project as Presented- Highly Advantageous</b></p>	<p>3. Trinity is a 35-year-old real estate development company based in Boston. We have created over \$3 Billion in development including the creation of over 9,000 units of housing and 600,000 SF of non-residential development. Trinity’s relevant experience includes the recently completed 26-story, 277-unit mixed-income Passive House development in the Bronx, NY. That development is currently the largest certified passive house development in the country, and it has been awarded the prestigious <i>Plus Best Overall Project and Best High-Rise Multifamily Project of 2022 as well as New York State’s Energy Research and Development Authority’s Building of Excellence Awards</i>. Trinity is a leader in affordable housing creation and has completed five, multi-phase developments with the Boston Housing Authority (Orchard Gardens, Maverick Landing, Franklin Hill, Washington Beech and Orient Heights) for a total of 1,530 units. Trinity’s comparable experience in market rate housing includes the development of the 241-unit Avenir development, the 310-unit One Canal development on the Rose Kennedy Greenway, and the 200-unit Boston East development on the East Boston waterfront.</p> <p>4. It will provide the working capital in order to successfully design and permit the development and raise the necessary funds to construct and complete the development.</p> <p>5. Trinity maintains a \$3M line of credit with TD Bank for working capital purposes, and has long-standing relationships with TD Bank, Bank of America, MHIC and MassHousing as project lenders and investors.</p>
<p>v. <b>Diversity and Inclusion – Highly Advantageous</b></p>	<p>1. Trinity Financial is 50% minority owned. Should Trinity be designated, it is planned that its long-term employees, Kenan Bigby, a person of color, and Abby Goldenfarb, a woman, will lead the development project.</p> <p>2. In addition, 27% of the firms identified to work on the development are WBEs or MBEs, including: ICON architecture (WBE), Klopfer Martin Design Group (WBE), Bryant Associates (MBE/DBE), Nitsch Engineering (WBE) Architects, Everstreet (WBE), Wang Commissioning and Tara Construction (MBE)</p>

	<ol style="list-style-type: none"><li>3. The proponent has set forth a clear plan to maximize minority participation in the construction of the project and has included a chart showing Trinity's track record exceeding goals for employing minorities, women and Boston residents, and for subcontracting to Minority- and Women-owned businesses.</li><li>4. The plan includes and affirms hiring and staffing goals of 50% residents, 25% people of color, and 10% women, as well as 25% MBE and 9% WBE firms.</li><li>5. The plan includes significant outreach for both market-rate, affordable and retail marketing, leasing and sales and proposes partnerships and alliances that are new and innovative.</li><li>6. The proponent also sets forth a clear plan for employing minorities and women in the management, and for purchasing from Minority- and Women-owned firms for property management goods and services. Notably, the proponent's management firm, Trinity Management, is headed by a woman of color and Trinity Management's overall workforce is over 67% minority and over 52% female.</li></ol>
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## DEVELOPMENT SUBMISSION

- a. Development Team
- b. Development Concept
- c. Development Plan
- d. Boston Residents Jobs Policy
- e. Diversity and Inclusion Plan



July 10, 2023

Teresa Polhemus  
Executive Director/Secretary  
Boston Planning & Development Agency  
One City Hall Square #9  
Boston, MA 02201

Dear Ms. Polhemus,

On behalf of Trinity Financial, I am pleased to express our enthusiastic interest in the BPDA's Request for Proposals for the redevelopment of the Austin Street Parking Lots.

The redevelopment of the Austin Street Parking Lots is a significant undertaking. Today, the southern gateway to the dynamic and historic neighborhood of Charlestown is a pair of underutilized parking lots which neither support nor reflect the vitality of the neighborhood. The Trinity team views this RFP as an incredible opportunity to transform the lots into an extension of the greater Charlestown community with much needed affordable and market rate housing, the potential expansion of a neighborhood-based early education program, a deep commitment to the arts, neighborhood retail, and indoor and outdoor recreational spaces for the community.

For over 35 years, Trinity Financial has been at the forefront of transformative, transit-oriented development. Working with many of the team members we have assembled for this project, we have taken on incredibly complicated projects. We were the first developer to finance and construct buildings in the Bulfinch Triangle after the removal of the Central Artery's elevated expressway, negotiating complicated ground leases with MDOT and the MBTA. We worked with the city of Boston and the State to transform obsolete public housing units into beautiful mixed-income neighborhoods, creating over 1500 units with the Boston Housing Authority. We completed the first affordable, homeownership condominium development on the East Boston waterfront in 2005, as part of our Carlton Wharf development, when new development on the East Boston waterfront had not yet been established. Most recently, we built the country's largest passive house affordable housing development in the Bronx, NY, winning national awards for our innovation in design and sustainability.

The successful execution of the Austin Street Parking Lots development is not a simple undertaking. This project is inherently complex-especially given its location on filled tidelands, which require a Chapter 91 License from the Executive Office of Environmental Affairs. On account of existing infrastructure and access needs by Boston Sand and Gravel, it is critical that design, engineering and construction must be carefully coordinated. In an environment with both rising construction costs and interest rates, a team will need to be experienced in balancing the needs of numerous public agencies and community groups, while keeping project costs in line. We have demonstrated history of overcoming similar challenge in development such as our pivoting from a condominium structure to a rental strategy in 2007 when facing the headwinds of the Great Recession, and working with hundreds residential tenants to keep them in their homes during the Pandemic.

At the forefront of these projects has been our deep commitment to people and to community. As you will

see in the following proposal, **in addition to the incredibly diverse and talented team** we have assembled, we are inspired by the proposed **partnerships with Charlestown community-based partners** that we have initially engaged.

## **COMMUNITY**

First, we have engaged the Charlestown Nursery School in an effort to support their **ambition to create broader and more equitable access to high quality, early childhood education**. This proposal includes a space for a potential relocation and expansion of their existing 4,000 SF space to a new 19,000 SF space that could accommodate a broader spectrum of early childhood programming, teacher training and specialty instruction.

Second, we have had preliminary conversations with Deidre Tao of the Artists Group of Charlestown to learn more about this group and their aspirations. In our efforts to celebrate the **burgeoning arts community in Charlestown**, we have included an opportunity for a **community art gallery presence at the property**. We are also proposing the creation of an artist preference for the inclusionary development policy rental live/work/sell units. Finally, we will be sponsoring a Call for Artists for the commissioning of a public art piece for our open space and exploring the potential for a music rehearsal space or maker space at the property.

Our team is energized by the potential to provide the desired outdoor field space for Charlestown youth that will allow for youth practice of sports such as soccer, t-ball, flag football and lacrosse. We are exploring partnerships to program and run the proposed indoor community sport court we are proposing adjacent to the fields in order to advance opportunities for year-round healthy recreation for Charlestown children.

In a community with many important stakeholders, we look forward to not only continuing the preliminary conversations we have started but also to engage with the multitude of neighbors and stakeholders who are eager to provide input on the site after we are designated. We believe our proposal can only improve with this input.

## **TEAM**

We are proposing a team to develop this project that we believe is unprecedented and unmatched in its capability and diversity. Trinity Financial is a 35-year-old real estate development company that is 50% owned by Patrick Lee (a Black person) and 50% owned by James Keefe (a White person). Since the company's founding in 1987, the firm has intentionally sought diversity in its hiring. Trinity's staff is quite diverse and includes people of color and women in positions of significant authority. More than 53% of Trinity's current personnel are either people of color (42%) and/or women (29%). The Trinity senior staff that will be responsible for this development, Kenan Bigby, is a man of color, and Abby Goldenfarb is a woman, and a resident of Charlestown.

Our property management firm, Trinity Management, LLC is committed to employing a diverse workforce and creating opportunities for small business, disadvantaged businesses, minority-owned and women-owned business enterprises. Trinity Management's commitment to Affirmative Action and Equal Opportunity serves not only the best interests of our Company, but also the communities in which it operates. Trinity Management's overall workforce is over 67% minority and over 52% of its workforce is female. Trinity Management, LLC has been honored annually, since its inception, by MassHousing, a self-supporting not-for-profit public agency, for its achievement in consistently awarding millions of dollars annually to minority and women-owned business enterprises in Massachusetts.

Our deep commitment to capability and diversity also extends to the team of consultants that we have assembled for this development. The team includes firms, including expert sustainability consultants, that have the experience necessary to successfully execute the precedent-setting sustainability objectives that our team has proposed here.

Forty two percent (42%) of the consultants that Trinity has assembled for this project include MBE, WBE, and women-owned firms. The design team for the project includes **ICON architects**, a **WBE firm**, and **Klopfer Martin Design Group**, a **WBE** landscaping architecture firm. Our civil engineering and transportation team, **Bryant Associates**, is a **Minority and Disadvantaged Business Enterprise**. **Nitsch Engineering**, a **WBE**, will provide survey services, **Everstreet**, a **WBE**, will provide retail consulting and brokerage. **Wang Commissioning** will be the commissioning agent for the development and is both a **WBE** and **MBE**. Trinity Management is led by a Latina Chief Operating Officer and employs a diverse workforce, many of whom are Black, Latino and Asian, allowing the company to provide management services that reduce or eliminate cultural and linguistic barriers.

The full team that Trinity has assembled is experienced, committed, and capable. Please see **Exhibit A** for a description of our Team Members and their responsibilities.

### **RELEVANT EXPERIENCE**

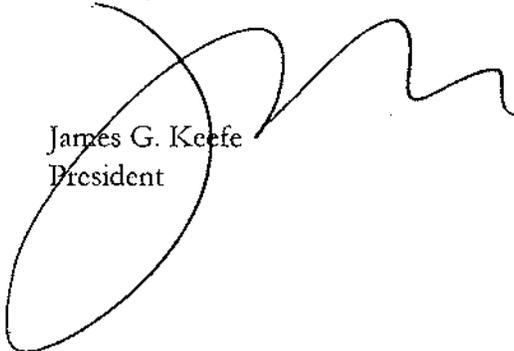
Trinity's development experience now amounts to more than \$3 billion of development work, including more than 9,500 units of housing and over 600,000 sf of commercial of office space. Our affiliated property management company, Trinity Management, manages more than 7,700 units of housing, including more than 2,100 units for third parties. Trinity has headquarters offices in Boston and Manhattan and undertakes development and management work in the states of Massachusetts, Rhode Island, Connecticut and New York. Together the two companies employ over 275 people in those four states.

The Trinity team has an established reputation for developing real estate that transforms urban neighborhoods, including commercial districts and mixed-income residential communities. We bring decades of experience in engaging with communities to build consensus and implement plans that are financially viable and reflect the vision of the stakeholders. Please see **Exhibit B** for descriptions of just a handful of these developments and please feel free to reach out to any of the references we have provided in **Exhibit C**.

Finally, Trinity has a well-deserved reputation for being flexible, for being honest, for being loyal, for having a sense of humor, and we never, ever quit. Your thoughtful consideration of this team and proposal will be very much appreciated.

Sincerely,

James G. Keefe  
President

A handwritten signature in black ink, appearing to read "James G. Keefe", is written over the typed name and title. The signature is fluid and cursive, with a large loop at the beginning and a wavy end.



July 5, 2023

Abby Goldenfarb  
Trinity Financial Inc.  
75 Federal Street, 4<sup>th</sup> Floor  
Boston, MA 02110

RE: Letter of Interest for Austin Street Parking Lot-Charlestown Nursery School Expansion

Dear Abby,

Pursuant to our previous conversations, I am pleased to express our formal interest in Trinity Financials' proposal for the redevelopment of the Austin Street Parking Lots, should the Trinity team be Designated as Developer of the site by the Boston Planning & Development Agency.

Trinity and Charlestown Nursery School have been actively engaged in conversations about the expansion of Charlestown Nursery School into a new proposed location in the Trinity redevelopment of the Austin Street parking lot site. This new 19,000 SF Charlestown Nursery School and Innovation Lab would allow the school to expand and diversify its early childhood educational offerings to expand the impact of the award-winning school.

Charlestown Nursery School (CNS) is a non-profit early education center in Charlestown, MA for ages 0-5. Established in 2007, CNS has become a model learning lab. It has been featured in academic literature and documentaries as an example of high-quality education and has established university partnerships across Boston. Welcoming over a thousand educators from around the globe annually, it has also become a hub of teacher training and research. Importantly, CNS leads the way in educator compensation and was highlighted by the Boston Women's Workforce Council in the Signer Spotlight Series for focusing on pay equity and adequately compensating educators.

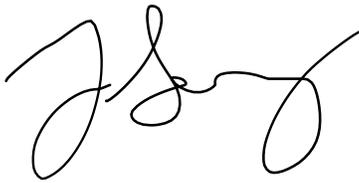
CNS' success and recognition have led to high demand. Today, the school employs highly trained and skilled educators, has a strong reputation in the community, and significantly, a successful and sustainable business model. With over 100 tuition-paying families, growing reserves coupled with generous fundraising and grant support, Charlestown Nursery School is a self-sustaining non-profit 501c3.

For the Austin Street parking lot redevelopment, CNS is looking to the future and is partnering with Trinity Financial to create an expanded early education center to serve the broader needs of children 0-5 and their families. As a recognized leader in research driven programming for young children, the school would like to support a broader range of families in the Charlestown

community. With an expanded space to deliver high-quality early education, CNS will be able to pursue partnerships with organizations such as the Kennedy Center and Boston Public Schools and impact the early educational opportunities for many more families. This expansion will allow CNS to provide full-day and year-round programming to support working families and leverage the city, state, and federal investment in early childhood education. An expanded space would allow CNS to achieve its mission to be more accessible and provide a world-renowned education to every interested family.

We deeply respect the intent of Trinity to think innovatively about partnerships that benefit the Charlestown community and beyond. We are excited about the opportunity to work together on this vision and to be part of this groundbreaking public-private partnership.

Thank you,

A handwritten signature in black ink, appearing to read 'J. Seney', with a large, sweeping flourish at the end.

Jessica Seney  
CNS Board President

A handwritten signature in black ink, reading 'Kelly Pellagrini', with a large, stylized 'K' and 'P'.

Kelly Pellagrini  
Co-Founder and Co-Director

A handwritten signature in black ink, reading 'Cady Audette', with a large, stylized 'C' and 'A'.

Cady Audette  
Co-Director

## EXHIBIT A TRINITY DEVELOPMENT TEAM

<u>Role</u>	<u>Firm</u>	<u>Principal Contact</u>
Developer	Trinity Financial, Inc.	Kenan Bigby
<b>Architect</b>	<b>ICON architecture, Inc. (WBE)</b>	<b>Nancy Ludwig</b>
<b>Landscape Architect</b>	<b>Klopfer Martin Design Group (WBE)</b>	<b>Marc Klopfer</b>
Air Quality Consultant	Tech Environmental	Marc Wallace
Permitting Consultant	Fort Point Associates	Jamie Fay
<b>Civil, Traffic</b>	<b>Bryant Associates, Inc. (MBE/DBE)</b>	<b>James Comeau</b>
<b>Survey</b>	<b>Nitsch Engineering(WBE)</b>	<b>Deb Danik</b>
Sustainability Consultants	New Ecology	Maciej Konieczny
Environmental Engineer	McPhail Associates	Ambrose Donovan
Preconstruction Contractors	Dimeo Construction	Steve Rutledge
	<b>Tara Construction (MBE)</b>	<b>Pedro Perez</b>
Legal Counsel-Land Use	Goulston & Storrs	Peter Kochansky
Legal Counsel-Transaction	Nixon Peabody	Dara Newman Histed
Photovoltaic Consultant	Sunbug Solar	Adam Thurell
Geotechnical Consultant	Brightcore	Dave Hermantin
<b>Retail Consultant</b>	<b>Everstreet (WBE)</b>	<b>Ann Ehrhart</b>
<b>Residential Broker</b>	<b>Reitz Realty Group (woman-owned business)</b>	<b>Jane Reitz</b>
Property Manager	Trinity Management, LLC	Maribel Concepcion
Accounting	Cohn Reznick	Nick Ratti
<b>Commissioning</b>	<b>Wang Commissioning (MBE/MBE)</b>	<b>Ivy Wang</b>
General Contractor	To Be Determined	To Be Determined

### DEVELOPMENT TEAM MEMBERS

The Trinity development team is comprised of firms and individuals with extensive mixed use development experience, including civic work, mixed-income housing development and green and sustainable building design. Members of the Team are as follows:

**Architecture:** The architect for Trinity’s Austin Street redevelopment is **ICON architecture (a certified WBE firm)**. **ICON is a Boston-based, women-owned business that believes great design begins with collaboration. ICON has decades of experience in the creation of thoughtful master planning, transit-oriented development, educational facilities and artist live/work housing.** Trinity and ICON have successfully collaborated on transformational projects in New England including the creation of over 1700 units in Boston alone. Trinity will contract directly with and will oversee ICON’s work on the redevelopment. **ICON is led by President and Senior Principal, Nancy Ludwig, a Charlestown resident.**

In order to successfully execute the ambitious sustainability and design objectives for the project, the architecture team will collaborate with several sub-consultants, including the following:

- **Kloper Martin Design Group (a certified WBE firm)** will provide landscape architecture services for the project. Mark Kloper will be the Principal in charge of the project.
- **MEP Engineer, Structural Engineers** will be named after designation.

**Air Quality Consulting: Tech Environmental** will provide air quality consulting and monitoring for buildings and open space on the development. Marc Wallace will be the Principal in charge of the project.

**Permitting: Fort Point Associates** will serve as the permitting consultant for the Austin Street redevelopment. Fort Point Associates, Inc., is a multi-disciplinary firm with over twenty-five years of experience in urban planning, permitting, and environmental consultation. Serving both private and public sector clients, their diverse experience includes major institutional expansions, private real estate developments in residential and complex public infrastructure improvements. Jamie Fay will be the Principal in charge of the development for Fort Point Associates.

**Civil and Transportation Engineer: Bryant Associates (a certified MBE firm)** will provide civil and transportation engineering for the development. Trinity will contract directly with Bryant for its services. Jeff Bryant will be the Principal in Charge of this project.

**Survey: Nitsch Engineering (a certified WBE firm)** will provide all surveying services for the project.

**Environmental: McPhail Associates, LLC** will be responsible for all environmental engineering services including geo-technical and geo-environmental services. Trinity Financial will contract directly with McPhail Engineering and be responsible for all oversight of the team members. Ambrose Donovan, LSP, will serve as Principal-in-Charge and William Burns will serve as Project Manager for the development.

**Legal – Land Use: Goulston and Storrs** will provide counsel and representation related to permitting, zoning, and local approvals. Peter Kochansky, a land use attorney at Goulston, will serve as local/permitting counsel for the Austin Street development.

**Legal – Real Estate: Nixon Peabody** will be the transactional counsel for the development; providing legal services related to the joint venture, and its financing documents. Dara Newman Histed will serve as the Principal in Charge for Nixon Peabody.

**Photovoltaic Consultant: Sunbug Solar** will be sizing and designing the photovoltaic renewable onsite energy to achieve maximum results. Adam Thurell will be the Principal in Charge of the development.

**Brightcore** will be the project's geothermal consultant, completing a design build, turnkey geothermal system which will function as the primary source for heating and cooling the buildings. David Hermantin will be the Principal in Charge of the project.

**Pre-Construction Services: Dimeo Construction and Tara Construction (a certified MBE firm)** - Dimeo Construction and Tara Construction, working together, will provide pre-construction services, including cost estimating through the design stage of the Austin Street redevelopment. Principals in Charge for the redevelopment will be Stephen Rutledge, President and CEO of Dimeo Construction and Pedro Perez of Tara Construction.

**Retail Consulting: Everstreet (a certified WBE firm)** will provide retail consulting and brokerage services for the project. Ann Ehrhart will be the Principal in Charge for Everstreet.

**Residential Brokerage: Reitz Realty**, a Charlestown-based, woman-owned firm, will provide real estate brokerage consulting for the market rate, homeownership component of the project.

**Sustainability Consultant: New Ecology, Inc.** will serve as the Project's Sustainability Consultant. In this role, New Ecology will oversee the team's effort to obtain LEED Platinum status and to ensure compliance with Enterprise's Green Communities standards. Maciej Konieczny will be the Principal in Charge of the project for New Ecology.

**Accounting: The Cohn Reznick** team will be providing accounting and financial projections for the project, including advising on new regulations for sustainability subsidies and tax credits for the redevelopment. Nick Ratti will be the Principal in Charge of the project.

**Property Management: Trinity Management** will serve as property manager for the project, providing building management and maintenance services for the building's commercial and residential tenants. Maribel Batista, Executive Vice President of Trinity Management will be the Principal in Charge of the Development.

**Building Commissioning: Wang Commissioning (a certified MBE firm)** will provide commissioning services for the project to ensure the building meets local building code requirements, satisfies LEED fundamental prerequisites and obtains LEED credits and building enclosure goals. Ivy Wang will be the Principal in Charge of the project.

**For more information on the Development team, please see Section 2f. Qualifications and Resumes.**

## **TRINITY PROJECT PERSONNEL:**

The Trinity personnel that will be working on the Austin Street redevelopment are listed below:



**Trinity Principal: James Keefe** is the co-founder of Trinity Financial. One of the hallmark operating principles of Trinity is that the owners are intimately familiar with each project that the firm undertakes and are involved on a daily basis to address complex problems and make major decisions. Mr. Keefe is a former member of the Boston Landmarks Commission, a founding member of the Codman Square Housing Development Corporation (now NDC), and has taught at Tufts University in the Urban and Environmental Policy Department. He has a Bachelor's degree from Fordham University and a Master's degree in Business Administration from Boston University.



**Trinity Managing Director, Development: Kenan Bigby** will oversee the day-to-day activity of the development team members. During Mr. Bigby's tenure at Trinity he has overseen the development of nearly 2,500 units of housing including 66 Summer and Vela on the Park in Stamford, CT and Treadmark on the MBTA's redline in Boston, MA. He enjoys an excellent rapport with public and federal agencies and with the communities in which he has worked. He has an aptitude for creating successful public / private partnerships and exhibits a strong ability to manage the complex financial structures needed to complete large-scale development projects. He also acts as liaison to residents and community stakeholders throughout the permitting and development process. Mr. Bigby holds a Bachelor's degree from the University of Pennsylvania.



**Trinity Vice President, Development: Abby Goldenfarb** will also oversee the day-to-day management of the project, including leading the teams of consultants through the complex design, permitting, financing, closing and marketing phases of the development. During her 19-year tenure at Trinity, Ms. Goldenfarb has overseen the development of over 1600 units of housing, including both luxury rental housing, affordable rental housing and condominium development. Ms. Goldenfarb currently lives in Charlestown and serves on the Board of Charlestown's Courageous Sailing. Ms. Goldenfarb received a Bachelor's degree from Wellesley College and a Master's degree in Business Administration from Boston University's Questrom School of Business.



**Trinity, Director of Business Development Michael Hunter** responsible for leading business development activities for the company. Michael's efforts have focused on cultivating new client relationships and expanding Trinity's presence throughout the Northeast. Michael previously served in the Administration of Governor Deval Patrick as Undersecretary for Business Development overseeing the Mass Office of Business Development, Mass Office of International Trade and Investment and Tourism. Michael has held various positions in real estate over his career including Assistant Vice President at AECOM, Real Estate Manager for SUPERVALU and Deputy Director at the Boston Redevelopment Authority. Michael earned a Master's in Management from the Heller School at Brandeis University and BA in Political Science from the College of the Holy Cross.



**Trinity Vice President, Design & Construction: Christoph Stump** is a registered architect with more than 15 years of experience in the design and construction of mixed-use and residential developments. Prior to joining Trinity in 2014, Mr. Stump worked at Magnusson Architecture and Planning, PC for 8 years, overseeing the quality control department and planning, design, permitting and construction of multiple mixed-use affordable family and senior housing and educational projects. Mr. Stump is a registered architect with a focus on energy efficiency and accessibility and holds a Master's-equivalent degree in Architecture from the Technical University of Berlin, Germany.

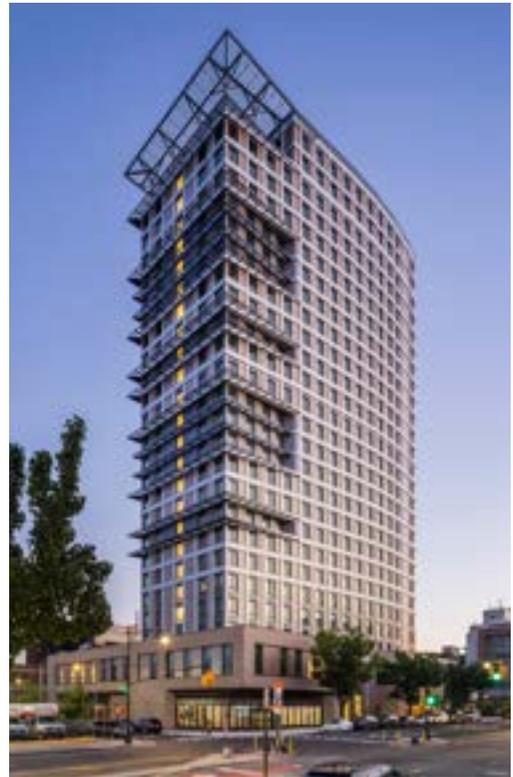
# EXHIBIT B

## 425 Grand Concourse, Bronx, NY

The 425 Grand Concourse project is a 26-story, mixed-use, and mixed-income Passive House building located in the Bronx, NY. The building consists of 277 units of housing affordable to households with little or no income and for households with incomes up to 100% of the Area Median Income.

On-site resident amenities include a fitness center, tenant lounge, community room, and accessible, fully landscaped roof decks on the 3rd floor podium roof and the 25th floor. The building is equipped with building-wide free WiFi. In addition to the residential component, the project also includes space for a supermarket, a Federally Qualified Health Center, and program and administrative space for the City University of New York (CUNY).

The 425 Grand Concourse Project is designed to meet the Passive House standard, providing superior energy efficiency within the building, increased resident comfort and superior indoor air quality while simultaneously helping to greatly reduce the project's carbon footprint. It is currently the largest passive house development in the country, and it has been awarded the prestigious Phius Best Overall Project and Best High-Rise Multifamily Project of 2022 as well as New York State's Energy Research and Development Authority's Building of Excellence Award.



## Avenir, Boston, MA

Located in the heart of Boston's historic Bulfinch Triangle, Trinity developed Avenir as a 10-story mixed-use, transportation-oriented development. The building is built directly above the North Station Green and Orange lines and is the subject of a ground lease with the MBTA. The property features retail on the ground floor, a 121-space parking garage on the second and third floors wrapped with housing, and 241 residential units, including 17 affordable units.

Although originally conceived of as a condominium building, Trinity re-positioned the project as luxury rental in the fall of 2006 enabling construction to commence in June 2007. Trinity was responsible for the successful on-schedule completion of the building in July 2009. Originally owned and operated by Archstone Smith REIT, Avenir is now operated by Equity Apartments.



With its stylish interiors and links to public transportation, Avenir Apartments has become one of Boston's most appealing places to live.

## **Boston East, East Boston, MA**

Boston East is a 200-unit luxury multifamily building on the East Boston waterfront. Trinity and its development partner, the East Boston Community Development Corporation, were designated developer of the vacant, city-owned site in December 2006 by the City of Boston's Department of Neighborhood Development. After undertaking a complex permitting process and weathering the financial recession, Boston East commenced construction in 2015.

Formerly a Brownfields waterfront site that was inaccessible to the community, Boston East is now a showcase property with private residences and public amenities available to the East Boston neighborhood. Boston East sits one block away from Central Square which offers commercial and retail uses, and four blocks away from Maverick Square and the MBTA's Blue Line to Downtown and Logan Airport.

The northern portion of the site is designated for housing. With highly designed finishes, striking amenities, and access to the water, Boston East continues the renaissance of the East Boston waterfront with thoughtfully designed and programmed luxury apartments. Boston East residents enjoy breathtaking views from a building designed to evoke the sense of the historic wharfs of East Boston. With a welcoming entryway and gracious open spaces, the building is aesthetically appealing from both Border Street and the new Harborwalk that runs along the water edge of the site. The building includes a rooftop lounge, fitness center, pup spa, underground parking and outdoor amenities, including a generous landscaped yard that is programmed with outdoor lawn games, grills and a fire pit. A unique amenity of the building is its inclusion of a community art gallery that hosts public events and art shows and six affordable artist live/work/sell units on the ground floor. In 2017, Boston East was voted Boston's Best New Building by Curbed Boston.

The southern portion of the site will be dedicated to meeting the state's Designated Port Area (DPA) requirements. The East Boston Community Development Corporation is marketing the site to potential marine industrial users.



## **One Canal Street - Boston, MA**

Located at the tip of the Rose Kennedy Greenway, the One Canal Project involves the development of surface and air rights on three parcels in the Bulfinch Triangle area of Boston. These parcels are among the development sites in the Bulfinch Triangle created by construction of the Central Artery/Tunnel Project and submersion of the Massachusetts Bay Transportation Authority (MBTA) Green Line. In August 2010, both agencies designated Trinity Financial as the developer for these Parcels: 2A, 2B and 2C.

The removal of the elevated Central Artery and Green Line structures has allowed for new development and pedestrian scaled streets that reconnect the North End to government and entertainment uses at Government Center and the TD Garden, as well as the residential historic mixed uses of the Bulfinch Triangle and residential West End.



Designed to emulate the historic patterning of the historic Bulfinch Triangle, while providing a stunning capstone to the Rose Kennedy Greenway, the One Canal project includes the development of approximately 435,000 square feet of residential and retail space. The lobby entrance on Canal Street includes visual and historic references to the Middlesex Canal and its extension that once flowed through the site. The second and third floors contain state-of-the-art amenities including a fitness center, community room, outdoor plazas, leasing space, and a 147-space parking garage for the residents of the building. The fourth through twelfth floors contain 310 luxury apartment homes, including exceptional penthouse level finishes and designs on the upper two floors. One Canal also provides 20 affordable apartment homes on-site.

One Canal, adjacent to the Avenir building (completed by Trinity Financial in 2009), continues the transformation of the Bulfinch Triangle area into a mixed-use district that complements its surrounding areas and brings vitality to an area once in shadow from the elevated highway and Green Line structures.

### **Maverick Landing - East Boston, MA**

Maverick Landing is a mixed income neighborhood located on the East Boston waterfront. In 2001, the Boston Housing Authority was awarded a \$35 million HOPE VI award for the complete renovation of Maverick Gardens, a deteriorated public housing development. Working with development partner, the East Boston Community Development Corporation, Trinity devised a four phase redevelopment plan calling for demolition of all 413 units to be replaced with 396 units in newly constructed buildings including, 20 townhouse buildings and six six-story mid-rise buildings and a community center.



The new development was the first LEEDs certified multi-family housing development in New England and includes energy efficient lighting, appliances, and structural elements including photovoltaic panels. Maverick Landing is a mixed income community with 77% of the units affordable to households earning up to 60% of area median income and the remaining 23% as market rate rentals.

The reconfiguration of the historic street pattern provides a new corridor to Boston Harbor, and reconnects Maverick to the surrounding East Boston community. A new non-profit, Maverick Landing Community Services, Inc. provides on-going supportive services for residents of the development.

Maverick has received national recognition for its focus on energy efficiency and earned the honor of Affordable Housing Magazine's 2006 "Best Affordable Housing Development".

### **Carlton Wharf - East Boston, MA**

Carlton Wharf was developed by Trinity Financial with development partner East Boston Community Development Corporation. This project played a critical role in the revitalization of the East Boston waterfront with 30-units of for-sale workforce housing available to households earning between 80% and 120% of area median income.

The project involved the complex Chapter 91 waterfront permitting process that Trinity completed in less than ten months. The seven story building has elevator access to all units and includes a mix of one-, two- and three-bedroom floorplans with magnificent views of Boston Harbor and the city skyline.



### **VELA on the Park - Stamford, CT**

As the fourth development phase of Park Square West, Vela on the Park features 209 units and offers residents hotel inspired service and convenience. Amenities include a 19th floor roof deck space, cutting edge health and wellness facilities, pet amenities, and unprecedented park and water views.

Vela is located in downtown Stamford at the top of Restaurant Row, steps away from arts, entertainment, and gourmet food options. The development features studio, one and two-bedroom units located an eight-minute walk from Metro North and Amtrak.



### **Orient Heights, East Boston, MA**

In January of 2015, the Boston Housing Authority (BHA) selected Trinity Financial and East Boston CDC development team to work with the BHA and the Department of Housing and Community Development (DHCD) to finalize a redevelopment strategy for the State Public Housing site, Orient Heights. The original Orient Heights Development was comprised of 331 units of state-funded public housing terraced into steep hillside at the northern edge of East Boston's, Orient Heights neighborhood. The 15-acre site housed thirteen, three-story buildings (4 of which have since been demolished), seven two-story town-house blocks, and a community center. After an extensive architectural and engineering study of the existing site, it was determined that new construction was the most efficient way to proceed. Phase One included 120 replacement public housing units in a mix of 1-, 2-, 3-, 4-, and 5-bedroom unit types and was completed in 2018. The first phase of the project employed public funds from City resources, State resources as well as private equity raised through 4% Low Income Housing Tax Credit and private lending in the form of a construction loan from Citibank N.A. The remaining Phase Two and Three included 211 replacement public housing units reflecting similar unit types as before mentioned. The project utilized 4% Low Income Housing Tax Credits to bring equity into each phase, as well as public and private funding.



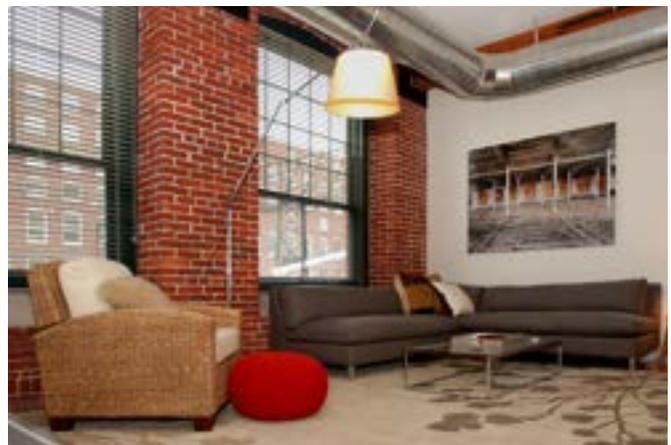
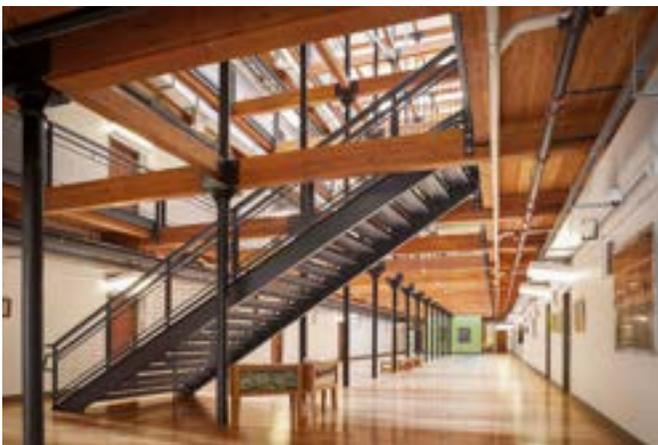
## Appleton Mills, Lowell, MA

Phase One of the Hamilton Canal District commenced with the \$64 million historic restoration of the Appleton Mills complex into 130 units of affordable artist housing. For years, the deteriorated, vacant structure loomed ominously over the gateway to the City and set a negative tone for visitors to the Downtown and other Lowell venues, including the Lowell National Historic Park. Accordingly, its restoration was a high priority for the City, the local office of the National Park Service, and the Patrick Administration, which designated the Hamilton Canal redevelopment area as a priority Growth District Initiative (GDI).



The building was designed and marketed to appeal to artists and other creative professionals, consistent with the City's efforts to attract and retain such individuals as part of its downtown development strategy. A preference for artists was established, subject to Fair Housing guidelines, and units are available to all households meeting income limitations and credit requirements. The loft style units range in size from 500 to 1,400 square feet, and include a mix of unit types and layouts, including studios, one bedroom flats, one bedroom townhouses, two bedroom flats and two bedroom townhouses. A number of units with ground floor access include artist sell space. While the units feature high ceilings and considerable light, the unit finishes are simple and durable.

The atrium is designed as a gallery/exhibit space and is conducive to community events such as open studios, film screenings and readings. Common areas in the building include a fitness area, laundry/community lounge, roof deck, artist workshop space and a landscaped mill yard. Today, the Appleton Mills is home to a thriving creative arts community and represents the largest affordable artist housing development in Massachusetts.



## **Enterprise Center, Brockton, MA**

The Enterprise Center project is a vibrant, mixed-use development that recreated a significant city block and its street edges in downtown Brockton. The transit-oriented development sits within walking distance of the commuter rail station in downtown Brockton, and within walking distance of the City's center. The new development two phases and restores several historic buildings for retail, commercial and housing uses. The block suffered from considerable blight and physical deterioration.

Trinity worked with the community to develop a multi-phase development program reflective of the goals of the City and its residents. The first phase of development consisted of 113 units of housing in new construction along Centre Street. A section of the new construction, named Enso Flats, included 42 artist live/ work units which are affordable to artists earning up to 60% of the Area Median Income. The remaining 71 units of new construction, named Centre 50, included a mix of affordable and market rate units. In addition to the housing there is ground floor retail, artist gallery space, green space and parking. Enterprise Main (the existing Enterprise Building) has been historically rehabilitated to create 55,000 square feet of new commercial and office space.



## **Trinity's Creative Experience**

Trinity brings its own creative programming experience to the Austin Street Parking Lots redevelopment, having successfully developed over 170 units of affordable artist preference housing, and associated gallery space, in the cities of Lowell, Brockton and East Boston, MA. The following developments charted groundbreaking opportunities for the artists not only for affordable housing but for workspace, gallery space and collaboration opportunities.

## **Appleton Mills-Lowell, MA**

The Appleton Mills was the first phase of the Hamilton Canal District in Lowell. The building includes 130 units of affordable housing with a preference for artists and other creative professionals. The program was consistent with Lowell's efforts to attract and retain such individuals as part of its downtown development strategy and met the community's desire to maintain affordable housing for the artists who had helped establish the City as a flourishing arts destination. Trinity developed an artist certification process so that creative individuals received a preference over other applicants. Over 200 artists of all disciplines were ultimately certified by the Appleton Mills Artist Selection Board (comprised of a Trinity representative, a representative of its property management team and an artist representative nominated by the City).

A "Call for Artists" competition for the permanent art installation that would highlight the Mill's Atrium Gallery drew many submissions. The installed piece draws visitors' eyes up to a floating sculpture suspended from the rafters, creating a dynamic environment that constantly changes as light moves through the space. Construction on the Appleton Mills was completed in 2011 and the project is currently at stabilized occupancy. Today, the artists at Appleton Mills participate in Lowell's regular open studios events.



*Appleton Mills Atrium Open Studios show*

### **Boston East-East Boston, MA**

Boston East is a community with 200 apartment homes on the East Boston waterfront. With an awareness of the burgeoning artist community in East Boston, the property's neighboring East Boston Artists at 80 Border Street and the Atlantic Works Gallery, Trinity recognized the need for affordable artist housing in East Boston. As part of the development of this vacant site, Trinity converted would have otherwise been vacant ground floor space, to create six innovative affordable Artist Live/Work/Sell units and a community gallery that satisfied the State's Chapter 91 Facilities of Public Accommodation requirement. Construction was completed in 2018 and today the building is occupied at 97%. The six affordable artist units are occupied by City of Boston BPDA-certified artists including musicians, emerging artists and interior artists. For more information on the artist component at Boston East, please visit: [www.bostoneast.com/p/public-amenities/](http://www.bostoneast.com/p/public-amenities/)



*Boston East Gallery Opening Show*

### **Enzo Lofts- Brockton, MA**

Enso Flats is part of the \$100 million Enterprise Center project, located at the historic site of the former Brockton Enterprise Building, which is aimed at revitalizing downtown Brockton. The 42-unit Enso Flats community meets the unique needs of artists through highly-amenitized, spacious apartments, flexible floor plans, access to a community work area and artist gallery, and an abundance of natural light. The state-of-the-art gallery space is located on the ground-level. As part of the building's opening Trinity conducted a call for New England artists, designers and teams - including any potential collaborations with writers or musicians – to submit their qualifications for a freestanding piece of art for the building that incorporated attributes of Brockton's historic character and culture.



*Gallery at Enso Flats Gallery Opening*

## EXHIBIT C. REFERENCES & CONTACT INFORMATION

The following are references for Trinity Financial:

Elizabeth Gruber  
Senior Vice President/Relationship Manager  
Community Development Banking  
Bank of America  
100 Federal Street  
Boston, MA 02110  
617-346-1060  
[Elizabeth.gruber@bofa.com](mailto:Elizabeth.gruber@bofa.com)

Bank of America has financed a number of Trinity developments including Foundry Square (homeownership) in Newburyport, MA; Trinity's River Street development and the Brockton phases 1, 2 and commercial phases.

Ruth Moreira  
First Executive Vice President  
New York City Housing Development Corporation  
[rmoreira@nychdc.com](mailto:rmoreira@nychdc.com)  
212-227-7484

\*NYCHDC provided funding and issued the bonds for Trinity's 425 Grand Concourse 277-unit passive house development in the Bronx, NY

Robert F. Sullivan  
Mayor  
City of Brockton  
Brockton City Hall  
45 School Street  
Brockton, MA 02301  
[MayorSullivan@cobma.us](mailto:MayorSullivan@cobma.us)  
508-580-7123

Trinity completed the Enterprise Center in Brockton, comprised of Centre 50 and Enso Flats/Art Gallery and recently the Empresa development as well as the Enterprise Building renovation office and restaurant space.

Mark Teden  
Vice President Multi-family Programs  
MassHousing  
1 Beacon Street, 7<sup>th</sup> Floor  
Boston, MA 02108

\*MassHousing has provided financing on Trinity projects including: Appleton Mills, Trinity Terrace, Maverick Landing, Mattapan Phase IV, Orchard Hill development among others.

## CONTACT INFORMATION

The people authorized to represent the named Proposer is as follows:

Kenan Bigby, Managing Director  
Trinity Financial, Inc.  
75 Federal Street, 4<sup>th</sup> Floor  
Boston, MA 02110  
617-720-8400  
[kbigby@trinityfinancial.com](mailto:kbigby@trinityfinancial.com)

Abby Goldenfarb, Vice President  
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617-720-8400  
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**Please find additional confidential information under separate cover.**

**2b. DEVELOPMENT CONCEPT**

In advance of creating our proposal, the Trinity team engaged a variety of community stakeholders to get preliminary feedback on the RFP and to inform what types of programming the neighborhood might like to see as part of the redevelopment and what uses would be beneficial to the community. These preliminary meetings have informed and shaped Trinity’s proposed design and programming.

**With current residents of Charlestown leading our development, design and sales team, we have reimagined the Austin Street parking lots as an extension of the Town. In addition to new homes, which are desperately needed in our city, we are proposing places for families to gather, friends to meet up and children to grow, play and learn. We are proposing an early educational use which is intended to provide high quality education to Charlestown’s smallest and most vulnerable students. We are proposing recreational uses that are intended to intentionally draw the community across Rutherford Avenue to engage and connect with one another in a way that doesn’t currently exist in the neighborhood, especially in the inclement weather. We are proposing arts uses which celebrate Charlestown’s existing artist community. Finally, we are proposing retail which complement the existing shops, studios and cafes that currently exist along the historic Main Street corridor.**

**Development Objectives**

1. Conformance with PLAN Charlestown
2. Creation of Affordable Housing
3. Ground Floor Activation
4. Public/Open Space
5. Healthy Development
6. Arts and Culture
7. Diversity and Inclusion

PROGRAM	T O T A L SF	SATISFIES DEVELOPMENT OBJECTIVES
Affordable Home Ownership	171,927	MEETS OBJECTIVES 1, 2, 5 and 7 <ul style="list-style-type: none"> <li>• Housing in conformance with the PLAN: Charlestown goals including deeply affordable and workforce housing as well as family sized units</li> <li>• Affordability proposed across multiple levels ranging from 80% -100% for homeownership</li> <li>• Inclusion of Air Quality consultant on team prioritizes study and plan for air quality monitoring</li> <li>• Team has comprehensive approach to diversity and conclusion at all stages of development</li> </ul>
Affordable Housing-Rental	245,400	MEETS OBJECTIVES 1, 2, 5 and 7 <ul style="list-style-type: none"> <li>• Housing in conformance with the PLAN: Charlestown goals including deeply affordable and workforce housing as well as family sized units</li> <li>• 246 homes restricted to a maximum of 80% of AMI per RFP</li> <li>• 100 PBVs included in proposed redevelopment</li> <li>• Affordability proposed across multiple levels ranging from 30% to 80% for rental homes</li> <li>• Inclusion of Air Quality consultant on team prioritizes study and plan for air quality monitoring</li> <li>• Team has comprehensive approach to diversity and conclusion at all stages of development</li> </ul>

Market Rate Home Ownership	156,394	<p>MEETS OBJECTIVES 1, 2, 5, and 7</p> <ul style="list-style-type: none"> <li>Aligns with affordability goals from RFP</li> <li>Inclusion of Market rate housing allows for the cross subsidizing of affordable housing</li> <li>Inclusion of Air Quality consultant on team prioritizes study and plan for air quality monitoring</li> <li>Team has comprehensive approach to diversity and conclusion at all stages of development</li> </ul>
Open Space - Recreation/Community	50,000	<p>MEETS OBJECTIVES 1, 4, 5, 6, and 7</p> <ul style="list-style-type: none"> <li>Generous on-site public open spaces and sports practice field in conformance with the PLAN: Charlestown goals</li> <li>Inclusion of Air Quality consultant on team prioritizes study and plan for air quality monitoring</li> <li>Involvement of diverse property management team ensures establishment of equitable procedures and management</li> <li>Programming for arts-oriented outdoor open space provides opportunities for artist involvement</li> </ul>
Open Space Arts	30,000	<p>MEETS OBJECTIVES 1, 3, 4, 5, 6. 7</p> <ul style="list-style-type: none"> <li>Creates arts oriented public realm at Austin St. and Rutherford Ave, intersection in conformance with PLAN Charlestown</li> <li>Creates ground floor activation focused on the creative economy</li> <li>Inclusion of Air Quality consultant on team prioritizes study and plan for air quality monitoring</li> <li>Inclusion of Call for Artists celebrates creativity and identifies site as welcoming and inclusive</li> <li>Diversity of team will impact all stages of development and establishment of processes and goals for ongoing inclusivity</li> </ul>
Indoor Arts program including a new Gallery, maker space, affordable artist live/work rental units	11,200	<p>MEETS OBJECTIVES 1, 2, 5, 6 and 7</p> <ul style="list-style-type: none"> <li>Ground floor maker space in accordance with PLAN: Charlestown goals</li> <li>Inclusion of Air Quality consultant on team prioritizes study and plan for air quality monitoring</li> <li>Proposed Artist Preference on IDP units allows for Artists-in-Residence and provides opportunities for existing artists who are being priced out of Boston</li> </ul>
Neighborhood Retail	21,000	<p>MEETS OBJECTIVES 1, 3, 4 and 7</p> <ul style="list-style-type: none"> <li>Proposed small scale retail in accordance with PLAN: Charlestown</li> <li>Selective placement of retail enhances and complements housing above</li> <li>Inclusion of retail pavilion complements and provides opportunity for retail operators to embrace open space and foot traffic</li> <li>Inclusion of WBE retail consultant/broker will focus on outreach to local and women owned small business</li> </ul>

Parking	85,000	MEETS OBJECTIVE 1 with a .4 Parking Ratio  • On-site parking minimized in conformance with PLAN: Charlestown.
Early Education Component	19,076	Meets the Wu Administration’s objective to expand access to high quality, affordable early childhood education, invest in the early education and childcare workforce by building sustainable career pathways for educators.

**COMMUNITY BENEFITS**

Trinity’s proposed development will have the following community benefits:

**COMMUNITY BENEFITS-AFFORDABLE HOUSING**

- 246 units of affordable rental housing will provide more opportunities for current residents to stay in Charlestown despite increasingly limited housing supply and rising prices. A range of unit types will be attractive to households of all sizes and will serve members of the community who may be working in the neighborhood but may be priced out of the existing housing opportunities.
- The inclusion of 166 units of affordable homeownership housing will provide the opportunity for families seeking to make a long-term investment in the neighborhood. The benefits of homeownership allow families to be able to build wealth, gain stability and more predictability in their housing. We are proposing a mix of studios through four-bedroom units at 80% and 100% of Area Median Income (AMI).

HOUSING SIZE	SALES PRICES*	INCOME LEVELS
1 BEDROOM	\$219,500-\$287,400	\$83,120 - \$118,800
2 BEDROOM	\$258,500-\$334,700	\$95,040-\$148,400
3 BEDROOM	\$297,200-\$378,000	\$106,880-\$172,200
4 BEDROOM	\$334,400-\$421,300	\$118,720-\$172,200

*\*Sales prices are based on Area Median Income (AMI) as determined by the U.S. Department of Housing and Urban Development for the Boston-Cambridge-Quincy HUD FMR and are adjusted annually*

**COMMUNITY BENEFITS-MARKET RATE HOUSING**

The proposed 146 units of market rate rental housing will add additional inventory to the Charlestown market, providing more opportunities for individuals and families to live close to work and school. The transit-oriented nature of the development allows future residents to live in a neighborhood where walking and public transportation take priority over automobiles. Additionally, the market rate rental housing provides a cross subsidy so that the homeownership components of the site are financially feasible.

**COMMUNITY BENEFITS-EARLY EDUCATION COMPONENT**

**The Trinity proposal includes the potential expansion of a local Charlestown neighborhood nursery school.**

Charlestown Nursery School (CNS) is a non-profit early education center in Charlestown, MA for ages 0-5. Established in 2007, CNS has become a model learning lab. It has been featured in academic literature and documentaries as an example of high-quality education and has established university partnerships across Boston. Welcoming over a thousand educators from around the globe annually, it has also become a hub of teacher training and research.

The success and recognition have led to high demand and long waitlists. Today, the school has teachers, families, programs, and importantly, a successful and sustainable business model. With over almost 100 tuition-paying families, growing reserves coupled with generous fundraising and grant support, the Charlestown Nursery School is a self-sustaining non-profit 501c3. We raise close to 2 million dollars to cover operating expenses annually.

For the Austin Street parking lot redevelopment, CNS is looking to the future and is partnering with Trinity Financial to create an expanded early education center to serve the broader needs of children 0-5 and their families. As a recognized leader in research driven programming for young children, the school would like to support a broader range of families in the Charlestown community. With an expanded space to deliver high-quality early education, CNS will be able to pursue partnerships and sources of support that reflect Boston’s commitment to education for all families. This expansion allows CNS to provide full-day and year-round programming to support working families and leverage the city, state, and federal investment in universal preschool and early childhood. An expanded space would allow CNS to achieve its mission to be more accessible and provide their world-renowned education to every interested family.

**The Opportunity**

As part of a forward-thinking community, CNS would like to support optimal learning, living and longevity. Alongside the teacher training programs at Bunker Hill Community College, the health research centers at MGH and the wellness labs in Kendall Square, CNS has great potential to create a hub for the best in brain development and wellness. The Charlestown Nursery School and Early Education Lab and early learning center would serve the needs of working families and more importantly, optimizes on the best in



early learning. Charlestown Nursery School has been recognized for its high-quality programming and its commitment to reflect Boston’s scholarly traditions. This expanded, approximately 19,000 SF footprint would allow the school to serve more of the broader community including a potential partnership with Boston Public Schools and the Kennedy Center. New features including an outdoor extended day program, enrichment programming, teacher apprentice programming and early intervention would be a model for the city and beyond.



CHARLESTOWN NURSERY SCHOOL

**MISSION**

We believe that we should honor Boston’s scholarly tradition by employing the most current research in child development and learning, to ensure the highest quality early childhood practice. At its core, our program celebrates the great potential of young children, the value of professional teachers, the importance of parent collaboration, the responsibility of service to our community, and the richness of the world beyond the classroom.

## The Need

The child care workforce in Massachusetts is about 12% smaller today than it was before the start of the pandemic, according to a recent analysis from the [University of California, Berkeley](#). Fewer workers mean providers can't care for as many kids. According to a Massachusetts Department of Early Education and Care report released in May, the state is operating at about [92% of its pre-pandemic capacity](#) — with around 640 fewer licensed providers available.<sup>1</sup>

Of the centers and nursery schools that are running, many have been finding it increasingly difficult to hire qualified teaching staff. Leveraging its strategic partnerships with nearby community colleges and universities, CNS will be positioned to cultivate an internship program at Charlestown Nursery School, and help train new teachers in the most current research in child development and learning and in a high-quality early childhood environment.

We believe that we should honor Boston's scholarly tradition by employing the most current research in child development and learning, to ensure the highest quality early childhood practice. At its core, our program celebrates the great potential of young children, the value of professional teachers, the importance of parent collaboration, the responsibility of service to our community, and the richness of the world beyond the classroom.

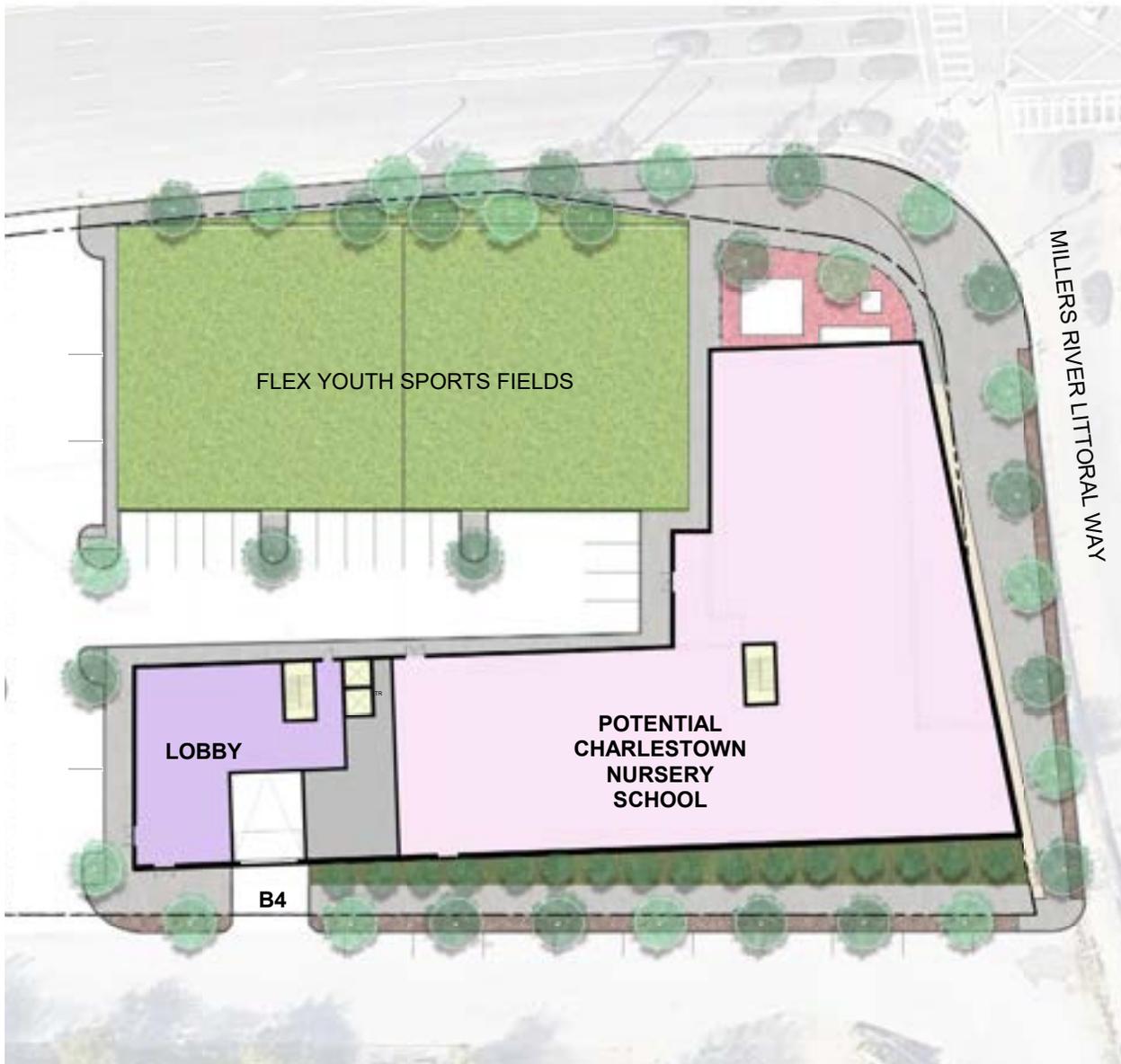
## Strategic Partnerships

The expansion of Charlestown Nursery School provides the opportunity for CNS to formalize strategic partnerships in order to expand its reach and allow more affordable options for families. Additionally, expansion of existing partnerships will allow for the school to have a broader reach.

- Partnerships with Boston Public Schools would allow us to support the Universal Pre-Kindergarten initiatives and community partnerships RFP to ensure more K0 and K1 publicly funded spaces.
- Partnerships with the Massachusetts Department of Early Education and Care, especially in light of the Common Start initiatives, would allow us to provide greater access to vouchers and subsidies.
- Partnerships with Bunker Hill Community College would allow us to collaborate with Neighborhood Villages and the Massachusetts Department of Early Education and Care to train teachers, provide practicum sites, and support workforce development. As a lab school so closely connected to universities, we could continue to partner for research and development in the field of early childhood education, supporting models and prototypes.
- CNS has had preliminary conversations with the Kennedy Center and other community-based organizations about proposed partnerships and collaborations for early childhood and education resource hubs to improve equity in early year experiences.
- Partnerships with the working groups for the early childhood initiative would allow us to ensure greater supports for early screenings, special needs, food insecurity and family supports with health care and community partnerships, particularly with the MGH Institute of Health Professionals and Spaulding. Partnerships with recreational programs like the YMCA, The Boys and Girls Club, Charlestown Lacrosse and Learning, NEMPAC, The Working Theater, and the Charlestown Movement Lab would allow us to connect 0-5 enrichment and create a community center for our youngest members of our community.
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1 WBUR June 13, 2022

**Program :**

The 19,000 SF proposed program is preliminarily conceived as follows:

- Approximately 8,000 SF of classroom spaces including the following:
  - 2 Preschool
  - 3 Toddler
  - 2 Infant
- Approximately 1000 SF of dedicated common community space for library, art and community other gatherings
- Approximately 3,000 SF for family childcare and extended day programming

- Approximately 2,000 SF dedicated to specialists and services including occupational therapy and speech therapy
- Approximately 5,000 SF dedicated to enrichment space for potentials such as dance, gymnastics and family meeting spaces

### **Funding**

It is anticipated that sources of funding to support the complete buildout of the new space would consist of tuition from families, fundraising, local, federal and state grant funding to support the additional early childhood programming. As an innovative research-based program, CNS is well-positioned to serve the needs of universal preschool and early childhood. Funding sources will include workforce, facilities and capital grants from:

- Children's Investment Fund
- City of Boston
- Massachusetts Department of Early Education and Care
- Department of Education

## **COMMUNITY BENEFITS- ARTS COMPONENT**

**The Trinity proposal includes a celebration of the arts that is central to its community concept.** Trinity has had initial conversations with Deidre Tao of the Artists Group of Charlestown to gain insight into what opportunities there are to assist the Charlestown and neighboring artist population. Should Trinity be designated developer we would look to gain more insight into the Charlestown arts community to create a space that is complementary to the pursuit and celebration of art.

**Our proposed arts-oriented community benefits program includes:**

- **The potential for the Artists Group of Charlestown or other arts groups to expand their gallery space into Austin Street redevelopment.**
- **The creation of a Call for Artists to create a public art showpiece for the property and pursue other collaborative programmatic opportunities**
- **The proposed inclusion of an artist preference for its Inclusionary Development Policy units and the establishment of an "Artist In Residence" program upon approval of local housing agencies**
- **The proposed inclusion of a music rehearsal/artist amenity space to be programmed as part of the community process and in partnership with local community arts organizations.**

## **COMMUNITY BENEFITS-OUTDOOR AND INDOOR RECREATION**

**The Trinity proposal includes indoor and outdoor recreational opportunities that will serve the Charlestown neighborhood year-round. The proposed sports-oriented community benefits include:**

- **The inclusion of four, 90x90 outdoor practice playing fields as requested by the RFP**
- **The inclusion of a 10,000 SF indoor recreational space including a basketball court and other potential sport space for use by the community as well as nearby athletic leagues and schools that are searching for activity space.**

The development team has had initial conversations with a potential operator of the space and intends to continue conversations with local community groups such as the Charlestown Youth Soccer Association and Charlestown Lacrosse and others to determine the most efficient and effective manner to program and operate the community space so that it remains viable and accessible to the entire Charlestown community.

Maintenance of the community space will be supported by the residential buildings on the site to ensure that it is appropriately managed and maintained.

### **COMMUNITY BENEFITS-NEIGHBORHOOD RETAIL**

The Trinity proposal includes up to 21,000 SF of ground floor space programmed for neighborhood retail. Working with the team at Everstreet (WBE), the development team intends to program the retail in a manner that creates a vibrant and inclusive neighborhood that celebrates diversity across income levels, ethnic backgrounds, and generations. Planned merchandising encompasses M/WBE shops that complement the existing small scale retail and restaurant offerings that currently exist in the Charlestown neighborhood.

To create a truly convenient and well-rounded destination, the project will endeavor to attract neighborhood services that meet daily needs. Potential retail concepts include offerings such as a pet supplies store, sporting goods, doctor's/medical offices, and access to affordable, healthy food options. This strong commitment to securing M/WBE businesses will showcase the many diverse, cultural backgrounds present throughout the greater Boston area and bring new flavors to the Charlestown neighborhood. Imagine family dinner, post youth-sporting event at Latin American restaurant that expanded from nearby Chelsea, sitting outside on a chilly autumn evening with a steaming bowl of a Pho from an operator out of Little Saigon in Dorchester or simply grabbing morning coffee from one of the many M/WBE owned + operated coffee shops prevalent throughout the city. The merchandising vision includes pairing a local café with a potential independent bookstore operator, providing a unique space not currently present in the Charlestown neighborhood. The open space arts-oriented courtyard at the corner of Austin St. and Rutherford Ave. will be anchored by a freestanding, jewel box hospitality building envisioned as a café during the day and lively, family friendly beer garden throughout the evening.

The highlight of the M/WBE retail program will be the potential for the creation of affordable retail offerings. Working with Everstreet, we intend to subdivide retail space into smaller retail offerings of approximately 1500 SF to attract small businesses. These footprints increase the likelihood of tenants growing into legacy businesses, the cornerstones of any great neighborhood.

Everstreet will prioritize inclusivity and support for these businesses through: business planning assistance, including pro-forma synthesis and review; intentional underwriting to deliver affordable opportunities and tenant improvement allowances covering both hard costs and soft costs; connections to funding sources tailored for supporting M/WBE growth; and a streamlined, equitable lease form. Design considerations will include smaller storefronts to accommodate these groups effectively and further ensure long-term success.

### **COMMUNITY BENEFITS-SUSTAINABLE DEVELOPMENT**

Trinity's recent experience completing the award winning 425 Grand Concourse passive house development in the Bronx, NY uniquely positions it to successfully execute on the ambitious sustainability goals the city has established in the Austin Street Parking Lots RFP. Trinity's passive house design, its proposed use of geothermal and photovoltaic energy, and its proposed open space elements will have benefits that extend to both residents of the buildings and the greater community.

### **Benefits for the Residents**

Recent energy supply shortages as well as a significant increase in expected future electricity demand have been and will affect Boston households tremendously, and specifically the most vulnerable households that affordable housing aims to serve. Trinity's proposed project would greatly reduce both utility costs as well as cost uncertainty to residents.

But outside of economic benefits, passive houses additionally have tremendous health benefits. The energy recovery ventilators that provide constant fresh outside air to each apartment are equipped with MERV 13 filter systems, removing PM2.5 (air pollution) and pollen from the fresh supply air. This is a great health benefit to all residents with respiratory illnesses such as asthma or COVID-19. The well-performing thermal envelope makes the building less vulnerable to prolonged electricity outages as interior temperatures stay stable for longer than in non-passive houses, specifically in the cold season.

Finally, high-performance casement windows with multiple lock points tremendously reduce outdoor-indoor noise transmission leading to a much quieter indoor environment, an especially important health and quality of life issue on a site that is adjacent to Interstate 93 and Rutherford Avenue.

### **Benefits to the Community**

The City of Boston has been at the forefront of climate action, as substantiated by its commitment to a carbon neutral city by 2050, its subsequent Climate Action Plan and its commitment to Zero Emission Buildings. Buildings we build today will be standing and operating in 2050 which means that the buildings we build today must be designed looking forward. On the grandest scale zero emission buildings benefit the planet by drastically reducing greenhouse gas emissions. More directly they also benefit the community surrounding them as they eliminate on-site fuel combustion, a major source of PM2.5 and other combustion byproducts resulting in health benefits similar to the benefits to residents described above.

Our anticipated storm water measures will benefit the community by infiltrating storm water into the site where possible and withholding some in detention tanks, so they don't overpower the city waste and storm systems. Our strategies to reduce heat island effects will also help keep the neighborhood cooler and our proposed publicly accessible fields and park can reduce the local temperature by a couple of degrees. Over time, the more buildings that follow similar passive house approaches, and incorporate alternative energy sources, will impact the demand on utilities and will reduce the use of power plants. Because power plants tend to use readily available fuels, such as oil, which is also among the dirtiest fuels, electricity should become more affordable and the chances of power outages should decrease. Anticipating the shift to mostly electric energy by Massachusetts's economy with a similar shift occurring in the transportation sector, it will be critical not just to reduce energy consumption to reduce overall grid loads, but also to employ strategies to reduce peak demand as this proposal does, to ensure a stable energy supply to all.

The Trinity team is highly motivated, experienced and capable of achieving a highly energy-efficient, sustainable and resilient development. All our above-mentioned strategies aim to reduce greenhouse gas emissions (on-site and off-site), prepare us for climate calamities that we used to think of "unthinkable", make the built environment healthier for residents and communities, and more affordable for a stable neighborhood.

### **ESTIMATED JOBS**

In addition to the tangible community benefits that the development will create for housing, the arts, open space, education and sustainability, it is estimated that the \$500 Million development will allow for the creation of a number of new jobs.

#### **Construction**

- Up to 1200 construction jobs in a range of trades will be associated with each of the two phases of the development.

**Permanent**

- Up 5 jobs will be created in association with the Affordable rental housing;
- Up to 5 jobs will be created in association with the Market Rate rental housing;
- Up to 30 jobs will be created in association with the proposed early childhood education component. This is significant given that following the pandemic, a workforce shortage in childcare has caused many employees not to return to work, especially women;
- Up to 4 jobs will be created in association with the community recreation component;
- Up to 135 jobs will be created in association with the community-oriented retail.

## 2c. DEVELOPMENT IMPLEMENTATION PLAN

Trinity Financial and the other members of the development team are well versed in complex, large-scale, urban projects with an array of challenges and opportunities. Trinity will build on the wide range of skills that our team brings to the table, from the technical aspects to the civic engagement, to ensure the Austin Street Parking Lots redevelopment is a highly successful project that becomes a source of pride in the neighborhood. The Trinity project will achieve the City's goals for the levels of affordability; comprehensive diversity, equity and inclusion program; and exceptional design and programming set forth in the RFP.

Trinity has a well-documented track record of permitting complicated mixed-use developments in downtown Boston, as well as throughout many neighborhoods throughout the City. Trinity successfully permitted, and subsequently closed on the financing, for two highly complicated transactions, each located on transformative urban sites, within the Bulfinch Triangle: Avenir and One Canal. The comprehensive permitting process for these two downtown projects was each successfully completed in under 12 months and required many of the state and city permits anticipated for the Austin Street redevelopment. Our approach to planning and designing all our projects – regardless of scale and location – is built upon community outreach and consensus building.

Once designated, we would work with the BPDA to identify key stakeholders with whom we ought to have in-person, one on one meetings. Although we have had initial meetings with a variety of stakeholders, we would also identify others we ought to contact, including Charlestown community groups, neighborhood associations, residents and property owners. We would then propose to meet with groups such as the Charlestown Neighborhood Council and elected officials to discuss our proposed Austin Street redevelopment plan and entertain feedback on how it might be improved.

**Trinity's approach to managing the formal phases of project development are as follows:**

- 1) **Document Negotiation:** Document negotiation will be handled by Trinity Financial with assistance from project counsel, Goulston & Storrs and Nixon Peabody.
- 2) **Pre-Construction Activities-Permitting and Design:** Pre-construction activities will be managed on a day-to-day basis by the Trinity Financial team, working in concert with development team members. Permitting and community process will be managed by the Trinity Financial team on a day-to-day basis with assistance primarily from Fort Point Associates and Goulston & Storrs. Others on the development team will be enlisted as needed for the preparation or analysis of required permitting submittals and reports. Design activities will be spearheaded by the ICON architecture team, with the sustainability principles outlined in this response to the RFP guiding the design.

Trinity Financial, Inc. will be responsible for leveraging its relationships in the capital markets to secure the debt and equity financing needed to effectuate this development project. Given the state and local resources needed for the development, Trinity will also engage early on with city state agencies to discuss its financing proposal including Executive Office of Housing and Livable Communities, MassHousing and the Mayor's Office of Housing. Trinity Financial, Inc. will provide all necessary working capital needed to advance the project and will provide the necessary guarantees to see the project through completion.

- 3) **Construction Activities:** Preconstruction activities and cost estimating exercises will be overseen by Trinity Financial's design and construction team, working in close coordination with the preconstruction

team of Dimeo and Tara Construction. Trinity Financial staff assignments include preliminary design overview, bidding the job to qualified general contractors, negotiating a construction agreement as well as owner's rep construction management services during construction.

- 4) **Lease-up, Sales and Operations:** As the construction concludes and lease up and operations commence on the rental components, and as marketing commences for the for-sale component, Trinity Financial will be responsible for overseeing leasing and operations of the property which will be conducted by Trinity Management. In addition to providing property management services for the development, it is anticipated that Trinity Management will also be responsible for marketing and leasing all of the project's affordable and market rate rental units. That scope of work includes thoughtfully and effectively implementing our Affirmatively Furthering Fair Housing Marketing Plan that will outline our outreach and communication to a number of organizations in and around the City to make sure we achieve the most diverse representation as possible.

In predevelopment, Trinity Financial will also engage our commercial broker, Everstreet, to lead the marketing and leasing of the development's retail space. As part of this RFP process, Everstreet has already commenced initial outreach to new and existing minority- and women-owned businesses that may otherwise not get the opportunity to lease retail space in the Charlestown neighborhoods.

As the project is leased up and sold and as it reaches stabilized operations and proceeds therefrom, Trinity Financial will be responsible for all reporting and compliance metrics required by the project's debt and equity partners, as well as the City and State.

## **PERMITTING**

Approximately 90% of the two Austin Street parcels are areas that were historically subject to the ebb and flow of the tides based on the Mass Department of Environmental Protection (MassDEP) presumptive jurisdictional lines. The original shoreline is shown in yellow on the attached graphic. The area was filled over time and no longer is subject to tidal action and therefore consists of filled tidelands. All of the jurisdictional area of the northerly parcel and about 80% of the southerly parcel consist of landlocked tidelands, for which MassDEP does not require a license as it is more than 250 feet from a waterway and separated by a public way. However, about 20% of the southern parcel is subject to Chapter 91 licensing as it is within 250 feet of the Millers River which comes off the Charles River under I-93. See area bounded by green line on attached graphic.

## Austin Street Ch. 91 Jurisdiction



The Landlocked tidelands portion of the site requires a “Public Benefit Determination” from the Secretary of Energy and Environmental Affairs for any project going through MEPA. The Public Benefit Determination simply needs to show that the project is providing public benefits including such things as affordable housing, public open space, tax revenue or economic development.

The portion of the site subject to licensing requires a full Chapter 91 licensing process following MEPA review. Chapter 91 regulations limit building heights, require 50% open space, require ground floor public uses and have setbacks from the water. Chapter 91 requirements apply only within the jurisdictional area, so a project design can usually accommodate the dimensional and use requirements.

## TIMELINE AND PHASING

It is anticipated that the project will seek approvals for the entire site, however construction is anticipated to occur in two phases. The Trinity team recognizes the city’s desire for the affordable homeownership component of the project to occur in the first phase. Should Trinity be designated developer we would like to engage in future conversations with the city about what is the most effective way to successfully phase the project, given construction sequencing and our proposed cross subsidization of the affordable homeownership component by the project’s market rate rental building.

Please find below a comprehensive list of the major permits and project milestones that are contemplated for the development.

**ANTICIPATED MILESTONES AND TIMELINE**

<b>AUSTIN STREET PARKING LOTS DEVELOPMENT MILESTONES</b>	<b>ANTICIPATED APPLICATION FILING DATE</b>	<b>ANTICIPATED PERMIT / APPROVAL ISSUANCE DATE</b>	<b>ANTICIPATED FINANCING MILESTONE</b>
Proposal Submission Due Date	July 10, 2023		
BPDA Presents Eligible Applicants to Community	July-August 2023		
BPDA Tentatively Designates Developer	September 2023		
Development Team Prepares Article 80 and MEPA Submission	September-December 2023		
DHCD Pre-Application for Funding			Q4 2023
Boston Planning and Development Agency: <ul style="list-style-type: none"> <li>• Article 80 Large Project Review 121A Tax Agreement</li> <li>• Article 25A Coastal Flood Resiliency Overlay District</li> <li>• Variance Recommendation</li> <li>• <b>Urban Renewal Plan Amendment</b></li> </ul>	January 2024	December 2024	
Federal Funding Agency: <b>NEPA Compliance</b>	January 2024	March or September 2024	
Federal Railroad Administration: Abandonment of Rail ROW	January 2024	January 2025	
Development Team submits Article 80 Filing	January 2024	December 2024	
DHCD/MOH Application for Funding			Q1 2024
DHCD/MOH 2 <sup>nd</sup> Application for Funding (if necessary)			Q3 2024
DHCD/MOH 3 <sup>rd</sup> Application for Funding (if necessary)			Q1 2025

**ANTICIPATED MILESTONES AND TIMELINE**

<b>AUSTIN STREET PARKING LOTS DEVELOPMENT MILESTONES</b>	<b>ANTICIPATED APPLICATION FILING DATE</b>	<b>ANTICIPATED PERMIT / APPROVAL ISSUANCE DATE</b>	<b>ANTICIPATED FINANCING MILESTONE</b>
Executive Office of Energy and Environmental Affairs: Massachusetts Environmental Policy Act Review	February 2024	October 2024	
Executive Office of Energy and Environmental Affairs: Public Benefit Determination	February 2024	October 2024	
Boston Civic Design Commission: Recommendation to BPDA	July 2024	December 2024	
Massachusetts Water Resources Authority: 8(M) Permit	October 2024	March 2025	
Massachusetts Historical Commission: Finding of No Adverse Effect (through MEPA process)	February 2024	October 2024	
Executive Office of Housing and Livable Communities: Urban Renewal Plan Amendment	July 2024	December 2024	
Boston Civic Design Commission: Recommendation to BPDA	July 2024	December 2024	
Massachusetts Department of Transportation: Vehicular Access Permit	September 2024	December 2024	
Massachusetts Department of Environmental Protection: Chapter 91 License (tied to Order of Conditions issued by BCC)	February 2025	October 2025	
Massachusetts Department of Transportation: Ch. 40 sec. 54A Approval	February 2025	May 2025	

**ANTICIPATED MILESTONES AND TIMELINE**

<b>AUSTIN STREET PARKING LOTS DEVELOPMENT MILESTONES</b>	<b>ANTICIPATED APPLICATION FILING DATE</b>	<b>ANTICIPATED PERMIT / APPROVAL ISSUANCE DATE</b>	<b>ANTICIPATED FINANCING MILESTONE</b>
Boston Conservation Commission: Order of Conditions	January 2025	March 2025	
Development Team Authorizes Construction Documents-after Zoning received*			
Boston Board of Appeals: Zoning Variance	December 2024	July 2025	
Boston Water and Sewer Commission: Site Plan Approval	December 2024	May 2025	
Boston Transportation Department: <ul style="list-style-type: none"> <li>• Transportation Access Plan Approval</li> <li>• Construction Management Plan</li> </ul>	January 2025	April 2025	
Boston Parks and Recreation Department: Approval of work within 100 feet of Parkland			
Boston Public Improvements Commission: <ul style="list-style-type: none"> <li>• Specific Repair Plan</li> <li>• License, Maintenance and Indemnification Agreement</li> </ul>	February 2025	April 2025	
Boston Inspectional Services Department: <ul style="list-style-type: none"> <li>• Building Permit*</li> <li>• Certificate of Occupancy*</li> </ul>			
Boston Public Safety Commission - Committee on Licenses: <ul style="list-style-type: none"> <li>• Inflammables Storage Permit/Garage License*</li> </ul>			

**ANTICIPATED MILESTONES AND TIMELINE**

<b>AUSTIN STREET PARKING LOTS DEVELOPMENT MILESTONES</b>	<b>ANTICIPATED APPLICATION FILING DATE</b>	<b>ANTICIPATED PERMIT / APPROVAL ISSUANCE DATE</b>	<b>ANTICIPATED FINANCING MILESTONE</b>
Construction Bidding/Contractor Selection/Cost Finalization			Winter 2025
Financing/Permitting Secured			Spring 2025
BFHC Approval and Other Marketing Requirements Complete	Spring 2025		
EPA: NPDES Construction General Permit*	14 days prior to the start of construction		
Phase I Closing-Construction Begins (36-month Construction Period)			Summer 2025
Phase I Construction Completion			Summer 2028
Phase I affordable lease up complete			Summer 2029
Phase II Closing -Construction Start			Summer 2028
Phase II Construction Completion			Summer 2031

\* Tied to start of construction or occupancy

## **OPERATIONAL PLAN**

This Operational Plan defines the responsibilities of the property management team (and others, as described herein) for the Austin Street Parking Lots redevelopment as the buildings enter their respective operational phases.

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

## **ROLES AND RESPONSIBILITIES**

Given the different financing structures for each building, there will be a management agreement between the ownership entity for each new building on the Austin Street Parking Lots Parcel and Trinity Management that will clearly define the responsibilities of both the Owner and the Agent respectively. The management agreement will incorporate, by reference, a management plan for each building and will set forth those responsibilities and obligations delegated to the Agent by the Owner. It also will identify the obligations the Agent must meet as established by applicable regulatory, municipal, state or federal agencies, laws and statutes.

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

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

## **PERSONNEL POLICY AND STAFFING**

### **EEO Policy**

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

### **Affirmative Action Policy, Plan, and Goals**

#### **Equal Opportunity Policy**

It is the policy of Trinity Management to promote equal opportunity in all of its activities. It is Trinity

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

### **Affirmative Action Policy**

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

### **Affirmative Action Officer**

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

### **Affirmative Action Methods**

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

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

## **AFFIRMATIVE ACTION METHODS FOR GOODS AND SERVICES**

As further described in Section 5. Equity and Inclusion Plan, Trinity Management is committed to identifying and utilizing Minority Business Enterprises (MBE's) to provide goods and services. Our commitment exceeds any mandated goals of participation by employing the following methods:

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

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

## GRIEVANCES

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

## STAFFING PLAN

To ensure a successful lease-up and ongoing operations for the proposed program for the Austin Street Parking Lots Parcels, Trinity Management will utilize a combination of onsite staff, as well as a number of skilled professionals from the corporate staff in support of that onsite staff.

For the rental buildings, during operations, for the onsite team comprised of administrative/office staff as well as maintenance personnel, we anticipate the appropriate staffing level for each rental building to include up to: for administrative staff, a full-time Property Manager, a full-time Assistant Property Manager and a full-time Leasing / Recertification Specialist; and for the maintenance staff, a full-time Maintenance Superintendent, a full-time Maintenance Technician, and a full-time Maintenance Tech / Porter. It is anticipated that given the onsite presence of Trinity Management for the rental buildings, the homeownership buildings will experience some economies of scale for their property management.

Trinity Management staff will perform as much of the routine day-to-day services as possible. Whenever necessary, and in accordance with the operating budget, Trinity Management will contract for certain services including landscaping and unit turnover. In addition, when a repair requires expertise beyond that of site staff, Trinity Management has an extensive network of skilled contractors and vendors to call upon. Further, Trinity Management typically outsources security and/or concierge services where appropriate, with the hours of coverage tailored to a property's particular needs and budget.

The onsite staff and contractors/vendors are one part of the staffing in support of the Austin Street Parking Lots program. Trinity Management has a robust organization of skilled professionals that centrally support the onsite staff, and include:

Directly supporting the onsite team, Trinity Management will provide an assigned Regional Director and a Senior Property Manager, as well as a Regional Facilities Manager. These senior personnel provide a wealth of knowledge and experience to oversee and guide the onsite personnel.

Accounting services for the property are provided by assigned property accountants under the direction of a controller and overseen by Trinity Management's Senior Vice President of Finance & Administration.

Trinity Management's compliance department, under the guidance of the Senior Director of Compliance, will provide direction and assistance to the site team to ensure resident files and recertifications are completed accurately and timely, and that the team is adhering to the required programs and housing plans.

Marketing and Leasing support, particularly for the market-rate units will be provided by the marketing team under the guidance of the Director of Marketing & Leasing

The efforts of all of the above staff will be directly overseen by Trinity Management's Chief Operating Officer, who will ensure the property is operating well, and in accordance with the property management agreement.

During the initial lease-up, Trinity Management will provide assistance in completing and crafting all required operating and property management documentation for agencies, lenders, investors, etc., as well as preparing the marketing and the affordable unit lottery.

The typical lease-up team includes:

Starting 9-12 months prior to building delivery:

Chief Operating Officer  
Regional Manager  
Senior Property Manager  
Senior Director of Compliance

At 6 months prior to building delivery, and around the affordable lottery, additional staff are added to the above team, including:

Marketing Specialist  
Compliance/Certification Specialists (typically 2 to 3)

At 2-3 months prior to building delivery:

The onsite Property Manager and Maintenance Superintendent are hired to ensure a smooth transition from construction completion to operations.

Prior to building delivery:

The remaining site staff are added.

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

## **TRAINING**

Trinity Management has an excellent tradition of employment and training programs and encourages employees to pursue self-development related courses through education assistance. Trinity Management has an excellent tradition of employment and training programs. When a new employee starts, they are given an orientation on all the policies and procedures for the property. Trinity Management also provides various training opportunities for its employees. Property Managers and Assistant Property Managers attend regularly scheduled meetings with colleagues to discuss job-related topics of common interest. Guest lecturers conduct special seminars and workshops. Maintenance staff share in roundtable discussions concerning maintenance delivery systems, preventive maintenance, landscaping and courses at educational institutions designed to enhance their technical skills. Trinity Management promotes staff participation in external workshops and

seminars in areas such as violence prevention, intervention in substance abuse matters relating to residents, wellness programs for elders, and art programs for residents of all ages.

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

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

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

## **PROFESSIONAL AFFILIATIONS AND ACCREDITATIONS**

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

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

Trinity Management was recently awarded the Accredited Management Organization® (AMO) designation from the Institute of Real Estate Management for their continued commitment to professional excellence.

## **MARKETING AND LEASING**

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

The Trinity team will comply with all Federal, State and local fair housing and civil rights laws. In carrying out its marketing program and tenant selection process, neither the Owner, nor its Agent, will discriminate based on race, color, creed, religion, sex, sexual orientation, national or ethnic origin, age, disability, handicap,

ancestry, legal source of income, class or marital status, or any other basis prohibited by law. This applies to accepting and processing applications, selecting tenants from among eligible applicants of the waiting list, assigning units, and certifying and recertifying eligibility for assistance.

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

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

## **PARKING AND TRANSPORTATION PLAN**

Following the guidelines in the RFP, and given the adjacency to the MBTA's Community College Orange Line Station, we have included limited parking at a .4 parking ratio for automobiles in our proposal. Our proposal does include a generous bicycle storage room in the project which accommodates a 1:1 ratio of bike parking per unit plus guest accommodations.

## **ADMINISTRATIVE & COMPLIANCE PROGRAM**

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

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

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

## **MAINTENANCE PROGRAM**

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

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

Deficiencies on the property are corrected through the work order procedure. The work order provides the maintenance staff with authorization to perform work on the property. Once a request for work has been entered into the computer, it is assigned a category, which defines the priority of the work and dictates how and when it will be dispatched for completion. Categorizing the workload offers many benefits to residents by ensuring that residents' maintenance issues are addressed promptly. In addition, the system allows for a continuous and accurate knowledge of the workload and what resources are available to meet the requirements

of the workload. The work order system also allows the Regional Directors and/or Chief Operating Officer to provide our clients with accurate information about the maintenance of the property. This helps in the development of staffing and budgeting needs and allows clients to participate in and understand the needs of their property.

Many preventive measures are required on a property to ensure that the quality features of the buildings and the apartments are maintained. The approach of Trinity Management is to inspect and maintain apartments on an annual basis and building systems according to the specific Preventive Maintenance Schedule that is uniquely designed for every property. A program is also established for janitorial and grounds work on every property. These schedules will be prepared prior to occupancy of the Austin Street Parking Lots Parcel. These are typically adjusted periodically and therefore are not part of the plan but are kept available in the management office.

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

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

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

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

## **REPORTING**

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

**PROJECTED OPERATING EXPENSES-RENTAL and AFFORDABLE CONDOMINIUM BUILDING**

Trinity Management projects a total initial year operating expense budget of approximately \$13,000 per unit in today's dollars. For Building #1 this would be \$2.3M and for Building #2 this would be \$2.8M. These expenses include the full-time staff that will be dedicated to the property, as well as anticipated maintenance and repair costs, landscaping costs, real estate taxes, and other expenses necessary to successfully maintain the property. The operating expenses for the residential component of the building will be covered by the rent generated from the rental units. Tenants of the commercial spaces will be responsible for the operating expenses of their leased space.

It is estimated that the affordable condominium budget would have condominium fees of approximately \$350 per month.

## 2d. BOSTON RESIDENTS JOBS POLICY

Since its founding in 1987, Trinity has been an industry leading and hiring a diverse workforce in all aspects of the development cycle. In 2015, Trinity formalized its commitment to these sound hiring practices with the adoption of its proprietary Contracting and Construction Employment Policy below:

**Trinity Financial, Inc.**  
**Contracting and Construction Employment Policy**

Since its inception, Trinity Financial has worked to establish relationships with contractors and vendors that provide the highest quality of goods and services and, in particular, those that are the most responsive to the following five objectives:

1. We select contractors and vendors that have the appropriate level of experience, that are responsive, that offer competitive pricing, that follow sound operating practices, and that have the ability to execute required tasks within very explicit time frames.
2. We insist that our contractors and vendors pay wages and benefits that comply with all applicable federal, state, and local employment laws when working on our projects.
3. We recognize the quality and the expertise of the local Building Trades and, accordingly, we seek to maximize their participation in all of our projects, where feasible.
4. We give strong preference to contractors and vendors that have a demonstrated track record in utilizing minority and woman owned businesses (MBE's/WBE's), with a goal of achieving at least a 25% participation rate by these firms in our projects.
5. We give strong preference to contractors and vendors that have a demonstrated track record in hiring a diverse workforce, including minorities, women, and workers from the project's impact area, with a goal of achieving a 30% labor participation rate by these individuals in our projects.

Throughout our history, Trinity has had an excellent track record in utilizing MBE/WBE firms and employing minorities, women and local residents in the construction and management of our properties. The firm has always welcomed opportunities to reinvest in local communities above and beyond the "bricks and mortar" of our projects. Providing attractive business opportunities to area businesses and decent jobs to local residents only serves to strengthen the local economy and therefore enhances long term value creation for the assets that we develop there.

The Trinity team recognizes the importance of diversity and will abide by the Boston Residents Jobs Policy for construction jobs on the Austin Street Parking Lots redevelopment. The team has vast experience complying with the Boston Residents Jobs Policy spanning several decades. Our approach consists of the following:

- Include workforce goals and reporting requirements in all general contracting and subcontracting agreements;

- Living Wage Requirements in all general contractor and/or subcontractor contracts of \$18.00/per hour or more;
- Perform kick-off meetings with project team, to include general contractor and its related subcontractors to review our internal compliance policy and other outside agency's standards;
- Monitor contractor's performance daily/weekly through routine site visits and weekly project updates to verify reported workers; hold corrective action meetings as necessary;
- Participate in local Labor Monitoring Committee meetings as requested;
- Maintain walk-on application procedure for workers seeking employment/training: distributing logs weekly to GC and subcontractors;
- Collect all Boston resident verification documentation for workers living in the City of Boston; and,
- Host Community Job Fairs and OSHA-10 job trainings for those without relevant construction experience through MPDC's Construction Pre-Apprenticeship Program, MT2T

In addition, our team works with a host of community partner organizations to increase employment opportunities for local, minority and female workers including but not limited to:

Building Pathways	Various Resident & Neighborhood Associations
YouthBuild Boston	Career Link & other employment programs
Local Vocational High School	Neighboring properties surrounding the Austin Street Parking Lots

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

Trinity Financial Diverse Subcontracting Performance							
Trinity Financial Project	Neighborhood	Minority Business Participation			Women Business Participation		
		Goal	Actual	% of Goal	Goal	Actual	% of Goal
Orient Heights Phase II East Boston, MA	East Boston	23%	36%	160%	9%	8%	89%
Orient Heights Phase I East Boston, MA	East Boston	23%	23%	102%	9%	11%	122%
Treadmark Dorchester, MA	Dorchester	15%	66%	440%	5%	50%	1000%
One Canal (Market Rate) Boston, MA	Downtown	25%	30%	120%	10%	5%	50%
Northampton Towers (Mixed-Finance) Boston, MA	Roxbury	25%	29%	116%	10%	17%	170%
Harrison Tower (Mixed finance) Boston, MA	Roxbury	25%	65%	260%	10%	0%	0%
Lucerne (Mixed finance) Boston, MA	Dorchester	25%	52%	208%	10%	5%	50%
Maverick Landing (HOPE VI) Boston, MA	East Boston	25%	24%	96%	10%	6.5%	65%
Washington Beech Phase 1 (HOPE VI) Boston, MA	Roslindale	30%	23%	77%	10%	15%	150%
Washington Beech Phase 2 (HOPE VI) Boston, MA	Roslindale	30%	25%	83%	10%	16%	160%
Mattapan Heights Phase 2 (Mixed-Finance) Boston, MA	Mattapan	25%	28%	112%	N/A	N/A	N/A
Mattapan Heights Phase 3 (Mixed-Finance) Boston, MA	Mattapan	25%	34%	136%	N/A	N/A	N/A
Mattapan Heights Phase 5 (Mixed-Finance) Boston, MA	Mattapan	25%	40%	160%	N/A	N/A	N/A
Franklin Hill Phase 1 (Mixed-Finance) Boston, MA	Dorchester	30%	33%	110%	10%	17%	170%
Franklin Hill Phase 2 (Mixed-Finance) Boston, MA	Dorchester	30%	29%	97%	10%	18%	180%
Davenport Commons (Student Rental) Boston, MA	Roxbury	15%	44%	293%	5%	3%	60%
Davenport Commons (Homeownership) Boston, MA	Roxbury	15%	32%	213%	5%	15%	300%
Shawmut Estates (Homeownership) Boston, MA	Roxbury	15%	50%	333%	5%	10%	200%
Orchard Gardens III (HOPE VI) Boston, MA	Roxbury	15%	28%	187%	5%	2%	40%
Orchard Gardens II (HOPE VI) Boston, MA	Roxbury	15%	33%	220%	5%	6%	120%

## 2e. DIVERSITY AND INCLUSION PLAN

This plan outlines the steps that the Trinity team will take to implement the City of Boston's MBE, WBE, Local Resident, and Section 3 goals as part of the Austin Street redevelopment and details our efforts and commitment to diversity, equity and inclusion across the various phases of the development cycle.

The Trinity development team is fully committed to diversity, equity and inclusion in order to expand employment, economic opportunities and to increase local economic benefits of our development projects. Our focus is to expand opportunities across all levels of the project from the initial formation of our team, the development of our project concept, through procurement and construction, through our affirmative fair marketing to future residents and finally through the property management process once the project has completed construction and is operating.

Today, Charlestown is renowned as one of the most desirable neighborhoods of Boston with walkable access to the waterfront, historic landmarks such as the Bunker Hill Monument, the USS Constitution, and the Freedom Trail. Additionally, the neighborhood is walkable to the TD Garden, the North End, Cambridge, is connected to the esplanade and in close proximity to the healthcare institutions such as the Spaulding Rehabilitation Hospital and the Massachusetts General Brigham campus. However, according to the Housing and Household Composition Community Profile for the Austin Street site at the end of this section, **the level of Historic Exclusion in Charlestown has been Moderate.** Today, only 4.9% of the area around the site is comprised of Black or African American households, compared to 25% across the city as a whole. Additionally, only 8% of the households are Hispanic, compared to a city average of close to 20%. To date, the demographics of this neighborhood have not been representative of the diversity of the overall city of Boston.

The intent of the Trinity Austin Street redevelopment team is to create processes and efforts that intentionally and thoughtfully reach out to communities of color at all levels of the development cycle with a goal of increasing diversity within the development and construction team, and ultimately into the residential units-both affordable and market rate, so that overall participation is reflective of that of the city as a whole.

### PROJECT TEAM AND OWNERSHIP

The team that will be engaged in the Austin Street redevelopment is unprecedented and unmatched in its capability and diversity. The project will be developed and owned by Trinity Financial, is a 35-year old real estate development company that is 50% owned by Patrick Lee (a Black person) and 50% owned by James Keefe (a White person); it is a 50/50 partnership.

Trinity's staff is quite diverse and includes people of color and women in positions of significant authority. More than 53% of Trinity's current personnel are either people of color (42%) and/or women (29%). Trinity's Managing Director of Development, Kenan Bigby, are both men of color, and two of the company's Vice Presidents of Development, Abby Goldenfarb and Eva Erlich, are both women.

### DEVELOPMENT TEAM

Forty two percent (42%) of the consultants that Trinity has assembled for this project include MBE, WBE, and women-owned firms. The design team for the project includes **ICON architecture**, a

**WBE firm, and Klopfer Martin Design Group, a WBE** landscaping architecture firm. Our civil engineering and transportation team, **Bryant Associates, is a Minority and Disadvantaged Business Enterprise. Nitsch Engineering, a WBE,** will provide survey services, **Everstreet, a WBE, will provide retail consulting and brokerage. Wang Commissioning** will be the commissioning agent for the development and is both **a WBE and MBE.** Trinity Management is led by a Latina Chief Operating Officer and employs a diverse workforce, many of whom are Black, Latino and Asian, allowing the company to provide management services that reduce or eliminate cultural and linguistic barriers.

- Development Partner – Abby Goldenfarb and Kenan Bigby
- Architect – ICON architecture
- Landscape Architect- Klopfer Martin Design Group
- Civil and Transportation Engineer – Bryant Associates, Inc.
- Survey- Nitch Engineering
- Commissioning – Wang Commissioning
- Pre-Construction Services – Tara Construction

Trinity has an established track record of Equity and Inclusion on its developments. Please see below for a sampling of recent completed projects:

Trinity Financial Project	Neighborhood	# of Units	Boston Resident Hours		Minority Hours		Women Hours		Section 3 New Hires	
			Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Treadmark (initial construction)	Dorchester	83	50%	68%	25%	62%	10%	9%	N/A	N/A
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Boston East	East Boston	200	40%	22%	40%	43%	5%	3%	N/A	N/A
Harrison Tower (Northampton Square Ph 2)	Roxbury	102	50%	35%	25%	43%	10%	4%	N/A	N/A
Northampton Tower (Northampton Square Ph 1)	Roxbury	245	50%	37%	25%	41%	10%	4%	N/A	N/A
Franklin Hill Phase 2	Dorchester	152	N/A	N/A	30%	47%	10%	6%	30%	41%
Franklin Hill Phase 1	Dorchester	114	N/A	N/A	30%	44%	10%	3%	30%	36%

Washington Beech Phase 2	Roslindale	106	N/A	N/A	30%	42%	10%	6%	30%	37%
Washington Beech Phase 1	Roslindale	100	N/A	N/A	30%	44%	10%	6%	30%	43%
Orchard Gardens	Roxbury	331	50%	43%	25%	72%	10%	2%	N/A	N/A

## PRECONSTRUCTION SERVICES

Although a general contractor has not yet been selected, the project will be utilizing pre-construction services from a partnership between Dimeo Construction Company and Tara Construction. Throughout both companies' histories, Dimeo and Tara have had an excellent track record in utilizing MBE/WBE firms and employing minorities, women and local residents in the construction and management of our properties. The firms have always welcomed opportunities to reinvest in local communities above and beyond the "bricks and mortar" of their projects.

The Dimeo/Tara partnership will provide preconstruction and cost estimating services for the Austin Street redevelopment. Dimeo Construction Company's approach to all assignments includes unsurpassed planning and operational services with cost, quality, schedule, and safety at the forefront of each decision. As the Lead Construction Manager, Dimeo will continue its ongoing relationship with Tara Construction, Inc. for the Austin Street redevelopment. The management teams at both Dimeo and Tara have longstanding relationships in the industry that span across several decades. Dimeo Construction Company will bring the construction management depth and expertise, along with extensive, large, and complex project experience in the Boston area and Northeast corridor to lead the project.

## GENERAL CONTRACTOR

### Identification of General Contractor

The Trinity team has yet to solicit official construction contract bids from general contractors. When we are at that stage of the project, we will solicit proposals from qualified general contractors who have demonstrated a track record similar in scope to the Austin Street project and who have also demonstrated strong performance in hiring local residents, people of color, and women workers and in subcontracting to MBE and WBE firms.

The Trinity team will work to establish relationships with contractors and vendors that provide the highest quality of goods and services and, in particular, those that are the most responsive to the following five objectives:

1. We select contractors and vendors that have the appropriate level of experience, that are responsive, that offer competitive pricing, that follow sound operating practices, and that have the ability to execute required tasks within very explicit time frames.
2. We insist that our contractors and vendors pay wages and benefits that comply with all applicable federal, state, and local employment laws when working on our projects.

3. We recognize the quality and the expertise of the local Building Trades and, accordingly, we will maximize their participation.
4. We give strong preference to contractors and vendors that have a demonstrated track record in utilizing minority and woman owned businesses (MBE's/WBE's), with a typical goal of achieving at least a 25% participation rate by these firms in our projects.
5. We give strong preference to contractors and vendors that have a demonstrated track record in hiring a diverse workforce, including minorities, women, and workers from the project's impact area, with a typical goal of achieving a 30% labor participation rate by these individuals in our projects.

The selected general contractor will be required to abide by the Boston Residents Jobs Policy for construction jobs on the Austin Street redevelopment project. The team has vast experience complying with the Boston Residents Jobs Policy spanning several decades. Our approach consists of the following:

- Include workforce goals and reporting requirements in all general contracting and subcontracting agreements;
- Living Wage Requirements in all general contractor and/or subcontractor contracts;
- Perform kick-off meetings with project team, to include general contractor and its related subcontractors to review our internal compliance policy and other outside agency's standards;
- Monitor contractor's performance daily/weekly through routine site visits and weekly project updates to verify reported workers; hold corrective action meetings as necessary;
- Participate in applicable local Labor Monitoring Committee meetings as requested;
- Maintain walk-on application procedures for workers seeking employment/training: distributing logs weekly to GC and subcontractors;
- Collect all Boston resident verification documentation for workers living in the City of Boston; and,
- Host Community Job Fairs and OSHA-10 job trainings for those without relevant construction experience through established Construction Pre-Apprenticeship Programs.

In addition, our team will work with a host of community partner organizations to increase employment opportunities for local, minority and female workers including but not limited to:

Building Pathways

Various Resident & Neighborhood Associations

YouthBuild Boston

Career Link & other employment programs

Local Vocational High Schools

## **PROJECT PERFORMANCE GOALS**

Trinity, in communication with the City of Boston and local neighborhood organizations, will establish the following goals for workforce hours and subcontracting performance on the Austin Street redevelopment project. These goals also reflect the Boston Residents Jobs Policy (see below), goals of the Boston Good Jobs Coalition, and long-standing standards we have used on construction projects.

### Construction Hiring and Workforce Hours

The goals for the project exceed the requirements under the revised Boston Residents Jobs Policy and area as follows:

- At least 50% local resident hours
- At least 25% people of color work hours
- At least 10% women work hours
- At least 10% Section 3 hires

### Subcontracting Goals

The goals for the project are:

- At least 25% for Minority Business Enterprises
- At least 9% for Women Business Enterprises
- At least 3% for Section 3 businesses

### **MARKETING AND LEASING OUTREACH**

The Austin Street redevelopment property management team will participate in well attended public local events to promote the property and its affordable and market rate rental and homeownership units to prospective residents and guests. We will also routinely send broker blasts to drive realtor/broker/locator leads/leases. Working with Everstreet and Reitz Realty, we will similarly engage these organizations in our efforts to lease the retail space at the property.

Our team will establish a Preferred Employer Program to be used in Outreach Marketing activities. Relationships will be established and maintained with local corporations and merchants that align with our vision. The team will create a network within the market of major employers, city organizations, and local associations, and will host events and send marketing materials to Preferred Employers.

Examples of Preferred Employers include:

- Organizations affiliated with local area medical institutions such as Spaulding Rehabilitation Hospital, Massachusetts General Hospital, Massachusetts Eye and Ear, Suffolk University, and the City, State and Local government offices in the area, as well as national medical diversity movements such as **Tour4Diversity**.
- Cultural Institutions such as the Constitution Museum, the Bunker Hill Museum, Museum of African American History, and others
- New England sports organizations such as the Boston Pride, Boston Red Sox, Boston Celtics, the Boston Bruins, the New England Patriots and the New England Revolution;
- Organizations affiliated with area educational institutions. As part of this effort we will directly engage in intentional outreach, focusing on a diverse mix of faculty and alumni groups such as, but not limited to the Bunker Hill Community College Alumni Association, , **Harvard Black Alumni Society**, and the **Black Alumni/ae of MIT**, **Black Alumni Leadership Council at Boston University**, **Wellesley Alumnae of African Descent** and the **Tufts Black Alumni Association** and graduate membership of diverse fraternal organizations such as **Alpha Kappa Alpha Sorority, Inc. Psi Omega Chapter**.
- Organizations recognized for their diversity such as **Boston's Builders of Color Coalition**; **National Society of Black Engineers Boston Professionals**, **Massachusetts Black Lawyers Association**, **The Boston Chapter of the National Black MBA Association**, the **National Association of Black Accountants-Boston Chapter**.

- Black-owned, women-owned and minority-owned local businesses and organizations, as well as businesses that are owned by or employee people with disabilities.

In connection with the Preferred Employer effort, the Austin Street property team will enter into strategic partnerships to amplify our outreach. Establishing relationships with organizations such as the **Black Economic Council of Massachusetts**, the **Boston Chapter of the NAACP**, and the **Chica Project** provides an opportunity to connect with members who are potential residents of the new residences, both affordable and market rate, and who may not have contemplated moving to the Charlestown neighborhood.

Additionally, the Austin Street property management team will seek out relationships with newly established organizations such as **Boston Young Black Professionals** and **Boston While Black**. Founded in July 2020, Boston While Black helps Black graduate students, professionals, & entrepreneurs navigate the social, cultural, political, and economic landscapes of Greater Boston. The Austin Street property management team will partner with these organizations throughout the year, creating opportunities to involve staff and residents in philanthropic and charity events associated with these organizations.

## PROPERTY MANAGEMENT

Trinity Management, LLC is committed to employing a diverse workforce and creating opportunities for small business, disadvantaged businesses, minority-owned and women-owned business enterprises. Trinity Management's commitment to Affirmative Action and Equal Opportunity serves not only the best interests of our Company, but also the communities in which it operates. Trinity Management's overall workforce is over 67% minority and over 52% of its workforce is female. Trinity Management, LLC has been honored annually, since its inception, by MassHousing, a self-supporting not-for-profit public agency, for its achievement in consistently awarding millions of dollars annually to minority and women-owned business enterprises in Massachusetts.

Trinity Management, LLC is committed to the principle of Equal Employment Opportunity. The firm's employment policies provide all persons with equal opportunity without unlawful regard to race, color, religion, genders, handicaps, national origins, legal sources of income, and familial statuses or any other basis prohibited by state or federal law. Trinity Management, LLC will encourage and outreach to residents of Boston when hiring any full-time employee for permanent, temporary, or seasonal employment. This policy includes outreach and training to accomplish the goals agreed upon with the Austin Street ownership entities.

New hires will be made in the following order of priority:

- Qualified residents of Boston,
- Qualified other residents of Suffolk County, and
- All other qualified applicants

Notice of potential or actual employment opportunities with job descriptions and specifications will be communicated using the following methods:

- Written notice at the property and nearby properties,
- Written notice in community newsletters,

- Notification during community meetings, and
- Advertisements placed in community newspapers

Candidates for positions will be selected using the following method:

- Submission of resume and application,
- Management screens applications through interview and testing where appropriate, and
- Finally, Management makes the final decision to offer employment

## GOALS

Trinity Management, LLC, has established a goal for Austin Street redevelopment of awarding, at minimum, 14% of its annual contracts and purchases to minority-owned businesses, 12% to woman-owned businesses, and 10% to disadvantaged and small business concerns. Preference will be given to business concerns in the following order:

1. Businesses - Owners are Residents of Boston
2. Businesses - Owners are Residents of Suffolk County
3. Businesses - Over 50% of Employees are Residents of #1 and #2 above
4. Businesses - Owners are Residents of Massachusetts

## **Resident Contracting, Policy, Plan, and Procedure**

Trinity Management, LLC has established a policy of outreach to residents of Boston and the surrounding community (local firms) to provide goods and services to the Austin Street redevelopment. We are committed to not just making bidding opportunities available to local firms but to developing real strategies for utilization.

Each year Trinity Management, LLC will provide a list of bidding opportunities. This information will be disseminated to all local firms.

Detailed below are the outreach methods we will use:

1. Outreach and Utilization - Trinity Management, LLC will establish a policy of outreach and utilization to the immediate and surrounding communities to provide goods and services to the Austin Street redevelopment. To accomplish this goal, Trinity Management will:
  - a. Solicit proposals from qualified small, disadvantaged, minority/women-owned businesses rep by creating master mailing list of local, minority, and women-owned contractors and suppliers that will be used to disseminate bid opportunity fairly and consistently.
  - b. As feasible, supplies and contracts will be divided into smaller contracts to promote more small business and minority/women-owned business participation.
  - c. Reach out to the Boston's Economic Development Office/Business and Community Development Division, MA Small Business Development Center Network, MassHousing, Small Business Administration, and other agencies for access to any existing contractor listings or vendor contact venues that might be available.

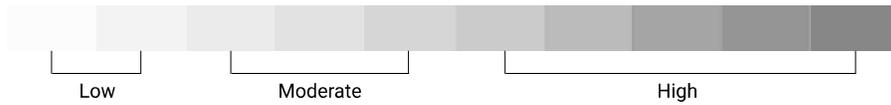
2. Vendor Restructuring - Majority firms currently providing goods or services through national contracts will be asked to develop business relationships with Section 3 firms. These relationships should lead to the development of joint ventures, partnerships and other business relationships. Samples of this type of arrangement can include the teaming of trash contractors, appliance contractors, property and liability insurance, HVAC contractors, etc.
3. Mentoring Program - Trinity Management, LLC will offer counseling to local small and minority/women-owned businesses in the community, where appropriate, to help those firms meet Trinity Management's vendor guidelines and to assist them in developing competitive business practices and services.

## Housing and Household Composition Community Profile

Project Address: Austin St, Charlestown, Massachusetts, 02129

Total Households in Project Area: 4039

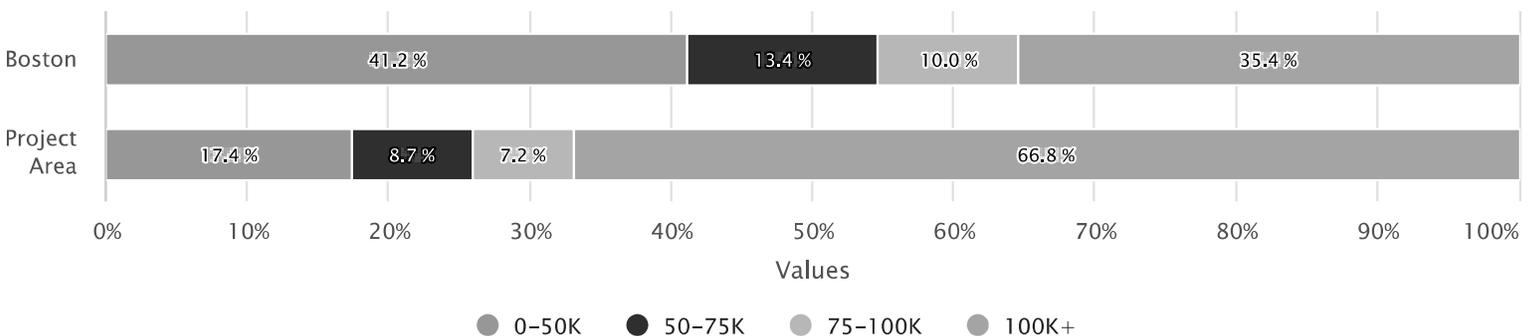
Historical Exclusion Level:  Moderate



### Boston Household Characteristics

	Percent of Housing Units that are Renter Occupied	Percent of Households spending 30% or more of Household Income on rent	Percent of Households spending more than 50% of Household Income on rent	Percent of Housing Units that are Income-Restricted	Percent of Households Using Mobile Housing Vouchers, BHA
Project Area	50.9%	34.1%	13.3%	15.2%	1.0%
Boston	65.9%	48.9%	25.8%	20.6%	4.7%

### Household Income Buckets

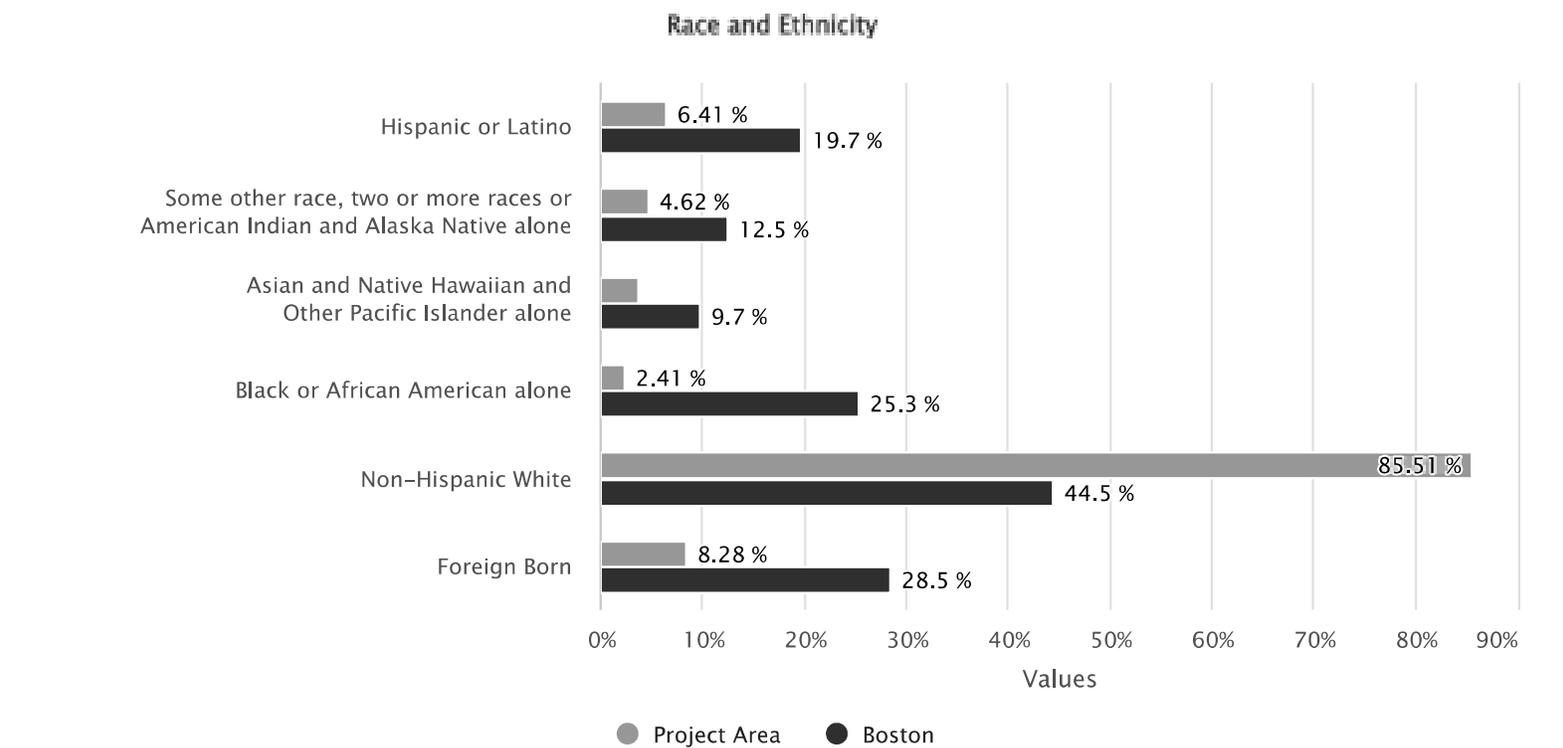
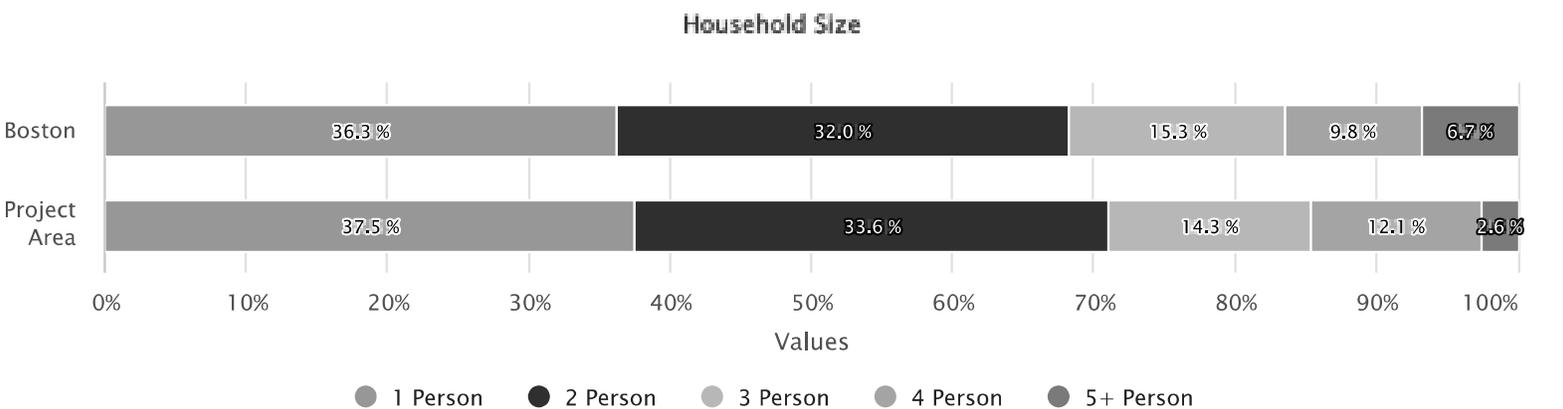


### Household Composition Characteristics

Household Type	Married couple families	Other families	Non-family householder living alone	Non-family householder not living alone	Households with Children under 18	Households with a member with a disability
Project Area	35%	10.8%	37.5%	16.7%	22%	13.3%

Household Type	Married couple families	Other families	Non-family householder living alone	Non-family householder not living alone	Households with Children under 18	Households with a member with a disability
Boston	28.0%	20.2%	36.3%	15.5%	22.4%	22.7%

Unit Sizes				
Mix of Units	Studio or 1-Bedroom	2-Bedroom	3-Bedroom	4+ Bedroom
Project Area	32.5%	37.1%	21.2%	9.1%
Boston	31.7%	34.6%	23.1%	10.7%





## DESIGN SUBMISSION

- a. Design Narrative
- b. Preliminary Zoning Analysis
- c. Sustainability Narrative
- d. Design Drawings

Plan of  
CHARLESTOWN PENINSULA

in the State of  
MASSACHUSETTS,

From Accurate Survey

By  
Peter Hays Surveyor

1818.

Engraved by Austin & Smith, Boston.

### 3a. DESIGN NARRATIVE

Response to Development Objectives -- The proposal responds to the Development Objectives and Design Guidelines of the RFP. Key features of the plan include:

- Conformance with PLAN Charlestown – the proposed plan incorporates housing for a range of incomes, generous open space for public passive and active recreation, enhanced streetscapes to strengthen pedestrian and bike connections, an enticing site entry from the Austin/Rutherford Streets intersection, a range of small retail and artist space, many new trees, and modest parking to favor residential use of public transit.
- Significant New Affordable Housing -- to fill the growing need for affordable Charlestown living. In total, 686 new homes are proposed – a mix of rental and home ownership -- consisting of studios, and one, two, and three-bedroom apartments, with over half the units designed as two and three-bedrooms for families. All units will be designed for contemporary living, enhanced by a range of resident amenities, and be supportive to all age groups and disabilities. These residential units will appeal to a broad range of Bostonians who rely on public transit. The project's proposed 245 parking spaces meet the BPDA guideline of 0.4 vehicle parking spaces per unit.
- Active Ground Floor Uses -- The ground level of all buildings will be devoted to commercial uses and community spaces that not only support the new housing, but serve neighborhood needs that are not currently being met. The site will be a unique place to bring the community together – through events that serve the broader neighborhood as well as building residents. Open spaces will be accessible and inviting to all, connecting open space elements across the site to encourage walking and recreation.



- Broad, Multi-Acre Open Spaces to Support Residents, Community, Youth Sports and Arts & Culture – two major new open spaces are being created for the community. The 30,000 SF courtyard at the Austin/Rutherford intersection will activate local, small-scale retail and artists facilities, and the 1-acre recreational open space on the eastern side of the site will cater to local youth sports and other recreation. and Rutherford Streets.



- **Healthy Development** -- All buildings will be constructed to Passive House standards, incorporating all-electric HVAC systems, robust building envelopes, and rooftop solar to significantly reduce the development's carbon footprint and ensure affordable utility costs for residents. Passive House building standards call for fresh air for each unit – that will be ducted from building rooftops away from I-93 -- and a robust construction system to assure healthy indoor air quality, and lessen noise from outside. Buildings have been sited to block movement of particulate matter towards the open recreation areas. The team has engaged Tech Environmental as an Air Quality Consultant to develop a plan for evaluating and monitoring both indoor and outdoor air quality. More information regarding air pollution monitoring is presented in the following sustainability section of this proposal.
- **11,200 SF of space devoted to Arts & Culture** – the Building 1 plan embraces the creative economy, supporting it with Live/Work units, Studios, music rehearsal or maker space, and a highly visible Gallery at the corner of Austin and Rutherford Streets.
- **Diversity & Inclusion-** please see Section 2e for information on Trinity's proposed Diversity and Inclusion plan.

### Design Narrative

The proposed development will enhance the public realm and create a strong sense of place, filling a gap in Charlestown's urban fabric along the I-93 void, and blocking view of the highway. New, mixed-use buildings will activate the streetscape, and fill this visual void with over 1.5 acres of open space, filled with new trees, tiered landscaping, broad sidewalks, public art, and access to new commercial/retail and community-serving spaces at ground level. Importantly, new buildings will offer much-needed affordable and workforce housing mixed with market-rate rental and home ownership opportunities. For residents, the buildings will offer fantastic views south of the Charles River and Boston, with easy access to public transit.



**The Eastern Site** (O Rutherford Avenue) nearest Route 1 Access Road, is the larger of the two sites at 2.8 acres (112,018 SF). The design for this site caters to home ownership and recreation:

- **Two Residential Buildings with 294 Home Ownership Condominiums, both Affordable and Market-rate** -- mix scales, with an 8-story height parallel to I-93, to hide it from view, stepping down to a 6-story volume along Rutherford Avenue, to meet the neighborhood residential scale. A series of bays and insets for private decks combine to create a residential rhythm across the facades. Setbacks at the sixth floor allow residential roof decks for both buildings, to enliven the building form and create additional landscaped open space and amenities for residents to enjoy. A +/- 3000 square foot interior amenity space will be created adjacent to each roof terrace. A ground floor lobby will provide secure entry for residents.
- **“The Fields”** -- the two structures wrap a broad 1-acre open space, sized to accommodate four 90' x 90' fields (per RFP). “The Fields” can accommodate a variety of Charlestown Youth sports, when scheduled, or provide passive and recreational space for residents and neighbors throughout the day. A landform berm accommodates spectator seating while reducing street noise, along Rutherford. A concrete paver promenade connects the buildings in a north/south direction. New trees, plantings and fencing provide a green edge and safety against street traffic.



- **A New Street** – is proposed to bisect the site to create a more standard sized neighborhood “block” and allow better access and service to the two buildings and fields. The new road provides an area to place (and relocate if needed) utilizes to service the new buildings. It will also more evenly distribute vehicles across the site. The development team understands that this road will need to be reviewed and permitted through the City and Mass-DOT in conjunction with the redesign of Rutherford Avenue.



- **19,000 SF proposed expanded Nursery School** -- ground level space in Building 4 is proposed as a potential expansion opportunity for the Charlestown Nursery School. Potential indoor uses include classrooms, community space, library, childcare and extended day programming, space for occupational and speech therapy, and enrichment space for dance, gymnastics and family meetings. A small parking area has been proposed in front of this building to serve as a drop-off area for the programs, and a short-term parking lot for evening or weekend field use.
- **10,000 SF Indoor Youth Sports Center** -- is imagined for the ground level retail space in Building 3 in support of year-round use of the fields, and for use on inclement days. A 2-story, youth-scaled basketball court projects from the building corner against the fields, glassy and open to view from both inside and outside. Other areas include the potential for indoor pickleball courts and will ultimately be programmed based on community feedback and conversations with the to-be-selected operator for the facility.



- Retail -- nearest Rutherford Avenue, is imagined to serve a community-focused retailer.

**The Western Site** (0 Austin Street) nearest the Austin Street/Rutherford Avenue intersection, is proposed to include rental housing and a neighborhood “Common” with unique retail and an artist focus:



- **392 Apartments in Two Buildings** – with 12-story volumes along I-93 and stepping down to a 6-stories toward neighborhood residential. Steps in the building allow residential roof decks, with landscaping and outdoor amenities; indoor amenity space is adjacent. A ground floor lobby is accessed off of the rear street, and a small drive with turn-around provides area for drop-off or pick-up adjacent to the lobby. Garage and service entries are along the rear street; garages sit a half level below grade, limited to the area directly under the building footprint.
- **Arts Center at the Ground Floor of Building 1** – with a highly visible corner gallery to entice entry onto the site and signal creative energy for pedestrians. Artist Live/Work Lofts grace the lower two floors on the courtyard, with potential “sell” space along common and more private “live” space above – the Live/Work units can spill out onto the “Art Plaza” adjacent, either to work on large format art, or “sell” to the public. At the ground level along Austin Street, we propose to add a sidewalk along the building length, providing entry to a potential music rehearsal space. The walk will be edged with a protective rail, highlighted by a sculpture that might interact with the traffic volumes, commissioned via a “Call for Artists” as well as additional outdoor sculptures.



- **“The Common”** -- a .7 acre open space, where retail and the arts can spill out into a landscaped court. A space adjacent to the gallery will act as an ‘Art Plaza’ at the corner. The driveway incorporates a large, multi-purpose paved space (Woonerf) for events, markets, concerts demarcated with bollards. This allows a medium-sized lawn in the center of the space, where sunlight will shine throughout the year. A pavilion for foods and snacks is located closer to the Retail of Building 2 enticing visitors onto the site. A trellis and street trees act as an edge against Rutherford Avenue, much like the eastern edge of the North End Parks of the Rose Kennedy Greenway (see photo) which sits against a very busy Atlantic Avenue.



- Additional Retail – in the ground floor of Building 2, extending out to Rutherford Avenue. The retail is envisioned to support small, local businesses that would benefit from access to this resident population and the broader community. We envision leased spaces as small as 1500 SF, but the space can configure to meet larger needs as well.

### Response to Design Guidelines

**Urban Design Context** – the proposed development responds to the surrounding urban design context, placing taller height nearer Cambridge Crossing and Hood Park, while stepping down to the residential neighborhood edge. The Common and the Field combine to add almost 2 acres of open space to Charlestown, and provide visibility to and through the development.

**Massing, Height and Orientation** -- Buildings are designed in a variety of scales and styles to look and feel residential and welcoming, with lower-scaled projecting volumes contributing to a pedestrian scale. Taller massing is aligned against I-93, and lower scaled volumes extend to meet Rutherford Avenue. For residents, the new twelve, eight and six-story buildings are designed to capitalize on views in all directions.

Buildings wrap large open spaces, encouraging a variety of activities and placemaking. Although taller elements align southwest, the broad open spaces edged by lower building volumes toward Rutherford, will allow significant sunlight to filter to the open spaces throughout the year. The width of open spaces supports broad visibility throughout the site.

**Contextual Architectural Design** – neighborhood expression focuses on a variety of building forms and expressions. At twelve stories (140 feet), the tallest buildings are lower than the neighboring towers of Cambridge Crossing. The 12-story height yields striking views above I-92, particularly to the south and west towards downtown and the Charles River. Facades are modulated with bays and setbacks to express the rhythm of a more traditional streetscape. Taller elements will be clad in a rainscreen metal panel system, while masonry is illustrated for the lower building volumes. Bays and upper “attic” stories will be clad in a residential cementitious siding and panels, highlighted by wood-look accents.

**Open Space / Public Realm** -- The new public open spaces created will provide significant recreational and ecological amenities for the Charlestown community. With passive and active programs, the new district landscape will be crafted to engage residents and neighbors in social spaces while assisting with stormwater treatment and passive cooling while also providing recreational opportunities for the community. New shade trees will be added throughout the new neighborhood and along the streets. New trees will be carefully selected to complement the existing tree canopy and overall building character while providing a diversity of native species to enhance ecological connections.

**Access, Circulation, Connectivity and Continuity** – A dramatically improved pedestrian and bicycle-oriented neighborhood will be created with a new network of access points and sidewalks throughout the site. To activate the street and create a more engaging public realm, benches and site furnishings in both shady and sunny areas will encourage social interaction. Utilities will be installed below grade, and new site lighting will incorporate “dark sky guidelines” and be scaled to a pedestrian, residential scale.

The public realm will be improved in a variety of ways, with new trees, landscaping, benches and built-in wall seating. Broad sidewalks will be built with a canopy of street trees. Between the sidewalk and the building entries, inviting spaces for small gatherings will be created between generous plantings that provide visual interest throughout the seasons. Seat walls will be incorporated into the edges of the planted areas, not only providing places for passers-by to sit, but also helping to mitigate sloping grade on the western site near the Austin/Rutherford intersection, and allowing accessible entry to all buildings.

New and improved existing streets will incorporate “complete streets” guidelines, connecting to green loop that is proposed around Charlestown’s perimeter by PLAN Charlestown. Improvements are planned for the rear street, incorporating parallel parking akin to other neighborhood streets. Improvements will be made to the underpass to access both Community College and its MBTA Orange Line Station, enhancing the walk for residents to these nearby connectors.

Bike parking will be provided in each building, in accordance with zoning guidelines – additionally visitor bike racks will be provided outdoors to support ridership throughout the neighborhood.

### 3b. PRELIMINARY ZONING ANALYSIS

As recommended by the RFP, the Trinity team has developed its proposal in response to the RFP guidelines to follow the PLAN Charlestown study. Additionally, Trinity's initial conversations with stakeholders informed its proposed heights, which rise higher against the Interstate 93 infrastructure and lower as it approaches Rutherford Avenue and the historic neighborhood scale. The resulting massing produces buildings which support the multitude of community benefits, yet do not overwhelm the site with unnecessary height.

#### ICON ARCHITECTURE PRELIMINARY ZONING ANALYSIS

##### Austin Street Parking Lots

##### Per Article 62, Charlestown Neighborhood District

Lots are NS -- Neighborhood Shopping Subdistrict (Zoning Map 2E)

##### Proposed & Allowed Uses:

- Multi-family Residential (R-2)
- Accessory Parking
- Local Retail Business
- Kindergarten

	Current Zoning -- Article 62 Charlestown-- NS	PLAN Charlestown -- Scenario March 30, 2023	Combined 0 Rutherford Ave. + 0 Austin Street
			221,095 GSF Site
<b>Max. Floor Area Ratio</b>	<b>2.0</b>	<b>4</b>	<b>3.4</b>
<b>Max. Building Height</b>	<b>35</b>	<b>150</b>	<b>150/70</b>
<b>Min. Lot Size</b>	<b>None</b>		<b>N/A</b>
<b>Min. Lot Area per Dwelling Unit</b>	<b>N/A</b>		<b>N/A</b>
<b>Min. Open Space per DU</b>	<b>50</b>		<b>195</b>
<b>Min. Lot Width</b>	<b>None</b>		<b>N/A</b>
<b>Min. Lot Frontage</b>	<b>None</b>		<b>N/A</b>
<b>Min. Front Yard</b>	<b>None</b>		<b>N/A</b>
<b>Min. Side Yard</b>	<b>None</b>		<b>N/A</b>
<b>Min. Rear Yard</b>	<b>20</b>		<b>N/A</b>

##### GSF

Building 1 -- 180,000 GSF (First Floor 17,600 GSF)	175 Units
Building 2 -- 245,000 GSF (First Floor 23,750 GSF)	217 Units
Building 3 -- 156,500 GSF (First Floor 22,600 GSF)	148 Units
Building 4 -- 172,000 GSF (First Floor 22,700 GSF)	146 Units
<b>753,500 GSF</b>	<b>86,650 GSF at grade</b>
	<b>686 Units</b>

### 3c. SUSTAINABILITY and AIR QUALITY

Trinity Financial is motivated to take an aggressive path towards climate resilient development and green building design. In 2022, Trinity completed the largest Phius certified Passive House to-date in the Bronx, NY<sup>1</sup>. The development won many awards, including the Phius Best Overall Project and Best High-Rise Multifamily 2022 as well as New York State's Energy Research and Development Authority's Building of Excellence Award.

#### Integrated Project Design and Delivery

Trinity has put together a highly experienced project team to tackle resiliency, green building design and air quality at the site: **ICON Architecture**, under the leadership of Charlestown resident, Nancy Ludwig, will be designing this leading-edge, high-efficiency project and will work closely with the sustainability consultants from **New Ecology, Inc. (NEI)** under Maciej Konieczny. Together with its geothermal consultant, **Brightcore Energy**, and its photovoltaic consultant, **Sunbug**, the development team will approach the development in a holistic way and will raise the sustainability bar even higher than its previous experience. Additionally, the team has engaged a dedicated air quality consultant, **Tech Environmental**, to create an approach to assessing and monitoring the air quality at the site. As experienced developers who hold and self-manage most of our properties, we understand the importance of risk reduction in development in the face of climate change. Heat, draught, wildfires, coastal and inland flooding are not events limited to certain geographies far away or occurring with frequencies comparable to historic records. With extensive experience in this field the project team developed a smart strategy to meet and showcase what we believe will make an exceptionally resilient development.

The Trinity team is committed to incorporating sustainable principles into the planning, design, and construction of the Austin Street Parking Lots redevelopment project in Charlestown. The development will be certified using Passive House Institute U.S. (Phius+) 2024 Core and will utilize all-electric systems. The Project will exceed the Boston Zoning Ordinance's Article 37 Green Buildings requirements and anticipates that the buildings will achieve certification at the Platinum level through the United States Green Building Council's (USGBC) Leadership in Energy and Environmental Design (LEED) Building Design and Construction (BD+C) for Multifamily Midrise Version 4 (LEED MFMR) rating system. The development will also exceed the Mayor's Office of Housing (MOH) Zero Emissions Building (ZEB) requirements with a HERS goal of below 34, will utilize embodied carbon Life Cycle Analysis (LCA) to drive the design to minimize the impact of building materials on the environment, and will plan and implement resiliency measures to assure the building survives extreme events providing residents with the ability to shelter in place.

#### Passive House

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<sup>1</sup> <https://www.phius.org/celebrating-landmark-425-grand-concourse-project>  
<https://passivehouseaccelerator.com/articles/a-breath-of-fresh-air-in-the-bronx>  
<https://www.nyc.gov/site/hpd/news/053-22/cutting-edge-425-grand-concourse-building-brings-277-affordable-apartments-holistic-#/0>

The four buildings in Trinity’s proposal will be Phius+ 2024 certified. Phius+ is a “high-performance building standard” – it challenges the building industry to construct buildings that can maintain a comfortable indoor environment with very low operating energy. It is a pass-fail standard for building energy performance, with additional requirements for quality assurance inspections, and for low-moisture-risk design.

The focus of Phius+ is on reducing heating and cooling energy using passive measures. In addition to an overall limit on energy use for all purposes (Source Energy Budget), it features limits on heating and cooling energy, in both the annual-total and peak-power sense. The targets for these heating and cooling loads are climate-specific and have been set based on consideration of the best that can be achieved “cost-competitively”.

Phius+ 2024 CORE is the anticipated certification pathway that will be the most current by the time building permit is issued and the project team will follow this pathway for all buildings and all portions of buildings including non-residential uses.

Phius+ Certification builds on established building science principals and guidelines and the project will be designed and constructed to also meet:

- EPA Energy Star Multi-Family New Construction (MFNC)
- EPA Indoor AirPLUS (IAP)
- DOE Zero Energy Ready Homes (ZERH)

Passive House’s focus on energy efficiency enables additional benefits that are key for a healthy development, specifically on the Austin Street Parking Lots site: Central energy recovery ventilators will be equipped with MERV 13 filters that remove pollutants from the constantly supplied fresh outside air such as pollen and harmful particulate matter of small sizes (PM 2.5). The constant fresh air supply makes operable windows a redundancy, and environmental triggers for asthma and other pulmonary diseases are excluded from the interior environment.

Additionally, the air-tight nature of high-performance windows as required under Passive House certification, greatly reduces the outdoor indoor sound transmission. With the heavy traffic patterns surrounding the site, along with the industrial land use of Boston Sand and Gravel, noise reduction is highly important for healthy living and further demonstrates the benefits of Passive House construction.

### **Zero Emissions Building (ZEB)**

The Mayor’s Office of Housing ZEB requirements are aggressive guidelines to assure highly sustainable and comfortable building design. Our pathway to minimize greenhouse gas emissions includes four strategies: (1) reduce energy consumption through Passive House design and low-flow plumbing fixtures, (2) reuse energy through energy recovery ventilation and wastewater heat recovery, (3) moving peak loads to off-peak where possible through high-capacity hot water storage tanks and a geothermal system, and (4) produce energy through photovoltaics. The project team will design and construct the new buildings to be all-electric and not to exceed the annual emissions target of 1,800 kWh/person. We aim to reach an annual emissions target below 1,500 kWh / person. Each building’s high

performance will be reflected with the achievement of a HERS score of under 34. Because Phius+ thresholds align well with MOH's ZEB thresholds, the project will also meet or exceed the following:

- Whole-building air infiltration targets will comply with Phius+ thresholds.
- We intend to use a geothermal system for heating and cooling (COP>5) as well as for supplemental heat for the domestic hot water generation<sup>2</sup>. Heat exchangers will transfer energy to a hydronic building loop that feeds water source heat pumps within each apartment.
- DHW will be generated using a CO<sub>2</sub> based heat pump (COP>3.5) system and will include a wastewater heat recovery energy exchange system. The ground source loop (geothermal) will preheat the domestic hot water due to the fact that these buildings will be cooling dominated.
- A dedicated outdoor air ventilation system will include high performance (>80% recovery) energy recovery ventilators (ERVs) and the outdoor air will be delivered directly to each habitable space and common area while it is exhausted from each kitchen and bathroom.
- Thermal bridge free and air-tight envelope with Passive House level insulation.
- Solar Photovoltaic installation will be maximized on roof trellises to allow for the maintenance of the roofing membrane as well as for the placement of roof equipment underneath<sup>3</sup>.

The four buildings will be modeled using WUFI Passive, and the performance of mechanical and envelope systems will be optimized to assure the highest performance at the lowest cost.

### **Article 37 - LEED**

Both ZEB and Passive House certifications focus on reducing operational energy, therefore a LEED certification is a holistic complement that results in a truly sustainable development. The development team is committed to exceed the City of Boston's Article 37 requirement and certify the project at the Platinum level of LEED<sup>4</sup>.

The team has worked with New Ecology to develop a preliminary LEED checklist for this project and through the certification, will achieve a high level of performance. In addition to meeting all prerequisites highlighted credits include:

- Integrated Project Planning is a core value of the development team. This process will be used throughout the project's design and construction.
- Connectivity is at the heart of Boston and will extend into the proposed development. The development conforms to a the BPDA's desired parking ration and will include:
  - Bike storage
  - Shared parking
  - Transit pass program for employees

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<sup>2</sup> See attached Brightcore Geothermal Analysis.

<sup>3</sup> See attached Helioscope Building Analyses and Summary Report

<sup>4</sup> See attached LEED Scorecards for Buildings 1 & 2 and Buildings 3 & 4.

- Car/bike share programs
  - EV Charging stations
- WaterSense high performance water fixtures and Energy Star qualified equipment will lead to achieving > 49% savings in water consumption
- Minimized on-site energy use will be a core feature of the development. The team will look carefully at the orientation and massing of each building, making sure that the window to wall ratio is optimized for each orientation. We anticipate using triple-pane windows for all apartments in order to significantly improve the sound performance of the façade.
  - The project will utilize a dedicated outdoor air system with >80% energy recovery (ERV). The ventilation system will be 100% balanced and employ constant air regulating dampers (CAR dampers) to steady both incoming as well as outgoing air flow from the apartments.
  - Ground source heat pumps (geothermal system) will be utilized for heating and cooling and supplemental domestic hot water.
- Extremely high score of indoor environmental quality with the planned achievement of maximum credits in enhanced ventilation, contaminant control, and balancing of heating equipment. Additionally, indoor air pollutants will be minimized by using low- to no-emitting products and the prohibition of smoking on the property.

### **Climate Resiliency**

The project team is keenly focused on resiliency<sup>5</sup> and assuring each building performs well over many years and each and every resident can feel safe and comfortable during severe weather events and climate-related change.

The team understands that the site is susceptible to 1% annual coastal flood risk by 2070. Additionally, the site is susceptible to significant near and long-term stormwater flooding, especially at the southeastern border. Stormwater flooding extents from a 10-year, 24-hour rainfall event under various climate conditions due to combined future sea level rise and extreme precipitation are predicted to reach 6 inches. To mitigate these effects the team will employ the following strategies:

- The elevation of the first floor, critical utilities, and mechanical systems and infrastructure will be at least one foot above Boston's Sea Level Rise – Base Flood Elevation (SLR-BFE; 19.5') anticipated by the year 2070 and assuming 40" rise in sea levels. The site's SLR Design Flood Elevation (DFE) will be 20.5'. We will investigate if the design flood elevation can be raised even further without impacting site accessibility after we commission a thorough elevation survey.
- Wet Floodproofing will be utilized by the team to mitigate flood risk in areas such as garages, access, and storage areas or other non-critical, below ground spaces. As outlined in the design guidelines, "Designing for the movement of water through a space or a building, which equalizes hydrostatic pressure and helps prevent structural failure" which the design team will implement.

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<sup>5</sup> See attached BPDA Climate Resiliency Checklist.

- Storm water management strategies will be integrated into landscaping with native, drought-tolerant plant species and will minimize site runoff and maximize site infiltration.
- The civil engineering team will design backflow devices to prevent water infiltration into the building through the sanitary waste and storm systems, including storm and wastewater retention tanks to temporarily accommodate building storm and wastewater during times when the backflow devices from the street are activated.

The site is also susceptible to high daytime temperatures with expected daytime air temperatures at 3 pm at 101 – 103° F and a heat event duration of longer than 32.5 hours. We are planning to mitigate the heat impacts using well established principles and design strategies such as:

- White roof
- Light colored pervious paving materials with large-canopy trees used for shading paved areas.
- Commit to evaluating the viability of implementing LEED v4.1 Heat Island Mitigation and Cool Walls Pilot Credit to further minimize the heat gain on site.

While the resiliency threats to the building and the site will be addressed during the design, the availability of shelter in place for the residents is critical and will result in an additional level of protection for vulnerable communities. Each building will include a natural gas-fired generator for emergency power generation. But in addition to the code-required emergency loads feeding life-safety systems such as fire pump, fire alarm system and emergency lighting, the generators will be sized to also accommodate in each building:

- a community room with dedicated heating, cooling, and ventilation systems and refrigerator for medications.
- building security and access system.
- water booster pumps to allow for the continued use of water within the apartments, which is especially important for continued use of kitchens and toilets in apartments above the 4<sup>th</sup> floor (typical street pressure height).
- One elevator
- Common area WiFi

We will also investigate the feasibility of connecting the energy recovery ventilators to the emergency power to allow for continued air tempering during prolonged power outages. This capability would be especially useful during heat waves. The ERVs could protect the apartments from hot and humid air during the day by operating the enthalpy wheel and hot gas dehumidification coils while flushing out hot air during the night by stopping the enthalpy wheel.

## **AIR QUALITY**

The BPDA and the public are concerned about air quality and the potential health impacts to future residents living at the proposed site and the use of future playing fields. In order to

proactively address these concerns, the Trinity team has engaged Tech Environmental to develop a holistic approach to better understanding and addressing the air quality concerns. Specifically, the concern is particulate matter emissions from Interstate 93 and abutting local roads. The assessment of the potential air quality impacts on the proposed project site will include a combination of air emissions calculations, air dispersion modeling and developing a low-cost monitoring approach after the proposed project is built.

### **Particulate Matter Emissions**

Particulate matter (PM) is a widespread air pollutant, consisting of a mixture of solid and liquid particles suspended in the air. Commonly used indicators describing PM that are relevant to health refer to the mass concentration of particles with a diameter of less than 10  $\mu\text{m}$  ( $\text{PM}_{10}$ ) and of particles with a diameter of less than 2.5  $\mu\text{m}$  ( $\text{PM}_{2.5}$ ).  $\text{PM}_{2.5}$ , often called fine PM, also comprises ultrafine particles having a diameter of less than 0.1  $\mu\text{m}$ . The size of diesel particulates that are of greatest health concern are those that are in the categories of fine (i.e.,  $\text{PM}_{2.5}$ ), and ultra fine particles. The main concern is diesel engine exhaust emitted from a broad range of diesel engines such as trucks, buses and cars on highways and local roads.

### **Applicable Air Quality Regulations**

Under the authority of the Clean Air Act, as amended, the U.S. Environmental Protection Agency (EPA) established a set of National Ambient Air Quality Standards (NAAQS) for various ‘criteria’ air pollutants. These standards are intended to protect public health and welfare. Currently, there are 24-hour and annual average NAAQS for  $\text{PM}_{2.5}$ . The 24-hour standard is 35.0 micrograms per cubic meter ( $\text{ug}/\text{m}^3$ ) and the annual standard is 12.0  $\text{ug}/\text{m}^3$ . In 2007, EPA promulgated multiple new vehicle emissions standards, including heavy-duty diesel trucks, that reduced particulate matter emissions by up to 90%.<sup>6</sup> These standards have been in place since the 2010 model year for heavy-duty diesel trucks. And, just recently, on April 12, 2023, EPA announced new, more ambitious proposed standards to further reduce emissions from light- and medium-duty vehicles starting with model year 2027 and phased in through model year 2032. Those standards signify a rapidly growing shift away from a focus on internal-combustion engine (ICE) technology and toward zero-emission technologies, including electrification.<sup>7</sup> This shift would result in a widespread reduction in air pollution in the United States, including the further lessening of particulate matter concentrations.

### **Silica Community Exposure Guideline**

Crystalline silica is an important material found abundantly in the earth’s crust, and sand is the primary source of crystalline silica. Silica dust is hazardous when very small (respirable) particles are inhaled. These respirable dust particles can penetrate deep into the lungs and cause disabling and sometimes fatal lung diseases, including silicosis and lung cancer, as well as kidney disease. The most common types of silica are alpha quartz, cristobalite, and tridymite. Silicosis or “concrete lung” is permanent lung damage caused by breathing dust containing extremely fine particles of crystalline silica. Crystalline silica is found in materials such as concrete, masonry and rock.

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<sup>6</sup> <https://www.epa.gov/emission-standards-reference-guide/epa-emission-standards-heavy-duty-highway-engines-and-vehicles>.

<sup>7</sup> <https://www.epa.gov/regulations-emissions-vehicles-and-engines/proposed-rule-multi-pollutant-emissions-standards-model>.

Although there is an Occupational Safety Health Administration (OSHA) silica standard, this only applies to workers based on an 8-hour workday. The OSHA limit is 50 micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ ) and a detection limit of  $5 \mu\text{g}/\text{m}^3$ . The OSHA method considers respirable silica, often referred to as PM 4.0 and specifically identifies the amount of silica in the sample. In non-occupational situations, as in a residential area or community, this is not an adequate standard to protect individuals since the potential exposure can be 24 hours per day, seven (7) days per week, 365 days per year. There is no Federal or Massachusetts recommended, safe level of airborne silica outdoors or in any non-occupational setting set. However, several states have adopted “safe limits” for non-occupational exposure, which include California, New Jersey, Minnesota, Vermont, and Texas. That guideline limit is  $3.0 \mu\text{g}/\text{m}^3$  of PM 4.0 silica.

### **Modeling Approach**

Tech Environmental has performed hundreds of air emissions dispersion modeling analyses for motor vehicles and aircraft. These analyses include dispersion modeling of highways, intersections, parking lots and parking garages, ground service vehicles and aircraft activity at airports, as well as microscale and mesoscale motor vehicle emissions analyses for roadway and real estate developments. The assessment of potential PM<sub>2.5</sub> impacts from Interstate 93 and local roads on the proposed project site will be completed by performing air emissions and dispersion modeling analyses using EPA-approved models. These models include EPA’s Motor Vehicle Emission Simulator (MOVES) and the American Meteorological Society/Environmental Protection Agency Regulatory Model (AERMOD). Modeling of the Boston Sand & Gravel facility silica dust impacts may be performed using available PM emissions data from either EPA or MassDEP for the facility as a surrogate for PM 4.0 silica to only provide a general assessment of its potential impacts on the proposed Project site.

### **Potential Future Monitoring Approach**

While the Massachusetts Department of Environmental Protection (MassDEP) maintains PM<sub>2.5</sub> monitors in various parts of the Commonwealth, the focus of those monitors is to ensure compliance with the NAAQS on a regional level. Air sensors, more portable and easier to use than conventional regulatory air monitors, have become increasingly popular for measuring air pollution across the United States. Researchers and communities have used air sensors to fill gaps in understanding local air quality. One widely used sensor type, the PurpleAir, was tested at more than 70 locations throughout the United States by EPA researchers and more than 30 state, local, and tribal air agency partners.<sup>8</sup> These sensors are a potential low-cost (i.e., less than \$300/unit) solution to monitor PM<sub>2.5</sub> both indoors and outdoors. These units have WiFi connections and provide real-time data to both PurpleAir and EPA websites. Given their capabilities and affordable cost, Tech Environmental and the Project Team will evaluate the potential advantages and disadvantages of this type of monitoring program to protect the public health inside the proposed residential buildings and playing fields.

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<sup>8</sup> <https://www.epa.gov/sciencematters/epa-research-improves-air-quality-information-public-airnow-fire-and-smoke-map>



# GEOTHERMAL RENEWABLE HEATING & COOLING

Our geothermal solutions eliminate the use of fossil fuels to heat and cool buildings, reducing carbon emissions and lowering operating costs

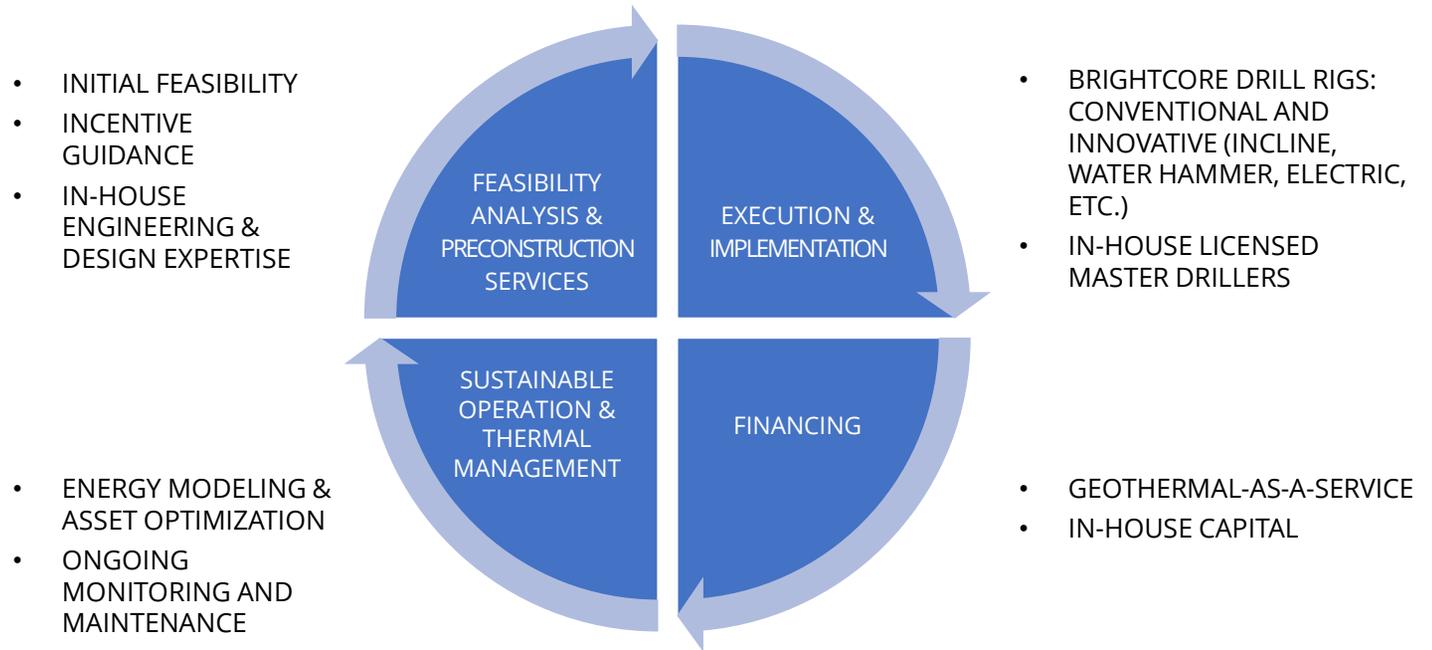
 **Brightcore**  
BUILDING ENERGY PERFORMANCE™



- Turnkey Model
- Technical Expertise
- In-house Drilling
- Innovation
- Energy as a Service
- Financial Strength
- Local Presence

# UNIQUE GEOTHERMAL BUSINESS MODEL

## In-House Engineering & Design, Drilling, Finance and Ongoing O&M



# GROUND LOOP HEAT EXCHANGER – SITE FEASIBILITY

## AUSTIN STREET PARKING LOTS, CHARLESTOWN, MA

- » Site **PASSES** preliminary analysis.
- » Our preliminary geological assessment show favorable conditions for geothermal drilling.
- » The city has mapped utility lines that run across the property resulting in possible site constraints for drilling.



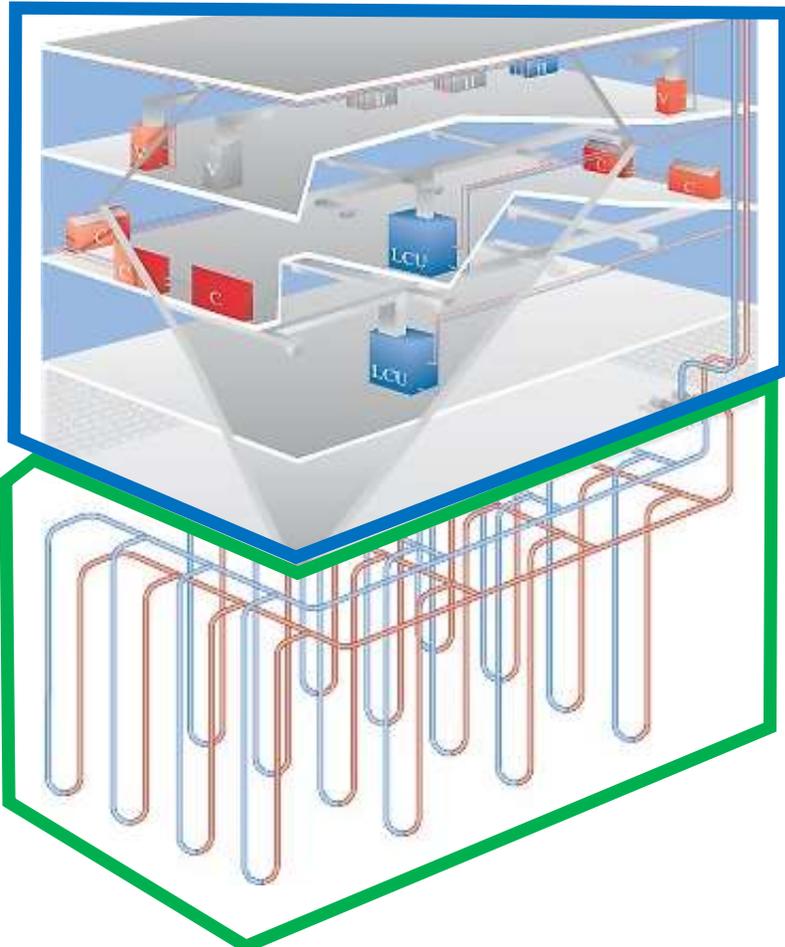
Aerial of Austin Street Parking Lots



Austin Street Parking Lots Constraints



# GEOHERMAL SYSTEM DESIGN ELEMENTS



## **Building System (HVAC):**

Water Source Heat Pumps, Interior Piping, Circulating Pumps, DHW Heating Equipment, etc.

**Ground Connection (GLHE):** Ground heat exchanger (sub-surface lateral piping, and the manifold / header)

Brightcore provides the **Ground Connection**, the **Building System** is by Owner/Developer

# GROUND LOOP HEAT EXCHANGER – SITE EVALUATION

## WEST LOT (BLG 1 & 2), AUSTIN STREET PARKING LOTS

- » Lot size considering utility constraints is 64,563 SF.
- » Minimum area required for the proposed vertical GLHE installation is utilizing 750' deep bores and 30' spacing.
- » The maximum well-field is ~70 boreholes providing a total 300 tons.
  - » Red areas are utilities lines on the site.
  - » Blue areas show possible drilling areas.



# GROUND LOOP HEAT EXCHANGER – PRELIMINARY SELECTION

## BUILDING 1, AUSTIN STREET PARKING LOTS

- » Lot Size: 64,563 FT<sup>2</sup>
- » Building Size: 185,910 FT<sup>2</sup>
  
- » Estimated thermal capacity and approximately 27 boreholes required for sufficient capacity:
  - » 48-tons Heating (578.2 MBH)
  - » 21-tons DHW (831.5 MBH)\*
  - » 116-tons Cooling
  
- » Annual operational savings of **21%** on Heating, Cooling and Domestic Hot Water compared to a full ASHP system.
  - » ~ 314,000 kBTU saved
  - » ~\$17,500/year saved energy costs\*\*
  - » ~\$37,000/year saved maintenance costs
  
- » Estimated 32 tons of CO<sub>2</sub>e saved per year



\* Geothermal will support DHW primarily served by alternative electric based system.

\*\* Estimated savings based on \$0.19/kWh.



# GROUND LOOP HEAT EXCHANGER – CUSTOMER OWNERSHIP

## BUILDING 1, AUSTIN STREET PARKING LOTS

Heat Pump Cost & Operation Comparison			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$4,650,000	\$4,650,000	
GLHE Cost	\$1,850,000	\$0	
HVAC ITC	-\$1,860,000	\$0	
GLHE ITC	-\$740,000	\$0	
Mass Save*	-\$522,000	\$0	
<b>Net Upfront Cost</b>	<b>\$3,378,000</b>	<b>\$4,650,000</b>	<b>\$1,272,000</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$65,000	\$83,000	
Year 1 Maintenance Cost	\$56,000	\$93,000	
<b>Total Operation Costs</b>	<b>\$121,000</b>	<b>\$176,000</b>	<b>\$55,000</b>

**Energy and Maintenance Savings of \$2,220,000 over 30 years**

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.



# GROUND LOOP HEAT EXCHANGER – GEOTHERMAL AS A SERVICE BUILDING 1, AUSTIN STREET PARKING LOTS

Heat Pump Cost & Operation Comparison - GaaS			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$4,650,000	\$4,650,000	
GLHE Cost	\$0	\$0	
HVAC ITC	-\$1,860,000	\$0	
GLHE ITC	Retained By Brightcore	\$0	
Mass Save*	Retained By Brightcore	\$0	
<b>Net Upfront Cost</b>	<b>\$2,790,000</b>	<b>\$4,650,000</b>	<b>\$1,860,000</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$65,000	\$82,375	
Year 1 Maintenance Cost	\$56,000	\$92,955	
Year 1 GaaS Fee	\$54,263	\$0	
<b>Total Operation Costs</b>	<b>\$175,263</b>	<b>\$175,330</b>	<b>\$68</b>

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.

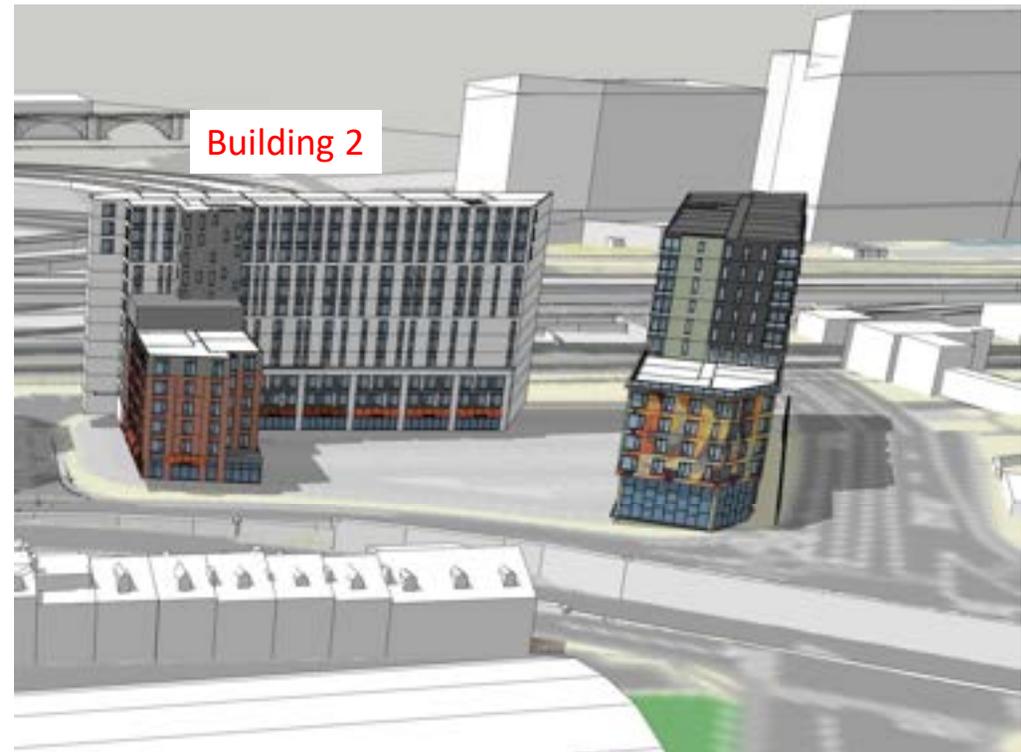


# GROUND LOOP HEAT EXCHANGER – PRELIMINARY SELECTION BUILDING 2, AUSTIN STREET PARKING LOTS

- » Lot Size: 64,563 FT<sup>2</sup>
- » Building Size: 251,450 FT<sup>2</sup>
- » Estimated thermal capacity and approximately 37 boreholes required for sufficient capacity:
  - » 65-tons Heating (782.1 MBH)
  - » 21-tons DHW (831.5 MBH)\*
  - » 157-tons Cooling
- » Annual operational savings of **26%** on Heating, Cooling and Domestic Hot Water compared to a full ASHP system.
  - » ~ 424,500 kBTU saved
  - » ~\$23,600/year saved energy costs\*\*
  - » ~\$50,300/year saved maintenance costs
- » Estimated 44 tons of CO<sub>2</sub>e saved per year

\* Geothermal will support DHW primarily served by alternative electric based system.

\*\* Estimated savings based on \$0.19/kWh.



# GROUND LOOP HEAT EXCHANGER – CUSTOMER OWNERSHIP

## BUILDING 2, AUSTIN STREET PARKING LOTS

Heat Pump Cost & Operation Comparison			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$6,290,000	\$6,290,000	
GLHE Cost	\$2,280,000	\$0	
HVAC ITC	-\$2,520,000	\$0	
GLHE ITC	-\$920,000	\$0	
Mass Save*	-\$706,500	\$0	
<b>Net Upfront Cost</b>	<b>\$4,423,500</b>	<b>\$6,290,000</b>	<b>\$1,866,500</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$67,000	\$90,000	
Year 1 Maintenance Cost	\$76,000	\$126,000	
<b>Total Operation Costs</b>	<b>\$143,000</b>	<b>\$216,000</b>	<b>\$73,000</b>

**Energy and Maintenance Savings of \$3,000,000 over 30 years**

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.



# GROUND LOOP HEAT EXCHANGER – GEOTHERMAL AS A SERVICE BUILDING 2, AUSTIN STREET PARKING LOTS

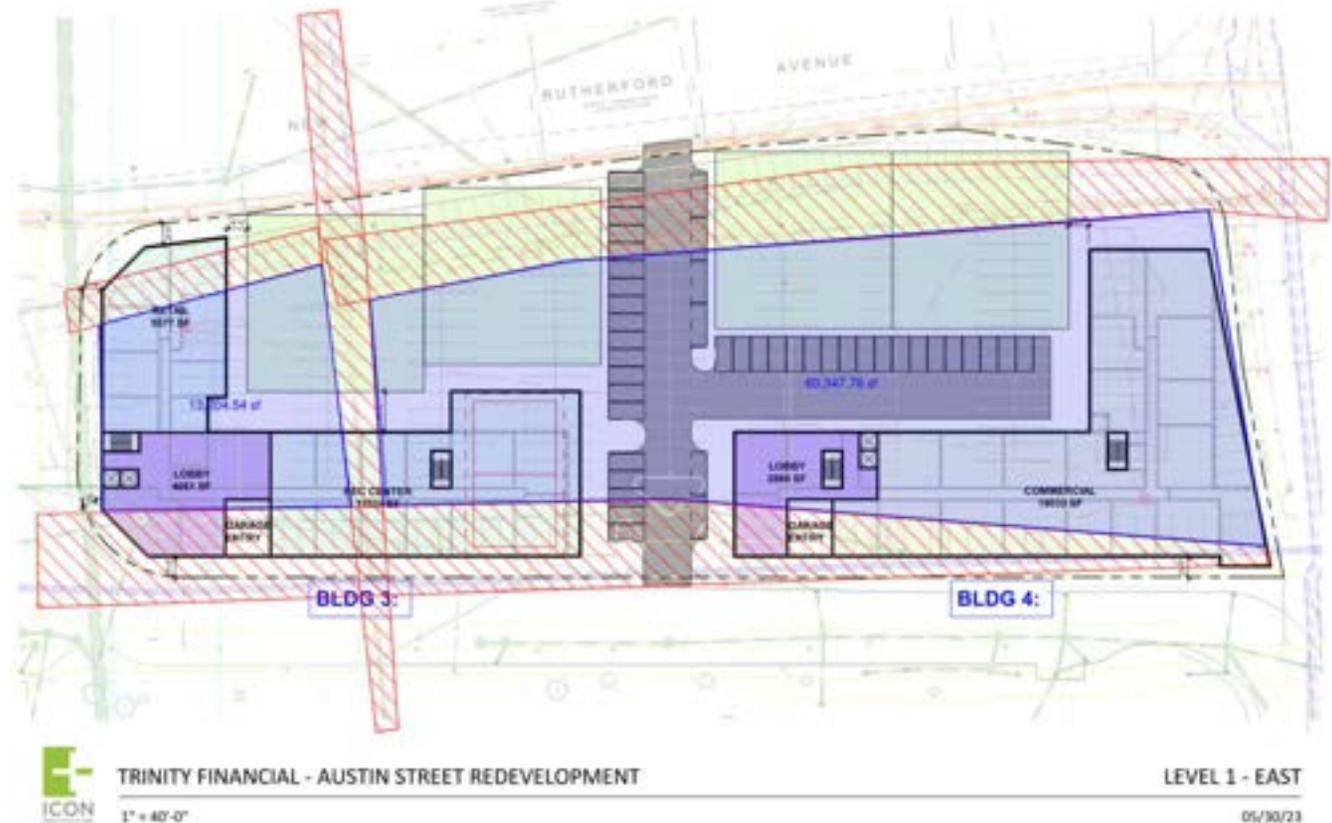
Heat Pump Cost & Operation Comparison - GaaS			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$6,290,000	\$6,290,000	
GLHE Cost	\$0	\$0	
HVAC ITC	-\$2,520,000	\$0	
GLHE ITC	Retained By Brightcore	\$0	
Mass Save*	Retained By Brightcore	\$0	
<b>Net Upfront Cost</b>	<b>\$3,770,000</b>	<b>\$6,290,000</b>	<b>\$2,520,000</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$67,000	\$89,643	
Year 1 Maintenance Cost	\$76,000	\$125,725	
Year 1 GaaS Fee	\$60,524	\$0	
<b>Total Operation Costs</b>	<b>\$203,524</b>	<b>\$215,368</b>	<b>\$11,844</b>

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.

# GROUND LOOP HEAT EXCHANGER – SITE EVALUATION

## EAST LOT (BLG 3 & 4), AUSTIN STREET PARKING LOTS

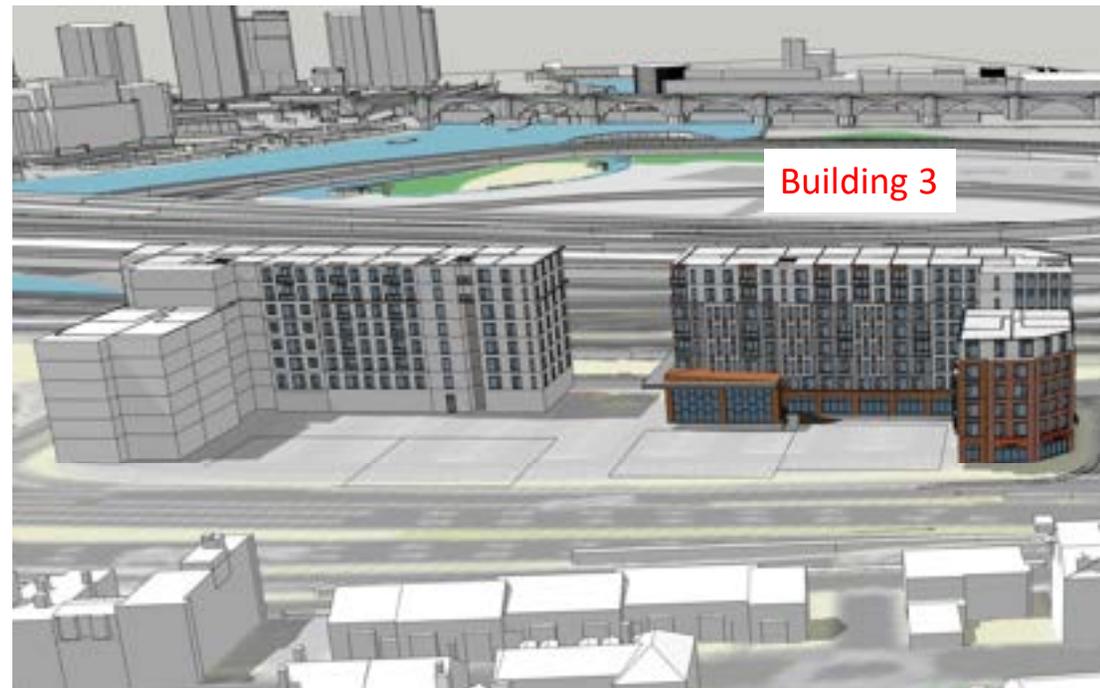
- » Lot size considering utility constraints is 73,551 SF.
- » Minimum area required for the proposed vertical GLHE installation is utilizing 750' deep bores and 30' spacing.
- » The maximum well-field is ~80 boreholes providing a total 343 tons.
  - » Red areas are utilities lines on the site.
  - » Blue areas show possible drilling areas.



# GROUND LOOP HEAT EXCHANGER – PRELIMINARY SELECTION

## BUILDING 3, AUSTIN STREET PARKING LOTS

- » Lot Size: 73,551 FT<sup>2</sup>
- » Building Size: 156,394 FT<sup>2</sup>
- » Estimated thermal capacity and approximately 23 boreholes required for sufficient capacity:
  - » 41-tons Heating (486 MBH)
  - » 21-tons DHW (253.3 MBH)\*
  - » 98-tons Cooling
- » Annual operational savings of **21%** on Heating, Cooling and Domestic Hot Water compared to a full ASHP system.
  - » ~ 264,000 kBTU saved
  - » ~\$14,700/year saved energy costs\*\*
  - » ~\$31,300/year saved maintenance costs
- » Estimated 27 tons of CO<sub>2</sub>e saved per year



\* Geothermal will support DHW primarily served by alternative electric based system.

\*\* Estimated savings based on \$0.19/kWh.

# GROUND LOOP HEAT EXCHANGER – CUSTOMER OWNERSHIP

## BUILDING 3, AUSTIN STREET PARKING LOTS

Heat Pump Cost & Operation Comparison			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$3,910,000	\$3,910,000	
GLHE Cost	\$1,670,000	\$0	
HVAC ITC	-\$1,570,000	\$0	
GLHE ITC	-\$670,000	\$0	
Mass Save	-\$441,000	\$0	
<b>Net Upfront Cost</b>	<b>\$2,899,000</b>	<b>\$3,910,000</b>	<b>\$1,011,000</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$65,000	\$80,000	
Year 1 Maintenance Cost	\$47,000	\$79,000	
<b>Total Operation Costs</b>	<b>\$112,000</b>	<b>\$159,000</b>	<b>\$47,000</b>

**Energy and Maintenance Savings of \$1,870,000 over 30 years**

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.



# GROUND LOOP HEAT EXCHANGER – GEOTHERMAL AS A SERVICE BUILDING 3, AUSTIN STREET PARKING LOTS

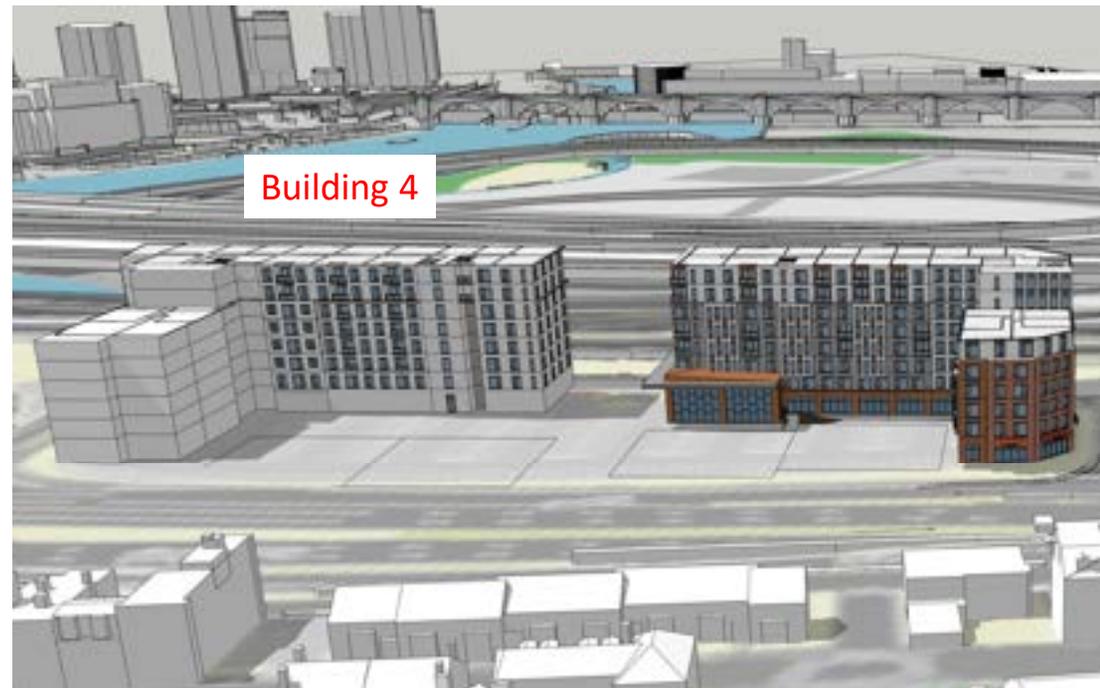
Heat Pump Cost & Operation Comparison - GaaS			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$3,910,000	\$3,910,000	
GLHE Cost	\$0	\$0	
HVAC ITC	-\$1,570,000	\$0	
GLHE ITC	Retained By Brightcore	\$0	
Mass Save*	Retained By Brightcore	\$0	
<b>Net Upfront Cost</b>	<b>\$2,340,000</b>	<b>\$3,910,000</b>	<b>\$1,570,000</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$65,000	\$79,103	
Year 1 Maintenance Cost	\$47,000	\$78,197	
Year 1 GaaS Fee	\$51,514	\$0	
<b>Total Operation Costs</b>	<b>\$163,514</b>	<b>\$157,300</b>	<b>\$6,215</b>

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.

# GROUND LOOP HEAT EXCHANGER – PRELIMINARY SELECTION

## BUILDING 4, AUSTIN STREET PARKING LOTS

- » Lot Size: 73,551 FT<sup>2</sup>
- » Building Size: 170,626 FT<sup>2</sup>
- » Estimated thermal capacity and approximately 25 boreholes required for sufficient capacity:
  - » 44-tons Heating (530.7 MBH)
  - » 21-tons DHW (253.3 MBH)\*
  - » 107-tons Cooling
- » Annual operational savings of **20%** on Heating, Cooling and Domestic Hot Water compared to a full ASHP system.
  - » ~ 288,000 kBTU saved
  - » ~\$16,000/year saved energy costs\*\*
  - » ~\$34,000/year saved maintenance costs
- » Estimated 30 tons of CO<sub>2</sub>e saved per year



\* Geothermal will support DHW primarily served by alternative electric based system.

\*\* Estimated savings based on \$0.19/kWh.

# GROUND LOOP HEAT EXCHANGER – CUSTOMER OWNERSHIP

## BUILDING 4, AUSTIN STREET PARKING LOTS

Heat Pump Cost & Operation Comparison			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$4,270,000	\$4,270,000	
GLHE Cost	\$1,760,000	\$0	
HVAC ITC	-\$1,710,000	\$0	
GLHE ITC	-\$710,000	\$0	
Mass Save*	-\$481,500	\$0	
<b>Net Upfront Cost</b>	<b>\$3,128,500</b>	<b>\$4,270,000</b>	<b>\$1,141,500</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$65,000	\$81,000	
Year 1 Maintenance Cost	\$52,000	\$86,000	
<b>Total Operation Costs</b>	<b>\$117,000</b>	<b>\$167,000</b>	<b>\$50,000</b>

**Energy and Maintenance Savings of \$2,040,000 over 30 years**

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.



# GROUND LOOP HEAT EXCHANGER – GEOTHERMAL AS A SERVICE BUILDING 4, AUSTIN STREET PARKING LOTS

Heat Pump Cost & Operation Comparison - GaaS			
	GSHP Design	Alternative Design	Δ
<b>Upfront Project Costs</b>			
HVAC Cost	\$4,270,000	\$4,270,000	
GLHE Cost	\$0	\$0	
HVAC ITC	-\$1,710,000	\$0	
GLHE ITC	Retained By Brightcore	\$0	
Mass Save*	Retained By Brightcore	\$0	
<b>Net Upfront Cost</b>	<b>\$2,560,000</b>	<b>\$4,270,000</b>	<b>\$1,710,000</b>
<b>Annual Costs</b>			
Year 1 Electricity Cost	\$65,000	\$80,681	
Year 1 Maintenance Cost	\$52,000	\$85,313	
Year 1 GaaS Fee	\$52,889	\$0	
<b>Total Operation Costs</b>	<b>\$169,889</b>	<b>\$165,994</b>	<b>\$3,895</b>

\*MassSave incentive estimate based on the GSHP measure incentive of \$4,500/ton. We recommend registering with [MassSave](#) to confirm the details for this program.

# DEDICATED TO OUR CLIENTS' SUSTAINABILITY

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## MULTI-FAMILY HOUSING





**THE BRIGHTCORE TEAM HAS...**

**250 MILLION**

kWh saved through LED lighting upgrades

**\$500 MILLION**

solar PV projects implemented and financed

**150**

geothermal projects designed and implemented

**100+**

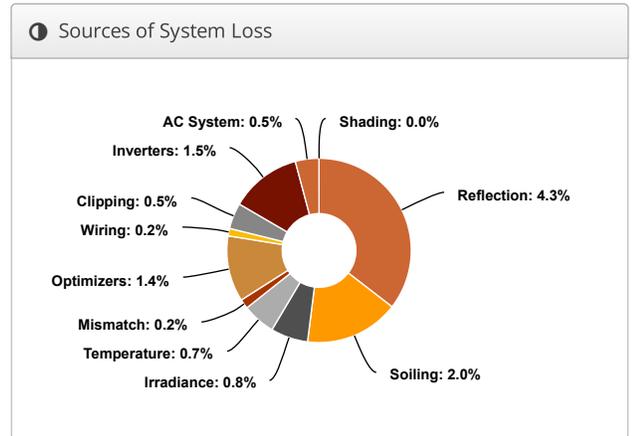
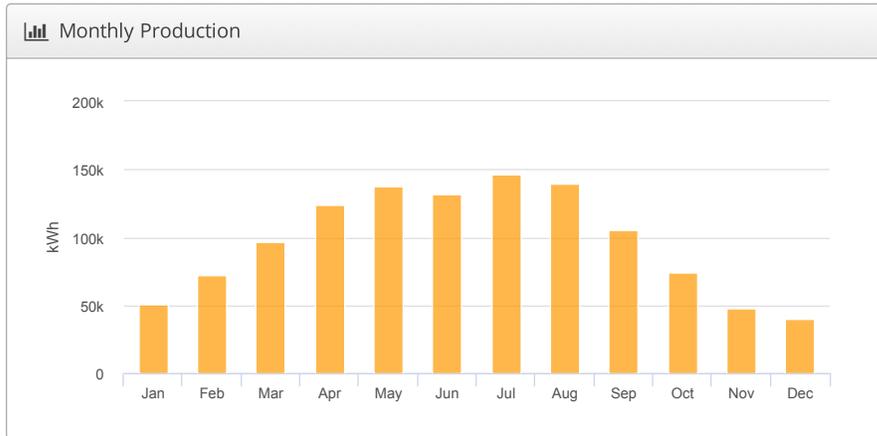
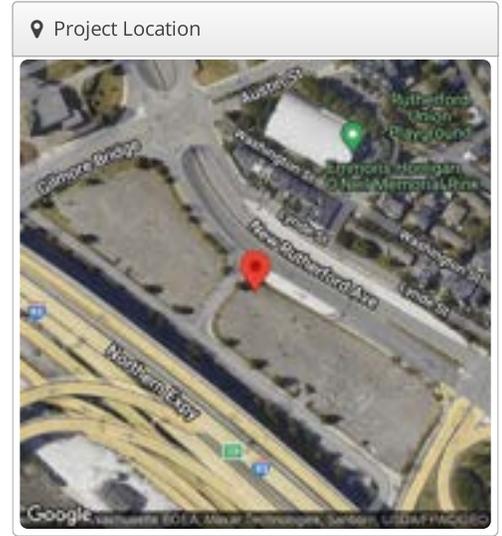
aggregate years of clean energy experience

**Brightcore**  
BUILDING ENERGY PERFORMANCE™

## Design 1 Trinity - Austin Parking, 110 Austin Street, Charlestown, MA

Report	
Project Name	Trinity - Austin Parking
Project Description	New Construction
Project Address	110 Austin Street, Charlestown, MA
Prepared By	Ryan Black ryan.black@sunbugsolar.com

System Metrics	
Design	Design 1
Module DC Nameplate	918.1 kW
Inverter AC Nameplate	800.0 kW Load Ratio: 1.15
Annual Production	1.165 GWh
Performance Ratio	88.5%
kWh/kWp	1,268.8
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)
Simulator Version	d1fdc2c4dc-2a0a5e0f08-f28afdb0ab-2e78336a83



⚡ Annual Production			
	Description	Output	% Delta
Irradiance (kWh/m <sup>2</sup> )	Annual Global Horizontal Irradiance	1,423.3	
	POA Irradiance	1,434.1	0.8%
	Shaded Irradiance	1,434.1	0.0%
	Irradiance after Reflection	1,372.7	-4.3%
	Irradiance after Soiling	1,345.2	-2.0%
	<b>Total Collector Irradiance</b>	<b>1,345.2</b>	<b>0.0%</b>
Energy (kWh)	Nameplate	1,234,840.5	
	Output at Irradiance Levels	1,225,115.0	-0.8%
	Output at Cell Temperature Derate	1,216,563.2	-0.7%
	Output After Mismatch	1,214,125.6	-0.2%
	Optimizer Output	1,197,125.4	-1.4%
	Optimal DC Output	1,195,222.9	-0.2%
	Constrained DC Output	1,188,676.6	-0.5%
	Inverter Output	1,170,765.4	-1.5%
		<b>Energy to Grid</b>	<b>1,164,911.6</b>
Temperature Metrics			
	Avg. Operating Ambient Temp		12.0 °C
	Avg. Operating Cell Temp		18.9 °C
Simulation Metrics			
	Operating Hours	4688	
	Solved Hours	4688	

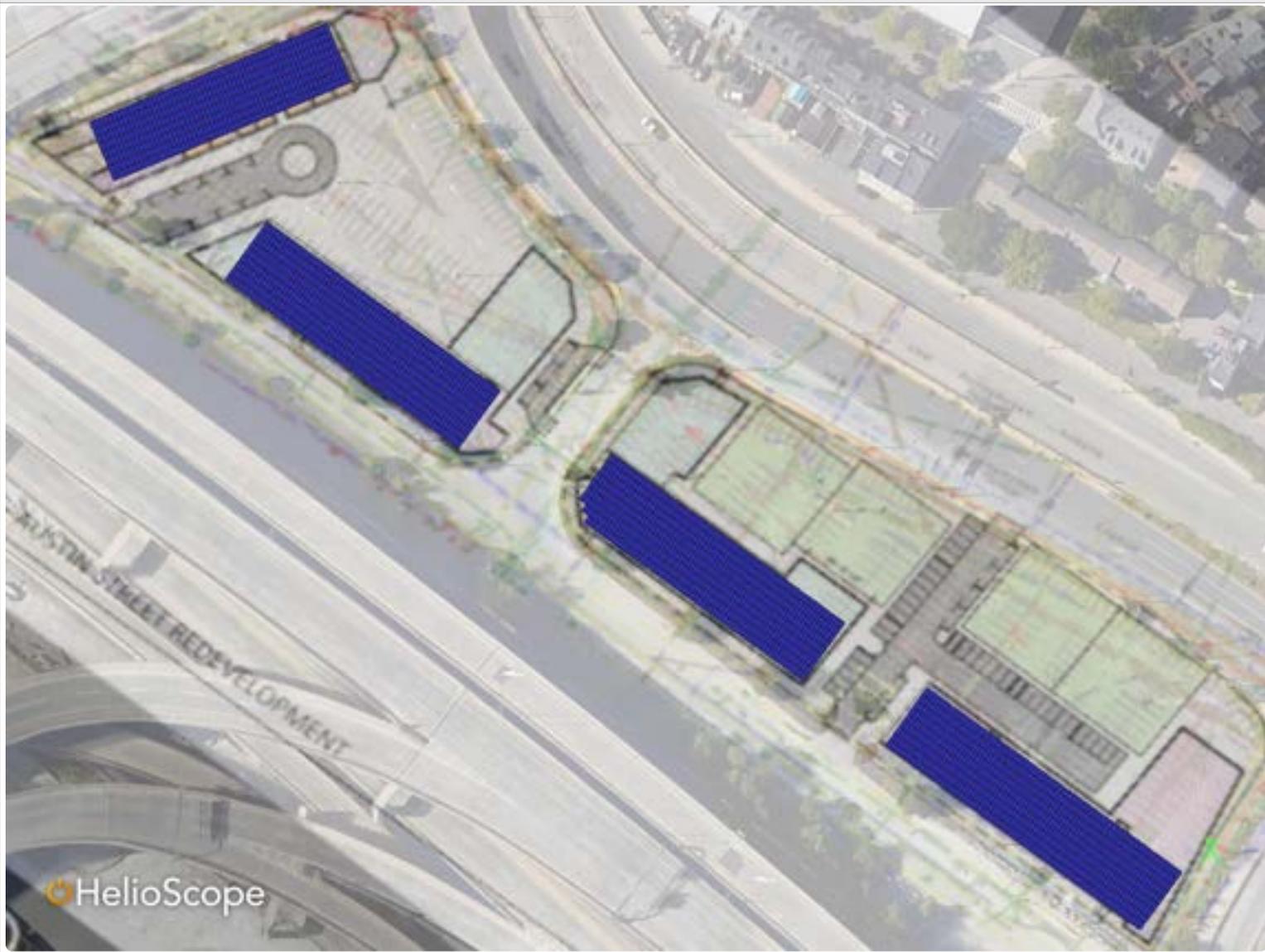
☁ Condition Set												
Description	Condition Set 1											
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)											
Solar Angle Location	Meteo Lat/Lng											
Transposition Model	Perez Model											
Temperature Model	Sandia Model											
Temperature Model Parameters	Rack Type	a	b	Temperature Delta								
	Fixed Tilt	-3.56	-0.075	3°C								
	Flush Mount	-2.81	-0.0455	0°C								
	East-West	-3.56	-0.075	3°C								
	Carport	-3.56	-0.075	3°C								
Soiling (%)	J	F	M	A	M	J	J	A	S	O	N	D
	2	2	2	2	2	2	2	2	2	2	2	2
Irradiation Variance	5%											
Cell Temperature Spread	4° C											
Module Binning Range	-2.5% to 2.5%											
AC System Derate	0.50%											
Trackers	Maximum Angle						Backtracking					
	60°						Enabled					
Module Characterizations	Module						Uploaded By			Characterization		
	Q.PEAK DUO BLK ML-G10 405 (Hanwha Q Cells)						HelioScope			Spec Sheet Characterization, PAN		
Component Characterizations	Device						Uploaded By			Characterization		
	P950 (SolarEdge)						HelioScope			Mfg Spec Sheet		
	SE40KUS (2021) (SolarEdge)						HelioScope			Spec Sheet		

📦 Components		
Component	Name	Count
Inverters	SE40KUS (2021) (SolarEdge)	20 (800.0 kW)
Strings	10 AWG (Copper)	67 (8,911.9 ft)
Optimizers	P950 (SolarEdge)	1,147 (1.09 MW)
Module	Hanwha Q Cells, Q.PEAK DUO BLK ML-G10 405 (405W)	2,267 (918.1 kW)

🔌 Wiring Zones			
Description	Combiner Poles	String Size	Stringing Strategy
Wiring Zone	-	13-35	Along Racking
Wiring Zone 2	-	13-35	Along Racking
Wiring Zone 3	-	13-35	Along Racking
Wiring Zone 4	-	13-35	Along Racking

🏠 Field Segments									
Description	Racking	Orientation	Tilt	Azimuth	Intrarow Spacing	Frame Size	Frames	Modules	Power
Field Segment 1	Carport	Portrait (Vertical)	1°	157.40018°	0.0 ft	1x1	464	464	187.9 kW
Field Segment 1 (copy)	Carport	Portrait (Vertical)	1°	215.8876°	0.0 ft	1x1	585	585	236.9 kW
Field Segment 1 (copy 1)	Carport	Portrait (Vertical)	1°	215.8876°	0.0 ft	1x1	579	579	234.5 kW
Field Segment 1 (copy 2)	Carport	Portrait (Vertical)	1°	215.8876°	0.0 ft	1x1	639	639	258.8 kW

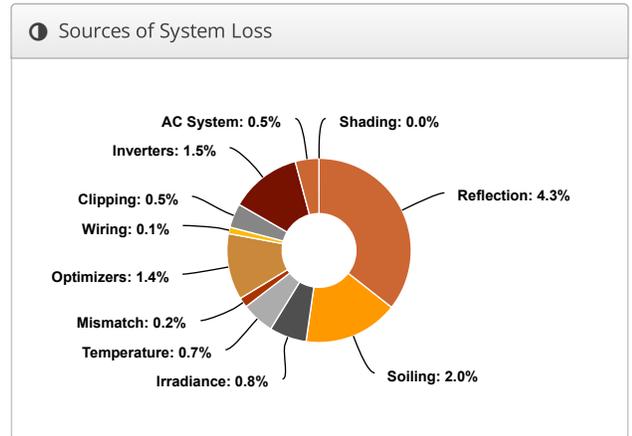
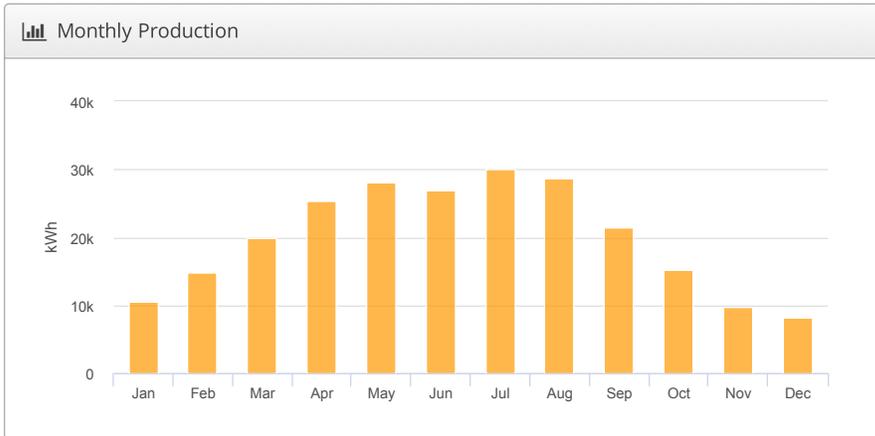
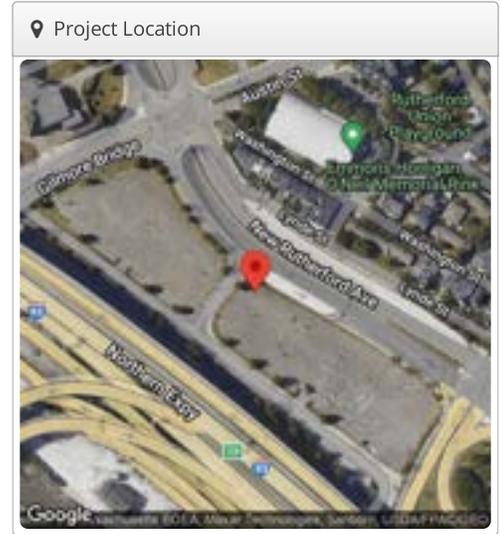
Detailed Layout



## Bldg1 Market Rental Trinity - Austin Parking, 110 Austin Street, Charlestown, MA

Report	
Project Name	Trinity - Austin Parking
Project Description	New Construction
Project Address	110 Austin Street, Charlestown, MA
Prepared By	Ryan Black ryan.black@sunbugsolar.com

System Metrics	
Design	Bldg1 Market Rental
Module DC Nameplate	187.9 kW
Inverter AC Nameplate	160.0 kW Load Ratio: 1.17
Annual Production	238.8 MWh
Performance Ratio	88.5%
kWh/kWp	1,270.8
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)
Simulator Version	d1fdc2c4dc-2a0a5e0f08-f28afdb0ab-2e78336a83



⚡ Annual Production			
	Description	Output	% Delta
Irradiance (kWh/m <sup>2</sup> )	Annual Global Horizontal Irradiance	1,423.3	
	POA Irradiance	1,435.5	0.9%
	Shaded Irradiance	1,435.5	0.0%
	Irradiance after Reflection	1,374.0	-4.3%
	Irradiance after Soiling	1,346.5	-2.0%
	<b>Total Collector Irradiance</b>	<b>1,346.5</b>	<b>0.0%</b>
Energy (kWh)	Nameplate	252,986.1	
	Output at Irradiance Levels	250,999.2	-0.8%
	Output at Cell Temperature Derate	249,254.8	-0.7%
	Output After Mismatch	248,735.6	-0.2%
	Optimizer Output	245,252.9	-1.4%
	Optimal DC Output	244,916.3	-0.1%
	Constrained DC Output	243,673.2	-0.5%
	Inverter Output	240,002.4	-1.5%
	<b>Energy to Grid</b>	<b>238,802.4</b>	<b>-0.5%</b>
Temperature Metrics			
	Avg. Operating Ambient Temp		12.0 °C
	Avg. Operating Cell Temp		18.9 °C
Simulation Metrics			
	Operating Hours	4688	
	Solved Hours	4688	

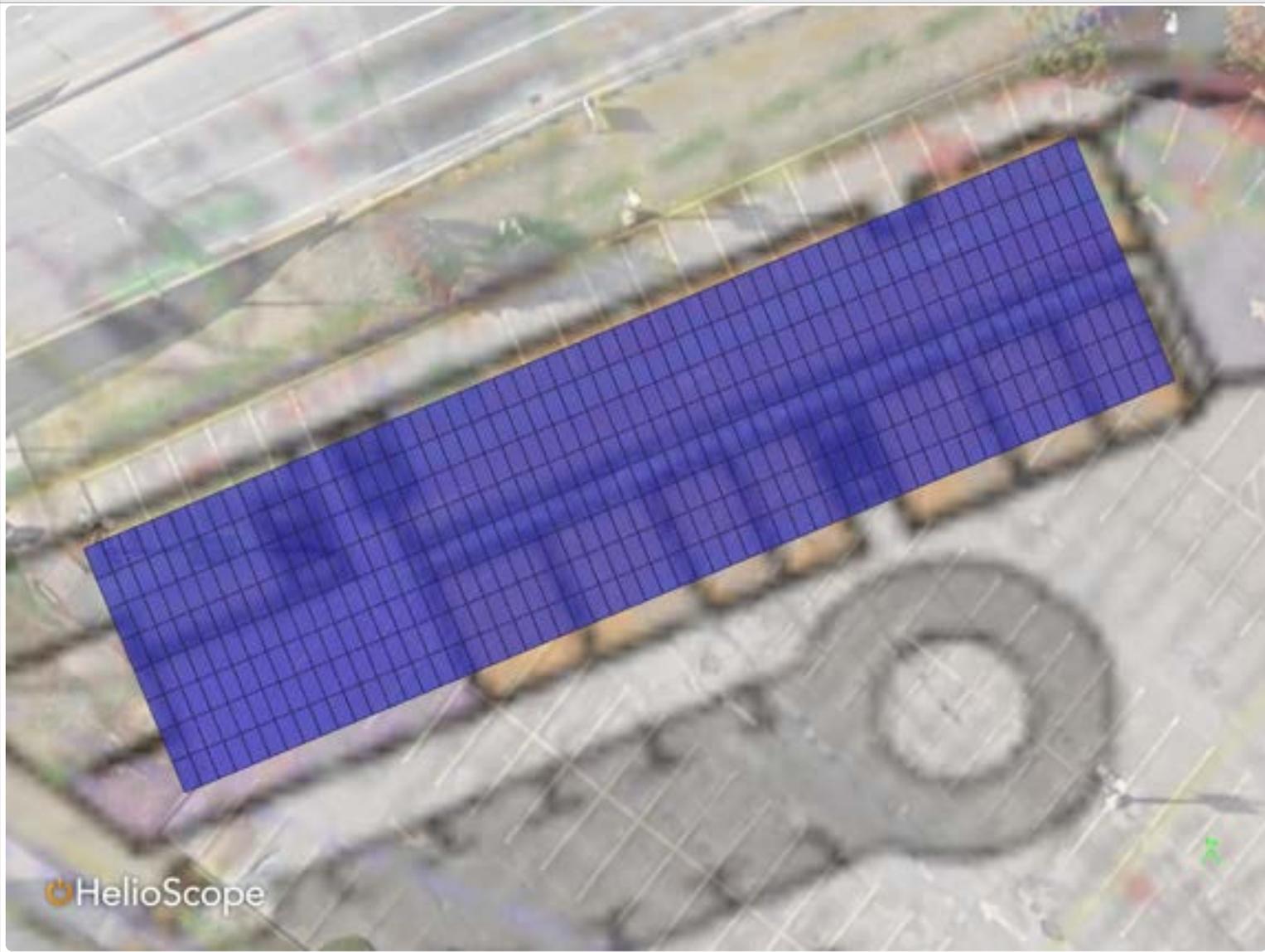
☁ Condition Set												
Description	Condition Set 1											
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)											
Solar Angle Location	Meteo Lat/Lng											
Transposition Model	Perez Model											
Temperature Model	Sandia Model											
Temperature Model Parameters	Rack Type	a	b	Temperature Delta								
	Fixed Tilt	-3.56	-0.075	3°C								
	Flush Mount	-2.81	-0.0455	0°C								
	East-West	-3.56	-0.075	3°C								
	Carport	-3.56	-0.075	3°C								
Soiling (%)	J	F	M	A	M	J	J	A	S	O	N	D
	2	2	2	2	2	2	2	2	2	2	2	2
Irradiation Variance	5%											
Cell Temperature Spread	4° C											
Module Binning Range	-2.5% to 2.5%											
AC System Derate	0.50%											
Trackers	Maximum Angle						Backtracking					
	60°						Enabled					
Module Characterizations	Module						Uploaded By			Characterization		
	Q.PEAK DUO BLK ML-G10 405 (Hanwha Q Cells)						HelioScope			Spec Sheet Characterization, PAN		
Component Characterizations	Device						Uploaded By			Characterization		
	P950 (SolarEdge)						HelioScope			Mfg Spec Sheet		
	SE40KUS (2021) (SolarEdge)						HelioScope			Spec Sheet		

📦 Components		
Component	Name	Count
Inverters	SE40KUS (2021) (SolarEdge)	4 (160.0 kW)
Strings	10 AWG (Copper)	14 (1,474.9 ft)
Optimizers	P950 (SolarEdge)	238 (226.1 kW)
Module	Hanwha Q Cells, Q.PEAK DUO BLK ML-G10 405 (405W)	464 (187.9 kW)

🔌 Wiring Zones			
Description	Combiner Poles	String Size	Stringing Strategy
Wiring Zone	-	13-35	Along Racking
Wiring Zone 2	-	-	Along Racking
Wiring Zone 3	-	-	Along Racking
Wiring Zone 4	-	-	Along Racking

🏠 Field Segments									
Description	Racking	Orientation	Tilt	Azimuth	Intrarow Spacing	Frame Size	Frames	Modules	Power
Field Segment 1	Carport	Portrait (Vertical)	1°	157.40018°	0.0 ft	1x1	464	464	187.9 kW

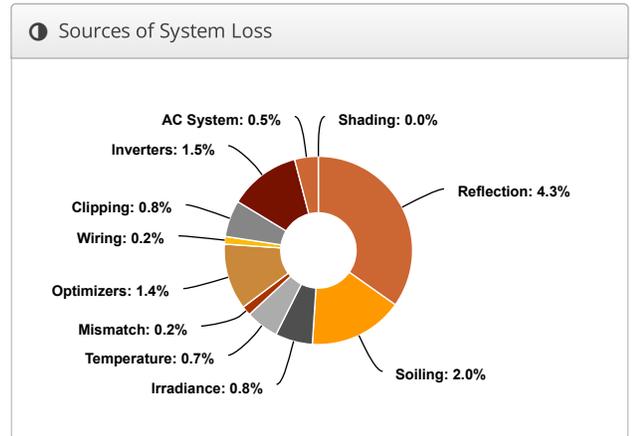
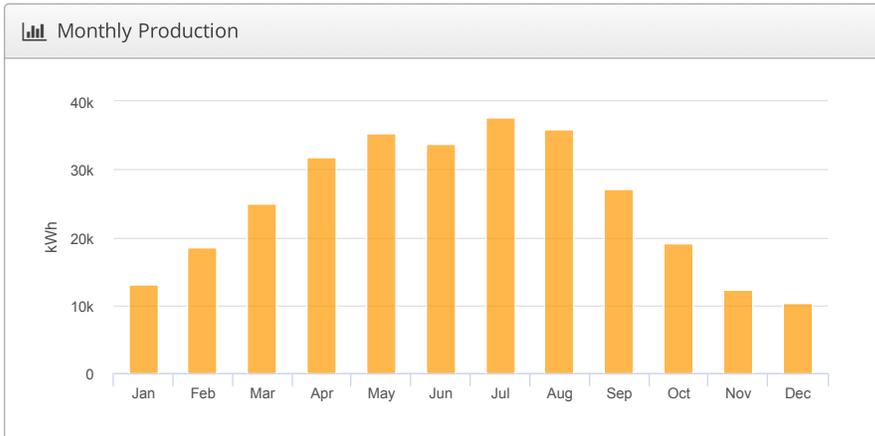
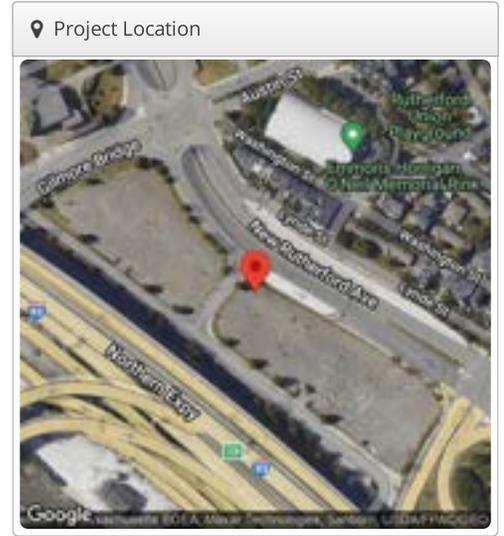
Detailed Layout



## Bldg2 Affordable Rental Trinity - Austin Parking, 110 Austin Street, Charlestown, MA

Report	
Project Name	Trinity - Austin Parking
Project Description	New Construction
Project Address	110 Austin Street, Charlestown, MA
Prepared By	Ryan Black ryan.black@sunbugsolar.com

System Metrics	
Design	Bldg2 Affordable Rental
Module DC Nameplate	236.9 kW
Inverter AC Nameplate	200.0 kW Load Ratio: 1.18
Annual Production	299.8 MWh
Performance Ratio	88.3%
kWh/kWp	1,265.5
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)
Simulator Version	d1fdc2c4dc-2a0a5e0f08-f28afdb0ab-2e78336a83



⚡ Annual Production			
	Description	Output	% Delta
Irradiance (kWh/m <sup>2</sup> )	Annual Global Horizontal Irradiance	1,423.3	
	POA Irradiance	1,433.8	0.7%
	Shaded Irradiance	1,433.8	0.0%
	Irradiance after Reflection	1,372.3	-4.3%
	Irradiance after Soiling	1,344.9	-2.0%
	<b>Total Collector Irradiance</b>	<b>1,344.9</b>	<b>0.0%</b>
Energy (kWh)	Nameplate	318,565.5	
	Output at Irradiance Levels	316,054.5	-0.8%
	Output at Cell Temperature Derate	313,846.4	-0.7%
	Output After Mismatch	313,223.2	-0.2%
	Optimizer Output	308,837.4	-1.4%
	Optimal DC Output	308,339.3	-0.2%
	Constrained DC Output	305,950.2	-0.8%
	Inverter Output	301,329.9	-1.5%
	<b>Energy to Grid</b>	<b>299,823.2</b>	<b>-0.5%</b>
	Temperature Metrics		
	Avg. Operating Ambient Temp		12.0 °C
	Avg. Operating Cell Temp		18.9 °C
Simulation Metrics			
	Operating Hours	4688	
	Solved Hours	4688	

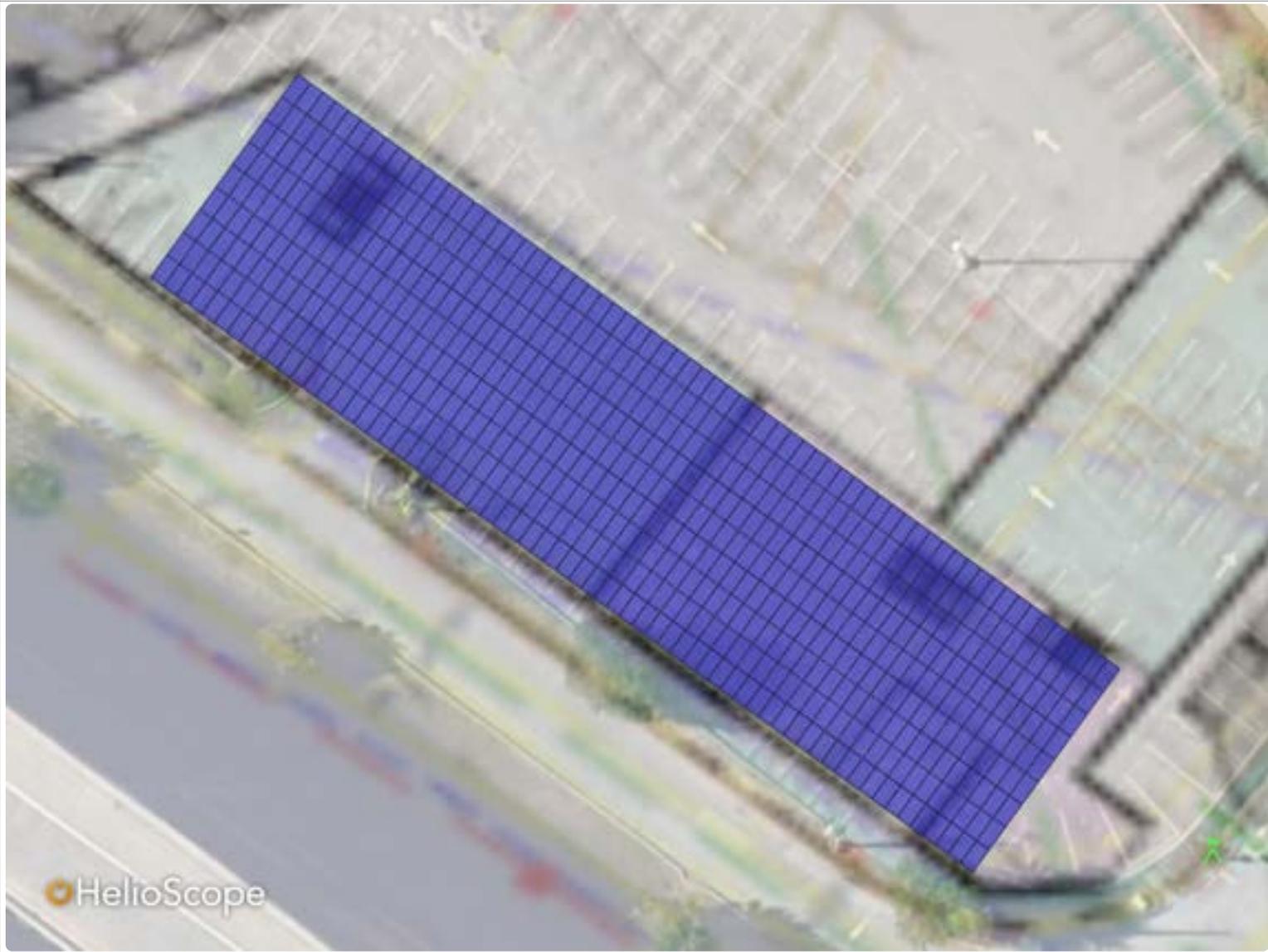
☁ Condition Set												
Description	Condition Set 1											
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)											
Solar Angle Location	Meteo Lat/Lng											
Transposition Model	Perez Model											
Temperature Model	Sandia Model											
Temperature Model Parameters	Rack Type	a	b	Temperature Delta								
	Fixed Tilt	-3.56	-0.075	3°C								
	Flush Mount	-2.81	-0.0455	0°C								
	East-West	-3.56	-0.075	3°C								
	Carport	-3.56	-0.075	3°C								
Soiling (%)	J	F	M	A	M	J	J	A	S	O	N	D
	2	2	2	2	2	2	2	2	2	2	2	2
Irradiation Variance	5%											
Cell Temperature Spread	4° C											
Module Binning Range	-2.5% to 2.5%											
AC System Derate	0.50%											
Trackers	Maximum Angle						Backtracking					
	60°						Enabled					
Module Characterizations	Module						Uploaded By		Characterization			
	Q.PEAK DUO BLK ML-G10 405 (Hanwha Q Cells)						HelioScope		Spec Sheet Characterization, PAN			
Component Characterizations	Device						Uploaded By		Characterization			
	P950 (SolarEdge)						HelioScope		Mfg Spec Sheet			
	SE40KUS (2021) (SolarEdge)						HelioScope		Spec Sheet			

📦 Components		
Component	Name	Count
Inverters	SE40KUS (2021) (SolarEdge)	5 (200.0 kW)
Strings	10 AWG (Copper)	17 (2,388.9 ft)
Optimizers	P950 (SolarEdge)	296 (281.2 kW)
Module	Hanwha Q Cells, Q.PEAK DUO BLK ML-G10 405 (405W)	585 (236.9 kW)

🔌 Wiring Zones			
Description	Combiner Poles	String Size	Stringing Strategy
Wiring Zone	-	-	Along Racking
Wiring Zone 2	-	13-35	Along Racking
Wiring Zone 3	-	-	Along Racking
Wiring Zone 4	-	-	Along Racking

🏠 Field Segments									
Description	Racking	Orientation	Tilt	Azimuth	Intrarow Spacing	Frame Size	Frames	Modules	Power
Field Segment 1 (copy)	Carport	Portrait (Vertical)	1°	215.8876°	0.0 ft	1x1	585	585	236.9 kW

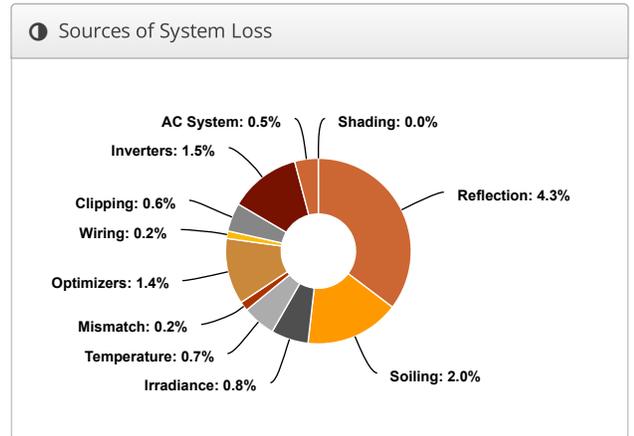
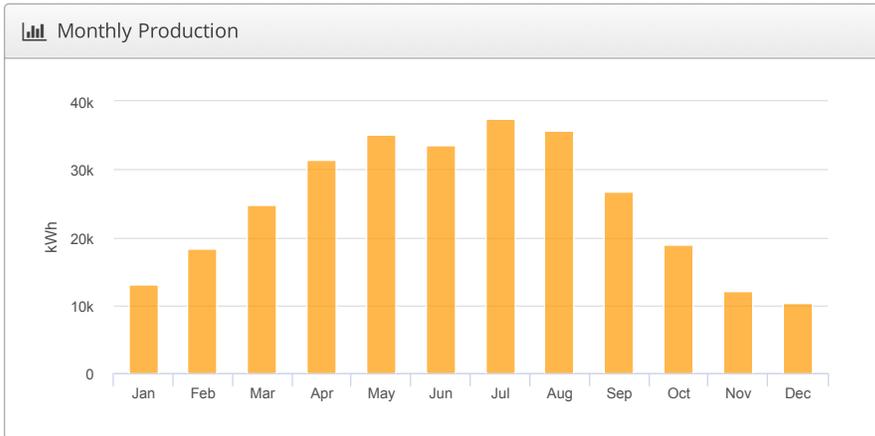
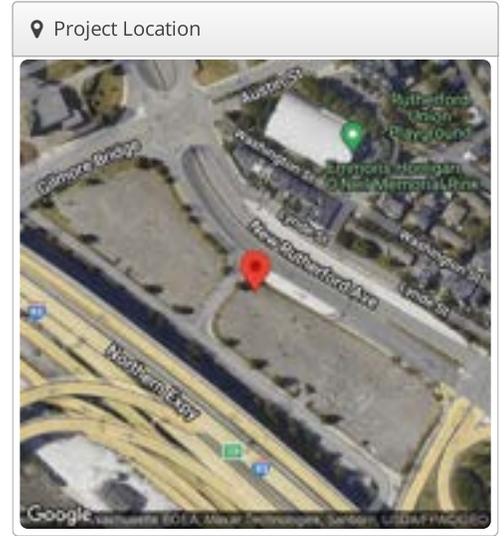
Detailed Layout



## Bldg3 Market H.O. Trinity - Austin Parking, 110 Austin Street, Charlestown, MA

Report	
Project Name	Trinity - Austin Parking
Project Description	New Construction
Project Address	110 Austin Street, Charlestown, MA
Prepared By	Ryan Black ryan.black@sunbugsolar.com

System Metrics	
Design	Bldg3 Market H.O.
Module DC Nameplate	234.5 kW
Inverter AC Nameplate	200.0 kW Load Ratio: 1.17
Annual Production	297.3 MWh
Performance Ratio	88.4%
kWh/kWp	1,267.8
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)
Simulator Version	d1fdc2c4dc-2a0a5e0f08-f28afdb0ab-2e78336a83



⚡ Annual Production			
	Description	Output	% Delta
Irradiance (kWh/m <sup>2</sup> )	Annual Global Horizontal Irradiance	1,423.3	
	POA Irradiance	1,433.8	0.7%
	Shaded Irradiance	1,433.8	0.0%
	Irradiance after Reflection	1,372.3	-4.3%
	Irradiance after Soiling	1,344.9	-2.0%
	<b>Total Collector Irradiance</b>	<b>1,344.9</b>	<b>0.0%</b>
Energy (kWh)	Nameplate	315,296.4	
	Output at Irradiance Levels	312,811.2	-0.8%
	Output at Cell Temperature Derate	310,625.8	-0.7%
	Output After Mismatch	310,019.1	-0.2%
	Optimizer Output	305,678.1	-1.4%
	Optimal DC Output	305,189.0	-0.2%
	Constrained DC Output	303,356.4	-0.6%
	Inverter Output	298,783.0	-1.5%
	<b>Energy to Grid</b>	<b>297,289.1</b>	<b>-0.5%</b>
	Temperature Metrics		
	Avg. Operating Ambient Temp		12.0 °C
	Avg. Operating Cell Temp		18.9 °C
Simulation Metrics			
	Operating Hours	4688	
	Solved Hours	4688	

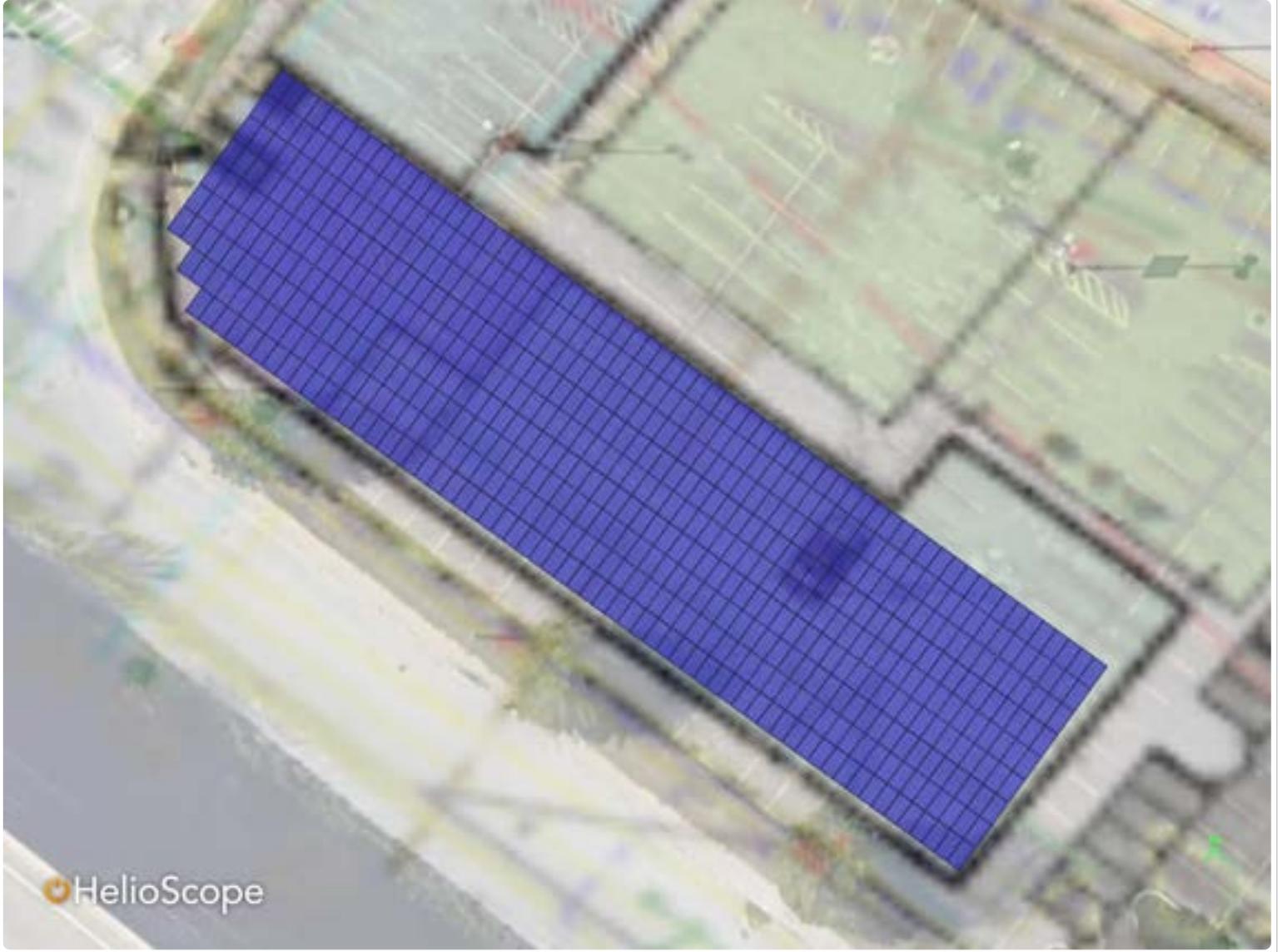
☁ Condition Set												
Description	Condition Set 1											
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)											
Solar Angle Location	Meteo Lat/Lng											
Transposition Model	Perez Model											
Temperature Model	Sandia Model											
Temperature Model Parameters	Rack Type	a	b	Temperature Delta								
	Fixed Tilt	-3.56	-0.075	3°C								
	Flush Mount	-2.81	-0.0455	0°C								
	East-West	-3.56	-0.075	3°C								
	Carport	-3.56	-0.075	3°C								
Soiling (%)	J	F	M	A	M	J	J	A	S	O	N	D
	2	2	2	2	2	2	2	2	2	2	2	2
Irradiation Variance	5%											
Cell Temperature Spread	4° C											
Module Binning Range	-2.5% to 2.5%											
AC System Derate	0.50%											
Trackers	Maximum Angle						Backtracking					
	60°						Enabled					
Module Characterizations	Module						Uploaded By			Characterization		
	Q.PEAK DUO BLK ML-G10 405 (Hanwha Q Cells)						HelioScope			Spec Sheet Characterization, PAN		
Component Characterizations	Device						Uploaded By			Characterization		
	P950 (SolarEdge)						HelioScope			Mfg Spec Sheet		
	SE40KUS (2021) (SolarEdge)						HelioScope			Spec Sheet		

📦 Components		
Component	Name	Count
Inverters	SE40KUS (2021) (SolarEdge)	5 (200.0 kW)
Strings	10 AWG (Copper)	17 (2,319.5 ft)
Optimizers	P950 (SolarEdge)	290 (275.5 kW)
Module	Hanwha Q Cells, Q.PEAK DUO BLK ML-G10 405 (405W)	579 (234.5 kW)

🔌 Wiring Zones			
Description	Combiner Poles	String Size	Stringing Strategy
Wiring Zone	-	-	Along Racking
Wiring Zone 2	-	-	Along Racking
Wiring Zone 3	-	13-35	Along Racking
Wiring Zone 4	-	-	Along Racking

🏠 Field Segments									
Description	Racking	Orientation	Tilt	Azimuth	Intrarow Spacing	Frame Size	Frames	Modules	Power
Field Segment 1 (copy 1)	Carport	Portrait (Vertical)	1°	215.8876°	0.0 ft	1x1	579	579	234.5 kW

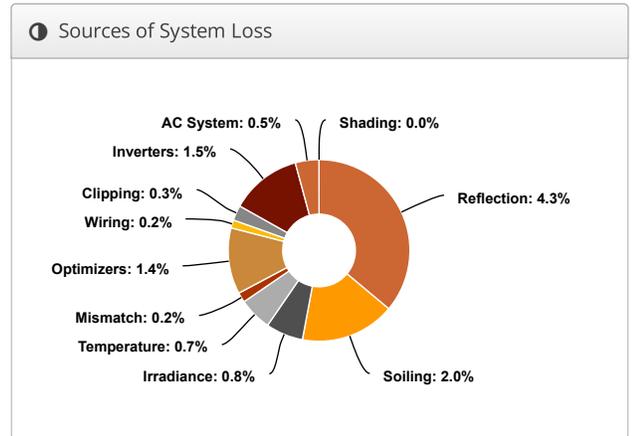
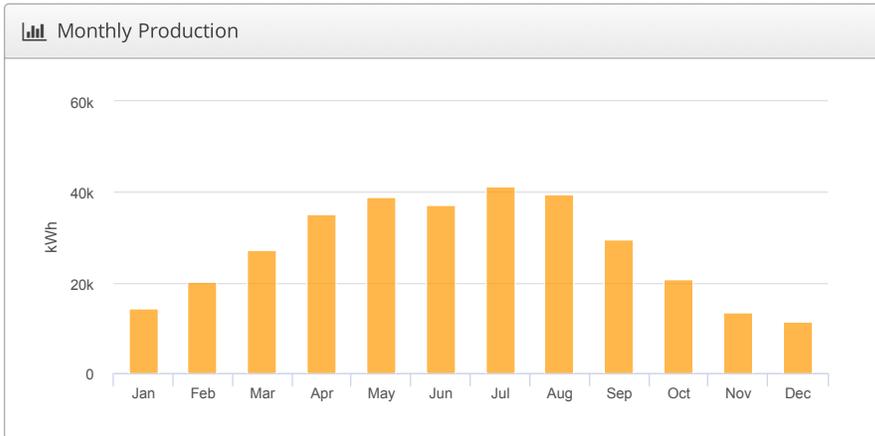
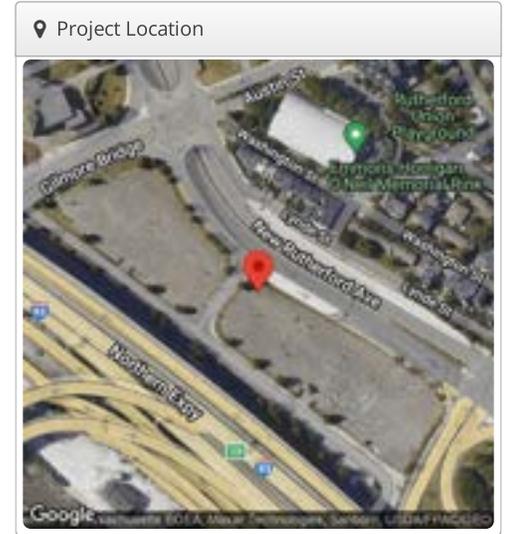
Detailed Layout



## Bldg4 Affordable H.O. Trinity - Austin Parking, 110 Austin Street, Charlestown, MA

Report	
Project Name	Trinity - Austin Parking
Project Description	New Construction
Project Address	110 Austin Street, Charlestown, MA
Prepared By	Ryan Black ryan.black@sunbugsolar.com

System Metrics	
Design	Bldg4 Affordable H.O.
Module DC Nameplate	258.8 kW
Inverter AC Nameplate	240.0 kW Load Ratio: 1.08
Annual Production	329.0 MWh
Performance Ratio	88.7%
kWh/kWp	1,271.1
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)
Simulator Version	d1fdc2c4dc-2a0a5e0f08-f28afdb0ab-2e78336a83



⚡ Annual Production			
	Description	Output	% Delta
Irradiance (kWh/m <sup>2</sup> )	Annual Global Horizontal Irradiance	1,423.3	
	POA Irradiance	1,433.8	0.7%
	Shaded Irradiance	1,433.8	0.0%
	Irradiance after Reflection	1,372.3	-4.3%
	Irradiance after Soiling	1,344.9	-2.0%
	<b>Total Collector Irradiance</b>	<b>1,344.9</b>	<b>0.0%</b>
Energy (kWh)	Nameplate	347,971.4	
	Output at Irradiance Levels	345,228.8	-0.8%
	Output at Cell Temperature Derate	342,817.1	-0.7%
	Output After Mismatch	342,101.1	-0.2%
	Optimizer Output	337,310.9	-1.4%
	Optimal DC Output	336,735.3	-0.2%
	Constrained DC Output	335,660.8	-0.3%
	Inverter Output	330,615.0	-1.5%
	<b>Energy to Grid</b>	<b>328,962.0</b>	<b>-0.5%</b>
	Temperature Metrics		
	Avg. Operating Ambient Temp		12.0 °C
	Avg. Operating Cell Temp		18.9 °C
Simulation Metrics			
	Operating Hours	4688	
	Solved Hours	4688	

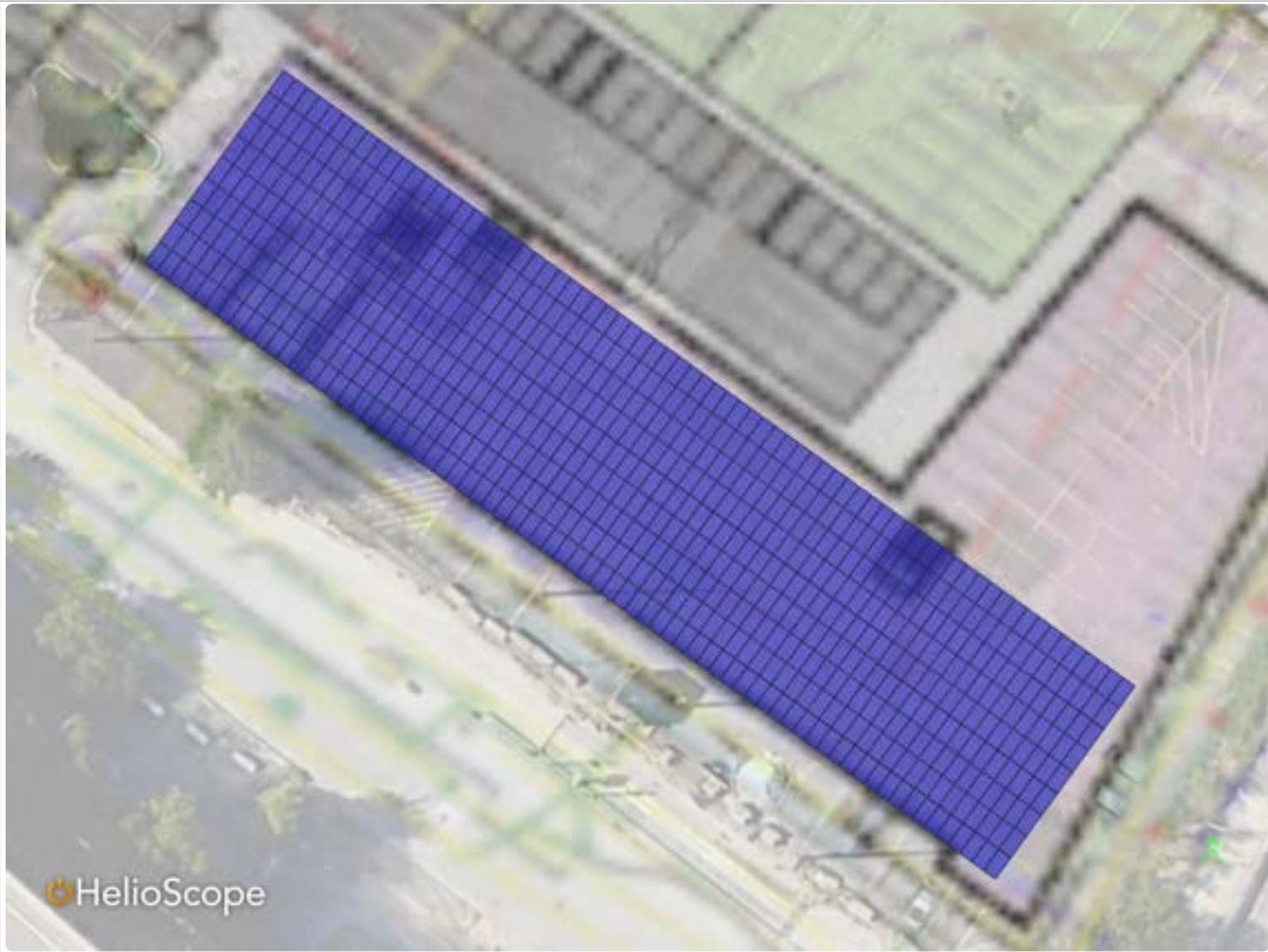
☁ Condition Set												
Description	Condition Set 1											
Weather Dataset	TMY, 10km grid (42.35,-71.05), NREL (prospector)											
Solar Angle Location	Meteo Lat/Lng											
Transposition Model	Perez Model											
Temperature Model	Sandia Model											
Temperature Model Parameters	Rack Type	a	b	Temperature Delta								
	Fixed Tilt	-3.56	-0.075	3°C								
	Flush Mount	-2.81	-0.0455	0°C								
	East-West	-3.56	-0.075	3°C								
	Carport	-3.56	-0.075	3°C								
Soiling (%)	J	F	M	A	M	J	J	A	S	O	N	D
	2	2	2	2	2	2	2	2	2	2	2	2
Irradiation Variance	5%											
Cell Temperature Spread	4° C											
Module Binning Range	-2.5% to 2.5%											
AC System Derate	0.50%											
Trackers	Maximum Angle						Backtracking					
	60°						Enabled					
Module Characterizations	Module						Uploaded By			Characterization		
	Q.PEAK DUO BLK ML-G10 405 (Hanwha Q Cells)						HelioScope			Spec Sheet Characterization, PAN		
Component Characterizations	Device						Uploaded By			Characterization		
	P950 (SolarEdge)						HelioScope			Mfg Spec Sheet		
	SE40KUS (2021) (SolarEdge)						HelioScope			Spec Sheet		

📦 Components		
Component	Name	Count
Inverters	SE40KUS (2021) (SolarEdge)	6 (240.0 kW)
Strings	10 AWG (Copper)	19 (2,728.6 ft)
Optimizers	P950 (SolarEdge)	323 (306.9 kW)
Module	Hanwha Q Cells, Q.PEAK DUO BLK ML-G10 405 (405W)	639 (258.8 kW)

🔌 Wiring Zones			
Description	Combiner Poles	String Size	Stringing Strategy
Wiring Zone	-	-	Along Racking
Wiring Zone 2	-	-	Along Racking
Wiring Zone 3	-	-	Along Racking
Wiring Zone 4	-	13-35	Along Racking

🏠 Field Segments									
Description	Racking	Orientation	Tilt	Azimuth	Intrarow Spacing	Frame Size	Frames	Modules	Power
Field Segment 1 (copy 2)	Carport	Portrait (Vertical)	1°	215.8876°	0.0 ft	1x1	639	639	258.8 kW

Detailed Layout



# Austin Street Parking Lots Scorecard

Location: Austin St - Building 2, Charlestown, MA , USA

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



Integrative Process		Preliminary	Y	1 of 2	M	1	Verified	0
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IPc	Integrative Process			1 of 2		1		
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Location and Transportation		Preliminary	Y	13 of 15	M	3	Verified	0
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LTp	Floodplain Avoidance			Required				Not Verified
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*Performance Path*

LTc	LEED for Neighborhood Development			0 of 15		0		
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*Prescriptive Path*

LTc	Site Selection			7 of 8		2		
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LTc	Compact Development			3 of 3		0		
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LTc	Community Resources			2 of 2		0		
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LTc	Access to Transit			1 of 2		1		
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Sustainable Sites		Preliminary	Y	3 of 7	M	2	Verified	0
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SSp	Construction Activity Pollution Prevention			Required				Not Verified
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SSp	No Invasive Plants			Required				Not Verified
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SSc	Heat Island Reduction			1 of 2		0		
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SSc	Rainwater Management			0 of 3		2		
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SSc	Nontoxic Pest Control			2 of 2		0		
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Water Efficiency		Preliminary	Y	7 of 12	M	1	Verified	0
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WEp	Water Metering			Required				Not Verified
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*Performance Path*

WEc	Total Water Use			7 of 12		1		
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*Prescriptive Path*

WEc	Indoor Water Use			0 of 6		0		
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WEc	Outdoor Water Use			0 of 4		1		
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Energy and Atmosphere		Preliminary	Y	33 of 37	M	4	Verified	0
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EAp	Minimum Energy Performance			Required				Not Verified
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EAp	Energy Metering			Required				Not Verified
-----	-----------------	--	--	----------	--	--	--	--------------

EAp	Education of the Homeowner, Tenant or Building Manager			Required				Not Verified
-----	--	--	--	----------	--	--	--	--------------

EAc	Annual Energy Use			30 of 30		0		
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EAc	Efficient Hot Water Distribution System			3 of 5		2		
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EAc	Advanced Utility Tracking			0 of 2		2		
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<b>Materials and Resources</b>		Preliminary	Y	2.5 of 9	M	2	Verified	0
MRp	Certified Tropical Wood	Required					Not Verified	
MRp	Durability Management	Required					Not Verified	
MRc	Durability Management Verification	1 of 1			0			
MRc	Environmentally Preferable Products	0.5 of 5			1			
MRc	Construction Waste Management	1 of 3			1			



<b>Indoor Environmental Quality</b>		Preliminary	Y	14 of 18	M	0	Verified	0
EQp	Ventilation	Required					Not Verified	
EQp	Combustion Venting	Required					Not Verified	
EQp	Garage Pollutant Protection	Required					Not Verified	
EQp	Radon-Resistant Construction	Required					Not Verified	
EQp	Air Filtering	Required					Not Verified	
EQp	Environmental Tobacco Smoke	Required					Not Verified	
EQp	Compartmentalization	Required					Not Verified	
EQc	Enhanced Ventilation	3 of 3			0			
EQc	Contaminant Control	1 of 2			0			
EQc	Balancing of Heating and Cooling Distribution Systems	2 of 3			0			
EQc	Enhanced Compartmentalization	1 of 3			0			
EQc	Combustion Venting	2 of 2			0			
EQc	Enhanced Garage Pollutant Protection	1 of 1			0			
EQc	Low-Emitting Products	3 of 3			0			
EQc	No Environmental Tobacco Smoke	1 of 1			0			



<b>Innovation</b>		Preliminary	Y	4.5 of 6	M	1	Verified	0
INp	Preliminary Rating	Required					Not Verified	
INc	Innovation	3.5 of 5			1			
INc	LEED Accredited Professional	1 of 1			0			



<b>Regional Priority</b>		Preliminary	Y	2 of 4	M	1	Verified	0
RPc	Regional Priority	2 of 4			1			

### Point Floors

The project earned at least 8 points total in Location and Transportation and Energy and Atmosphere

The project earned at least 3 points in Water Efficiency

The project earned at least 3 points in Indoor Environmental Quality

### Total

Preliminary Y 80 of 110 M 15 Verified 0

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

# Austin Street Parking Lots Scorecard

Location: Austin St, Charlestown, MA , USA

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



Integrative Process		Preliminary	Y	1 of 2	M	1	Verified	0
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IPc	Integrative Process			1 of 2		1		
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Location and Transportation		Preliminary	Y	13 of 15	M	3	Verified	0
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LTp	Floodplain Avoidance			Required				Not Verified
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*Performance Path*

LTc	LEED for Neighborhood Development			0 of 15		0		
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*Prescriptive Path*

LTc	Site Selection			8 of 8		1		
-----	----------------	--	--	--------	--	---	--	--

LTc	Compact Development			3 of 3		0		
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LTc	Community Resources			1 of 2		1		
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LTc	Access to Transit			1 of 2		1		
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Sustainable Sites		Preliminary	Y	3.5 of 7	M	3	Verified	0
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SSp	Construction Activity Pollution Prevention			Required				Not Verified
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SSp	No Invasive Plants			Required				Not Verified
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SSc	Heat Island Reduction			2 of 2		0		
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SSc	Rainwater Management			0 of 3		2		
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SSc	Nontoxic Pest Control			1.5 of 2		1		
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Water Efficiency		Preliminary	Y	7 of 12	M	1	Verified	0
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WEp	Water Metering			Required				Not Verified
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*Performance Path*

WEc	Total Water Use			7 of 12		1		
-----	-----------------	--	--	---------	--	---	--	--

*Prescriptive Path*

WEc	Indoor Water Use			0 of 6		0		
-----	------------------	--	--	--------	--	---	--	--

WEc	Outdoor Water Use			0 of 4		1		
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Energy and Atmosphere		Preliminary	Y	34 of 37	M	3	Verified	0
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EAp	Minimum Energy Performance			Required				Not Verified
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EAp	Energy Metering			Required				Not Verified
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EAp	Education of the Homeowner, Tenant or Building Manager			Required				Not Verified
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EAc	Annual Energy Use			30 of 30		0		
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EAc	Efficient Hot Water Distribution System			3 of 5		2		
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EAc	Advanced Utility Tracking			1 of 2		1		
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<b>Materials and Resources</b>		Preliminary	Y	2 of 9	M	2.5	Verified	0
MRp	Certified Tropical Wood			Required				Not Verified
MRp	Durability Management			Required				Not Verified
MRc	Durability Management Verification			1 of 1		0		
MRc	Environmentally Preferable Products			0 of 5		1.5		
MRc	Construction Waste Management			1 of 3		1		



<b>Indoor Environmental Quality</b>		Preliminary	Y	13.5 of 18	M	1.5	Verified	0
EQp	Ventilation			Required				Not Verified
EQp	Combustion Venting			Required				Not Verified
EQp	Garage Pollutant Protection			Required				Not Verified
EQp	Radon-Resistant Construction			Required				Not Verified
EQp	Air Filtering			Required				Not Verified
EQp	Environmental Tobacco Smoke			Required				Not Verified
EQp	Compartmentalization			Required				Not Verified
EQc	Enhanced Ventilation			3 of 3		0		
EQc	Contaminant Control			1 of 2		0		
EQc	Balancing of Heating and Cooling Distribution Systems			2 of 3		1		
EQc	Enhanced Compartmentalization			1 of 3		0		
EQc	Combustion Venting			2 of 2		0		
EQc	Enhanced Garage Pollutant Protection			1 of 1		0		
EQc	Low-Emitting Products			2.5 of 3		0.5		
EQc	No Environmental Tobacco Smoke			1 of 1		0		



<b>Innovation</b>		Preliminary	Y	4 of 6	M	1	Verified	0
INp	Preliminary Rating			Required				Not Verified
INc	Innovation			3 of 5		1		
INc	LEED Accredited Professional			1 of 1		0		



<b>Regional Priority</b>		Preliminary	Y	2 of 4	M	1	Verified	0
RPc	Regional Priority			2 of 4		1		

### Point Floors

The project earned at least 8 points total in Location and Transportation and Energy and Atmosphere

The project earned at least 3 points in Water Efficiency

The project earned at least 3 points in Indoor Environmental Quality

### Total

Preliminary Y 80 of 110 M 17 Verified 0

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

**NOTE: Project filings should be prepared and submitted using the online [Climate Resiliency Checklist](#).**

**A.1 - Project Information**

Project Name:	Austin Street Parking Lots Redevelopment – Buildings 1, 2, 3,4 combined			
Project Address:	Charlestown, MA			
Project Address Additional:				
Filing Type (select)	Preliminary- RFP			
Filing Contact	Maciej Konieczny	New Ecology, Inc.	konieczny@newecology.org	617-557-1700 x7024
Is MEPA approval required	YES			

**A.3 - Project Team**

Owner / Developer:	Trinity Financial			
Architect:	ICON Architecture			
Engineer:	TBD			
Sustainability / LEED:	New Ecology, Inc.			
Permitting:	Fort Point Associates			
Construction Management:	TBD			

**A.3 - Project Description and Design Conditions**

List the principal Building Uses:	Multifamily Housing
List the First Floor Uses:	Multifamily Housing, Amenity/Office Space, Supporting Spaces
List any Critical Site Infrastructure and or Building Uses:	None

**Site and Building:**

Site Area:	5.1 acres	Building Area:	764,380
Building Height:	TBD	Building Height:	12/6, 12/6, 8/6, 8/6 stories
Existing Site Elevation – Low:	16.14	Existing Site Elevation – High:	33.1
Proposed Site Elevation – Low:	16.14	Proposed Site Elevation – High:	33.1
Proposed First Floor Elevation:	20.5'	Below grade levels:	1

**Article 37 Green Building:**

LEED Version - Rating System:	Multifamily Midrise	LEED Certification:	Yes
Proposed LEED rating:	Platinum	Proposed LEED point score:	80

**Building Envelope**

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

Roof:	R-50 c.i.	Exposed Floor:	N/A
Foundation Wall:	R-10	Slab Edge (at or below grade):	R-10 CI
Vertical Above-grade Assemblies (%’s are of total vertical area and together should total 100%):			
Area of Opaque Curtain Wall & Spandrel Assembly:	0%	Wall & Spandrel Assembly Value:	~R-30
Area of Framed & Insulated / Standard Wall:	75%	Wall Value	~R-30
Area of Vision Window:	25%	Window Glazing Assembly Value:	TBD
		Window Glazing SHGC:	TBD
Area of Doors:	1.5%	Door Assembly Value:	U<0.5

**Energy Loads and Performance**

For this filing – describe how energy loads & performance were determined

<i>Buildings have been designed to exceed the 9<sup>th</sup> edition of the Massachusetts Stretch Energy Code. Whole building energy simulation was performed using Wufi.</i>			
Annual Electric:	TBD	Peak Electric:	TBD
Annual Heating:	TBD	Peak Heating:	TBD
Annual Cooling:	TBD	Peak Cooling:	TBD
Energy Use - Below ASHRAE 90.1 - 2013:	N/A (Phius compliance)	Have the local utilities reviewed the building energy performance?:	No
Energy Use - Below Mass. Code:	N/A (Phius compliance)	Energy Use Intensity:	~20 kBtu/SF

**Back-up / Emergency Power System**

Electrical Generation Output:	TBD	Number of Power Units:	TBD
System Type:	TBD	Fuel Source:	TBD

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

Electric:	Yes - TBD	Heating:	Yes - TBD
		Cooling:	Yes - TBD

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

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

### B.1 – GHG Emissions - Design Conditions

For this Filing - Annual Building GHG Emissions: TBD

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

The design will include high performance envelope and mechanical systems. The buildings will be modeled early during the design process so that the energy models could inform the team's decisions. This project is targeting passive house certification under Phius CORE 2024.

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

The envelope will be high-performance to comply with Phius CORE 2024, with continuous exterior insulation, primary and secondary air barriers.

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

All mechanical equipment will be designed as high performance. Central DHW CO2 heat pump water heaters with waste water heat recovery will serve the units with a rated COP>3.6. GSHP heat pump system will provide heating and cooling to all spaces. Outdoor air will be supplied via central ERV units with an anticipated recovery rating >80%. LED lighting will be specified, with automatic controls in common areas. All plumbing fixtures will be low-flow or low-flush.

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

A rooftop canopy solar PV system is planned to offset a significant portion of the site's electricity consumption.

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

Not planned

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

The team plans to apply for incentives through the MassSave Multifamily Passive House program.

### B.2 - GHG Reduction - Adaptation Strategies

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

The building will be designed all-electric.

---

### C - Extreme Heat Events

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

**C.1 – Extreme Heat - Design Conditions**

Temperature Range - Low:	7.7°F	Temperature Range - High:	91°F
Annual Heating Degree Days:	5495	Annual Cooling Degree Days:	812

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

Days - Above 90°:	5	Days - Above 100°:	1
Number of Heatwaves / Year:	2	Average Duration of Heatwave (Days):	3

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

High-albedo roofing materials will help to mitigate the urban heat island effect. Building cladding will be evaluated to comply with LEED’s Cool Walls credit

**C.2 - Extreme Heat – Adaptation Strategies**

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

Cooling systems will be sized to accommodate current and future cooling loads. High-albedo roofing materials are to be specified.

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

A high-performance building envelope retains comfortable temperatures in the building for an extended period in the event of a loss of service. A standby generator will be provided to backup power to elevator and emergency lighting inverters as well as booster pumps. It is the intent of the project to provide shelter in place capability.

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**D - Extreme Precipitation Events**

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

**D.1 – Extreme Precipitation - Design Conditions**

10 Year, 24 Hour Design Storm:	0.83 in/24 hrs
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Describe all building and site measures for reducing storm water run-off:

The project will include on-site storm water recharge and retention.

**D.2 - Extreme Precipitation - Adaptation Strategies**

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

The project will include on-site storm water retention and recharge, as well as waste water backflow prevention

## E – Sea Level Rise and Storms

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

Is any portion of the site in a FEMA SFHA?

Yes

What Zone:

AE

Current FEMA SFHA Zone Base Flood Elevation:

19.5

Is any portion of the site in a BPDA Sea Level Rise - Flood Hazard Area? Use the online [BPDA SLR-FHA Mapping Tool](#) to assess the susceptibility of the project site.

Yes

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

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

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

Sea Level Rise - Base Flood Elevation:

19.5'

Sea Level Rise - Design Flood Elevation:

21.5'

First Floor Elevation:

21.5'

Site Elevations at Building:

21.5'

Accessible Route Elevation:

21.5'

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

The team will design the 1<sup>st</sup> floor elevation relative to the risks associated with sea level rise and flooding by placing the first floor elevation 24” above the base floor elevation.

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

The building will utilize wetproofing techniques in below grade parking areas. Additionally, mechanical systems and critical systems will be located above the floodplain, and storm water retention.

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

The design will support shelter in place capability by providing heating/cooling/lighting and electricity to selected common areas as well as power to water boost pumps to assure water is available to all residents. A generator will support one elevator and emergency lighting inverters.

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

Owner will work to develop an extensive Continuity of Operations Plan (COOP) for operations. This plan will include protocols to be used in response to a variety of disruptions, including natural disasters and service outages.

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

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

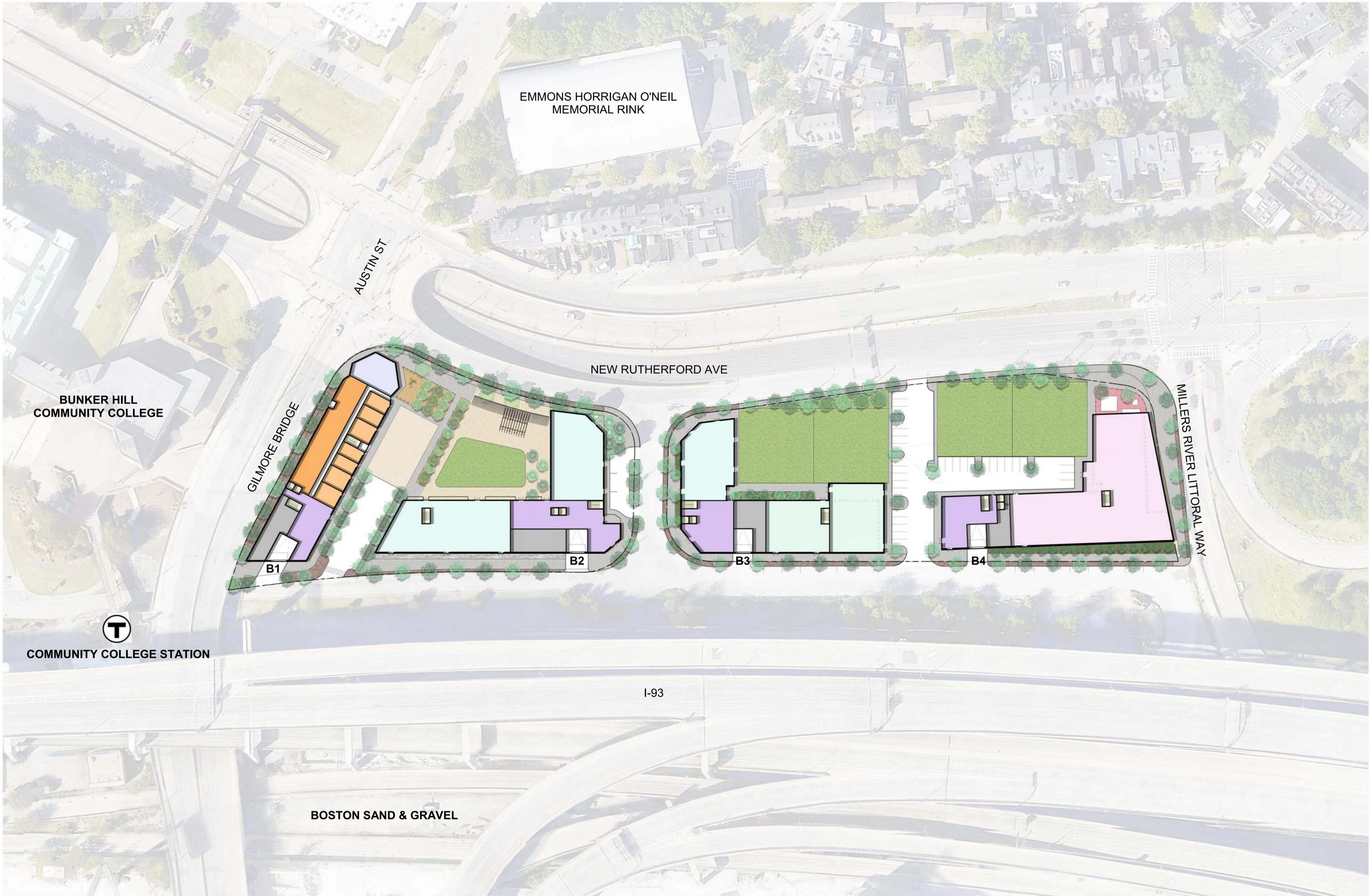
If deemed necessary in the future, portions of the site could be altered to mitigate the effects of flooding on the buildings.

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

Future building adaptation strategies could include additional relocation of mechanical and electrical equipment to higher floors, redesigning building elevators, and dry- or wet-floodproofing areas on the first floors.

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

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



EMMONS HORRIGAN O'NEIL  
MEMORIAL RINK

AUSTIN ST

NEW RUTHERFORD AVE

BUNKER HILL  
COMMUNITY COLLEGE

GILMORE BRIDGE

MILLERS RIVER LITTORAL WAY

B1

B2

B3

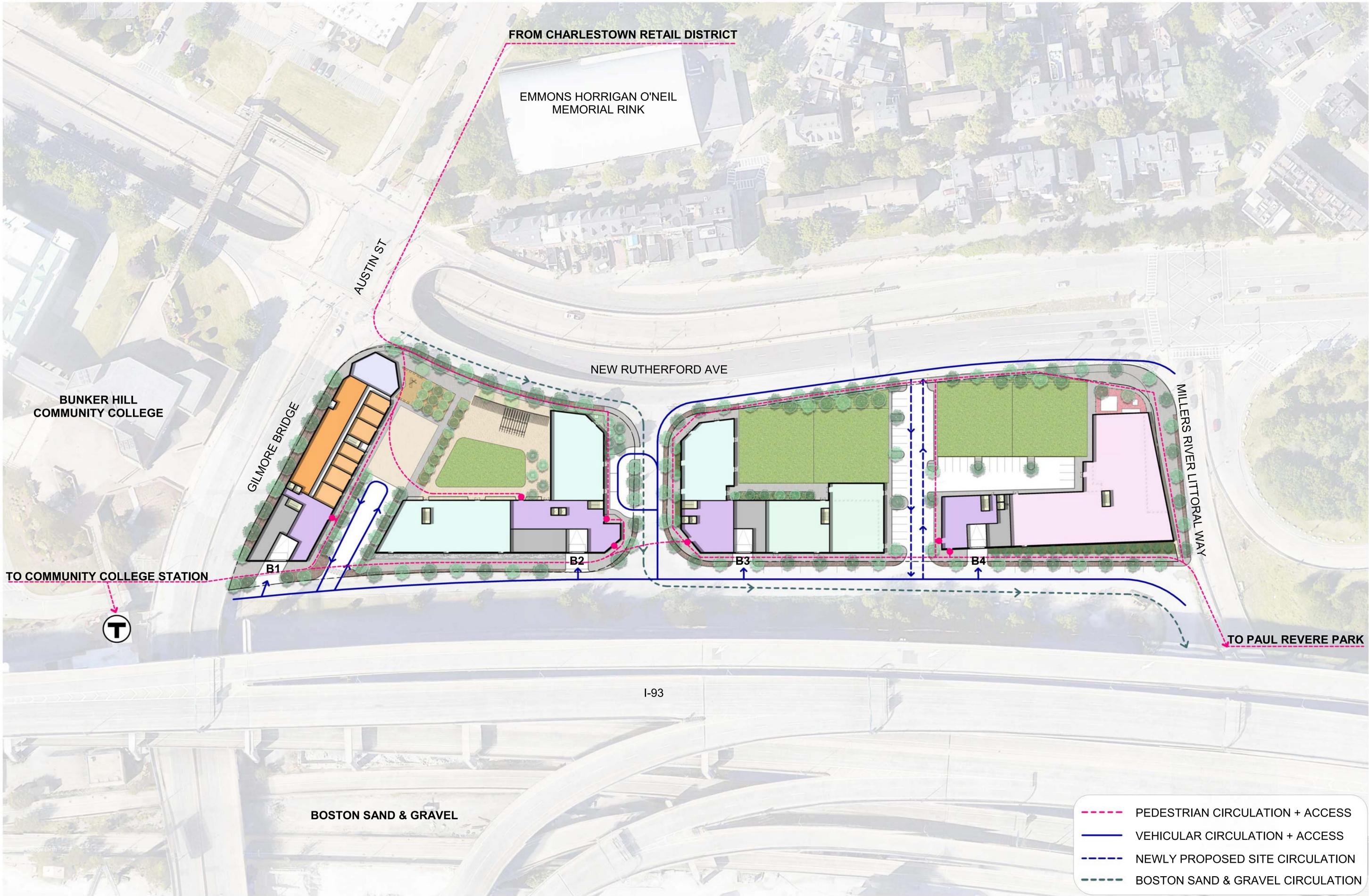
B4



COMMUNITY COLLEGE STATION

I-93

BOSTON SAND & GRAVEL



FROM CHARLESTOWN RETAIL DISTRICT

EMMONS HORRIGAN O'NEIL  
MEMORIAL RINK

AUSTIN ST

NEW RUTHERFORD AVE

BUNKER HILL  
COMMUNITY COLLEGE

GILMORE BRIDGE

MILLERS RIVER LITTORAL WAY

TO COMMUNITY COLLEGE STATION



B1

B2

B3

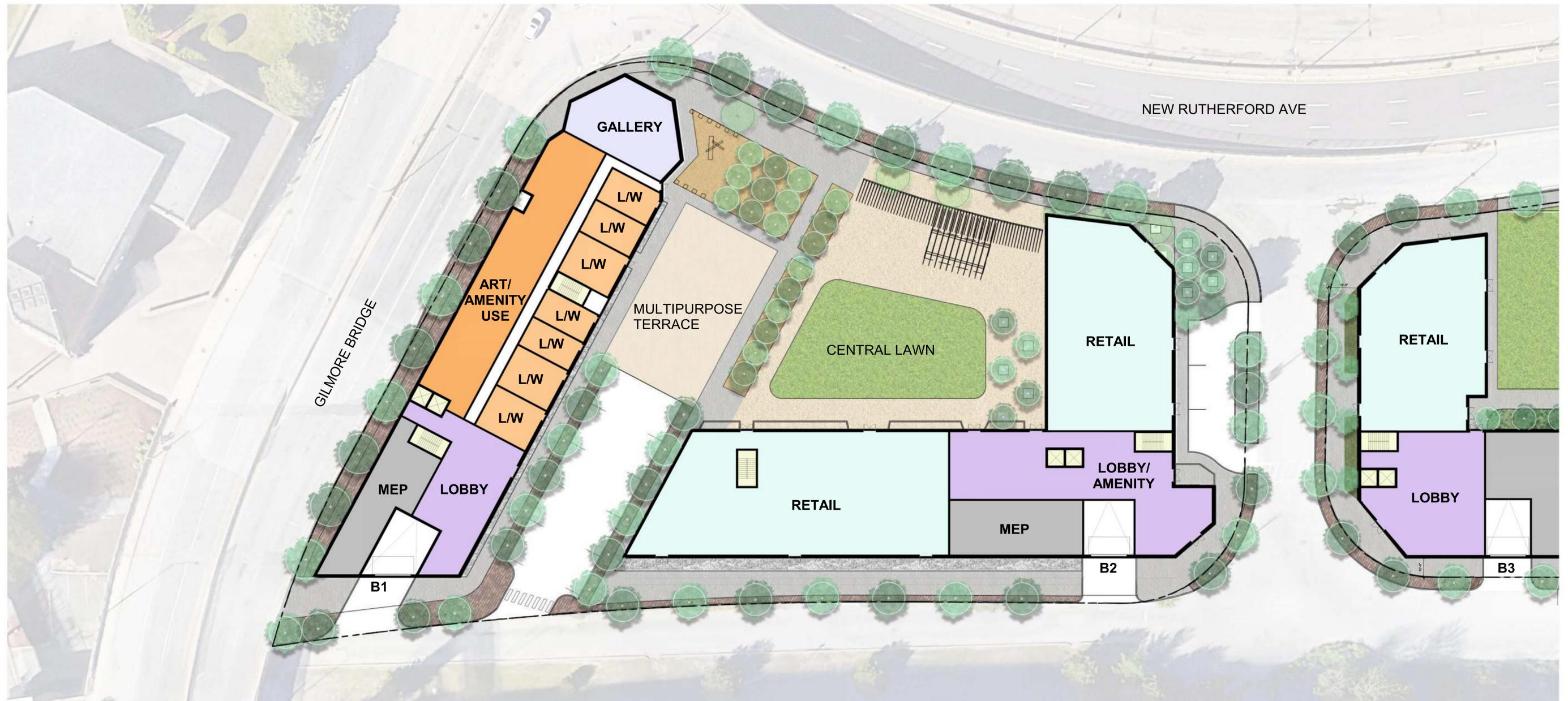
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TO PAUL REVERE PARK

I-93

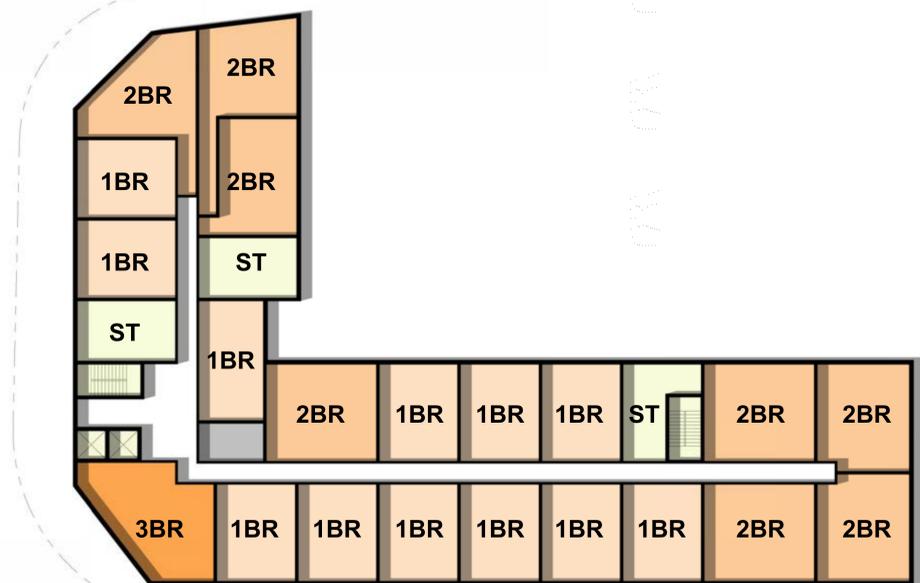
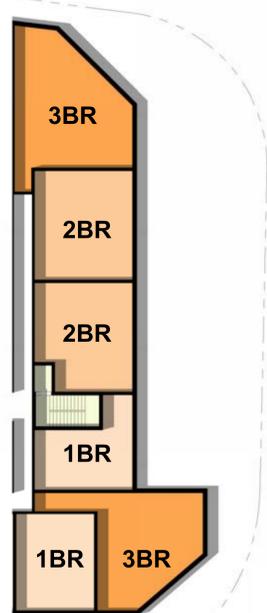
BOSTON SAND & GRAVEL

- - - PEDESTRIAN CIRCULATION + ACCESS
- VEHICULAR CIRCULATION + ACCESS
- - - NEWLY PROPOSED SITE CIRCULATION
- - - BOSTON SAND & GRAVEL CIRCULATION





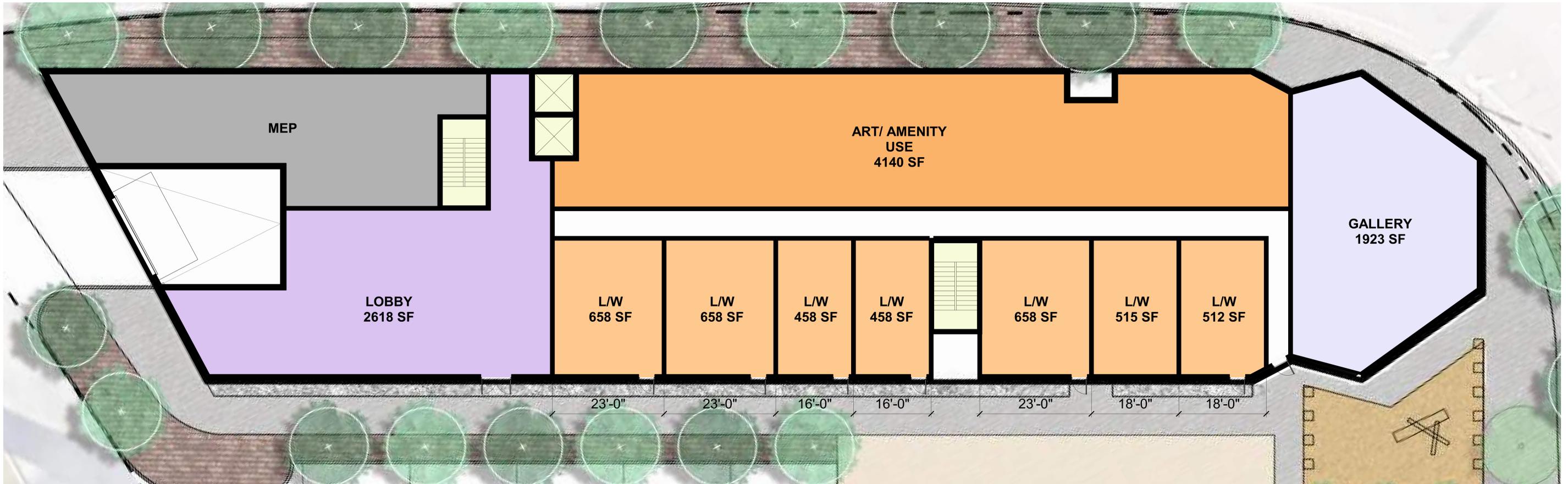




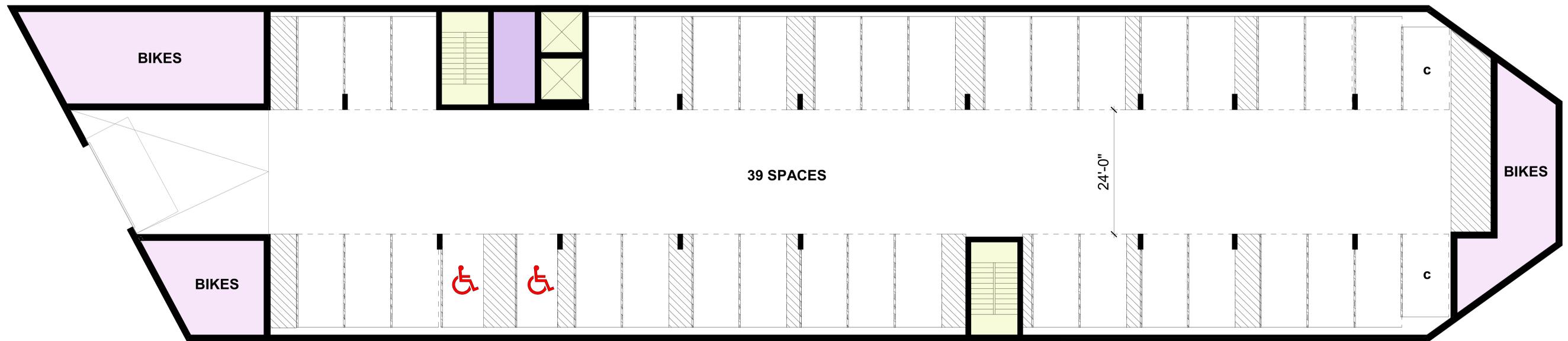
B3



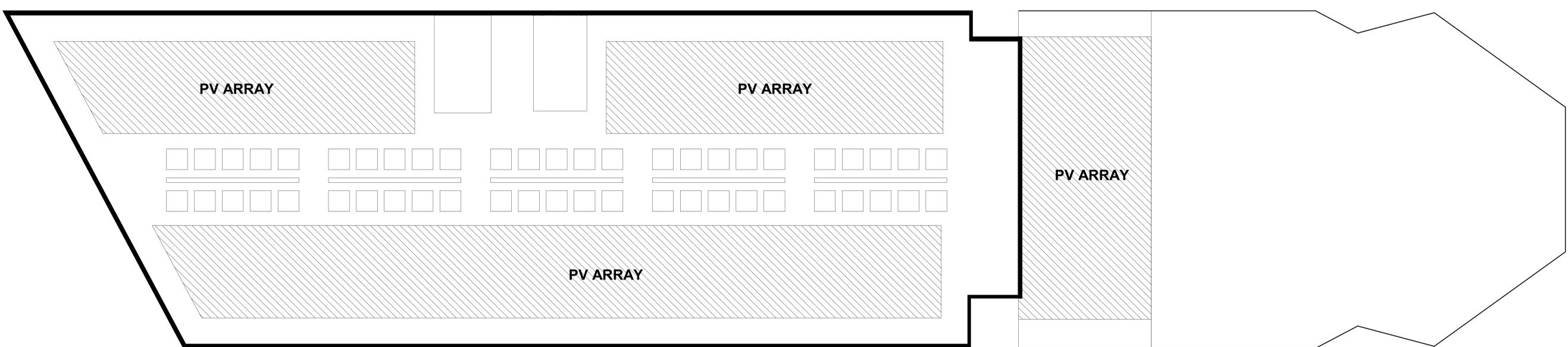
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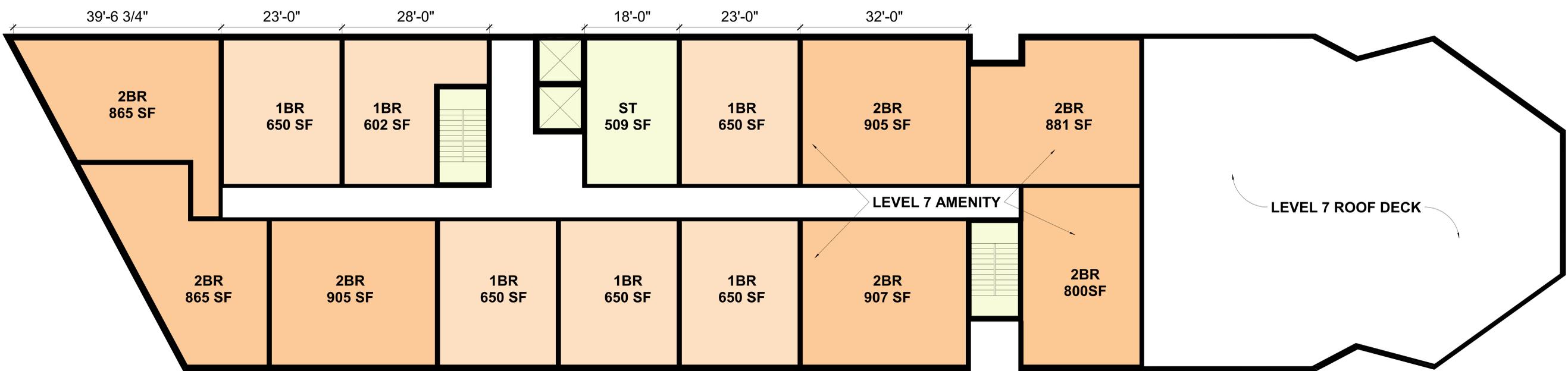
2 BUILDING 1 - LEVEL 1  
1/8" = 1'-0"



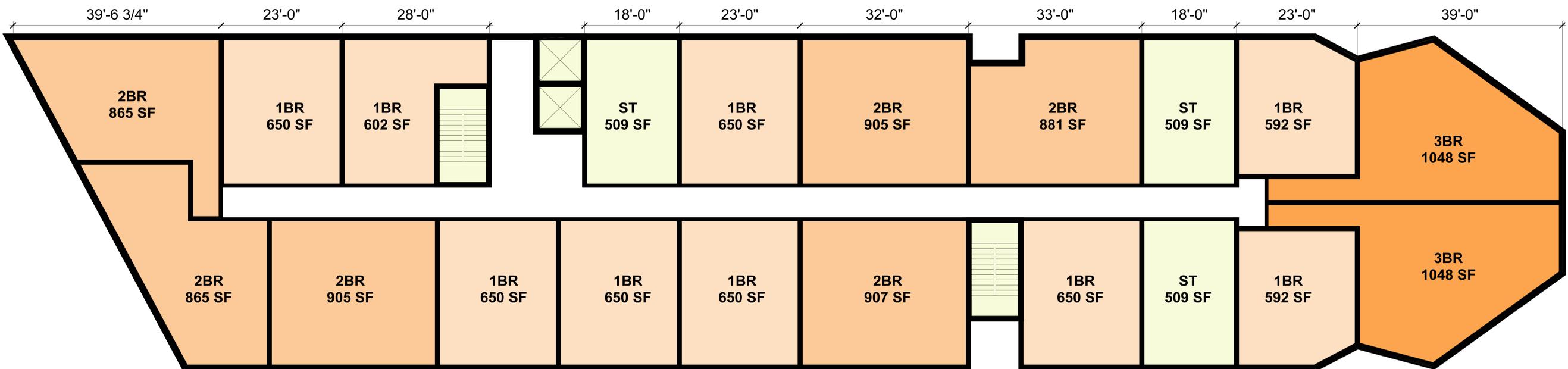
1 BUILDING 1 - PARKING PLAN  
1/8" = 1'-0"



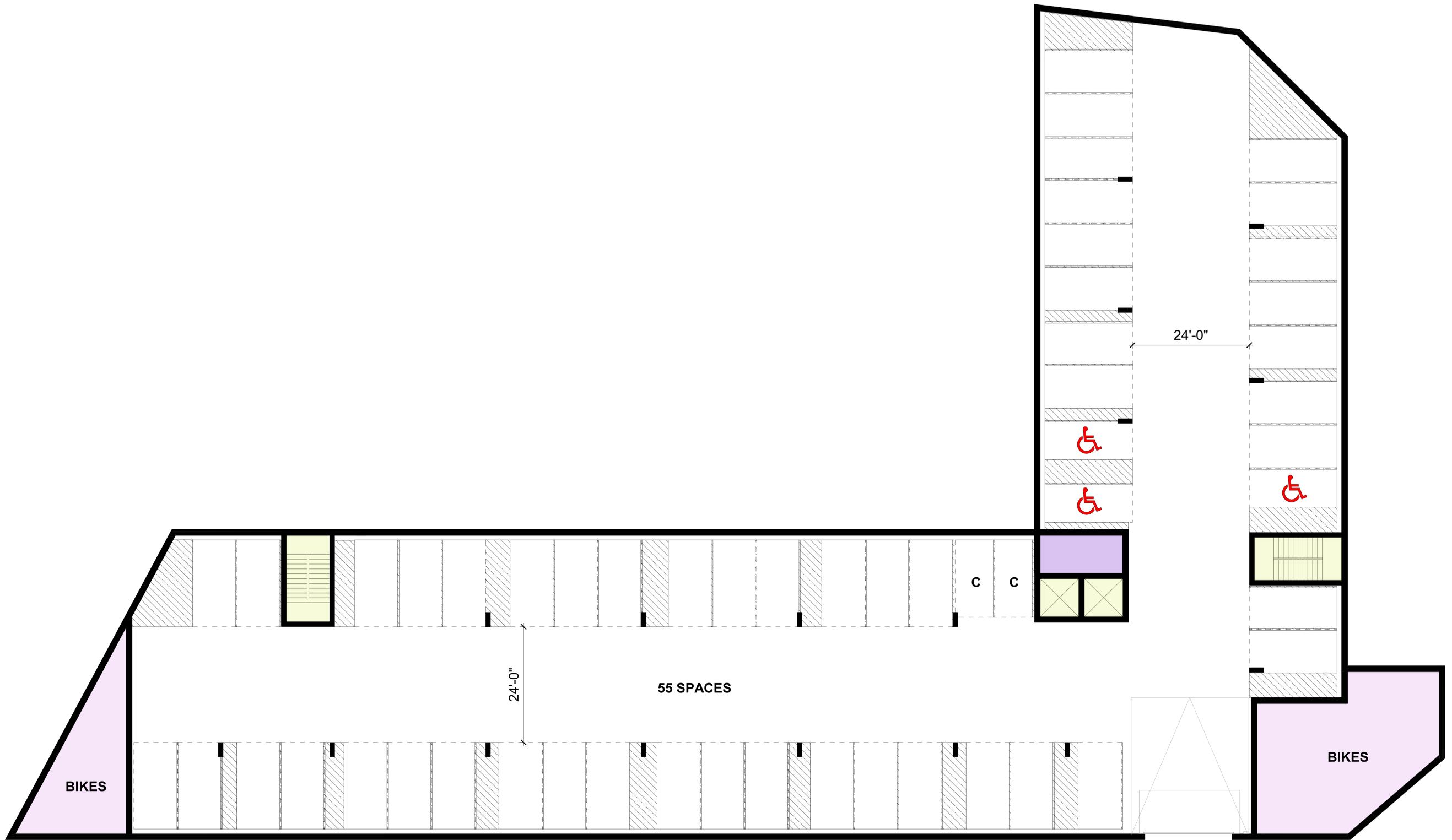
2 BUILDING 1 - ROOF PLAN  
1/8" = 1'-0"

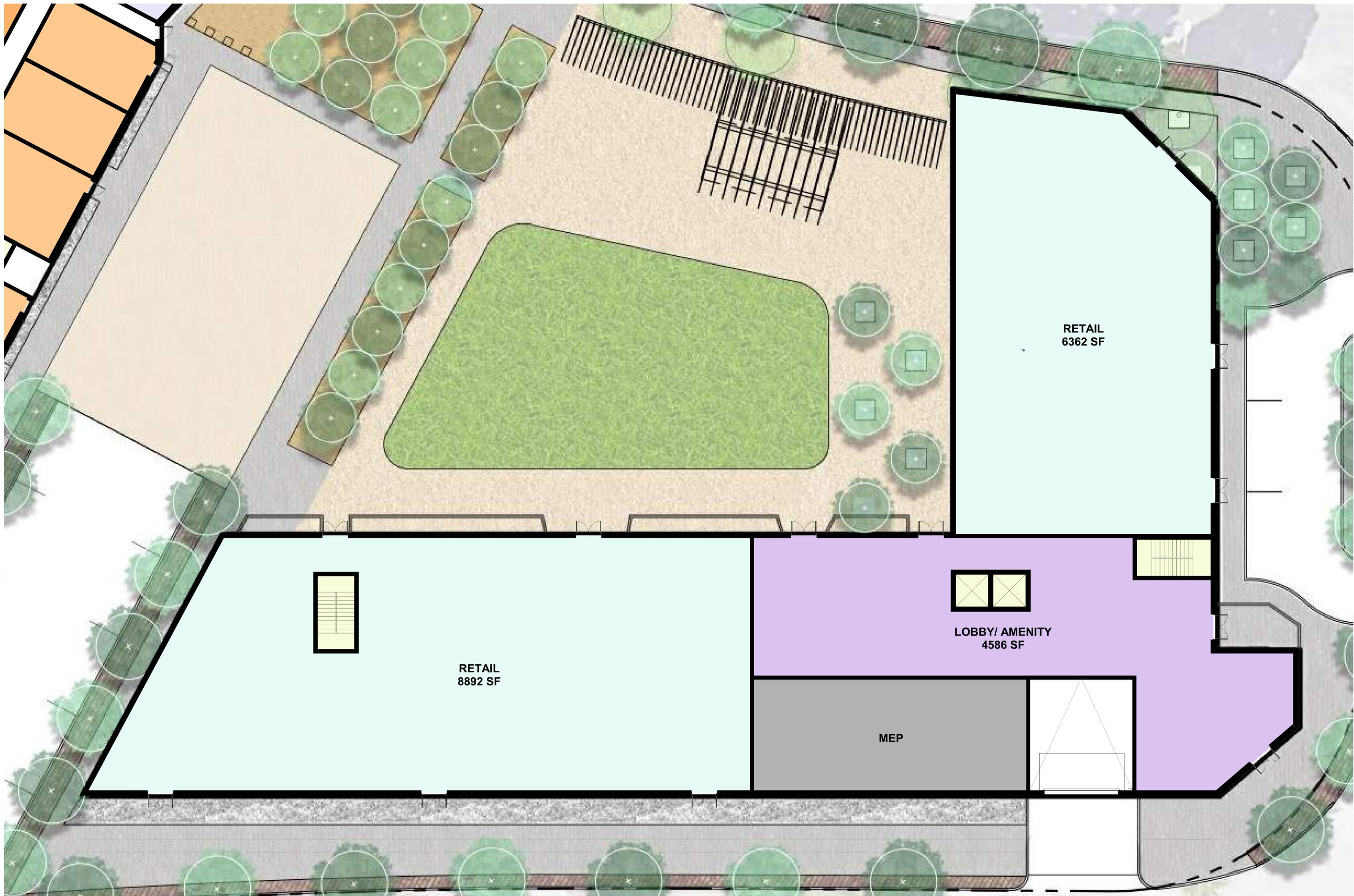


3 BUILDING 1 - TYPICAL UPPER LEVEL PLAN  
1/8" = 1'-0"



1 BUILDING 1 - TYPICAL LEVEL PLAN  
1/8" = 1'-0"



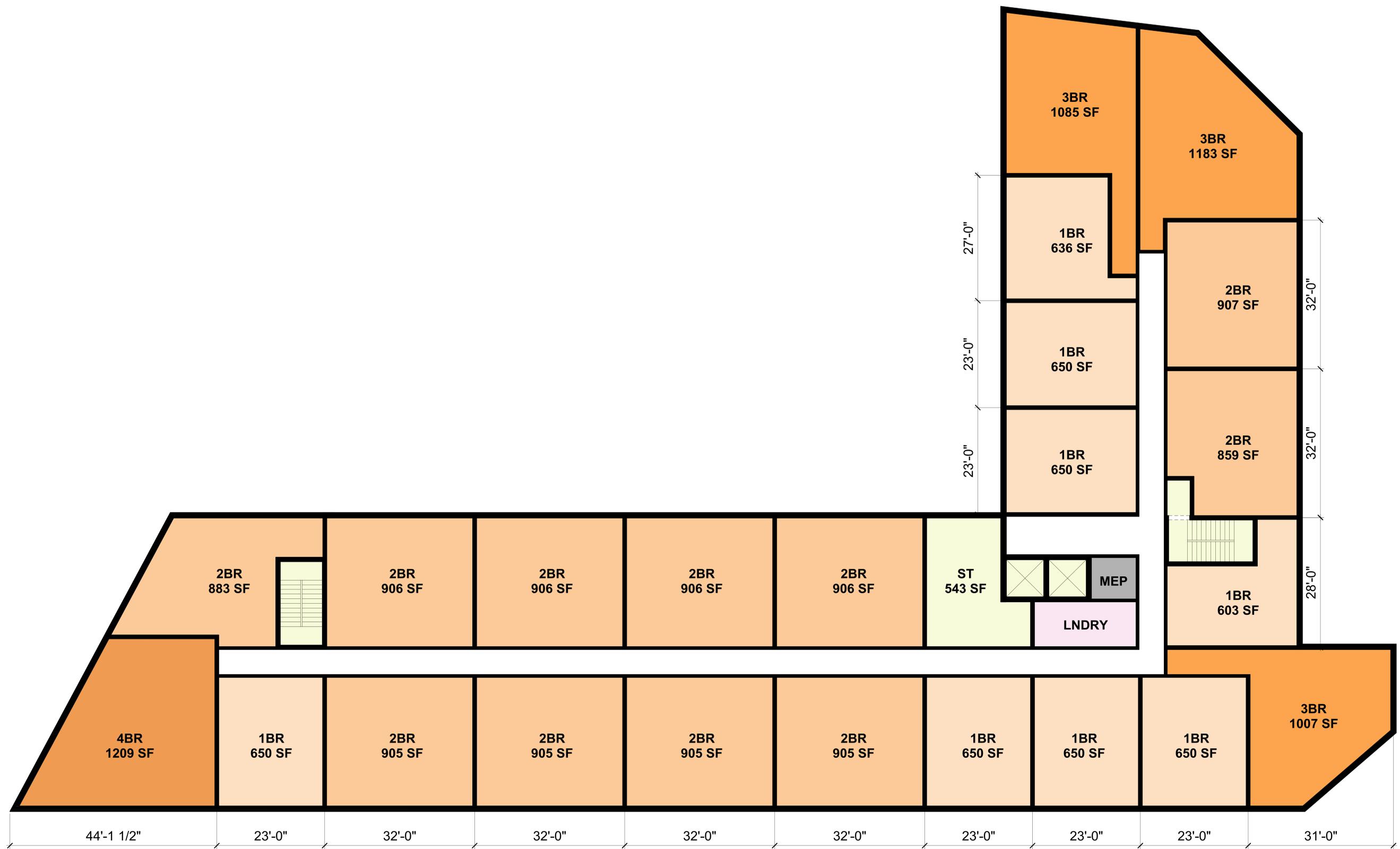


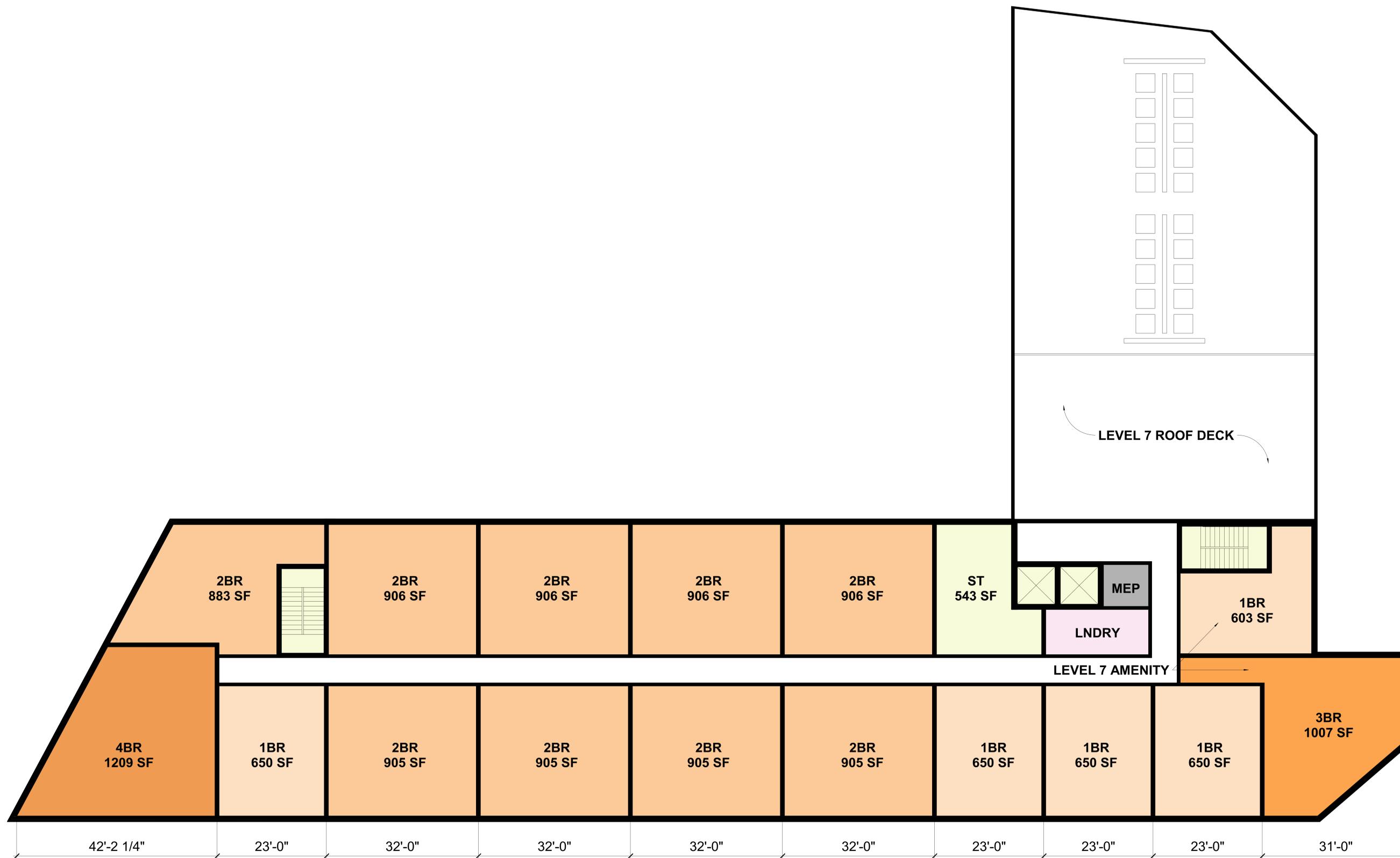
RETAIL  
6362 SF

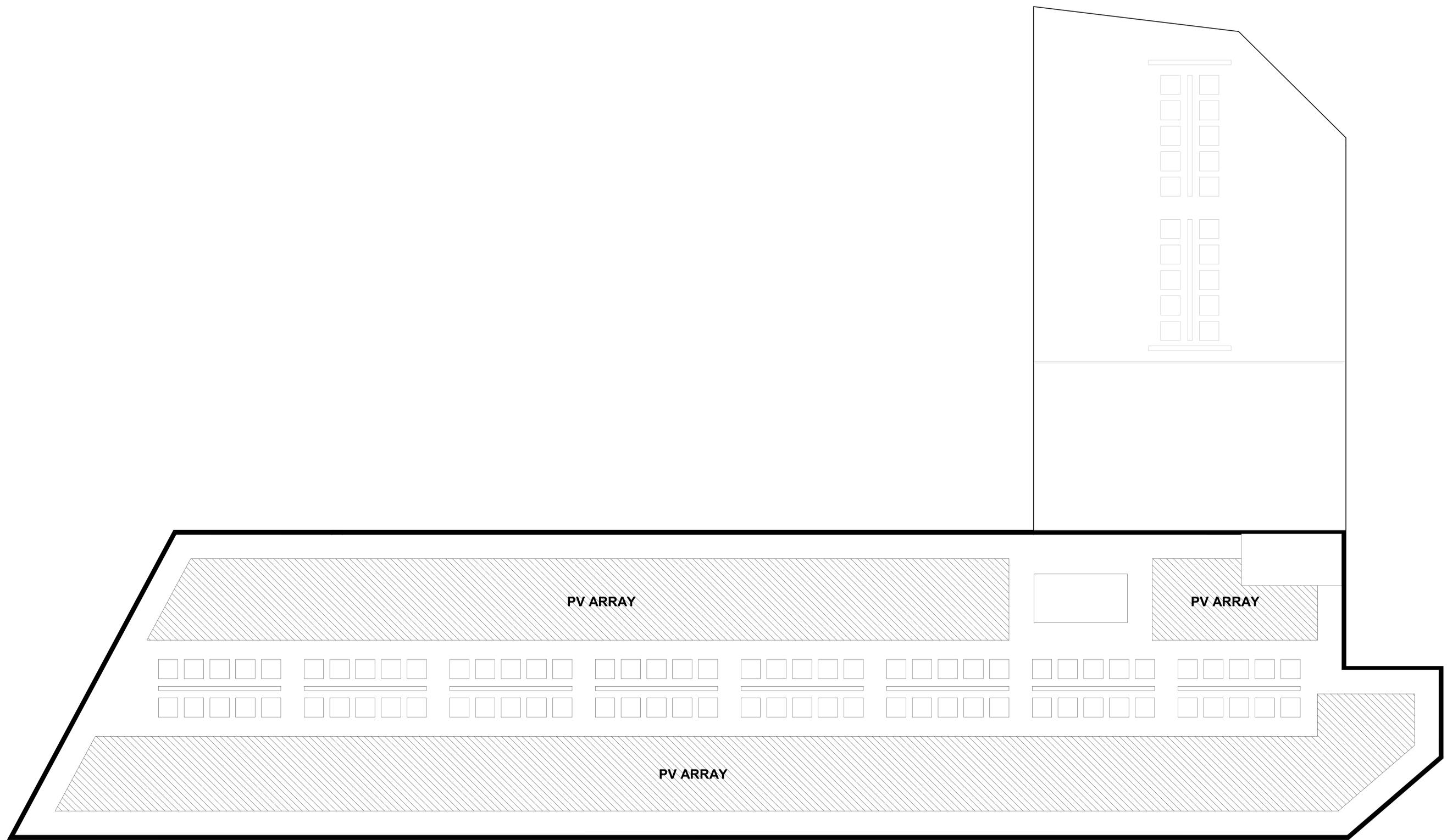
LOBBY/ AMENITY  
4586 SF

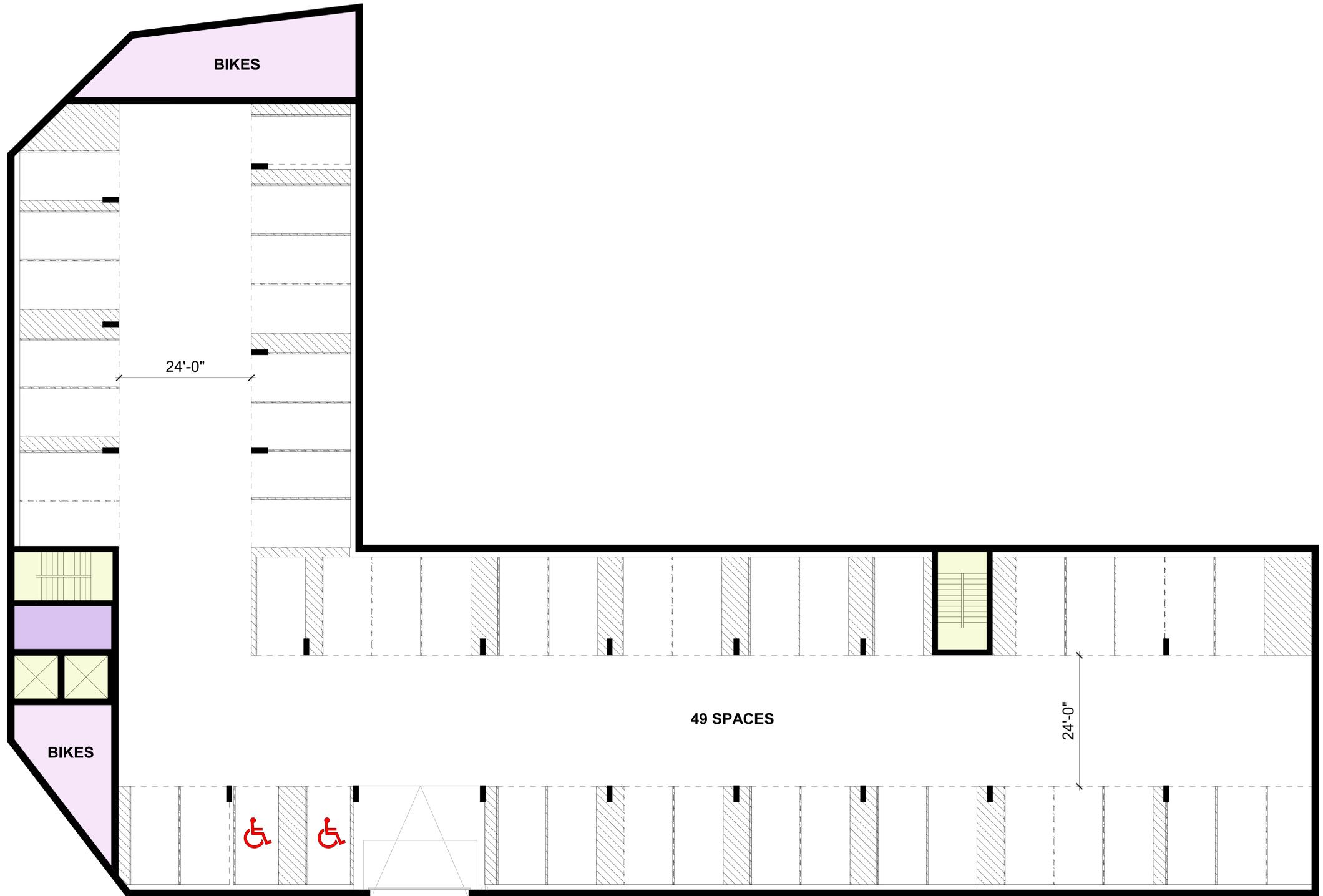
RETAIL  
8892 SF

MEP



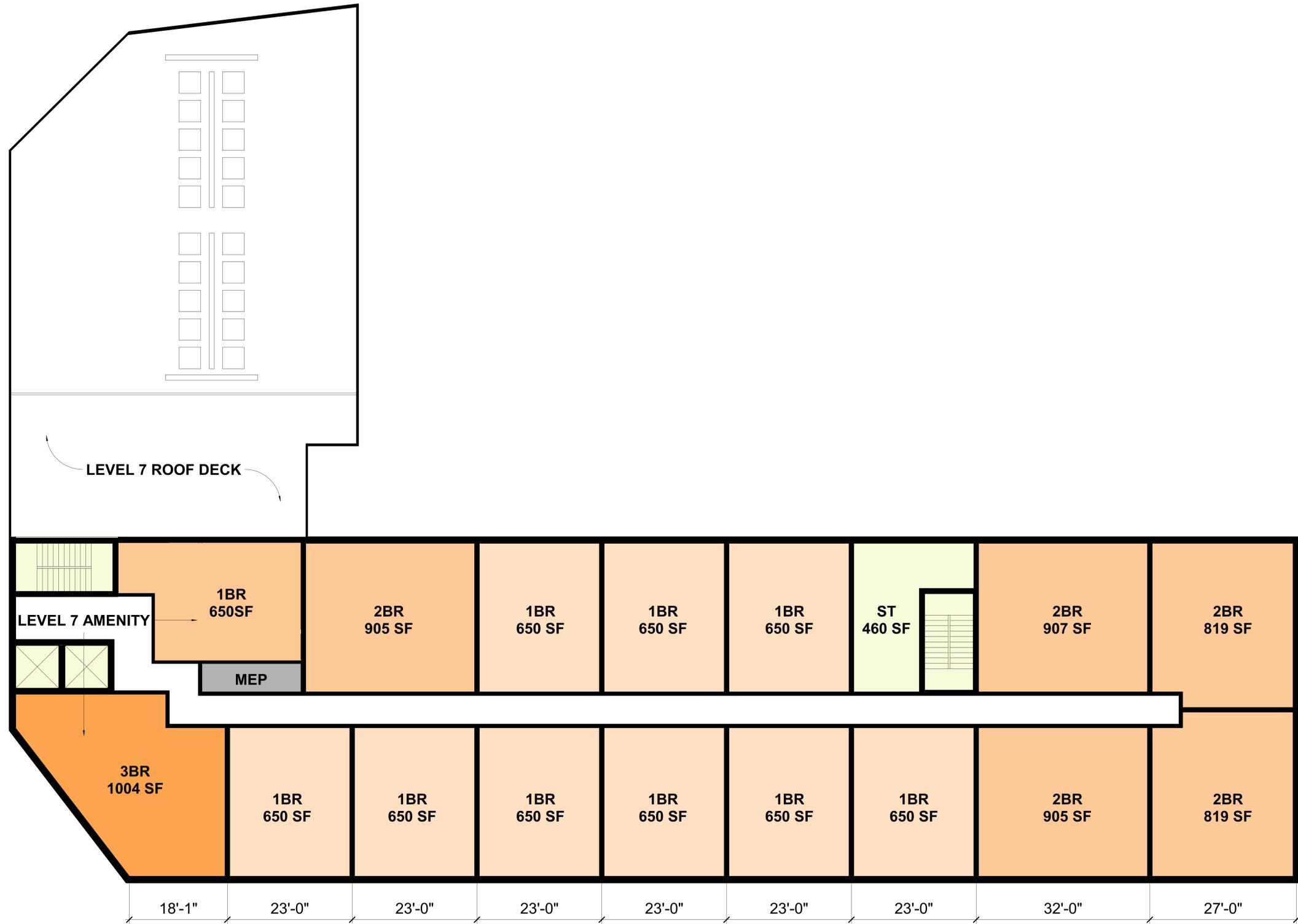


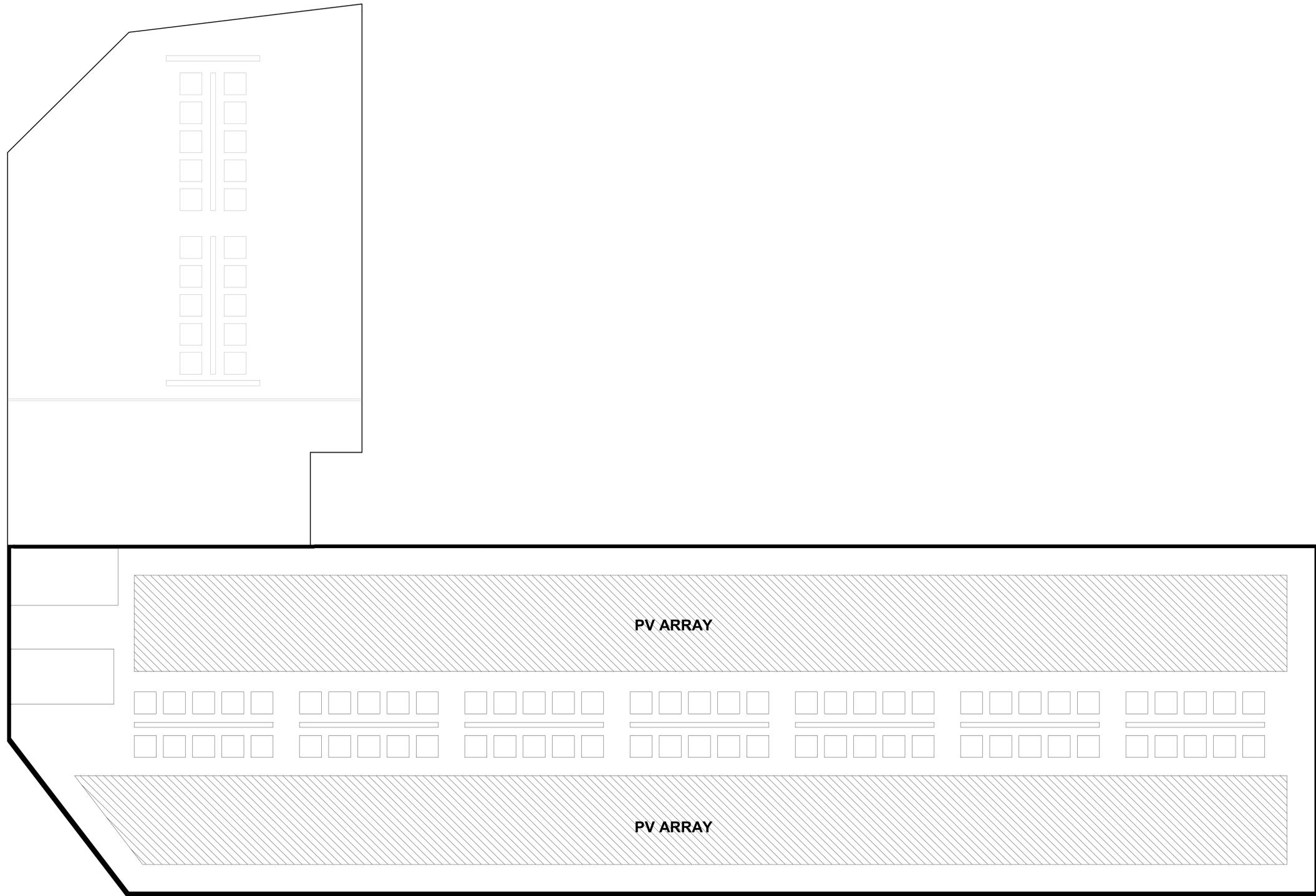


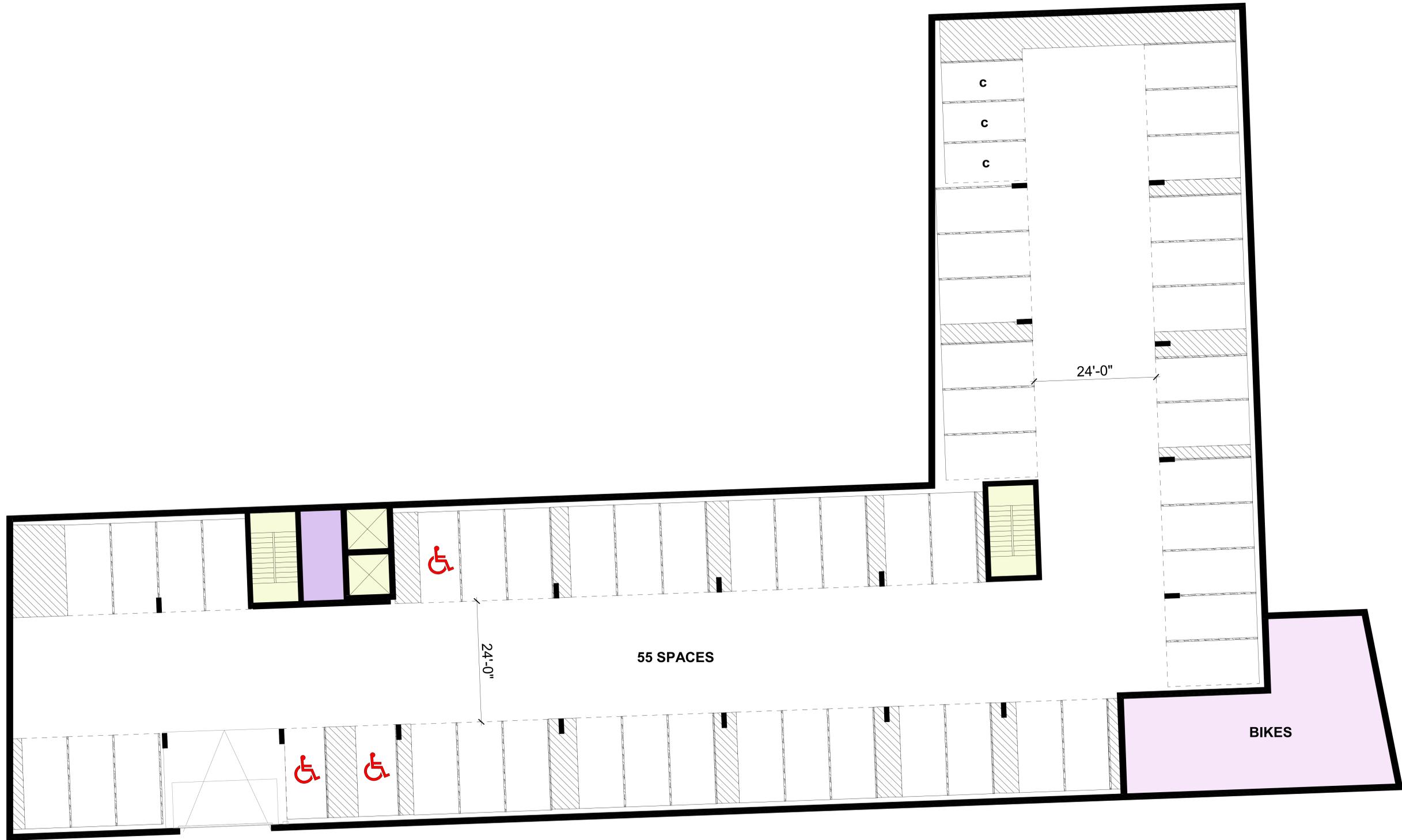








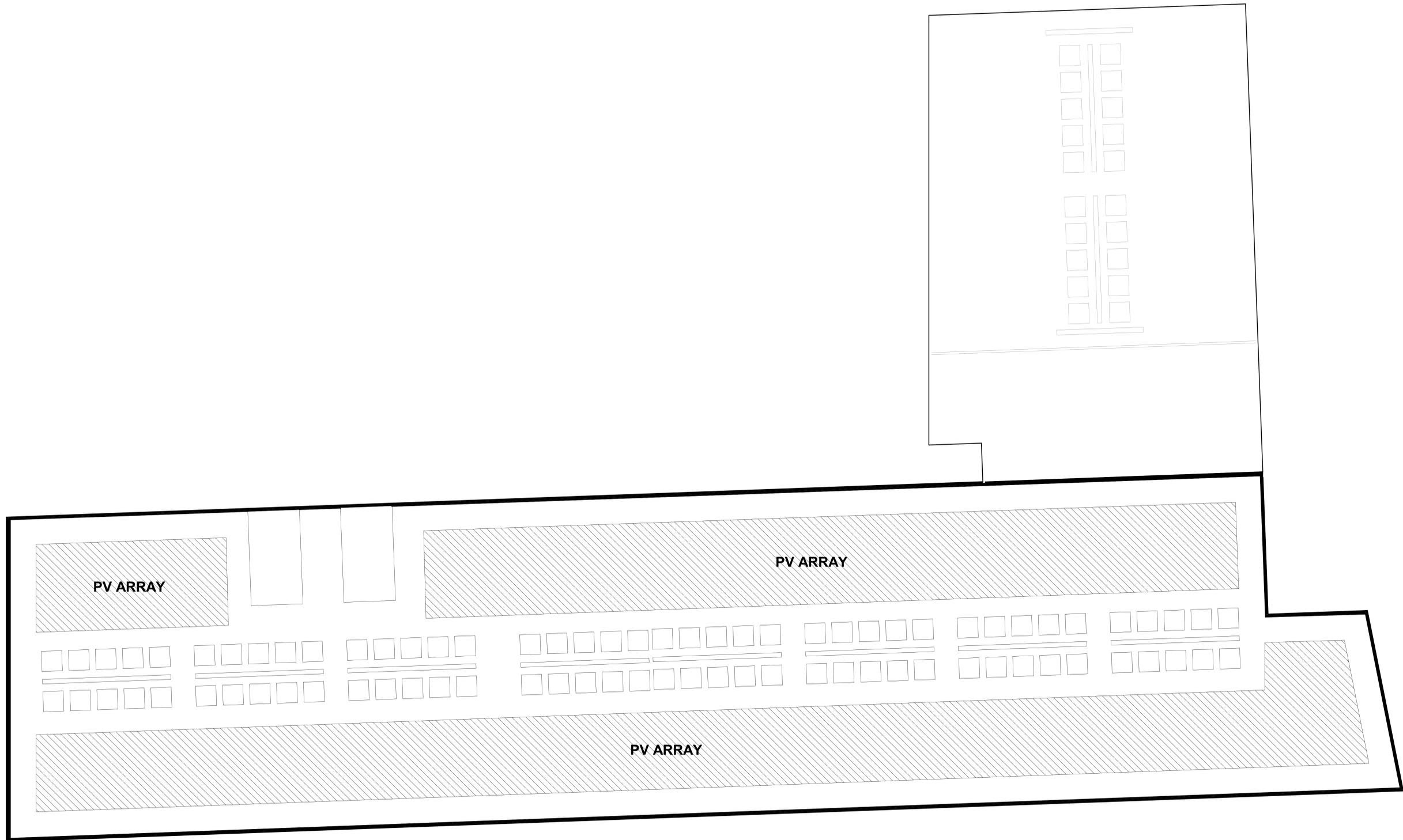














2 OVERALL NORTH ELEVATION  
1" = 20'-0"



1 OVERALL SOUTH ELEVATION  
1" = 20'-0"

PV ARRAY  
 WOOD LOOK SIDING  
 COMPOSITE METAL PANELS  
 BRICK MASONRY VENEER  
 GRAPHIC MURAL





- PV ARRAY
- WOOD LOOK SIDING
- COMPOSITE METAL PANELS
- BRICK MASONRY VENEER
- GRAPHIC MURAL



2 BUILDING 1 NORTH ELEVATION  
1/8" = 1'-0"



1 BUILDING 1 SOUTH ELEVATION  
1/8" = 1'-0"

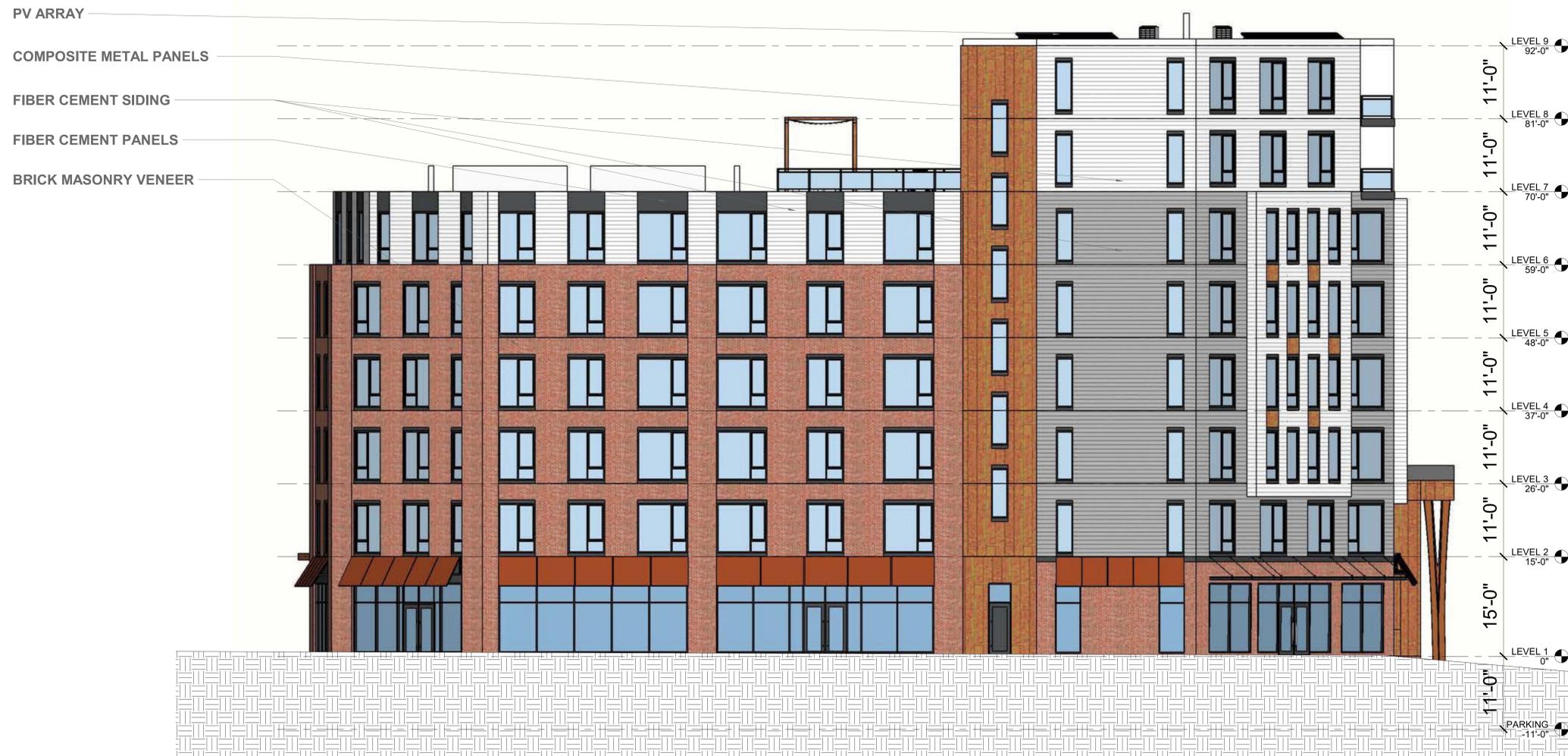








PV ARRAY  
 COMPOSITE METAL PANELS  
 BRICK MASONRY VENEER





- PV ARRAY
- WOOD LOOK SIDING
- FIBER CEMENT SIDING
- FIBER CEMENT PANELS
- BRICK MASONRY VENEER
- COMPOSITE METAL PANELS



PV ARRAY

WOOD LOOK SIDING

FIBER CEMENT SIDING

COMPOSITE METAL PANELS

BRICK MASONRY VENEER



LEVEL 9  
92'-0"

11'-0"

LEVEL 8  
81'-0"

11'-0"

LEVEL 7  
70'-0"

11'-0"

LEVEL 6  
59'-0"

11'-0"

LEVEL 5  
48'-0"

11'-0"

LEVEL 4  
37'-0"

11'-0"

LEVEL 3  
26'-0"

11'-0"

LEVEL 2  
15'-0"

15'-0"

LEVEL 1  
0'-0"

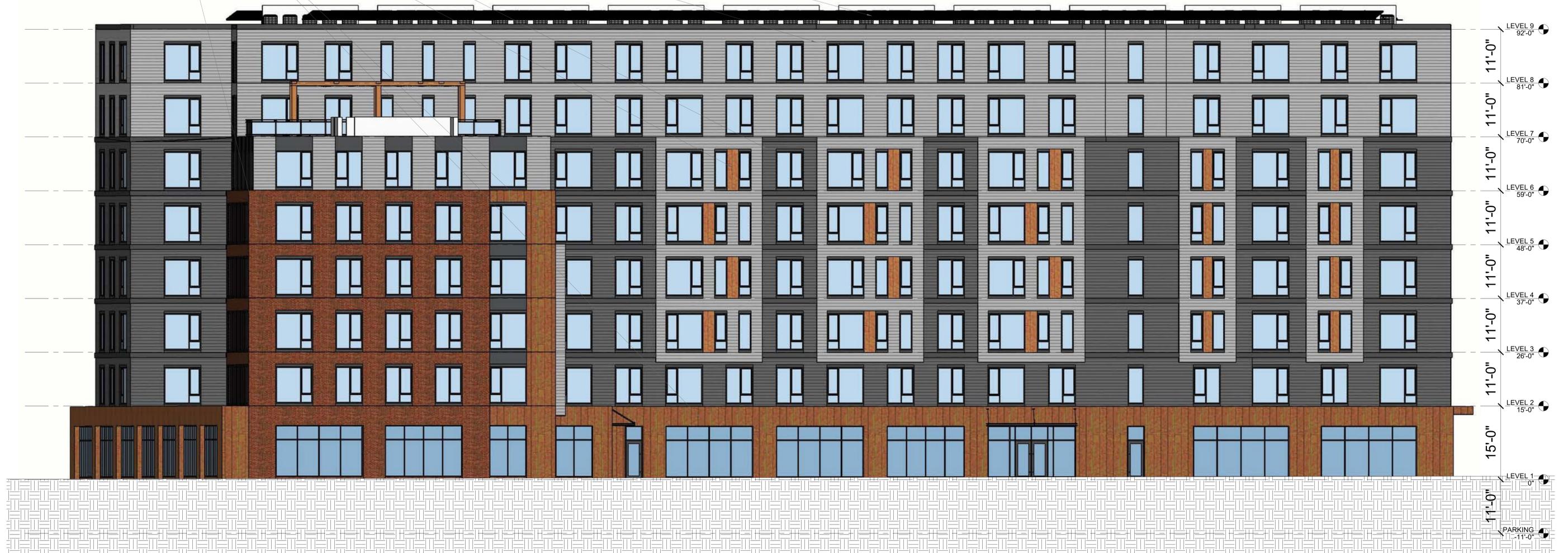
11'-0"

PARKING  
-11'-0"



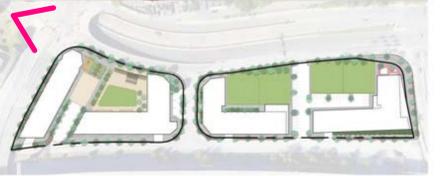


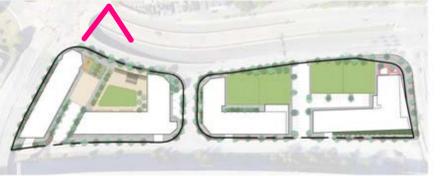
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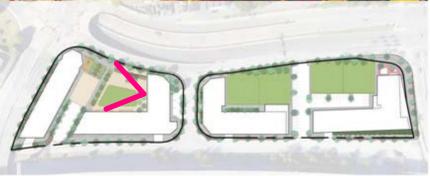


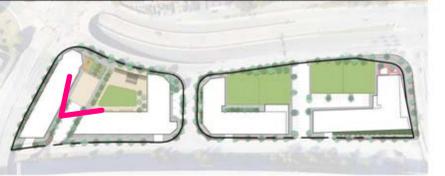
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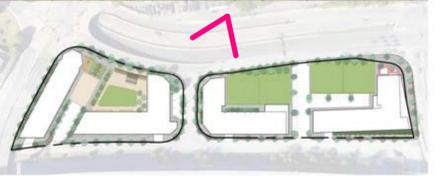












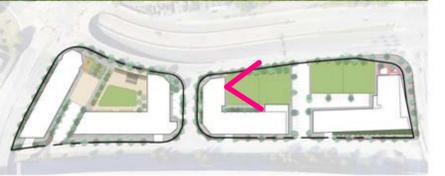
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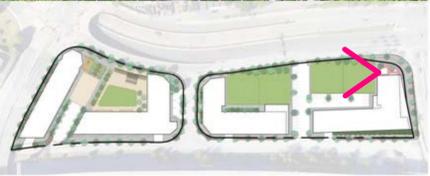
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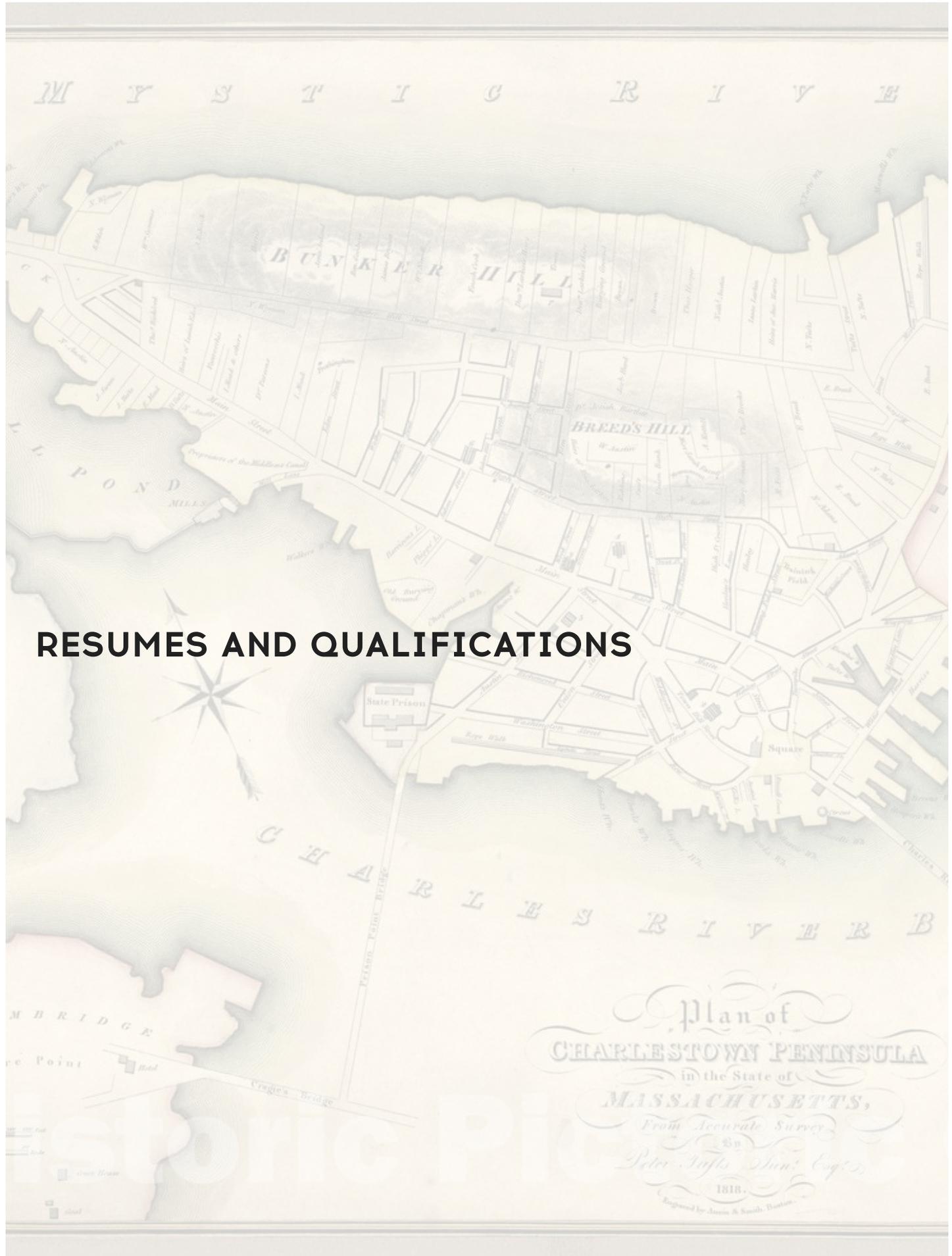
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EAST AND WEST SITE PERSPECTIVE ACROSS NEW RUTHERFORD





**RESUMES AND QUALIFICATIONS**



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# WHAT'S *really* IMPORTANT?



35 years

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9,500 units / over 600,000 sf retail + commercial

7,738 units under management

285 employees

Properties located in Massachusetts, New York, Connecticut & Rhode Island

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## FROM THE BEGINNING

SINCE 1987, TRINITY FINANCIAL has pursued a distinctive vision of real estate development based on a few core principles and a collaborative urban spirit. We love the challenge of each new project, but we're also energized by the broader issues of revitalizing neighborhoods, strengthening cities and fostering opportunity. In every case, we start from a clear understanding of how cities work, how we can help and why our work matters. As the project

unfolds, we translate this energy and understanding into structures and relationships that succeed financially, respect every constituency and enhance life for everyone they touch.

Revitalizing  
neighborhoods

Strengthening  
cities

Fostering  
opportunity

*Our Projects*

## 425 Grand Concourse - Bronx, NY



Total Development Cost: \$178 million  
Units: 277/Commercial + Retail - 47,000 SF  
Completed: 2022

The 425 Grand Concourse project is a 27-story, mixed-use, and mixed-income building located in the Bronx, N.Y. The project consists of 277 units of housing affordable to households from 30% to 100% of the Area Median Income. In addition to the residential component, the project consist of a Supermarket, a Community Health Clinic, an Educational Facility and a Cultural Center. On-site resident amenities include a

fitness center, tenant lounge, community room, a package delivery room, and an accessible roof deck.

The 425 Grand Concourse Project is also designed to meet Passive House Standards - aimed at providing superior energy efficiency within the building and helping to greatly reduce the project's carbon footprint. 425 Grand Concourse is one of the largest Passive House projects in North America and a major example of innovative and energy efficient development.



## Boston East - East Boston, MA



Total Development Cost: \$75 million

Units: 200

Completed: 2018

Boston East is a 200-unit luxury multifamily building on the East Boston waterfront. Trinity and its development partner, the East Boston Community Development Corporation, were designated developer of the vacant, city-owned site in December 2006 by the City of Boston's Department of Neighborhood Development. After undertaking a complex permitting process and weathering the financial recession, Boston East commenced construction in 2015.

Formerly a Brownfields waterfront site that was inaccessible to the community, Boston East is now a showcase property with private residences and public amenities available to the East Boston neighborhood. Boston East sits one block away from Central Square which offers commercial and retail uses, and four blocks away from Maverick Square and the MBTA's Blue Line to Downtown and Logan Airport.

The northern portion of the site is designated for housing. With highly designed finishes, striking amenities, and access to the water, Boston East continues the renaissance of the East Boston waterfront with thoughtfully

designed and programmed luxury apartments. Boston East residents enjoy breathtaking views from a building designed to evoke the sense of the historic wharfs of East Boston. With a welcoming entryway and gracious open spaces, the building is aesthetically appealing from both Border Street and the new Harborwalk that runs along the water edge of the site. The building includes a rooftop lounge, fitness center, pup spa, underground parking and outdoor amenities, including a generous landscaped yard that is programmed with outdoor lawn games, grills and a fire pit. A unique amenity of the building is its inclusion of a community art gallery that hosts public events and art shows and six affordable artist live/work/sell units on the ground floor. In 2017, Boston East was voted Boston's Best New Building by Curbed Boston.

The southern portion of the site will be dedicated to meeting the state's Designated Port Area (DPA) requirements. The East Boston Community Development Corporation is marketing the site to potential marine industrial users.

For more information visit [www.bostoneast.com](http://www.bostoneast.com)



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## Avenir - Boston, MA



Total Development Cost: \$150 million  
Units: 241/Retail - 30,000 SF  
Completed: 2009

Located in the heart of Boston's historic Bulfinch Triangle, Trinity developed Avenir as a 10-story mixed-use, transportation-oriented development.

The development is built directly above the North Station Green and Orange lines, and is the subject of a ground lease with the MBTA. The block-long building features retail on the ground floor, a 121-space parking garage on the second and third floors wrapped with housing, and 241 residential units, including 17 affordable units.

Although originally conceived of as a condominium building, Trinity re-positioned the project as luxury rental in the fall of 2006 enabling construction to commence in June 2007. Trinity was responsible for the successful on-schedule completion of the building in July 2009. Originally owned and operated by Archstone Smith REIT, Avenir is now operated by Equity Apartments.

With its stylish interiors and links to public transportation, Avenir Apartments has become one of Boston's most appealing places to live.



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## 855 Courtlandt - Bronx, NY



Total Development Cost: \$66 million

Units: 152/Retail - 21,400 SF

Completed: 2016

The 855 Courtlandt (formerly known as 3160 Park Ave.) project is an exciting mixed-use, mixed-income development that has turned a vacant and underutilized parcel in the Bronx into a vibrant and economically impactful addition to the community by providing apartments affordable to households from 40% to 100% of the Area Median Income. The site is located within the Melrose Commons Urban Renewal Area established by the New York City Department of Housing Preservation and Development (HPD) with its community partners. The site was one of the last undeveloped parcels within the Urban Renewal Area and offered a unique opportunity to put the finishing touches on this ambitious planning effort. 855 Courtlandt is a highly energy-efficient building that exceeds Enterprise Green Communities Criteria.

## The Carruth - Dorchester, MA



Total Development Cost: \$52.6 million  
Units: 74 rental, 42 condominium/Retail - 10,500 SF  
Completed: 2008

The Carruth is a transit-oriented development that involves the construction of 116 units of mixed-income housing and approximately 10,000 square feet of neighborhood retail on a site directly adjacent to the MBTA's Ashmont Peabody Square Station in the heart of historic Peabody Square. The development parcel is the subject of a long-term ground lease between Trinity and the MBTA. The building is a six-story structure with one floor of neighborhood retail and five stories of housing. Floors 2-4 include 74 affordable rental units and floors 5 and 6 include 42 market rate condominiums. The first floor retail is occupied by Tavolo, an Italian restaurant, a Chiropractic office, a college preparatory program for urban youth, and an innovative banking concept in which a branch of Eastern Bank is integrated with Ripple Cafe, an independent coffee shop.

Construction was completed in the summer of 2008.



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## Carlton Wharf - East Boston, MA



Total Development Cost: \$7 million

Units: 30

Completed: 2005

Carlton Wharf was developed by Trinity Financial with development partner East Boston Community Development Corporation. This project played a critical role in the revitalization of the East Boston waterfront with 30-units of for-sale workforce housing available to households earning between 80% and 120% of area median income.

The project involved the complex Chapter 91 waterfront permitting process that Trinity completed in less than ten months. The seven story building has elevator access to all units and includes a mix of one-, two- and three-bedroom floorplans with magnificent views of Boston Harbor and the city skyline.

*Carlton Wharf site - before*



*View of Boston skyline from Carlton Wharf*



## Arlington Point - Lawrence, MA



Total Development Cost: \$46 million

Units: 102

Completed: 2019

Van Brodie Mill is a project within the multi-phase redevelopment effort of Lawrence's 34-acre Arlington Mills Smart Growth Overlay District. This adaptive reuse project, which is also located in the federally designated Arlington Mills Historic District, transformed a vacant mill into 102 units of mixed-income rental housing, while remediating a Brownfields site. Initially constructed in 1919, the Van Brodie Mill was originally home to a facility that manufactured yarn for wool and flannel products. By the 1950s, the Van Brodie Mill was operated by a different company that shifted production to food products, including packaged breakfast cereals and rations for the military. Van Brodie Mill is Trinity's first project in Lawrence.

Van Brodie Mill, now known as Arlington Point, serves residents with a broad range of incomes. Of the property's 102 units, 16 are for very low-income households earning at or below 30% of the area median income (AMI), 67 for low-income families earning at or below 60% of AMI, and 19 for Workforce Housing units for households earning between 61% and 80% of AMI. The completed project contains a mix of studio apartments, one-, two- and three-bedroom apartment homes.

Trinity leveraged a combination of tax credit equity sources – 9% low-income housing tax credits (LIHTCs), 4% LIHTCs, state LIHTCs, federal historic tax credits, and state historic tax credits – to finance the majority of the cost of redeveloping Van Brodie Mill. The balance of the funding package included a permanent mortgage and Workforce Housing funds from MassHousing, as well as Affordable Housing Trust Fund and Housing Stabilization Funds from DHCD. TD Bank provided the project's construction financing.

For more information visit [www.arlingtonpoint.net](http://www.arlingtonpoint.net)



## Appleton Mills - Lowell, MA



Total Development Cost: \$64 million

Units: 130

Completed: 2011

Phase One of the Hamilton Canal District commenced with the \$64 million historic restoration of the Appleton Mills complex into 130 units of affordable artist housing. For years, the deteriorated, vacant structure loomed ominously over the gateway to the City, and set a negative tone for visitors to the Downtown and other Lowell venues, including the Lowell National Historic Park. Accordingly, its restoration was a high priority for the City, the local office of the National Park Service, and the Patrick Administration, which designated the Hamilton Canal redevelopment area as a priority Growth District Initiative (GDI).

While the building was significantly deteriorated, the masonry walls were sound and much of the structure was salvageable. In areas where masonry had previously been demolished, new infill walls were designed with clearly contemporary cladding in contrast to historic materials. The restored building includes a five-story, 30-foot wide atrium, to draw sunlight into common areas and create a dynamic architectural feature. The building's green components include a green roof, highly efficient mechanical system components and energy star appliances.

The building was designed and marketed to appeal to artists and other creative professionals, consistent with the City's efforts to attract and retain such individuals as part of its downtown development strategy. A preference for artists was established, subject to Fair Housing guidelines, and units are available to all households meeting income limitations and credit requirements. The loft style units range in size from 500 to 1,400 square feet, and include a mix of unit types and layouts, including studios,



one bedroom flats, one bedroom townhouses, two bedroom flats and two bedroom townhouses. A number of units with ground floor access include artist sell-space. While the units feature high ceilings and considerable light, the unit finishes are simple and durable.

The atrium is designed as a gallery/exhibit space and is conducive to community events such as open studios, film screenings and readings. Common areas in the building include a fitness area, laundry/community lounge, roof deck, artist workshop space and a landscaped mill yard. The elevators, doorways and loading docks are specified to accommodate larger items. The City allocated parking for Appleton Mills residents in the City's new Early Garage, which is across Jackson Street. Today the Appleton Mills is home to a thriving creative arts community and represents the largest affordable artist housing development in the Commonwealth.

## Bristol Commons & Lenox Green - Taunton, MA



Total Development Cost: \$65 million

Units: 160

Completed: 2014

In May 2011, the Taunton Housing Authority (THA) and Trinity were successfully awarded a \$22 Million HOPE VI Revitalization grant from the U.S. Department of Housing & Urban Development (HUD). In addition to the HOPE VI Grant, private equity resources and other public funds were used to rehabilitate the distressed 150-unit Fairfax Gardens public housing development.

Fairfax Gardens was built in 1951 as an isolated, 150-unit barracks-style development in the middle of a low density, single-family neighborhood. The units were clustered on a third of the 43-acre site, leaving the remaining acreage open as meadows and wetlands. The development's infrastructure, utilities, and many building components are original to the site and were outdated and in need of complete replacement. The buildings were neither energy-efficient nor accessible; the units cramped and much smaller than current space standards dictated; and mold, pests, and deteriorated finishes were problems throughout. The distressed conditions at Fairfax Gardens not only negatively impacted residents' health and quality of life, but had also brought down the property values of nearby homes. The award of the HOPE VI grant allowed for the complete demolition and reconstruction of the existing Fairfax Gardens.

The new project, renamed Bristol Commons, de-densified the existing site replacing the 150 units across two distinct sites for a newly redeveloped total of 160 units. The redeveloped site contains 80 townhomes and eight duplex units, as well as new site infrastructure, a new community center, community gardens, green space, a basketball court and other community amenities. The 88 units in the Bristol Commons phase include one-, two-, three-, and four-bedroom units and 78 of the units are affordable to households earning between 0-60% of the Taunton area median income. Returning residents were given first priority to return to the newly created



development. The majority of the families are considered to be extremely low income and require operating subsidies from the THA. These operating subsidies allow all residents to pay only 30% of their income as rent. The remaining ten units are market rate units and have no income restriction assigned to them.

The second site developed is located in downtown Taunton in a transit oriented development (TOD) overlay district. The Parcel 6A-2 site is adjacent to public transit and other services. The Parcel 6A-2 site, named Lenox Green, has new site infrastructure, eighteen townhomes, a three story 54-unit mid-rise building with community space/management offices, raised community planting beds, walking paths connecting to local services, a playground and other community amenities. The 72 units in the Lenox Green include one-, two- and three-bedroom units and all 72 of the units are affordable to households earning between 0-60% of the Taunton area median income. The same operating subsidies offered to residents of the Bristol Commons site are also available to the residents of the Lenox Green site.

The project had its financial closing in July of 2012 and was completed in the spring of 2014.

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## Brookfield Commons - White Plains, NY



Total Development Cost: \$63 million

Units: 129

Phase 2 Completed: 2022

Brookfield Commons consists of the redevelopment of the 9.3 acre Winbrook Houses public housing development located in downtown White Plains, NY. Trinity Financial and co-developer, the White Plains Housing Authority have partnered to undertake the redevelopment of the site. Brookfield Commons consists of high quality, modern apartments with mixed income tiers, including workforce housing units, to promote a diversity of incomes. The project is being constructed in phases to ensure that existing Winbrook Houses residents are not involuntarily displaced or relocated outside of the Brookfield Commons campus. The existing tenants, community stakeholders, and the City of White Plains were all engaged and provided essential feedback during the planning process.

The current phase, The Overture at Brookfield Commons (Brookfield Commons Phase II), consists of the new construction of a 9 story, 147,229 sq ft mixed-use building with 129 units, and 2,074 square feet of community facility space. The project also contains 77 at-grade parking spaces. This multi-family building consists of 40 one bedrooms, 63 two bedrooms, 23 three bedrooms, 2 four bedrooms and 1 superintendent's unit. There is a fitness room, children's playroom and a tenant lounge and terrace. The subject building includes units for existing Winbrook Houses residents, LIHTC units and workforce housing units. There is a vacant, existing Winbrook building which will be demolished clearing the way for the construction of the Phase II building. The project has achieved NYSERDA Energy Star & Enterprise Green Communities Certification.



## Courthouse Lofts - Worcester, MA



Total Development Cost: \$71.5 million

Units: 118

Completed: 2021

The Worcester Courthouse Project is the certified historic rehabilitation and adaptive re-use of the approximately 214,000 square-foot Old Worcester County Courthouse, originally built in 1845, into a new multifamily mixed income residence, with ancillary amenity space throughout. Upon construction completion, the repurposed building will contain roughly 114 residential units in the form of Studio, 1-, 2-, and 3-bedroom units. Located at 2 Main Street, the redevelopment of the Courthouse is part of a larger revitalization of the Historic Lincoln Square district, which sits just north of Downtown Worcester and the City center.



The primary design approach for Courthouse Lofts is to preserve the character and beauty of the existing building while creating an efficient layout and maximizing the residential square footage within. The design team has created floor plans that contain new comfortable, character-rich apartments while preserving the building's most impressive public spaces. These spaces include two of the most grand historic courtrooms that will be converted into amenity spaces, as well as the main entry hall of the building with its stunning marble columns and curving stone staircases.

The project includes a fitness center, clubhouse lounge, gallery space, and interior bicycle and resident storage. The site will also feature ample parking, landscaping restoration, and outdoor resident gathering spaces. An approximately 2,500 square foot retail/gallery space is also planned.

The income mix of the project is expected to be 50% market-rate (with some units unrestricted and some at a workforce tier of 120% of AMI) and 50% affordable to households below 60% of area median income.



## Major Taylor Museum - Worcester, MA



The Major Taylor Museum is an educational institution, housed within Courthouse Lofts, that honors the legacy of Marshall “Major” Taylor, one of Worcester’s most notable athletes. Winning the 1-mile cycling sprint in 1899, Taylor becoming the first African American world champion in a professional sport. Each year, a cycling race occurs nearby on George Street to commemorate this feat. The museum, a collaboration between the Major Taylor Association, Worcester Historical Museum, and Trinity Financial, tells the story of Taylor’s life and career as a world-famous athlete, advocate for social and racial equality, and Worcester resident for over three decades. The space serves to educate the public, host communal gatherings on relevant social issues, and add to the social and cultural fabric that exists in Worcester today.



## Davenport Commons & Shawmut Estates - Boston, MA



Total Development Cost: \$50 million  
Units: 125 student housing, 75 condominium/retail - 2,100 SF  
Completed: 2001

In 2001, Trinity and a local community development corporation completed Davenport Commons, a 200-unit, \$50 million housing program in Lower Roxbury.

The project consisted of 125 units of housing that are leased to Northeastern University as student housing and 75 units of homeownership housing, and 2,100 square feet of ground floor commercial space.

The project was sold out nearly eight months ahead of schedule including the market-rate homes that were sold to households with incomes up to 175% of area median income.

The homeownership units are accessed from the street, with the lower duplex units having individual entries complete with stoops reflective of the surrounding South End neighborhood. The first floor duplex units have some backyard space. All of the homeownership units have at-grade parking spaces.



## Enterprise Center - Brockton, MA



Total Development Cost: \$100 million  
Units: 215 rental housing  
10,000 square feet of retail space  
52,000 square feet of commercial space  
Completed: 2015 (phase one)

The Enterprise Center project is a vibrant, mixed-use development re-creating a significant city block and its street edges in downtown Brockton. The transit-oriented development sits within walking distance of the commuter rail station in downtown Brockton, and within walking distance of the city's center. The new development is occurring in two phases and will restore several historic buildings for retail, commercial and housing uses. The block is bounded by Centre Street, Main Street, Montello Street and Petronelli Way and has suffered from considerable blight and physical deterioration.

Trinity's development will be the catalyst to bring significant reinvestment back to downtown Brockton and reinvigorate what was once a bustling downtown location. The project is designed to comply with the goals of the Downtown Brockton Smart Growth Overlay District (DBSGOD) and was permitted using the Commonwealth's 40R Permitting Process. The project consists of two phases of housing and the historic rehabilitation of an existing commercial building. The project is funded using Historic Tax Credits, Low Income Housing Tax Credits, private tax credit equity and other public and private resources.

Trinity has worked with the community to develop a multi-phase development program reflective of the goals of the City and its residents. The first phase of development consisted of 113 units of housing in new construction along Centre Street. A section of the new construction, named Enso Flats, includes 42 artist live/work units which are affordable to artists earning up to 60% of the Area Median Income (AMI). The remaining 71 units of new construction, named Centre50, include a mix of affordable and market rate units. In addition to the housing there is space for ground floor retail, artist gallery space, green space and parking.

Enterprise Main (the existing Enterprise Building) has been historically rehabilitated to create 52,000 square feet of new commercial and office space.

The second phase of development consists of 111 units of housing, again a mix of affordable and market rate units and additional green space.

Upon completion this project will consist of 226 units of housing, 10,000 square feet of retail and artist exhibition space, and 52,000 square feet of commercial space.



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## Foundry Square - Newburyport, MA



Total Development Cost: \$7.2 million

Units: 20

Completed: 2006

In 2002, the City of Newburyport designated Trinity Financial developer of the former Newburyport Department of Public Works site with the goal of bringing affordable home ownership opportunities to the city. Trinity devised a plan to transform the blighted and vacant site into a vibrant community consistent in design, material and landscaping with the finest neighborhoods in Newburyport.

Foundry Square entailed the development of 20 units of for-sale housing, 13 of which are affordable to first time homebuyers earning below 80% of the area median income. The remaining seven units were sold at market rates. The plan called for one-, two-, and three-bedroom units in four townhouse structures built around a landscaped common. The building on the north side of the square is evocative of the former Albert Russell & Sons Foundry, a landmark building in Newburyport which was once located on the site.



## Glenark Mills & Glenark Oaks- Woonsocket, RI



Total Development Cost: \$13 million

Units: 89

Completed: 2013

Glenark Mills and Glenark Oaks are sister properties located approximately a half-mile from one another in the Constitution Hill neighborhood of Woonsocket, Rhode Island. Situated along the banks of the Blackstone River, Glenark Mills was built in 1865 as a textile mill and was later converted to 67 units of residential housing. Glenark Oaks was built in 1990 and contains a total of 22 units.

In 2011, Trinity Financial was selected by Rhode Island Housing as the developer to acquire, renovate and revitalize both Glenark Mills and Glenark Oaks. Working with Rhode-Island-based contractors, Trinity invested \$13 million in redeveloping and modernizing both properties. The buildings' common areas were updated and the apartment interiors were refurbished with new kitchens and bathrooms.

The redevelopment of Glenark Mills and Glenark Oaks were financed through the sale of low-income housing tax credits and historic tax credits. All 89 of the project's units are affordable to households earning up to 60% of area median income. Other financing sources include HOME Funds and state housing resources from Rhode Island Housing.

completed in December of 2013, Glenark Mills and Glenark Oaks represents Trinity's first project in Rhode Island since the completion of Newport Heights HOPE VI in 2006.



## Franklin Hill - Dorchester, MA



Total Development Cost: \$95 million

Units: 266

Completed: 2009

Franklin Hill was a 366-unit family public housing development located in Dorchester, MA that was severely physically distressed and, arguably, one of the least safe developments in the Boston Housing Authority portfolio. The BHA applied for, but did not receive, a HOPE VI implementation grant for the redevelopment of this site and decided to move forward in redeveloping Franklin Hill without HOPE VI funds.

Trinity Financial was selected to be the developer for this project in the summer of 2005. The first phase of redevelopment was completed in February 2008 and created 114 units of affordable rental housing. Trinity closed on the second phase of development in April 2008 and completed construction in October 2009. Phase 2 created an additional 152 units of affordable rental housing. The total development program called for the new construction of 157 replacement public housing rental units, 67 Section 8 project-based voucher rental units and 42 low income housing tax credit only units for total of 266 rental units. Funding for this 266-unit public housing redevelopment effort included \$17 million of Replacement Housing Factor funds from the BHA, \$71 million in LIHTC equity and additional funding from the Commonwealth of Massachusetts and the City of Boston. The redevelopment plan reconfigured the site with a new street layout, resulting in more traditional city blocks and better integration with the neighboring community. Additionally, the new development offers a variety of housing types better suited for this diverse population. Residents are now able to choose from larger townhouse style units with individual backyards or the modern convenience of an elevated mid-rise building. The redeveloped property includes offices for on-site property management, community meeting space, and program space for both the Boys and Girls Clubs of Boston and the Greater Boston Food Bank.



# The Mattapan Campus - Mattapan, MA



Total Development Cost: \$100 million

Units: 332

Completion Dates: Phase 1 - 2003/Phase 2 - 2006

Phases 3/4 - 2008/Phase 5A - 2012

Mattapan Heights is a multi-phased comprehensive redevelopment project that is transforming the former 52-acre hospital campus in the Mattapan neighborhood of Boston. Portions of the grand campus were abandoned for more than 20 years and the few remaining campus buildings were in an advanced state of disrepair.

Phase 1 commenced in November 2001 and was completed and occupied in March 2003. This first phase encompassed the rehabilitation of the Foley Building into 98 mixed-income elderly assisted and independent living units, and 18 units for Latina women in recovery and their children in the E Building. Mattapan Heights Phase 2 was completed in late 2006 and consists of the rehabilitation of five historical buildings into 83 affordable family housing units. Mattapan Heights Phases 3 and 4 were completed in February 2008 and created 73 affordable family housing units. Phases 3 and 4 included both new construction and historic restoration.

Phase 5A was completed in late 2012, creating a newly constructed building on the upper portion of the campus. This building, which is designed to be LEED Silver certifiable and Energy Star Multifamily High Rise Certified, contains 60 affordable units.

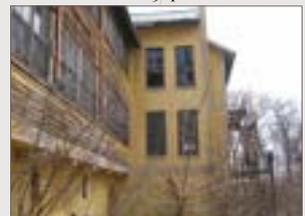
With the completion of the fifth phase of Mattapan Heights, more than 330 new units of mixed-income housing have been created, eight historic hospital buildings saved from demolition and more than 27 acres of campus landscape reclaimed and restored.

Awards Received: "Massachusetts Historical Commission Preservation Award," 2004; "Charles L. Edson Affordable Housing Tax Credit Excellence Award," 2004; "Boston Preservation Alliance - Significant Rehabilitation/Restoration Award," 2009.

Phase 2 - before & after



Phase 3/4 - before & after



## Maverick Landing - East Boston, MA



Total Development Cost: \$109 million

Units: 396

Completed: 2006

Maverick Landing is a mixed income neighborhood located on the East Boston waterfront. In 2001, the Boston Housing Authority was awarded a \$35 million HOPE VI award for the complete renovation of Maverick Gardens, a deteriorated public housing development. Working with development partner, the East Boston Community Development Corporation, Trinity devised a four phase redevelopment plan calling for demolition of all 413 units to be replaced with 396 units in newly constructed buildings including, 20 townhouse buildings and six six-story mid-rise buildings and a community center.

The new development was the first LEEDs certified multi-family housing development in New England and includes energy efficient lighting, appliances, and structural elements including photovoltaic panels. Maverick Landing is a mixed income community with 77% of the units affordable to households earning up to 60% of area median income and the remaining 23% as market rate rentals.

The reconfiguration of the historic street pattern provides a new corridor to Boston Harbor, and reconnects Maverick to the surrounding East Boston community. A new non-profit, Maverick Landing Community Services, Inc. provides on-going supportive services for residents of the development.

Maverick has received national recognition for its focus on energy efficiency and earned the honor of Affordable Housing Magazine's 2006 "Best Affordable Housing Development".



## Northampton Square - Boston, MA

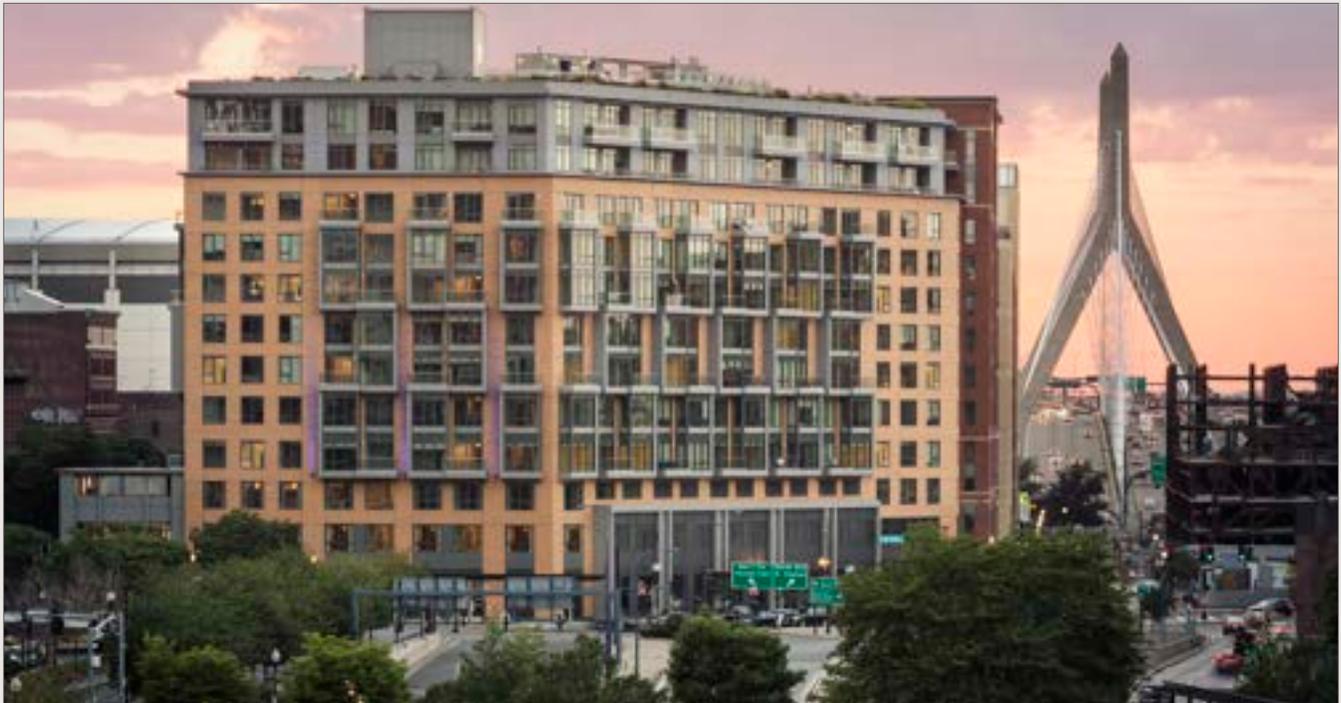


Total Development Cost: \$91 million  
Units: 347  
Completed: 2016

The Northampton Square complex is located in the South End/Lower Roxbury neighborhood of Boston, one block away from the Boston Medical Center and the Boston University Medical Campuses. The complex consists of a 29-story residential and commercial building at 35 Northampton Street and a 12-story residential building at 860 Harrison Avenue. The Northampton Square project involved three main components - (1) the renovation of 35 Northampton Street, (2) the renovation of 860 Harrison Avenue, and (3) the new construction of a shared lobby and connector corridor that wrap the existing facade of the building. In total, the project will create or preserve 347 units of housing, 60% of which will be maintained as affordable and below market rent. The complex includes an existing 539-space parking garage with sufficient capacity for the renovated housing as well as the commercial uses also housed in the development.

The original complex was built between 1969 and 1973 to house the Boston City Hospital School of Nursing. The Boston Public Health Commission (BPHC) acquired the site on July 1, 1996 and has managed the property since. In December of 2010, the BPHC selected Trinity Financial to redevelop various components of the site.

## One Canal Street - Boston, MA



Total Development Cost: \$195 million  
Units: 310 rental housing/retail - 21,000 SF  
Completed: 2016

Located at the tip of the Rose Kennedy Greenway, the One Canal Project involves the development of surface and air rights on three parcels in the Bulfinch Triangle area of Boston. These parcels are among the development sites in the Bulfinch Triangle created by construction of the Central Artery/Tunnel Project and submersion of the Massachusetts Bay Transportation Authority (MBTA) Green Line. In August 2010, both agencies designated Trinity Financial as the developer for these Parcels: 2A, 2B and 2C.

The removal of the elevated Central Artery and Green Line structures has allowed for new development and pedestrian scaled streets that reconnect the North End to government and entertainment uses at Government Center and the TD Garden, as well as the residential historic mixed uses of the Bulfinch Triangle and residential West End.

Designed to emulate the historic patterning of the historic Bulfinch Triangle, while providing a stunning capstone to the Rose Kennedy Greenway, the One Canal project includes the development of approximately 435,000 square feet of residential and retail space. The lobby entrance on Canal Street includes visual and historic references to the Middlesex Canal and its extension that once flowed through the site. The second and third floors contain state-of-the-art amenities including a fitness center, community room, outdoor plazas, leasing space, and a 147-space parking garage for the residents of the building. The fourth through twelfth floors contain 310 luxury apartment homes, including exceptional penthouse level finishes and designs on the upper two floors. One Canal also provides 20 affordable apartment homes on-site.

One Canal, adjacent to the Avenir building (completed by Trinity Financial in 2009), continues the transformation of the Bulfinch Triangle area into a mixed-use district that complements its surrounding areas and brings vitality to an area once in shadow from the elevated highway and Green Line structures.



## Orchard Gardens - Roxbury, MA



Total Development Cost: \$58 million

Units: 331

Completed: 1999

Orchard Gardens consists of the development of 331 units of rental housing on 15 acres of land in the Roxbury neighborhood of Boston. Completed in three phases, the development includes a new park, six new streets, and new offices for the resident association and on-site property management team. The team included Trinity, a local community development corporation and a local resident association.

Selected in May 1996, Trinity Financial and company achieved two closings for a total of \$57.67 million of financing, including \$27.3 million of private equity. With these closings, nine buildings containing 126 rehabilitated housing units were acquired; 162 new townhouses were constructed; and the former Dearborn school building was converted into 42 units of housing using historic tax credits. In December 1999, all 331 units were completed and occupied. Housing units are affordable to households in six different income categories.

## Overlook Terrace at Orient Heights - East Boston, MA



Total Development Cost: \$138 million

Units: all phases - 331

Completion Dates: phase one - 2018 phase two - 2020 phase three - 2023

The Orient Heights development comprises 331 units of state-funded public housing terraced into a steep hillside at the northern edge of East Boston's Orient Heights neighborhood. The 15-acre site is comprised of thirteen three-story buildings, seven two-story townhouse blocks, a Community Center and a Central Boiler Plant.

The Boston Housing Authority (BHA) undertook a planning process in 2008, funded by the Massachusetts Department of Housing and Community Development (DHCD), to look at redevelopment options for the site, and prepared a master plan with an overall design concept. This process resulted in a framework for selecting a development team with the collective goal of transforming the site into a modern mixed-income community modeled on the successful transformations of the BHA's Federal HOPE VI sites and recent redevelopment at West Broadway, Washington Beech and Old Colony.

In January of 2015, the BHA selected the Trinity Financial and East Boston CDC development team to work with the BHA and DHCD to finalize a redevelopment strategy for the site. Since that time, the development team has conducted due diligence at the site and met with the residents and broader neighborhood to understand the needs and desires of the community. All of this work resulted in the preparation of a draft Architectural and Engineering Study (A/E Study) by the development team. This A/E Study evaluated three conceptual options for the redevelopment of Orient Heights: Option 1 explored existing building rehabilitation, Option 2 combined rehabilitation with limited new construction, and Option 3 evaluated total new construction. DHCD rendered the decision for the redevelopment to be all new construction. Based on the current design, the redevelopment will consist of 373 units, of which 331 are replacement state public housing units.

Orient Heights is being redeveloped in phases: the newly completed Phase 1 consists of 120 units and construction plans for Phase 2 are underway.



## Randolph Houses - Harlem, NY



Total Development Cost: \$164 million

Units: 283

Completed: phase one - 2016; phase two - 2018

The Randolph Houses project is comprised of 36 five-story Old Law tenement buildings, 14 of which are on the north side of the street and 22 on the south side. This exciting project involved the historic rehabilitation and consolidation of the existing structures into three interconnected and fully handicapped accessible buildings. As part of the substantial rehabilitation of Randolph Houses, building facades were restored and the building interiors were completely demolished and rehabilitated.

The redevelopment of Randolph Houses – as a HUD mixed finance and LIHTC project – included the gut-rehabilitation of 452 housing units. The rehabilitated buildings on the south side of the street contain 168 units in what are now two interconnected buildings with central circulation and elevator access. The north side contains 115 units in what is now one interconnected building with central circulation and elevator access.

The newly reconfigured units are a mix of Studio, 1, 2, 3 and 4 bedroom apartments designed to accommodate family living. The rehabilitated buildings contain community spaces, a teaching kitchen, computer lab, fitness room, yoga room after school/arts room and storage units and bicycle storage for residents. There are also site improvements which include two children's play areas for different age groups and active and passive outdoor spaces for residents to enjoy, including barbecue areas, ping pong, chess tables and resident garden plots.



## The Regency - New Bedford, MA



Total Development Cost: \$30 million

Units: 129

Completed: 2011

Standing 16 stories tall with commanding harbor views and located steps from the historic downtown district, The Regency is the most prominent building in downtown New Bedford. It was completed in 1988 as a luxury apartment complex. The property suffered from serious façade deterioration and water damage because no major capital investments had been made since its opening.

MassHousing foreclosed on the property in 2005 and in 2009 Trinity Financial was selected to acquire and redevelop the building. Trinity made a total capital investment of \$32 million converting underutilized commercial space into new apartments, increasing the total number of units from 123 to 129. The unit mix includes 33 affordable units, 10 "workforce" units and 86 market-rate units. The façade was replaced on floors 5-16, and additional repairs were made to floors 1-4, including new windows and patio doors. The building's common areas and apartment interiors were renovated with new kitchens, bathrooms and HVAC systems. The building is now fully leased at rents above pro forma levels. This property commands the highest rents in the area and is arguably the best high-rise apartment property in the area.

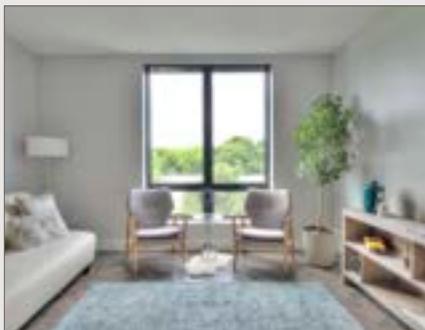
## Treadmark - Dorchester, MA



Total Development Cost: \$45 million  
Units: 83  
Completed: 2018

Treadmark is an 83-unit, six-story building located at the end of the southern end of the MBTA's Red Line, at Ashmont Station. The site was formerly the home to Ashmont Tire shop for the past 40 years and was an underutilized site. The unit mix includes 51 Low Income Housing Tax Credit (LIHTC) rental units, affordable up to 60% of the Area Median Income (AMI) and 32 for sale condominiums. Four of the condominiums meet the requirements of the City of Boston's Inclusionary Development Policy (80-100% of AMI), 16 units are affordable to individuals making up to 110% of AMI (workforce units) and the balance are market rate.

The building also includes 5,000 square feet of ground floor neighborhood retail and 32 spaces for parking (30 garage spaces and 2 surface spaces). The project enhances the streetscape with the addition of street trees and street furniture down the block as well as the creation of 8 on-street parking spaces in front of the building. Following its sister property directly across the street, The Carruth, Treadmark is the second new construction building to be built in and around the Ashmont/Peabody Square area over the past 10 years. The building adds to the vibrancy and growth that is already well underway in the Ashmont/Peabody Square neighborhood. The building is designed by The Architectural Team with interiors by celebrity firm, Taniya Nayak Design.



# Trinity Terrace - Dorchester, MA



Total Development Cost: \$17.2 million  
Units: 62  
Completed: 2004

Trinity Terrace is a 62 unit, affordable housing development in the Four Corners neighborhood of Dorchester. The project began in 2003 with the acquisition of one privately owned parcel of land, and twenty-two parcels owned by the City of Boston. For many years the vacant lots served as dumping grounds for refuse, adversely affecting the surrounding community. The development process entailed construction of twelve townhouse structures and the rehabilitation of a 19th century commercial building that had been vacant for 30 years. The three-story commercial building provides first floor retail space, with eight housing units above. Trinity Terrace also includes a community center that provides space for property management and recreation activities for residents. Key design elements include: front porches, private outdoor space, surface parking, and a new street featuring a linear urban park.



Before Images

## Van Dyke III - Brooklyn, NY

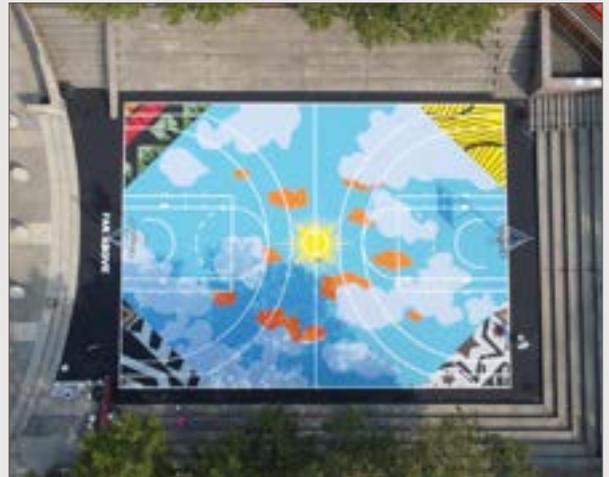


Total Development Cost: \$101.3 million

Units: 180

Completed: 2021

Van Dyke III is a 12-story, mixed-use, affordable housing project located in the Brownsville area of Brooklyn, N.Y. on the site of the Van Dyke Houses NYCHA development. The project consists of 180 units of housing affordable to households from 30% to 60% of the Area Median Income. In addition to the residential component, the project contains a Early Childhood Educational Center, a Community Health Clinic and a Wellness Center. On-site resident amenities will include a resident library, a computer lab, a fitness room, a tenant lounge, a community room, an accessible roof deck, tenant roof gardening plots, a package delivery room, and a ground floor outdoor recreational area.



## VELA on the Park - Stamford, CT



Total Development Cost: \$79 million  
Units: 209/Commercial: 3,800 SF  
Completed: 2018

As the fourth development phase of Park Square West, Vela on the Park features 209 units and offers residents hotel inspired service and convenience. Amenities include a 19th floor roof deck space, cutting edge health and wellness facilities, pet amenities, and unprecedented park and water views.

Vela is located in downtown Stamford at the top of Restaurant Row, steps away from arts, entertainment, and gourmet food options. The development features studio, one and two-bedroom units located an eight-minute walk from Metro North and Amtrak.



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## Washington Beech - Roslindale, MA



Total Development Cost: \$100 million

Units: 206

Completion Dates: phase 1 - 2010; phase 2 - 2011

The HOPE VI redevelopment of Washington Beech includes demolition of the existing 266 units and creation of 206 new rental units. The new site design reduces density to be more in keeping with the surrounding neighborhood. A variety of unit types replace the existing institutional walk-ups including a low-rise elevator building, garden apartments, duplexes over flats, and townhouses. New roads were built so that all unit entries front on a street and residents can park nearby. A central green space with play facilities and park benches is provided for young children and adults.

Construction of Washington Beech occurred in two stages to accommodate the relocation and re-housing of existing residents. Residents began relocation of the first phase buildings in the summer of 2008. Lease up of the new buildings was completed in December 2011, three months ahead of schedule.

Redevelopment of Washington Beech cost approximately \$100 million, with \$20 million provided through federal HOPE VI funds and \$10 million through federal American Recovery and Reinvestment Act funding. Other funders include the Commonwealth of Massachusetts through the HOME, HSF and AHT programs, the City of Boston's Neighborhood Housing Trust Program, Department of Public Works, and Department of Neighborhood Development, the Boston Water and Sewer Commission and private equity generated from the syndication of Low Income Housing Tax credits through RBC Capital Markets.



## 66 Summer Street - Stamford, CT



Total Development Cost: \$79 million  
Units: 194/Retail - 6,800 SF  
Completed: 2015

Centrally located in the heart of downtown Stamford, Trinity's Park Square West – Phase 2, known as 66 Summer Street, is a luxury, high rise mixed-use development consisting of 194 residential units in a 15-story structure with approximately 6,800 square feet of ground floor retail, and a structured parking garage. The property consists of a mix of studios, one, two, and three bedroom units. Building amenities include a main lobby area with a security and concierge desk, and a breakfast bar. The second floor features a fitness center and a community lounge with a kitchen area. Each unit boasts a full appliance package with a washer and dryer, granite counter tops, stainless steel appliances including an electric range/oven, a built-in microwave with vent-hood, and a dishwasher.

The immediate neighborhood has lively retail and active entertainment establishments, including the Palace Theatre, the Rich Forum, the Majestic Bow-Tie Cinema, Stamford's Restaurant Row, Target department store, the Stamford Town Center (an 860,000 sf super-regional mall anchored by Saks Fifth Avenue and Macy's), and the 115-room Courtyard Marriott hotel. The University of Connecticut's Stamford Campus is on an adjacent block to the site, serving approximately 1,200 students seeking various four-year degrees, MBA, and executive MBA (EMBA) degrees. The site is a 10-minute walk from the Stamford Transportation Center, where commuters can easily connect to Manhattan via a 45-minute train ride.



## Quinnipiac Terrace - New Haven, CT



Total Development Cost: \$69 million

Units 193

Phase 1 Completed: 2006

Phase 2 Completed: 2008

Phase 3 Completed: 2011

Quinnipiac Terrace, New Haven, Connecticut Trinity was the development partner selected by the Housing Authority of the City of New Haven (HANH) for the HOPE VI redevelopment of Quinnipiac Terrace. In March 2003, HANH was awarded a \$20 million HOPE VI grant for the redevelopment of Quinnipiac Terrace. As part of this effort, Trinity transformed a severely distressed public housing development into a vibrant new mixed-income community that will reconnect to the larger Fair Haven neighborhood and create an exciting new riverfront community in New Haven.

The new Quinnipiac Terrace provides housing that meets the needs and lifestyles of today's families with appropriate kitchens, living areas, and outdoor spaces. The design maximized private, individual entries and created private backyards in almost all units. The redevelopment occurred in three phases and consists of 193 new units of housing with a mix of public housing and rental housing. Financial closing for the first rental phase occurred on April 15, 2005. Phase 1 consisted of the demolition of seven existing public housing buildings and the construction of 81 new family apartments. The total development costs for Phase 1 were approximately \$22 million and were financed through a combination of HOPE VI funds, 9% Low Income Housing Tax Credits and City of New Haven funds. In 2006, Trinity was

awarded \$2.2 million in 9% credits by Connecticut Housing Finance Agency for Phase 2, twice the amount of credits in a single allocation than had been anticipated. Phase 2 construction began in September 2006 and was completed in March 2008. Phase 2 created an additional 79 units of affordable rental housing. The third phase of development, which includes 33 units of mixed income rental housing, closed in July 2010 and was completed in May 2011 for a total development cost of \$15 million.



## Rowe Apartments - New Haven, CT



Total Development Cost: \$36 million

Units: 104

Completed: 2011

Completed in 2011, the William T. Rowe (Rowe) redevelopment transformed a blighted property into high-quality housing for residents with a mix of incomes. The existing Rowe property (old Rowe) was physically distressed, required structural repairs, and a complete overhaul of existing building systems. After evaluating the existing structure it became apparent the old Rowe building was not salvageable and had to be demolished. The new Rowe has been repositioned so that it maintains the sense of community established during the old Rowe's 37-year history while still taking advantage of the positive changes occurring in the downtown area of New Haven.

The redevelopment of the Rowe Apartments consisted of the new construction of 104 units of one- and two-bedroom apartments in a nine-story building on land that is adjacent to the existing Rowe building. The adjacent property was acquired via a unique land swap agreement with the Yale-New Haven Hospital. The building also includes off-street parking for 88 vehicles, approximately 2,000 square feet of first floor retail/commercial space, and approximately 2,000 square feet of community and supportive service space. Of the building's 104 units, 78 of them are set aside to households earning at or below 60% of the area median income (AMI). The remaining 26 units are market rate, targeted towards people working in the nearby medical district.

# Soundview Landing - Norwalk, CT



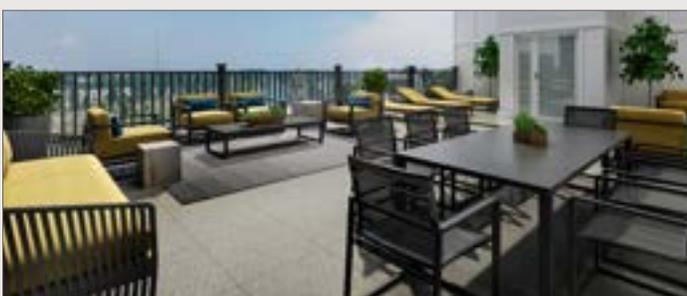
Total Development Cost: \$153.1 million

Units: 80

Completed: phase 1 - 2018 phase 2 - 2020 phase 3 - 2021

Soundview Landing, formerly named Washington Village Phase One, is the new construction of 80 rental residences on two vacant parcels in the South Norwalk Neighborhood of Norwalk, CT. The project is the initial phase of a larger multi-phase redevelopment effort that will replace the existing, obsolete 136-unit Washington Village public housing project with a new 273-unit, mixed-income community.

The Norwalk Housing Authority, the Norwalk Redevelopment Agency, and Trinity Financial are working together on this exciting Choice Neighborhoods Initiative that will benefit the existing residents of Washington Village and the broader South Norwalk section of the city.



## 60 King - Providence, RI



Total Development Cost: \$22.7 million

Units: 60

Completed: 2018

Trinity's 60 King is an adaptive reuse project which converted a vacant historic mill building in the Olneyville neighborhood of Providence into 60 units of mixed-income rental housing. Originally constructed in 1923, 60 King was the home of the Rochambeau Worsted Wool manufacturing facility until the 1950s when the complex was acquired by the Imperial Knife Company.

The redevelopment of 60 King breathes new life into an architecturally significant structure, remediated a contaminated Brownfields site and helped to reconnect this isolated building to the rest of the Olneyville neighborhood. Trinity undertook 60 King in collaboration with two Providence-based community development corporations: ONE Neighborhood Builders and SWAP, Inc. (Stop Wasting Abandoned Property).

60 King features a total of 60 affordable and market-rate apartments, including studio, one-, two- and three-bedroom units. The rents for the project are targeted to a range of different income levels: 47 units available at 60% of area median income, 7 units with rents set at 30% of area median income, and 6 unrestricted, market-rate units. 60 King

was financed with a blend of low-income housing tax credits, federal historic tax credits, state historic tax credits, soft debt from Rhode Island Housing and the City of Providence, as well as RIDEM Brownfields Remediation grant funding.

60 King is the second project in the multi-phase redevelopment of Olneyville that is contemplated in the Build Olneyville Plan, a community-based planning process that was led by the Providence Housing Authority, ONE Neighborhood Builders and Trinity in 2014, and which was financed through a HUD Choice Neighborhoods Initiative (CNI) planning grant.

The Build Olneyville Plans lays out a holistic vision for the future of Olneyville across several different elements, including housing, education and people. Moving forward, Trinity hopes to leverage the 60 King project and the work of the Build Olneyville Plan into a \$30 million HUD CNI implementation grant, which would help to catalyze the redevelopment of a portion of the adjacent 330-unit Manton Heights public housing development, and the construction of new mixed-income housing on and around the 60 King site.



## Newport Heights - Newport, RI



Total Development Cost: \$74 million

Units: 299

Completion Dates: Phase 1 - 2004/Phase 2 - 2006/Phase 3 - 2007

Located in the North End neighborhood of Newport, RI, the Tonomy Hill housing development was one of the most distressed public housing projects in the state of Rhode Island. Originally constructed in 1939 as temporary housing for Navy personnel, the property was suffering from major structural deficiencies and outdated and inadequate mechanical systems. Additionally, the site configuration isolated residents from their neighbors and the larger community, exacerbating the already high rates of poverty, crime, substance abuse, domestic abuse and illiteracy prevalent at the site. In 1999, Trinity Financial was selected as the developer for the site and put together a multi-phase mixed finance plan to transform Tonomy Hill into a new, mixed-income community called Newport Heights.

Completed in 2004, Newport Heights Phase 1 replaced 64 units of distressed public housing with 81 newly constructed units of mixed-income rental housing, new public streets and other public infrastructure improvements. The 81 units of housing serve a range of income categories including units subsidized with PB Section 8 or Public Housing subsidies, tax credit units (40%-60% AMI), moderate units (60%-80% AMI) and market rate units (greater than 80% AMI) without income restrictions. The \$16 million Phase 1 project was financed with a mixed-finance package that includes nearly \$7.8 million of equity raised through the sale of low income housing tax credits. Other resources include Housing Authority Capital Grant Program funds, City of Newport contributions and state housing resources from Rhode Island Housing.

Completed in 2006, Phase 2 of Newport Heights replaced 120 units of distressed public housing with 147 newly constructed units of mixed-income rental housing as well as continuing the public infrastructure

improvements begun in Phase 1. Phase 2 also serves a mixed-income population. The \$33 million Phase 2 project was financed with a mixed-finance package that includes nearly \$17 million of equity raised through the sale of low income housing tax credits. Other resources include Housing Authority HOPE VI and/or Capital Grant Program funds, City of Newport contributions, and state housing resources from Rhode Island Housing.

Completed in 2007, phase 3 of Newport Heights replaced 91 units of distressed public housing with 71 units of mixed-income rental housing and continued the public infrastructure improvements of the first two phases. Phase 3 also serves a mixed-income population. Additionally, the Phase 3 project includes residential and program space for the Winslow Place program serving formerly homeless women and their children. The \$24.3 million Phase 3 project was financed with a mixed-finance package that includes nearly \$13 million of equity raised via the sale of low income housing tax credits. Other resources include Housing Authority HOPE VI and/or Capital Grant Program funds, City of Newport contributions, Federal Home Loan Bank AHP funds and state housing resources from Rhode Island Housing.



Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
<b>Marriner Mill</b> Lawrence, MA	\$46.8m (P)	\$36.5m (P)	Mixed Income Rental Housing	87	Bonds, LIHTC, DHCD, HSF, Federal HTC, State HTC, AHT, MassHousing Workforce Housing Fund	Owner Developer	2021(P)
							2023 (P)
<b>Orient Heights Phase 3</b> East Boston, MA	\$63.5m (P)	\$22.7m (P)	Public Housing, Mixed Income	123	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2021 (P)
							2022 (P)
<b>Enterprise Center Phase 2</b> Brockton, MA	\$48m (P)	30.5m (P)	Mixed Income Rental Housing	111	LIHTC, Tax Exempt Bonds	Owner Developer	2021 (P)
				414+ Parking Garage			2023 (P)
<b>425 Grand Concourse</b> Bronx, NY	\$175m (P)	\$45m (P)	Mixed Income Rental Housing, Commercial	277	Tax Exempt Bonds, HDC, HPD, LIHTC	Owner Developer	2019
				47,000 SF			2022 (P)
<b>Brookfield Commons</b> White Plains, NY	\$63m (P)	\$30.5m (P)	Public Housing, Mixed Income	130	Tax Exempt Bonds, Private Debt, LIHTC, HCR, HFA, Westchester County Funding	Developer	2019
							2022 (P)
<b>Washington Village CNI Phase 3</b> Norwalk, CT	\$65.6m (P)	33m (P)	Mixed Income Rental Housing	108	LIHTC, Tax Exempt Bonds, HUD CNI Funds, NRA CTDOH	Owner Developer	2019
							2021
<b>Van Dyke III</b> Brooklyn, NY	\$101.3m (P)	\$38.8m (P)	Mixed Income Rental Housing	180	Tax Exempt Bonds, HDC, HPD, LIHTC	Developer	2018
				24,000 SF			2021
<b>Courthouse Lofts</b> Worcester, MA	\$71.5m (P)	\$42.2m (P)	Mixed Income Rental Housing	118	LIHTC, Historic Tax Credits, Tax Exempt Bonds, AHT, HOME, Workforce Funds	Owner Developer	2018
							2021
<b>Orient Heights Phase 2</b> East Boston, MA	\$51.8m (P)	\$19.6m (P)	Public Housing, Mixed Income	88	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2018
							2020

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units		Financing	Role of Trinity	Year Closed	
					SF Commercial				Year Completed
<b>Washington Village CNI Phase 2</b> Norwalk, CT	\$51.6m (P)	25.4m (P)	Mixed Income Rental Housing	85		LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, CHFA, CTDOH	Owner Developer	2018	
								2020	
<b>Arlington Point</b> Lawrence, MA	\$46 m (P)	\$37.6m (P)	Mixed Income Rental Housing	102		LIHTC, Federal HTC, State HTC, AHT, HSF, MassHousing Work Force Housing Fund	Owner Developer	2017	
								2019	
<b>60 King Street</b> Providence, RI	\$22m (P)	\$19m (P)	Mixed Income Rental Housing	60		LIHTC, Federal HTC, State HTC, HOME, HPP, RIDEM, Brownfields	Owner Developer	2017	
								2018	
<b>Washington Village CNI Phase 1</b> Norwalk, CT	\$44m	20.6m	Mixed Income Rental Housing	80		LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, CHFA, CTDOH	Owner Developer	2016	
								2018	
<b>Treadmark</b> Dorchester, MA	\$45m (P)	\$22.4m (P)	Mixed In- come Rental, Homeownership, Commercial	83		LIHTC, State LIHTC, Private Debt & Equity, Tax Exempt Bonds, DHCD, DND	Owner Developer	2016	
					5,000 SF			2018	
<b>Orient Heights Phase 1</b> East Boston, MA	\$52m	\$18m	Public Housing, Mixed Income	120		Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2016	
								2018	
<b>Randolph Houses Phase 2</b> Harlem, NY	\$67m (P)	\$44m (P)	Affordable Rental Housing	115		LIHTC, Tax Exempt Bonds, HPD, HDC, His- toric Tax Credits	Owner Developer	2016	
								2018	
<b>VELA on the Park</b> Stamford, CT	\$79m	\$21m	Mixed Use Market Rate Rental, Commercial	209		Private Debt and Equity	Owner Developer	2016	
					3,699 SF			2018	
<b>Boston East</b> East Boston, MA	\$71.4m	\$23.1m (P)	Market Rate Rental, Marine Related Commercial	200		Private Debt & Equity	Owner Developer	2015	
					50,000 SF			2017	

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units		Financing	Role of Trinity	Year Closed	
					SF Commercial				Year Completed
<b>3160 Park Avenue</b> Bronx, NY	\$66m	\$31m	Mixed Income Rental, Commercial	152		LIHTC, Tax Exempt Bonds, HDC, HPD, NMTC	Owner Developer	2014	
					21,000 SF				2016
<b>35@Eight Sixty Phase 2</b> Boston, MA	\$35m	\$18m	Mixed Income Rental Housing	102		Federal and State LIHTC, City of Boston, DHCD	Owner Developer	2014	
									2016
<b>Randolph Houses Phase 1</b> Harlem, NY	\$99m (P)	\$57m (P)	Affordable Rental Housing	168		LIHTC, Tax Exempt Bonds, NYCHA Capital Funds, HPD, HDC, Historic Tax Credits	Owner Developer	2013	
									2016
<b>One Canal</b> Boston, MA	\$196m	N/A	Market Rate Rental, Mixed Use	310		Private Equity/ Debt	Developer	2013	
					21,000 SF				2016
<b>66 Summer Street</b> Stamford, CT	\$73m	\$7m	Mixed Use, Market Rate Rental Housing	209		Private Debt and Equity	Owner Developer	2013	
					6,600 SF				2015
<b>Enterprise Center Phase 1: Enso Flats and Centre50</b> Brockton, MA	\$62m	\$34m	Mixed Use, Mixed Income Rental Housing, Commercial, Office, & Retail	113		LIHTC, TEB, NMTC, State LI- HTC, MassWorks DHCD	Owner Developer	2013	
					62,000 SF				2015
<b>35@Eight Sixty Phase 1</b> Boston, MA	\$56m	\$28m	Mixed Income, Rental Housing	245		Federal and State LIHTC, City of Boston, DHCD	Owner Developer	2013	
									2014
<b>Bristol Commons and Lenox Green HOPE VI</b> Taunton, MA	\$69m	\$52m	HOPE VI Mixed Income Housing	160		Federal and State LIHTC, HOPE VI, Construction Bridge Loan, Section 108 Loan, HUD BEDI Grant	Owner Developer	2012	
									2014
<b>Glenark Mills/ Glenark Oaks</b> Woonsocket, RI	\$14m	\$5m	Affordable Rental	89		LIHTC, Tax Exempt Bonds, HOME, Rhode Island Housing	Owner Developer	2012	
									2013

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
<b>Mattapan Heights Phase 5-A</b> Mattapan, MA	\$24m	\$15m	Affordable Rental	60	LIHTC, Tax Exempt Bonds, HSF, HOME, NHT, AHT	Owner Developer	2012
							2012
<b>Lucerne Gardens</b> Dorchester, MA	\$11.9m	\$5m	Mixed Income	45	LIHTC, Tax Exempt Bonds, Exempt HSF, AHT, CBH, HOME, NHT	Owner Developer	2011
							2012
<b>Quinnipiac Terrace Phase 3</b> New Haven, CT	\$15m	\$4.5m	Affordable Rental Housing	33	LIHTC, Tax Exempt Bonds, City of New Haven, HANH, State, HUD	Owner Developer	2010
							2011
<b>Rowe Apartments</b> New Haven, CT	\$36m	\$7.7m	Mixed Income Rental Housing	104	LIHTC, Tax Exempt Bonds, City of New Haven, HANH, State, HUD	Owner Developer	2010
				2,300 SF			2011
<b>The Regency</b> New Bedford, MA	\$30m	\$11m	Mixed Income Rental Housing	129	LIHTC, MassHousing, MHP, City of New Bedford	Owner Developer	2010
							2011
<b>110 Canal</b> Lowell, MA	\$15m	\$11m	Commercial		HTC, NMTC, Massworks	Owner Developer	2009
				55,000 SF			2012
<b>Appleton Mills</b> Lowell, MA	\$64m	\$42m	Affordable Rental	130	LIHTC, HOME, Tax Exempt Bonds, PDF, MassHousing, HTC, AHT	Owner Developer	2009
							2011
<b>Washington Beech HOPE VI</b> Roslindale, MA	\$90m	\$45m	Affordable Rental, Affordable Home Ownership	206	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2009
							2011
<b>Avenir</b> Boston, MA	\$150m	\$148.4m	Market Rate Rental, Transit Oriented Development, Commercial	241	Private Equity	Developer	2007
				29,000 SF			2009

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units		Financing	Role of Trinity	Year Closed	
				SF	Commercial			Year Completed	
<b>Franklin Hill</b> Dorchester, MA	\$106m	\$71m	Affordable Rental	266		LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2007	
								2009	
<b>The Carruth</b> Dorchester, MA	\$52m	\$28.2m	Transit Oriented Development, Mixed Income Rental and Home Ownership Hous- ing, Commercial	116		State LIHTC, LIHTC, HOME, NHT, PDF, TOD, Tax Exempt Bonds	Owner Developer	2006	
					10,000 SF			2008	
<b>Mattapan Heights III</b> Mattapan, MA	\$27.7m	\$16m	Mixed Income, Limited Equity Cooperative and Home Ownership	73		HTC, LIHTC, HSF, HOME, NHT, PDF, AHT, Tax Exempt Bonds, State LIHTC	Owner Developer	2006	
								2008	
<b>Foundry Square</b> Newburyport, MA	\$7.2m	N/A	Mixed Income, Home Ownership	20		HSF, AHT, HOME, North Shore - HOME, City of Newbury- port	Developer	2005	
								2006	
<b>The Riverway</b> Dorchester, MA	\$7.92m	N/A	Commercial			Private Financing	Owner Developer	2005	
					61,000 SF			2006	
<b>Quinnipiac Terrace</b> HOPE VI New Haven, CT	\$62m	\$19.2m	Mixed Income Rental	160		HOPE VI, LIHTC, City of New Haven	Owner Developer	2004	
								2008	
<b>Mattapan Heights II</b> Mattapan, MA	\$28.9m	\$21.3m	Mixed Income Rental	83		Tax Exempt Bonds, HTC, LIHTC, CDBG, NHT, AHT, State LIHTC	Owner Developer	2004	
								2005	
<b>Maverick Landing</b> HOPE VI East Boston, MA	\$105m	\$50m	Mixed Income Rental	396		LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2003	
								2006	
<b>Carlton Wharf</b> East Boston, MA	\$7m	\$12m	Workforce Home Ownership	30		HOME, HSF, AHT, NHT, CDBG, MTC, Construction Loan Linkage Sources	Developer	2003	
								2005	

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
<b>Trinity Terrace</b> Dorchester, MA	\$17m	\$11m	Mixed Income Rental	62	LIHTC, HOME, CDBG, HTC	Owner Developer	2003
							2004
<b>Newport Heights HOPE VI</b> Newport, RI	\$73m	\$37.8m	Mixed Income Rental	299	HOPE VI, LIHTC, HOME, FHLB, Tax Ex- empt Bonds	Owner Developer	2002
							2007
<b>The Foley</b> Mattapan, MA	\$20m		Affordable, Assisted & Inde- pendent Living, Supportive Housing	116	LIHTC, HTC, HOME, CDBG, FHLB	Owner Developer	2001
							2003
<b>Shaw's Supermarket Lower Mills</b> Dorchester, MA	\$24m	N/A	Commercial Supermarket		Private Financ- ing, HTC	Owner Developer	2001
				59,800 SF			2003
<b>Winchester Park</b> Ipswich, MA	N/A	N/A	Open Space Subdivision		Private Financing	Owner Developer	2001
				20 Lots			2002
<b>Harborlight House</b> Beverly, MA	\$3.5m	\$1.8m	Assisted Living	35	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	2000
<b>Mass Pike Towers</b> Boston, MA	\$19.7m	\$4.7m	Mixed Income Rental	200	Tax Exempt Bonds, LIHTC 4%, HOME, Sec. 236	Owner Developer	2000
				10,000 SF			2000
<b>Davenport Commons</b> Boston, MA	\$50m	\$0	Mixed Income Home Owner- ship and Student Residences, Neighborhood Retail	200	Tax Exempt Bonds, HOME, Taxable Bonds, FHLB Linkage, HOPE VI	Developer	1999
				2,100 SF			2001
<b>Southwark Plaza Philadelphia, PA</b>	\$57m	\$18m	Mixed Income Rental	470	Tax Exempt Bonds, LIHTC 4%, HOME, CDBG, HUD Mixed Finance	Development Manager	1998 2000

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units		Financing	Role of Trinity	Year Closed	
					SF Commercial				Year Completed
<b>Countryside Village</b> Marlborough, MA	\$6.9m	\$2.9m	Mixed Income Rental	118		LIHTC, HOME, Sec. 236	Owner Developer	1999	
<b>Orchard Gardens HOPE VI</b> Roxbury, MA	\$58m	\$27.3m	Mixed Income Rental	331		HOPE VI, LIHTC, CGP, HTC	Owner Developer	1998	1999
<b>Camfield Gardens</b> Roxbury, MA	\$16m	N/A	Mixed Income Rental	131		HUD Demo Disposition	Development Consultant	1998	1998
<b>Beverly YMCA Cabot Street House</b> Beverly, MA	\$3.8m	\$2m	SRO/Efficiency	45		LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	1998	1998
<b>Springfield YMCA Chestnut Street Residence</b> Springfield, MA	\$3.8m	\$1.9m	SRO/Efficiency	104		LIHTC, HOME CDBG	Development Manager	1997	1998
<b>Sonoma, Maple, Schuyler</b> Dorchester, MA	\$9.8m	N/A	Mixed Income Rental	102		HUD Demo Disposition	Development Consultant	1997	1998
<b>Beryl Gardens</b> Roxbury, MA	\$3.3m	\$1.4m	Mixed Income Rental	20		LIHTC, HOME, CDBG, FHLB	Development Manager	1997	1998
<b>Madison Park IV</b> Roxbury, MA	\$12.4m	\$2.6m	Mixed Income Rental	143		LIHTC, HOME, CDBG, FHLB	Development Manager	1996	1997
<b>Smith House</b> Roxbury, MA	\$5.9m	\$2.3m	Mixed Income Rental	132		LIHTC, HOME, CDBG, FHLB	Development Manager	1995	1996

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
<b>Haynes House</b> Roxbury, MA	\$9.6m	\$2m	Mixed Income Rental	136	LIHTC, HOME, CDBG, FHLB	Development Manager	1995
							1996
<b>Boston YMCA</b> Boston, MA	\$7.8m	\$5.4m	SRO/Efficiency	88	HTC, HOME, CDBG, FHLB	Development Manager	1995
							1996
<b>Mason Square</b> Springfield, MA	\$3.6m	N/A	Commercial		CDBG, Private Financing	Development Consultant	1994
				30,000 SF			1995
<b>Cape Ann YMCA</b> Cape Ann, MA	\$2.2m	\$1.2m	SRO	52	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	1994
			Commercial	8,099 SF			1995
<b>Joslin Court</b> Syracuse, NY	\$3.1m	\$1.2m	Mixed Income Rental	22	LIHTC, NYHTF, NYHDF, HOME	Development Manager	1994
							1995
<b>Orchard Hill Estates</b> Oxford, MA	\$19.5m	\$5.4m	Mixed Income Rental	215	LIHTC, HOME, Flex Sub, Sec. 236	Development Manager	1994
<b>Abyssinian Development Corporation</b> New York, NY	\$2.7m	N/A	Mixed Income	30	FHLB	Development Consultant	1994
			Commercial	5,250 SF			1995
<b>Lucerne Gardens</b> Dorchester, MA	\$5.4m	\$3.4m	Mixed Income Rental	45	LIHTC, HOME, CDBG, FHLB	Owner Developer	1993
<b>Cambridge YMCA</b> Cambridge, MA	\$4.2m	\$2.2m	SRO/Special Needs	134	LIHTC, HTC, CDBG, HOME, FHLB	Developer	1993

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
<b>Trinity House</b> East Boston, MA	\$1.5m	\$700k	SRO	15	LIHTC, HTC, CDBG, FHLB	Development Manager	1992
							1993
<b>Lithgow Block</b> Dorchester, MA	\$3.5m	\$1.5m	Mixed Income Rental	33	CDBG, Private Financing	Development Manager	1991
			Commercial	33,000 SF			1992
<b>Egleston Center</b> Boston, MA	\$2.2m	N/A	Commercial		CDBG, Private Financing	Development Consultant	1991
				10,000 SF			1992
<b>1734 Washington</b> Boston, MA	\$2.2m	\$1.1m	SRO	24	LIHTC, HTC, CDBG	Development Manager	1990
							1991
<b>Bowditch School</b> Boston, MA	\$5.2m	\$2.9m	Apartments/SRO	45	LIHTC, HTC, CDBG	Development Manager	1990
			Commercial	4,000 SF			1991
<b>398 Park Street</b> Boston, MA	\$1.3m	\$550k	SRO/Special Needs	18	LIHTC, CDBG	Development Manager	1989
							1990
<b>300 Shawmut Avenue</b> Boston, MA	\$2m	\$650k	SRO	20	LIHTC, CDBG	Development Manager	1989
							1990
<b>438 Warren Street</b> Boston, MA	\$1.1m	\$500k	SRO/Special Needs	15	LIHTC, HTC, CDBG	Development Manager	1988
							1989
<b>Totals</b>	<b>\$3.1b</b>	<b>\$1.4 b</b>		<b>9,278 units</b>			
				<b>517,848 SF</b>			

# Innovative Real Estate · Transformative Results



Trinity is a community-driven, diverse team of real estate professionals with a proven track record of developing urban sites from New York to Greater Boston. We have the unique ability to complete complex, mixed-use projects overseeing all aspects of real estate – from finance to development to property management – on urban sites, especially those challenged by politics, infrastructure, environment or market profile.

Our work spans half a dozen residential and commercial specialties, from multi-family housing to transit-oriented development. With over \$3 billion in transformative development work, we have a reputation for delivering high-quality multifamily projects resulting in a stronger urban fabric – with a commitment to people, place and partners. We care about the communities where we invest because we live and work there too.

Our projects reflect a distinctive urban focus, combining community sensitivity with financial acumen to create truly transformative projects.

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Telephone: 617-720-8400

CHARLESTOWN NURSERY SCHOOL

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Reimagining Early Childhood@

# Charlestown Nursery School



## Honoring Boston's Scholarly Tradition

For children who grow and learn in the neighborhood that was the birthplace of John Harvard's first school, Charlestown Nursery School is designed to bring the top educational experiences to the youngest learners. During the 0-5 years when 90 percent of the brain is formed, our goal is to optimize development and provide the same high-quality study that Boston is known for.



## Realizing Boston's Innovative Future

With pathways that connect historic markers to top hospitals, world-renowned research labs, design hubs, academic institutions, waterways and greenways, we aim to provide a forward and outward thinking school that will prepare children to be adaptive lifelong learners ready for the world's next opportunities.



## Celebrated by educators for

- model programming
- research-driven practice
- co-teaching
- small ratios
- personalized instruction
- individualized assessment
- emergent curriculum
- parent partnerships
- Montessori, Reggio integration
- art studio
- learning labs
- outdoor education...and more

## Come visit

to see why educators travel from around the globe to see our program.



@charlestownnurseryschool

Realizing the Early Childhood Research@

# Charlestown Nursery School



## Leadership Team



### Kelly Garvey Pellagrini

co-founder and co-director

Kelly brings more than 15 years of experience in early childhood education. In addition to a B.A. from Bates College, Kelly holds Masters degrees from Smith College and Lesley University. She was part of the first cohort at Saul Zaentz Early Education Initiative at Harvard and is currently in a business education program also at Harvard. She has served on the Mayor's Advisory Committee for 0-5 School Readiness, Strategies for Children work groups and has been active in creating early childhood programs throughout the area.



### Cady Audette

co-director

Cady has over 15 years of experience working as a teacher and administrator in independent schools. She has a B.S. from Boston University and a M. Ed. from Lesley University. Recently, she was part of the first cohort at Saul Zaentz Early Education Initiative at Harvard and is currently in a business education program also at Harvard. She has overseen several programs and serves as an advisor in early childhood education. At CNS, she welcomes researchers from around the world.

## Featured in

- Exchange Magazine
- Eye on Education
- Channel 5
- The Wonder of Learning
- The Children's Garden, documentary
- The Most Important Year
- Complementary Curriculum
- Boston Magazine
- Commonwealth Magazine
- The Henchinger Report
- Boston Area Reggio Emilia Network
- Strategies for Children

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Designing to serve more children and families through expanded programming.

ICON ARCHITECTURE , INC.

<https://www.iconarch.com/>



ONE CANAL | BOSTON, MA

## ICON Architecture, Inc.

### WOMEN-OWNED BUSINESS ENTERPRISE WBE

ICON is a women-owned, Boston-based firm of 50 staff with award-winning work focused on innovative, sustainable housing—creating new paradigms for living. Widely recognized for our vision, creativity, and responsiveness to clients, ICON’s principals and senior staff offer the skills necessary to conceive and implement complex projects that require coordination of clients, citizens and agencies. We bring to our clients an ability to listen carefully, to assimilate and synthesize, and to help build consensus among often-conflicting interests.

The Current make-up of the firm includes 8 principals and 39 technical staff, staff including 22 registered architects, 13 LEED Accredited Professionals and 5 Certified Passive House Consultants. The firm has been ranked on Boston Business Journal’s List of Massachusetts’ Top 100 Women-Led Businesses for the past five years.

ICON’s projects have been case studies for nationally distributed books on urban housing, published by the Urban Land Institute, Harvard University Press, and Global Green. Our work has won numerous awards, multiple Builders Choice Design Awards, a Governor’s Smart Growth Leadership Award, and multiple Preservation Achievement Awards from the Boston Preservation Alliance and the Massachusetts Historical Commission.

### FIRM LEADERSHIP (*Principals + Partners*)

**Nancy Ludwig** - Senior Principal, President  
**Janis Mamayek** - Principal, Director of Architecture  
**Ned Collier** - Principal, Education Studio  
**Michelle Apigian** - Associate Principal  
**Kendra Halliwell** - Associate Principal  
**Matt Marotta** - Associate Principal  
**David Stockless** - Associate Principal  
**Michelle Waldon** - Associate Principal

### SUSTAINABLE DESIGN

We have numerous LEED certified buildings at all levels, and have also worked with Enterprise Green Communities. ICON will have completed eight residential Passive House buildings (320 units) by year end, with another half dozen under construction with another 150+ units underway. ICON brings particular passion and expertise in affordable sustainable design. Sustainability is intrinsic to our practice and to good design. Our “sensible green” approach maximizes investment to create durable, cost-effective solutions that will enhance comfort and performance while reducing costs. We believe in the critical importance of a high-performance building envelope to provide long term savings and durability along with a high degree of comfort, healthy air quality and resilience. Careful attention to a robust and air tight thermal envelope allows for simpler, more cost-effective mechanical systems and also results in buildings with radically reduced energy demand and therefore long-term operating costs. A super-insulated envelope also eliminates uncomfortable drafts and requires a modest amount of continuously filtered air which vastly improves air quality. When these principals are built into the project, and we plan for the potential for renewable energy, if or when it becomes available, Net Zero is within reach.

Sustainability is ultimately about more than environmental stewardship – it’s about people. Toward that end, ICON is focused on creating equitable communities that incorporate Universal and Active design, going beyond accessibility as mandated by codes to emphasize environments usable by all people. We think strategically about grade changes to ensure connected paths allow for movement, access and visitability in a seamless manner. Whether indoor or out, navigation through a site, within amenity spaces and units alike should be simple and natural for all. Careful planning and siting reduce the need for ramps, keeping costs down and preventing visible unit differentiation or distinct paths. Colors, materials and lighting are intended to ensure information is easily perceptible and spaces are intuitive to use.

# ICON ARCHITECTURE RELEVANT EXPERIENCE

## AVENIR

BOSTON, MA

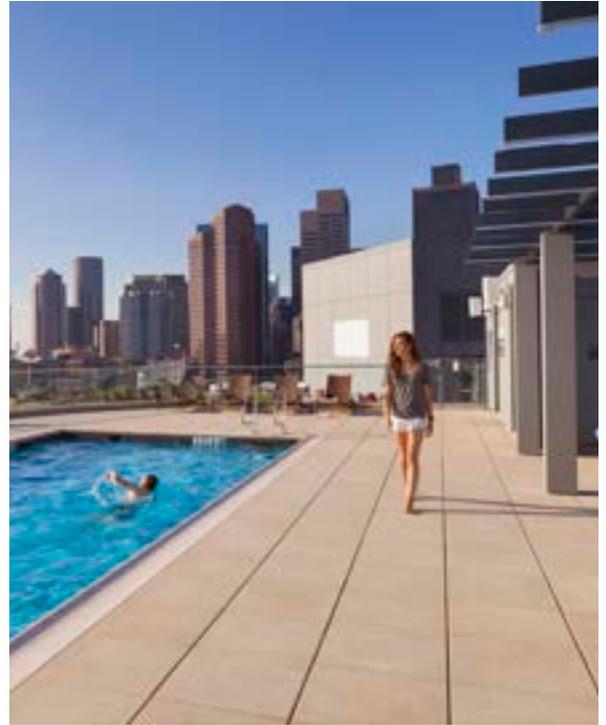
Avenir elegantly combines 241 upscale apartments with vibrant retail and transportation links in Boston's Bulfinch Triangle sports and entertainment district. Looking across to Boston's Zakim Bridge, Avenir reclaims a 400 foot long block over Boston's "Big Dig", meeting the technical challenges of building on top of a new transit infrastructure and a subway station. The 10-story building's varied massing and texture respond to the historic Bulfinch Triangle context of individual buildings aggregated over time. Tall, multi-level lofts wrap the internal parking structure to conceal it from street view, while upper level apartments enjoy the expansive terraces created between building volumes. High end finishes include wood floors, contemporary gourmet kitchens, and luxurious soaking tubs with rain shower heads.



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## ONE CANAL BOSTON, MA

Located in the historic Bulfinch Triangle, the 310-unit One Canal prominently engages Boston's Greenway, displaying a tracery of decks and bays that dissolve the indoor/outdoor boundary. Technically challenging, the building straddles the Central Artery and MBTA Orange & Green lines, and fills a void between the North and West End neighborhoods. City Winery occupies the 20,000 SF first floor retail space, while residential amenities array across several levels and include three courtyards and a rooftop pool deck with long views across the cityscape and harbor.



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## SALEM HEIGHTS

SALEM, MA

A 283-unit affordable housing community located in Salem, MA. Composed of two 10-story highrise towers built in the 1970's, the complex contains 77 one-bedroom and 186 two-bedroom apartments. The two towers are connected at the ground floor, and sited atop a hill with expansive views of the City of Salem and its harbor beyond.

The new exterior includes new structural insulated sheathing panels, composite metal panels, exterior PV system and thin brick at the lower levels. New energy efficient windows and TPO roofs with rigid insulation are being provided on both towers. Common area upgrades include new multi-purpose amenity spaces and property management offices. Three existing exterior spaces will be reconfigured for accessibility and a wider range of uses, including a new playground.



## CLARENDON HILL

SOMERVILLE, MA

Looking over the verdant Alewife Parkway, this new mixed-income community will create 591 apartments across a range of housing types.

These highly sustainable buildings will include high performing operable windows, and a super-insulated envelope. Arrayed around a central park, three highrise buildings are located at the bottom of the slope. Stepping up the hill, midrise buildings frame the park, while a grouping of townhomes are sited at the top of the slope, relating to the residential fabric of Somerville. Highlights of the design include new streets and open space, with an overlook and pedestrian connection to the Parkway.

Construction of the first building of 168 affordable units began in 2023. The project is being built with an innovative modular construction system -- expected to reduce construction time and create a robust residential living environment.

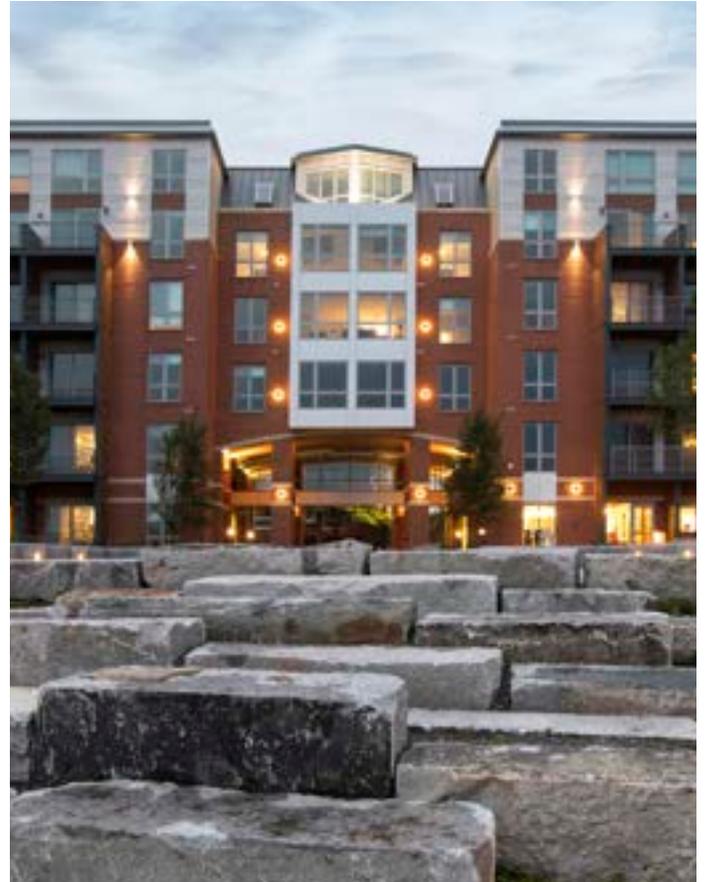


# ICON ARCHITECTURE RELEVANT EXPERIENCE

## BOSTON EAST

EAST BOSTON, MA

Combining a unique mix of uses, Boston East includes artist, affordable and market housing with a future marine facility, Harborwalk, and a Community Gallery overlooking the water. Artist live/work/sell units fill out the ground floor, opening onto a broad promenade which becomes an outdoor showroom for resident artists' work. These units offer loft-like homes with broad floor plates, concrete floors, and high ceilings scaled to encourage a variety of art formats. The building design embraces a "marine industrial" theme, with wharf-like building wings extending from the central archway, inviting the community to the waterfront courtyard; the archway is topped by a lighthouse-inspired light monitor.



## 33 SYLVAN AVENUE NEW HAVEN, CT

Located within a walk of the Yale New Haven Hospital District, this nine-story tower provides 104 one- and two-bedroom units of mixed-income and intergenerational housing: 39 units of affordable senior, supportive, and special needs housing as well as 65 units of mixed-income rental housing all above a base of community, program, and retail space. Each unit's large windows provide views of Downtown New Haven and the picturesque Sleeping Giant State Park.

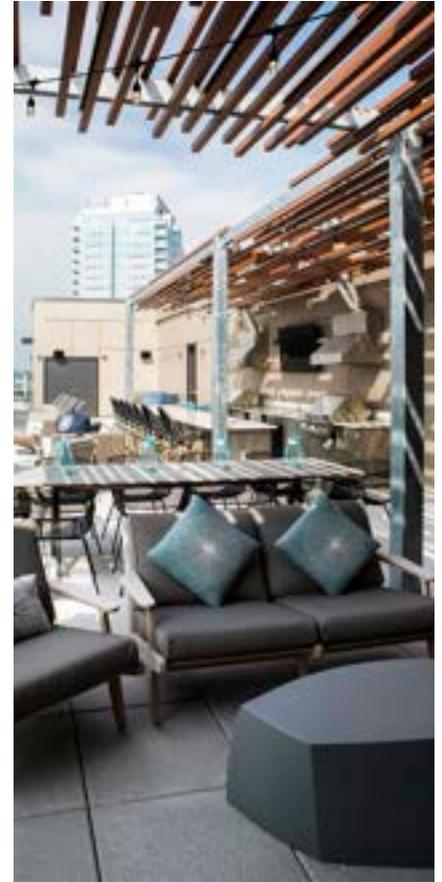


# ICON ARCHITECTURE RELEVANT EXPERIENCE

## VELA ON THE PARK

STAMFORD, CT

Vela on the Park features 209 luxury apartment homes and offers residents boutique hotel-inspired service and convenience. Located at the heart of "Restaurant Row" in downtown Stamford, Vela commands amazing views out over the new Mill River Park from an expansive 19th floor roof deck with views extending to Lower Manhattan. Amenities include a 19th floor roof deck with a private dining space, a cutting edge health and wellness facilities, pet amenities, an arcade room, and unprecedented park views, including views that extend up to Lower Manhattan.



## 66 SUMMER STREET

STAMFORD, CT

This 15-story tower is a key component of the Park Square West mixed-use development in downtown Stamford. 66 Summer houses 209 luxury apartments with a double height retail space on the ground floor. Amenities on the second floor mezzanine include a fitness room, yoga/flex space, library and club room with kitchen. The 15th floor rooftop deck provides breathtaking views. 66 Summer features a range of unit layouts, which vary from studios to two-bedrooms, and ultimately meet resident demands for views of downtown Stamford, the waterfront and as far as Lower Manhattan. Five townhouse units offer private stoops to the street level. The 321-space central parking garage connects to the city's Summer Street Garage, providing designated parking for the residents.

# ICON ARCHITECTURE RELEVANT EXPERIENCE

## FINCH

CAMBRIDGE, MA

This award-winning 98-unit affordable housing project located across the street from Fresh Pond is the largest multi-family housing development in the Commonwealth designed to be highly resilient and low energy. The six-story building is Certified for Passive House through PHIUS, and includes a 105 kW Photovoltaic array on the roof. The project incorporates Active Design principles and celebrates community with a variety of large, flexible program spaces and a roof deck.



## ORIENT HEIGHTS

EAST BOSTON, MA

ICON evaluated the existing 1950s Orient Heights housing in an A/E study for three potential conditions: re-use, hybrid (new and rehab), or new construction. The heart of the resultant Master Plan will be the renovated Community Center, surrounded by play areas and lushly landscaped open spaces for families to gather and grow. The 331 public housing residents are being rehoused in energy-efficient, gracious, and sustainable new townhomes and four story midrise buildings, arrayed across this hillside site. The first phase comprises 120 homes in five buildings and achieved LEED for Homes Platinum. A gracious entry plaza and rhythmic streetscape creates a new image for this visible location just north of Boston. Phase Two (88 units) is on track for completion in the spring of 2020.

# ICON ARCHITECTURE RELEVANT EXPERIENCE

## SOUNDVIEW LANDING

NORWALK, CT

Hurricane Sandy-impacted Washington Village is the recipient of a large-scale Choice Neighborhoods Transformation Plan and 30 million dollars of infrastructure funding. Goals include the replacement of the existing Washington Village public housing project, one of the oldest remaining such developments in Connecticut. The redevelopment, within walking distance of the SoNo train station, is being designed to conform to the recently adopted TOD zoning guidelines for the area and FEMA requirements for construction in an AE flood zone. The City of Norwalk is partnered with the Housing Authority and the private developer, raising the infrastructure and street grades by five feet. The scope includes creation of a vibrant 273-unit mixed-income community, with amenities and social programs, a renovated and reprogrammed city park, and new streetscapes and pocket parks for residents.



## 1550 ON THE CHARLES

BOSTON, MA

1550 on the Charles transforms a 1.65-acre former industrial site into a vibrant, pedestrian-friendly, transit-oriented development with 249 new residential units in two unique buildings. Marking a key gateway into the Boston Landing district, the two separate buildings engage the landscape, with entry courts, outdoor amenity areas, private patios, and decks for upper floor units.

The apartment building's corners playfully "ripple" decks and bays to engage the visual connection to the riverfront, alternating between recess and projection, adding shadow and interest to dissolve the inside/outside boundary. At the "ripple" corners, brightly colored shingles clad the angled walls, to provide a rich texture, like that of water walls with a lively patterning. The alternate recessed floors are clad in a "wood-look" siding, connecting to the natural setting of the parkland along the river.

Large, punched openings in these facades reveal groups of residential decks, and engage the larger scale of this broad parkway, with decks twisting to enhance the river view. At the entry courtyard, a projecting frame groups windows over the building entry in a simple gesture to direct attention to the lobby beyond the broad, landscaped courtyard.

# ICON ARCHITECTURE RELEVANT EXPERIENCE

## MAVERICK LANDING

EAST BOSTON, MA

Situated along Boston's Inner Harbor, this nine acre, transit-oriented neighborhood replaced an obsolete 1940s public housing "superblock". Maverick Landing's 426 mixed-income units offer a wide variety of unit types, including rental townhouses, mid-rise apartment buildings, and a seven-story condominium building at the water's edge. With rooftop photovoltaic panels and a cogeneration system, Maverick Landing is the first LEED certified affordable housing development in New England, engaging "healthy home" design and construction practices.



## WASHINGTON BEECH

ROSLINDALE, MA

Transforming the BHA's 1940's era family housing as a HOPE VI community, this revitalized housing centers on a new park and connects back into the surrounding Roslindale neighborhood with new streets and sidewalks. 216 apartments, in a range of housing types, engage this new public realm. A 5-story apartment building marks the primary corner of the site with one- and two-bedroom units and a community center open to view. Townhouse style two-, three-, four-, and five-bedroom units array around the central park and bounding new streets, with inviting front door stoops and private rear yards for each unit. Incorporating a photovoltaic array, and leading edge energy and air quality strategies, Washington Beech earned LEED for Homes Gold and LEED-H Midrise Gold.



**Education**

Bachelor of Architecture, University of Cincinnati  
Magna Cum Laude

**Registration**

Massachusetts (6048)

**Affiliations**

**HomeStart:**

Board of Directors, Gala Co-Chair

**Boston Society of Architects:**

Former Editorial Board AB,  
Former Board Commissioner, Education  
Former Chair, Awards Committee

**AIA New England**

Board Member FAIA

**Urban Land Institute:**

Advisory Board Member  
HED Product Council

**NESEA**

Board Member

**Boston Architectural College:**

Board Member  
Former Thesis Committee Rep

**Design Juries**

ULI Jack Kemp Excellence in  
Affordable Housing Awards  
Reviewer

AIA Housing Awards Chair, 2014

AIA Memphis Design Awards, 2011

ACES Engineering Excellence, 2010

AIA Wash. DC Design Awards, 2009

AGC Build New England, 2009

**Relevant Experience**

Principal-in-Charge, **Clarendon Hill**, Somerville, MA: Multiple site options and community meetings paved the way for design approval through the City of Somerville's new zoning ordinance. Looking over the verdant Alewife Parkway, this new mixed-income community will create 591 mixed-income apartments arrayed around a central park. Highlights of the design include new streets and open space, with a pedestrian connection to the Parkway. The A/E team is working closely with a modular manufacturer for first-of-it's-kind steel high-rise design.

Principal-in-Charge, **Tempo**, Cambridge, MA: The two-building complex of 320 luxury apartments is uniquely situated along Cambridge's Route 2, near the MBTA Redline Alewife Station, befitting this TOD location, capturing pastoral views of the 120-acre Alewife Brook Reservation beyond. The building features a bowling alley and 8,000+ SF of amenities.

Principal-in-Charge, **66 Summer Street**, Stamford, CT: 209 luxury apartments showcase an edgy, modern lobby. The two-story lobby features porcelain tile floors and a glass panel connecting stair, linking to the second floor Clubroom, Yoga and Fitness Rooms, and cozy Library. Apartments offer quartz countertops and open kitchens, with floor-to-ceiling windows looking out over Stamford Harbor and Long Island Sound. The fifteenth floor Roof Terrace boasts a chef's kitchen, fireplace, and gracious outdoor gathering space.

Principal-in-Charge, **Amaya**, East Boston: As the first new construction on the expansive Suffolk Downs Redevelopment, this mixed-use building will provide 475 residential rental apartments, almost 300 parking spaces, over 12,000 square feet of luxury amenity space and 24,000 square feet of commercial space. Positioned next to the future Innovation Center with a gracious pedestrian connection and plaza connecting Beachmont station to the future Beachmont Square, Amaya will anchor the entire site.

Principal-in-Charge, **Overlook Terrace**, East Boston, MA: With long views from the hilltop, but limited vehicle and pedestrian access due to the slope, the redevelopment transforms this challenging site. Providing 331 units in a mix of apartment types and sizes, in both townhomes and midrise buildings. Achieved LEED for Homes Platinum certification.

Principal-in-Charge, **One Canal**, Boston, MA: Transit-oriented development in Boston's Bulfinch Triangle, including retail and parking below 310 rental apartments built over the MBTA Orange and Green Lines and the Central Artery Tunnel.

Principal-in-Charge, **Avenir**, Boston, MA: Avenir elegantly combines 241 upscale apartments with vibrant retail and transportation links in Boston's Bulfinch Triangle sports and entertainment district. The 10-story building's varied massing and texture respond to the historic Bulfinch Triangle context of individual buildings aggregated over time.

Principal-in-Charge, **Vela on the Park**, Stamford, CT: Vela on the Park features 209 luxury apartment homes and offers residents boutique hotel-inspired service and convenience. Amenities include a 19th floor roof deck with a private dining space, a cutting edge health and wellness facilities, pet amenities, an arcade room, and unprecedented park views, including views that extend up to Lower Manhattan.

Principal-in-Charge, **Beach House**, Revere, MA: The new six-story residential building along beautiful Revere Beach features 234 luxury apartment residences ranging from studio to two-bedroom configurations. Resident amenities at Beach House include a rooftop pool and terrace featuring scenic ocean views, a 2,000-square-foot gym and a movie room.

Principal-in-Charge, **Port 45**, Boston, MA: Port 45 responds to its location at the intersection of Boston's most vibrant neighborhoods -- where South Boston, Seaport and South End meet. The 105 cutting edge homes range from one- to three-bedrooms, with a ground level, enclosed parking garage complete with electric car charging stations.



**Education**

Bachelor of Architecture,  
University of Arkansas, Fayetteville,  
AR, 1998

Bachelor of Arts, (Fine Arts)  
Hendrix College, Conway, AR, 1993

**Registrations**

Massachusetts (50554)  
Connecticut (ASI 15033)

**Affiliations**

- American Institute of Architects
- Boston Society of Architects (BSA)
- FHLB Affordable Housing  
Competition, Design Mentor
- Modular Building Institute  
MBI Design Professionals  
Advisory Council
- Urban Land Institute  
Urban Design Product Council
- JPNC Zoning Committee

**Relevant Experience**

Project Manager, **Clarendon Hill**, Somerville (MA): Multiple site options and community meetings paved the way for design approval through the City of Somerville’s new zoning ordinance. Looking over the verdant Alewife Parkway, this new mixed-income community will create 591 mixed-income apartments arrayed around a central park. Highlights of the design include new streets and open space, with a pedestrian connection to the Parkway. The A/E team is working closely with a modular manufacturer for first-of-it’s-kind steel high-rise design.

Project Manager, **125 Amory Urban Design**, Jamaica Plain (MA): Through many community and agency stakeholder meetings, the final design incorporates three new streets and a linear park, reconnecting a range of building scales and mix of housing types into the adjacent neighborhood. The Housing Authority-owned six acre 125 Amory site will comprise up to 350 new units of mixed income apartments.

Project Manager, **250 Centre and 25 Amory Street**, Boston (MA): Located directly across from Jackson Square’s Orange Line Station, this challenging site comprises 154 new units of mixed income housing, ground floor retail space. Prior to construction, enabling work included relocating the existing sewerline and extensive coordination with the MBTA. In addition to the residential use, new streets connect the larger redevelopment as one of the final phases of the decades-long Jackson Square Master Plan.

Project Manager, **Holtzer Park**, Jamaica Plain (MA): This split-level 62-unit residential building faces Amory Street on the second floor, with the primary entry, management/leasing, and community space located adjacent to the new small play area in the center of the site, facing two new streets. The proposed building integrates colorful accents, emulating Jamaica Plain’s colorful neighborhood context.

Project Designer, **Avenir**, Boston (MA): Avenir elegantly combines 241 upscale apartments with vibrant retail and transportation links in Boston’s Bulfinch Triangle sports and entertainment district. The 10-story building’s varied massing and texture respond to the historic Bulfinch Triangle context of individual buildings aggregated over time.

Project Designer, **One Canal**, Boston (MA): Transit-oriented development in Boston’s Bulfinch Triangle, including retail and parking below 310 rental apartments built over the MBTA Orange and Green Lines and the Central Artery Tunnel.

Project Designer, **33 Sylvan Avenue**, New Haven (CT): Located near the Yale/ New Haven Hospital and Yale Medical School, the nine-story New Rowe Residences provides 104 one- and two-bedroom units of mixed-income, intergenerational housing.

Project Manager, **Soundview Landing**, Norwalk (CT): The local housing authority determined this aging public housing development to be inadequate for current resident needs, particularly following the devastation of Hurricane Sandy and heightened FEMA restrictions. This project provides a 1-to-1 replacement of the current 131 units with additional market rate apartments, totaling 273 apartments in five buildings in three phases. Awarded CHOICE funds in 2014. All buildings are Enterprise Green Communities Certified, and one midrise is LEED Gold certified.

Project Manager, **The Graphic**, Charlestown (MA): Blending old and new, this redevelopment combines the adaptive reuse of an industrial graphic arts factory with a new modular residential building for 171 new apartments. The largest modular construction development in the city of Boston, to date, this innovative construction method offers real cost advantages, reducing construction time, minimizing disruption to this urban community, and providing a high level of quality control.

Project Manager, **Overlook Terrace**, East Boston, (MA): With long views from the hilltop, but limited vehicle and pedestrian access due to the slope, the redevelopment team evaluated options to transform this challenging site. providing 331 units in a mix of apartment types and sizes, in both townhomes and midrise buildings. The last phase of this multiphase project is anticipated to begin construction in the summer of 2021, providing 331 units in a mix of apartment types and sizes, in both townhomes and midrise buildings. The first two phases achieved LEED for Homes Platinum certification.



**Education**

Bachelors of Architecture,  
Wentworth Institute of Technology,  
2006

**Affiliations**

Urban Land Institute (ULI),  
Member

ULI Next Product Council

**Relevant Experience**

Project Designer, **One Canal**, Boston, MA: Transit-oriented development in Boston's Bulfinch Triangle, includes retail and parking below 310 rental apartments built over the MBTA Orange and Green Lines and the Central Artery Tunnel.

Designer, **Vela on the Park**, Stamford, CT: Completing a nearly twenty-year development process, the final phase of Park Square West, with an address of 1011 Washington Boulevard, adds 209 luxury apartments, with extensive resident amenities and 3,500 SF of retail space to this landmark mixed-use redevelopment of a 4.4 acre urban renewal site in downtown Stamford. The rooftop patio and lounge of this \$55 million, 19-story tower offers views extending to Lower Manhattan's new Freedom Tower.

Project Manager, **Tempo**, Cambridge, MA: The two-building complex of 320 luxury apartments is uniquely situated along Cambridge's Route 2, near the MBTA Redline Alewife Station, befitting this TOD location, capturing pastoral views of the 120-acre Alewife Brook Reservation beyond. The building features a bowling alley and 8,000+ SF of amenities.

Designer, **66 Summer Street**, Stamford, CT: 209 luxury apartments showcase an edgy, modern lobby. The two-story lobby features porcelain tile floors and a glass panel connecting stair, linking to the second floor Clubroom, Yoga and Fitness Rooms, and cozy Library. Apartments offer quartz countertops and open kitchens, with floor-to-ceiling windows looking out over Stamford Harbor and Long Island Sound. The fifteenth floor Roof Terrace boasts a chef's kitchen, fireplace, and gracious outdoor gathering space.

Project Manager, **Amaya**, East Boston: As the first new construction on the expansive Suffolk Downs Redevelopment, this mixed-use building will provide 475 residential rental apartments, almost 300 parking spaces, over 12,000 square feet of luxury amenity space and 24,000 square feet of commercial space. Positioned next to the future Innovation Center with a gracious pedestrian connection and plaza connecting Beachmont station to the future Beachmont Square, Amaya will anchor the entire site.

Project Manager, **Residences on the Charles**, Newton (MA): Located along the Charles River, this community encourages outdoor play, biking, access to transit and luxury. This project consists of 2 buildings, encompassing 204 units. The first all-electric building captures over 4,000 SF of amenity and provides residents and the surrounding community access to outdoor spaces with view to the adjacent river. The second all-electric building has been designed to achieve Passive House Certification and includes a golf-simulator and community room for the Town of Newton Residents.

Project Manager, **Holmes**, Beverly, MA: Located in the heart of downtown Beverly, this transit-oriented mixed-use development backs directly onto the Beverly Depot commuter rail station. The 67,000 square foot six-story building includes 51 market-rate and 16 workforce rental units.

Project Manager, **201 Canal, MA**: Two side-by-side parcels in the Hamilton Canal District nestled between the Pawtucket Canal remnant walls and Appleton Mill. These new residential buildings will sensitively complement the historic district. Two five story buildings connecting by an overhead bridge, are reminiscent of the site's industrial past. The project will deliver 125 units of mixed-income housing, as well as 5,000 square feet of commercial space at along the Pawtucket Canal. Amenities include a roof deck with panoramic views of the Lowell National Historic Park and a well-appointed clubroom, network cafe, fitness space and private workrooms.

Project Manager, **Beach House**, Revere, MA: The new six-story residential building along beautiful Revere Beach features 234 luxury apartment residences ranging from studio to two-bedroom configurations. Resident amenities at Beach House include a rooftop pool and terrace featuring scenic ocean views, a 2,000-square-foot gym and a movie room.



**THE COMMONWEALTH OF MASSACHUSETTS**  
**Executive Office for Administration and Finance**  
**OPERATIONAL SERVICES DIVISION**

One Ashburton Place, Suit 1017  
Boston, MA 02108-1552

Charles D. Baker

Governor

Karyn E. Polito

Lieutenant Governor

Michael J. Heffernan

Secretary

Gary J. Lambert

Assistant Secretary for Operational Services Division

January 13, 2021

Ms. Janice Marinello  
ICON Architecture, Inc.  
101 Summer St  
5th floor  
Boston, MA 02110

Dear Ms. Marinello:

Congratulations! Your firm has been renewed as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of **ARCHITECTURE FOCUSED ON URBAN, MIXED-USE, TRANSIT-ORIENTED DEVELOPMENT; LEADING EDGE SUSTAINABLE & LEED CERTIFIED DESIGN; CAMPUS PLANNING AND DESIGN OF ACADEMIC FACILITIES**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification.** Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is December 24, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at [wso@state.ma.us](mailto:wso@state.ma.us).

Sincerely,

A handwritten signature in blue ink that reads "William M. McAvoy". The signature is written in a cursive style and is positioned above the typed name.

William M. McAvoy  
Deputy Assistant Secretary and  
Chief Legal Counsel

KLOPFER MARTIN DESIGN GROUP (KMDG)

<https://www.klopfermartin.com/>

## FIRM OVERVIEW

The Klopfer Martin Design Group (KMDG) is a MA-SDO Certified WBE landscape architecture firm providing municipalities, housing authorities, architects, non-profit organizations, and developers with high quality site design and collaboration. We work across scales, from the parcel to academic campuses to the urban design of city districts. The company was founded in 2006 by Mark Klopfer, who is both a licensed landscape architect and architect. In 2007 Kaki Martin joined the firm as a partner, bringing her extensive public landscape and public process experience to the group. Our work reflects this interest in landscape and architecture, building and site. Our approach balances the aspirations of our clients with a respect for the needs of site, community, and sustainability. Our office currently consists of nearly twenty professional staff, including two principals, in addition to a small group of flexible part-time consultants to assist with larger deadlines.

For over twenty-five years, Mark and Kaki have led complex teams that set new design vision for public landscapes. At KMDG, they combine their design, public process and programming, and technical skills to create a team that is rich in aesthetic vision, experienced at project delivery, and stimulated by creative clients who face real-world, bottom-line constraints.

Housing, including multi-family, senior living and mixed-use projects pose unique opportunities. These center on the need to create common gathering space in support of the project community as well as at times the public at large. Such projects draw from our experience in the public realm with creating places in streetscapes and small urban spaces, to the creation of common landscape areas that serve a development or campus. In creating semi-public landscapes that serve a particular community, which sometimes are separated from the public realm for security reasons, we propose means for shared views to occur whether it be from the community outward, or from the public realm inward. Physical connectivity to the public realm for residents is also a critically important part of our approach whether it be connecting to public transit, local commercial district or pedestrian network, the livability of the housing will be highly dependent on successful connections to the greater context. We have devoted our practice to work in the public realm. Our team's experience includes many housing and mixed-use projects including Corcoran Park Housing in Cambridge, the redevelopment of Medfield State Hospital into housing and community culture and arts, 176 Lincoln, Frankfort Gove Housing, Ashlar Park and Finch Cambridge, the City's largest affordable housing project in the last 40 years. Our work at Finch capitalized on the buildings 25' setback to create a "front porch" gathering space featuring seatwalls and a flush deck that define the space. To meet Enterprise Green Communities Certification the landscape includes native and low water requirement plants, porous paving and infiltration areas to retain stormwater on-site.

Lastly, our firm has a commitment to strive for works of beauty in landscape. For us, aesthetics lie in formal beauty and a belief that a designed landscape can reveal and inform the site's history or larger contextual (ecologic, urban, hydrologic) connections.



Finch Affordable Housing, Cambridge, MA



# MARK KLOPFER, FASLA, AIA, LEED AP

## Principal

(he/him)

### PROFILE

Mark Klopfer is a LEED accredited, registered landscape architect and architect with over twenty-five years of practice experience. His experience is based in public building, housing, and campus site design, public park, and on-structure landscapes. Mark is a Professor of Architecture at Wentworth Institute of Technology, and has been a member of the landscape and architecture design faculties at Harvard Design School, Cornell University, and the Rhode Island School of Design. He was the 2000-2001 Prince Charitable Trusts Rome Prize winner at the American Academy in Rome.

His interests lie at the interface of architecture and landscape, at the human scale of rooms and gardens to the urban scale of neighborhoods and cities. Allowing people to interpret and understand a contemporary landscape with its cultural and historic legacy is a primary intention in Mark's work.

### RECENT CAREER SUMMARY

*Klopfer Martin Design Group, Boston, MA*

Principal 2006 – Present

*Jacques Whitford, Woburn, MA*

Principal Landscape Architect, Practice Leader 2004 – 2006

*Landworks Studio, Salem, MA*

Principal 2001 – 2003

*Hargreaves Associates, Cambridge, MA*

Associate 1996 – 2000

### RELEVANT EXPERIENCE – SELECTED WORKS

#### *Housing + Mixed-Use*

- Finch Passive Affordable Housing; Cambridge, MA
- Medfield State Hospital Housing Redevelopment; Medfield, MA
- Ashlar Park Housing; Quincy, MA
- Corcoran Park Public Housing; Cambridge, MA
- Cohasset Harbor Housing; Cohasset, MA
- 1170–1200 Hancock Street Mixed-use; Quincy, MA
- 176 Lincoln Mixed-use; Boston, MA
- Gove + Frankfort Housing; Boston, MA
- 2 Harbor Life-Science Center; Boston, MA
- Chelsea Solders' Home Master Plan; Chelsea, MA
- Bromley Heath Housing site improvements; Boston, MA
- Court Square Press; Boston, MA (w Landworks Studio)
- Park 5 Mixed-Use Development; Beijing, China

#### *Master Planning + Institutional Landscapes*

- The Steel Yard; Providence, RI
- Horace Mann School at Edwards Middle School; Charlestown, MA
- Suffolk University, Roemer Plaza; Boston, MA
- BWH Academic Medical Campus, Landscape Master Plan; Boston, MA
- BWH Hale Building for Transformative Medicine; Boston, MA

### SELECT HONORS & AWARDS

- 2019 – Central Square East Boston; Boston, MA; Merit Award for Design, BSLA
- 2018 – Roemer Plaza, Suffolk University; Boston, MA; Architecture Masterprize, Education
- 2018 – Fisher Hill Reservoir Park, Brookline, MA; Merit Award for Design, BSLA
- 2018 – Roemer Plaza, Suffolk University; Boston, MA; Merit Award for Design, BSLA
- 2016 – Roemer Plaza; Boston, MA Citation Award for Excellence in Architecture, Institutional Work, AIA NE
- 2013 – The Steel Yard; Providence, RI Silver Medal, Rudy Bruner Award for Urban Excellence
- 2012 – The Steel Yard; Brownfield Renewal Social Impact Award
- 2011 – The Steel Yard; Honor Award, American Society of Land. Architects
- 2011 – The Steel Yard; Honor Award, Boston Society of Land. Architects
- 2011 – The Steel Yard; Great Places Design Award, EDRA

### REGISTRATION & LICENSURE

- Landscape Architect; MA #1164
- Architect; MA #31411
- LEED Accredited Professional
- NCARB
- CLARB #6361

### AFFILIATIONS

- Wentworth Institute of Technology, Professor of Architecture
- American Academy in Rome, FAAR 2001
- Harvard University, Studio Critic, Lecturer

### EDUCATION

- University of Virginia; Charlottesville, VA, Master of Landscape Architecture, 1994
- Cornell University; Ithaca, NY, Bachelor of Architecture, 1988





# EMILY SCARFE

## Associate

(she/her)

### PROFILE

Emily is an Associate and has practiced in the Boston area for over 10 years. With degrees in both architecture and landscape architecture, Emily has a profound appreciation for the built environment and a sincere respect for the natural world. Her expertise comprises a holistic approach to resiliency measures, including sustainable design best practices and innovative responses to rising tides. She has managed projects that range in scale from intimate residential courtyards to campus master plans and brings a breadth of professional experience working on challenging degraded urban sites. She was part of the original research group that developed the Sustainable Sites Initiative (SITES) at the Lady Bird Johnson Wildflower Center at the University of Texas at Austin where she helped to research and write the SITES credits and credentialing criteria and steered the first pilot projects through the certification process.

Since joining KMDG in 2021, Emily has been guiding and directing the firm's collective engagement with resiliency measures.

### RECENT CAREER SUMMARY

<i>Klopfert Martin Design Group</i> ; Boston, MA Associate	2021 - Present
<i>Gregory Lombardi Design</i> ; Cambridge, MA Associate II	2015 - 2021
<i>The Office of James Burnett</i> ; Boston, MA Associate	2014 - 2015
<i>Michael Van Valkenburgh Associates</i> ; Cambridge, MA	2012 - 2014

### RELEVANT EXPERIENCE – SELECTED WORKS

- Landscapes, Urban Design + Master Planning*
- 2 Harbor Life-Science Center; Boston, MA
- Seaport Circle; Boston, MA
- 176 Lincoln; Boston, MA
- Medfield State Hospital Master Plan; Medfield, MA
- Cambridge Urban Design Guidelines; Cambridge, MA
- 139-149 Washington Street; Brighton, MA\*
- 1000 Boylston Street; Boston, MA\*
- Estate Master Plan; Georgetown, SC\*
- Corporate Headquarters; Peoria, IL\*

#### Parks

The 606 Trail; Chicago, IL\*

#### Campuses

- UNC Collaborative Sciences Building; Chapel Hill, NC\*
- Middlesex Community College Circulation Analysis; Bedford, MA\*

### SELECT HONORS & AWARDS

- 2016 - Innovation Award; BSLA Moakley Park Ideas Competition
- 2016 - People's Choice Awards; BSLA Moakley Park Ideas Competition
- 2011 - Student Award; Blake Alexander Scholarship
- 2010 - Student Award; ASLA Texas Student Honor Award
- 2010 - Student Award; Mebane Scholarship
- 2009 - Student Award; Blake Alexander Scholarship
- 2007 - Student Award; Mebane Travel Scholarship
- 2007 - Student Award; L.F. Southerland Scholarship

### TEACHING

- 2011 University of Texas at Austin; Studio Instructor
- 2010-2011 University of Texas at Austin; Teaching Assistant

### EDUCATION

- The University of Texas at Austin, Master in Landscape Architecture, 2011
- The University of Texas at Austin, Master of Architecture, 2011
- Bard College; Annandale-on-Hudson, NY, Bachelor of Arts in Film, 1999

\*prior work experience



# FINCH CAMBRIDGE



**Client**  
Homeowner's Rehab, Inc.

**Location**  
Cambridge, Massachusetts

**Architect**  
ICON Architecture

**Landscape Architect**  
KMDG

**Status**  
Complete

KMDG worked with ICON architecture on the largest new affordable housing project in Cambridge in the last 40 years – featuring 98 new units built to Enterprise Green Communities certification. The one-acre site is across the street from Fresh Pond Reservation and a short distance to Alewife T Station on the Concord Avenue raised cycle track. The landscape capitalizes on its tight 25' building setback, utilizing seat walls with inset wood bench tops that serve multiple purposes. They help create a clear edge between public/private serving both residents and those at the MBTA 74 and 78 bus stop, while also defining a flush deck that becomes the project's 'front porch.' The back of the site features a custom landscaped play space for children.

For Enterprise Green Communities certification, the project utilizes native and low water requirement plants, porous paving and infiltration areas to retain stormwater on-site and strategically reduced the need for irrigated landscape.

# MEDFIELD HOUSING



Proposed Site Plan\*



Preliminary site analysis diagram

\*Site plan from ICON Architecture

## Client

Trinity Financial, Inc.

## Location

Medfield, Massachusetts

## Architecture

ICON Architecture

## Civil Engineering

VHB

## Landscape Architecture

KMDG

## Status

In Schematic Design

KMDG has teamed with Trinity Financial, Inc, ICON Architecture, and VHB to re-develop the former Medfield State Hospital in Medfield MA. Perched high at the northwest corner of Medfield, overlooking the Charles River and nestled amidst a bucolic landscape of trees and walking trails, are the majestic buildings of the former Medfield State Hospital Campus. Medfield State Hospital (MSH) is listed in the State and National Registers of Historic Places and is designated a local historic district.

The master plan proposes the adaptive reuse of 27 existing buildings into multi-family housing and ancillary amenity space, comprising approximately 393,000 SF with 25% of residential units designated as affordable housing. The plan for the 47.5 acre site marries complementary residential uses with the proposed Cultural Alliance of Medfield's plan for cultural and arts uses onsite. Additionally, it invites community use of open space, to anchor and sustain residents of all ages and interests. The team will actively integrate sustainability measures that reduce the environmental impact of this historic rehabilitation to the extent allowable by the National Park Service and the Massachusetts Historic Commission.



**Client**  
Berkeley Investments

**Location**  
Boston, Massachusetts

**Architect**  
CBT

**Landscape Architect**  
KMDG

**Status**  
In Design Development

The maker space and innovation district at 176 Lincoln is an institution-owned, developer-led rehabilitation project of a 1920s-era steel fabrication building, that in the 1990s was repurposed into a large floor plate, high floor-to-floor, raw lab space that never saw a tenant fit-out. The project is currently under review with the BPDA through Boston's Article 80 permitting process.

Our project re-envisioned the building's third life as a mixed-use 'maker space' with adjacent residences and offices to serve entrepreneurial, tech, start-ups. It introduces new 'shell and core' elements within the existing column and slab infrastructure, but the exterior, publicly-oriented spaces are the key components to this redevelopment. Some spaces are envisioned as extensions of the maker spaces in which prototypes and larger elements can be assembled, tested or weathered outside, while other spaces draw from this 'maker aesthetic' to become animated social spaces for gathering, events, retail functions such as cafes, or as semi-private landscapes for residential dwellings in the complex.



# 2 HARBOR LIFE-SCIENCE CENTER



**Client**  
Beacon Capital Partners

**Location**  
Boston, MA

**Architect**  
Handel Architects  
STUDIO ENÉE

**Landscape Architect**  
KMDG

**Transportation Engineers**  
VHB

**Civil Engineers**  
Nitsch

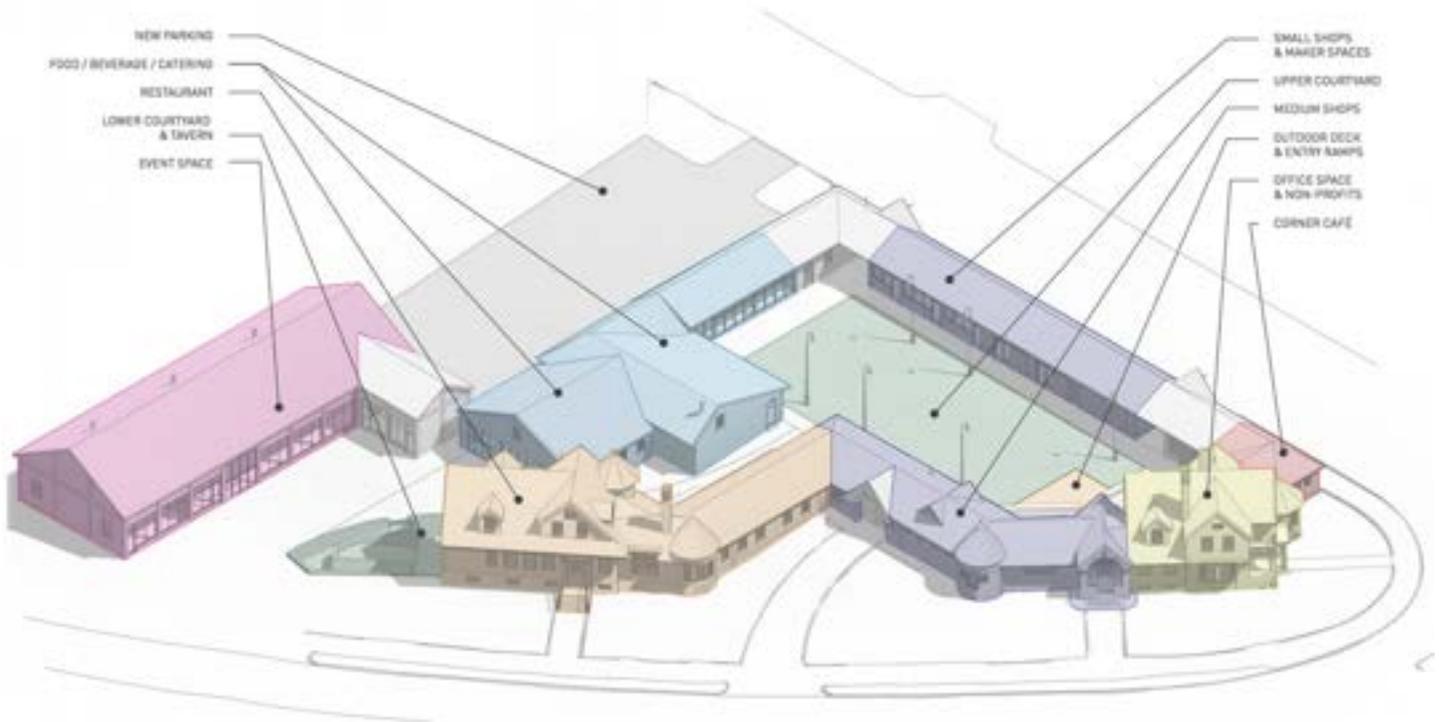
**Status**  
In Design Development

**Imagery**  
Shimahara Illustration

KMDG has teamed with Handel Architects on a new mixed use Life-Science center in Boston's Seaport located at the seam between the emerging residential and mixed-use South Boston Waterfront area and the industrial Raymond L. Flynn Marine Park (RLFMP). The site design of the 4-acre parcel looks to draw from the area's light-industrial and seaport history in establishing a new vision for landscape open space in the seaport. The Level 2 Amenity Terrace provides a calm respite for tenants, adjacent to the building's gym and yoga studios. The terrace provides informal seating covered by a custom shade structure, a tranquil water feature, and carefully articulated landforms that provide a sense of enclosure. The plant palette encompasses native plants and bamboo, as well as a pollinator garden. Site challenges include its location over the top of the Ted Williams Tunnel which precludes building construction over 2 floors, leading to the development of this portion of the site entirely as a landscape. Additionally the provision for 2050 resiliency that requires building ground floors be located four feet above grade poses challenges for the streetscape and the landscape around the building. As the gateway linking the Seaport and RLFMP, landscape design is at the forefront of obtaining Article 80 permitting approval from a multi-agency jurisdiction including Boston Planning & Design Authority, Massachusetts Port Authority, and Massachusetts Department of Transportation.



# THE CHARLES RIVER SPEEDWAY



**Client**  
Architectural Heritage Foundation

**Location**  
Boston, Massachusetts

**Engineers**  
Nitsch

**Architecture**  
Bruner/Cott Architects

**Landscape Architecture**  
KMDG

**Status**  
Complete

The Charles River Speedway Complex is in the Brighton neighborhood of Boston, Massachusetts. Dating from the 1890's, the site was offered for development through the DCR's Historic Curatorship Program. The development team's proposal involves a full rehabilitation of the buildings and landscape. Critical to the use of the site is the central courtyard which will support the tenant businesses including one of the anchor tenants Notch Brewing, a local craft brewer. The courtyard helps expand function space while also being accessible to the public as a neighborhood open space.

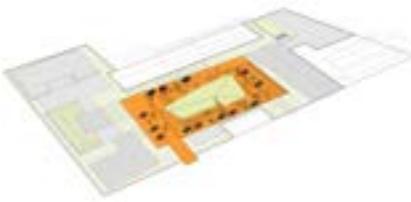
In partnership with Bruner Cott, KMDG was brought on as one of the lead consultants from the start of the project to support programming and conceptual design of the Speedway. Construction was completed in the summer of 2021.

# THE STEEL YARD



### Awards

- 2013 Rudy Bruner Silver Medal for Urban Excellence
- 2012 Sen. Chaffee Award for Conservation
- 2011 Honor Award ASLA
- 2011 Honor Award BSLA
- 2011 Providence Preservation Society Award
- 2011 Rhody Award, Preserve RI & RI Hist. Comm.
- 2011 Great Places Design Award, EDRA



CRUISE NIGHT



HALLOWEEN IRON POUR



MOVIE NIGHTS



IRON CHEF CONTEST



Christian Phillips Photography



Iron Chef viewing

**Client**  
The Steel Yard  
[www.thesteelyard.org](http://www.thesteelyard.org)

**Location**  
Providence, Rhode Island

**Environmental Engineer**  
EA Engineering, Science & Technology

**Civil Engineer**  
Morris Beacon Design

**Structural Engineer**  
Structures Workshop

**Landscape Architect**  
KMDG

**Status**  
Complete

In 2001, a forward-thinking group of individuals banded together to purchase a vacant steel fabrication facility as a campus for their nascent arts based non-profit. Faced with an expensive and comprehensive brownfield cleanup to allow the site to be used as envisioned, the Steel Yard and KMDG had to negotiate environmental requirements while also leveraging limited funds to meet programmatic needs and leave room for the organization's future growth.

Competing interests of large paved surfaces for outdoor work space, events, and vehicular movement, balanced with the sustainable interests of reducing impervious pavement, are driving forces of the landscape design. The resulting design is centered on a paved plane, 'the carpet,' which is woven with heavy- and light-duty pavements, impermeable and pervious materials. The margins beyond the pavement act as 'storm-water moats' infiltrating stormwater runoff, and providing habitat for volunteer vegetation. Building the carpet over existing grade reduced excavate and allowed all contaminated soil to remain on-site in landforms. Various program activities occur around the flexible campus core throughout the year, and on a daily basis, it serves the neighborhood as a publicly accessible, de facto park.



TECH ENVIRONMENTAL

<https://www.techenv.com/>

## Air Quality Services

Tech Environmental has been an industry leader since 1984, and our staff have over 100+ years of experience in air quality permitting, dispersion modeling, source and ambient monitoring evaluations. Our expertise and longstanding presence in the region means that we do not simply react to trends in air quality regulations in the Northeast; we are active participants in the development and implementation of those regulations.

**Permitting:** Tech Environmental's senior professionals have guided hundreds of projects through environmental regulatory approval and have managed large multi-disciplinary project teams on numerous projects. Our staff members have developed excellent working relationships with regulatory agency personnel at the Federal, State, and regional levels, as well as in many localities, and the firm has an excellent reputation among agency personnel for quality work. Tech Environmental has also worked on nearly 100 Boston Planning and Redevelopment Agency projects.

**Computer Modeling:** Air dispersion modeling is used to assess the effectiveness of air pollution control technologies and to evaluate compliance with air quality standards and with other regulatory requirements. Potential air quality sources for dispersion modeling include point sources, such as stacks and flares, area sources, such as parking lots and landfills, volume sources, such as garages and open buildings, and line sources, such as roadways and airport runways.

The US EPA "Guideline on Air Quality Models" specifies which models are acceptable for various situations, such as AERMOD and AERSCREEN model series to better predict potential ambient concentrations. The latest

versions of EPA's Motor Vehicle Emission Simulator (MOVES) and CAL3QHC models are used to calculate the emission factors for motor vehicles and to predict the impact at locations along roadways and intersections. Tech Environmental has run all versions of these models and their predecessors to better understand their development.

Tech Environmental has performed hundreds of air emissions dispersion modeling analyses for motor vehicles and aircraft. These analyses include dispersion modeling of highways, intersections, parking lots and parking garages, ground service vehicles and aircraft activity at airports, as well as microscale and mesoscale motor vehicle emissions analyses for roadway and real estate developments.

**Monitoring:** Regulatory agencies often require ambient air measurements of emissions impacts to establish the range and duration of air pollutant concentrations to which the public may be exposed. Tech Environmental can help address any health concerns you may have through sampling and then comparing the results to appropriate standards or limits.

Ambient air monitoring around a facility demands a range of technical expertise and knowledge that involves the unique combination of atmospheric science, meteorology, and a facility's operations. Tech Environmental's staff have also served as "expert witnesses" in public hearings and legal settings involving air monitoring matters.

Indoor Air Quality (IAQ) is increasingly becoming a concern due to buildings being designed with tighter construction to reduce energy usage. Tech Environmental can work quickly to investigate complaints of "poor air quality". These complaints often stem from inadequate ventilation or improper use of the HVAC system.

FORT POINT ASSOCIATES, INC.

<https://fpa-inc.com/>

## REPRESENTATIVE PROJECTS



### **Orient Heights Redevelopment, East Boston, MA**

FPA was retained by Trinity Orient Heights Limited Partnership to redevelop an existing 15-acre, 331-unit Boston Housing Authority public-housing development. The original development, constructed in 1951, received limited renovations in the more than 60 years it was in use. The Project involves the demolition of all buildings and replacement of the 331 units with new townhouses and mid-rise buildings. An additional 42 non-public housing units will be provided at market rate. New public open space includes a landscaped park, a play area, and a plaza. An 8,000 square foot on-site community

center and public way improvements will also be constructed in association with the redevelopment.

FPA guided the developer through the City of Boston's Article 80B review process and the State of Massachusetts' MEPA process to provide this critical upgrade to Boston's public housing stock.



### **Clippership Wharf, East Boston, MA**

Retained by Lendlease Development, Inc, FPA was responsible for leading and managing the environmental review and permitting of the mixed-use, transit-oriented redevelopment project on 10 acres of vacant, underutilized land at Clippership Wharf in East Boston. The project involved the construction of four six-story buildings containing up to 478 residential units, a public fitness club, a kayak launch, a fitness club, a destination restaurant, a commuter café, public parking, a recreational boat dock, and 1,400 linear feet of Harborwalk, creating a major waterfront destination for the entire East Boston community.

FPA secured approvals from the Boston Planning and Development Agency, Boston Conservation Commission, Boston Water and Sewer Commission, Boston Transportation Department and other state and federal agencies including the U.S. Army Corps of Engineers, the Federal Aviation Administration, the Massachusetts Executive Office of Energy and Environmental Affairs, Massachusetts Office of Coastal Zone Management, and the Massachusetts Department of Environmental Protection.



### **The Residences at Forest Hills, Jamaica Plain, MA**

Criterion Development Partners proposed to construct a mixed-use, transit-oriented development called The Residences at Forest Hills on a two-acre lot formerly in use as a paid surface parking lot located directly across the street from Boston's Forest Hills MBTA Station (Orange Line). The Project consists of two new buildings with 250 new housing units including 50 affordable units. New commercial spaces and residential amenity spaces will be located on the ground floor of the buildings adjacent to the Arborway. The Project will provide pedestrian-oriented, publicly accessible, open spaces,

including an open lawn to the south and streetscape enhancements such as street trees, seating, and lighting. A new pocket park at the corner of Washington Street and the Arborway will be built, featuring seating walls, a pedestrian path, and landscape and hardscape improvements.

FPA assisted the developer with City of Boston Article 80 approvals, Boston Parks and Recreation Commission approval, and review from the Massachusetts Historical Commission.



### **Jan Karski Way Extension Project, Dorchester, MA**

Bass Realty has proposed a mixed-use development on nearly 170,000 square feet of land to include approximately 400 residential units, 18,000 square feet of retail space, and approximately 260 below-grade vehicle parking spaces, 25 on-street vehicle parking spaces, and new public open space.

FPA provided planning, zoning, and environmental permitting for the project, which was approved by the BPDA and BZC in Fall 2021.



## 415 Newbury Street, Boston, MA

Trinity Financial's proposed project at 415 Newbury Street and 374 Commonwealth Avenue consists of two buildings containing approximately 133 residential units, residential amenities, and Harvard Club replacement facilities within approximately 181,093 sf of building space, together with approximately 125 off-street parking spaces, and related site and public realm improvements. The site is presently occupied by the Harvard Club of Boston and a surface parking lot. The project will help to address

Boston's need for transit-oriented housing units, with proximity to the Hynes Convention Center Station on the MBTA Green Line. FPA is assisting with the Expanded Project Notification Form (EPNF) process and Planned Development Area (PDA) process.



## 355 Bennington Street, East Boston, MA

FPA assisted the developer with the EPNF and Draft Project Impact Report under Boston's Article 80B approvals process for the 355 Bennington Street development. FPA also supported the project in the preparation of a PDA under Boston's Article 80C approvals process. Redgate's project involves demolishing the existing structure occupying the site and constructing a mixed-use building (up to 6 stories) with up to 170 residential units, ground floor retail space, off-street vehicle parking, and public realm improvements.



## 1141 Bennington Street, East Boston, MA

FPA assisted Redgate with the EPNF and Draft Project Impact Report under Boston's Article 80B approvals process for the redevelopment of the 1141 Bennington Street site into an approximately 249,534 gross square foot transit-oriented residential development, creating 220 new rental housing units, 1,144 gsf of retail space, 121 structured parking spaces, and significant improvements to the public realm. This project is currently under review by the BPDA.

The Project has been carefully designed to relate to the urban transit corridor and streetscape along Bennington Street, as well as the natural beauty of the Belle Isle Marsh. The proposed design thoughtfully enhances the Bennington Street streetscape while connecting it to the Belle Isle Marsh through an accessible pathway and reimagined public realm at the intersection of Bennington Street and Palermo Street. Main floor uses include a mix of residential units, lobby space, amenities, and retail. Approximately 121 parking spaces will be provided in a structured parking garage level, which is accessed from Austin Avenue.



## Maverick Landing, East Boston, MA

Retained by Trinity East Boston LLC, FPA was responsible for managing the environmental review and permitting process for the Boston Housing Authority-owned Maverick Gardens project. The Maverick Landing Development involved the demolition of the Maverick Gardens public housing complex and construction of 396 new, mixed-income rental units as well as 30 units of affordable condominiums. The project was partially funded by a federal HOPE VI housing revitalization grant.

The project has revitalized a large area of blighted housing in East Boston, as well as a vacant, underutilized site called Carlton Wharf along East Boston's waterfront. The project required close coordination with the City of Boston, East Boston residents, and a variety of stakeholders, as well as management of the project's team of subconsultants. FPA's responsibilities included the development of a strategic permitting plan, preparation of an ENF/PNF, and obtaining all required local, state, and federal approvals.



Jamie M. Fay, AICP, CEP

President

## Summary

Mr. Fay is founder and president of Fort Point Associates, Inc., a multi-disciplinary planning and environmental consulting firm. He has been the principal-in-charge and lead consultant for the past 35 years for a variety of master planning, real estate development and public infrastructure projects. Notable public sector projects include the \$2.5 billion Encore Boston Harbor Resort, the \$850 million Boston Convention and Exhibition Center, and the \$14 billion Central Artery/Tunnel project. Private sector projects include over \$4 billion in real estate development for commercial, industrial, residential and institutional uses. Mr. Fay is a member of the American Institute of Certified Planners, a Certified Environmental Planner, a Vice President and Trustee of The Boston Harbor Association for 25 years, and a Trustee of Boston Harbor Now.

## Relevant Experience

### **IMP, Boston University, Boston, MA**

Mr. Fay directed FPA's efforts as lead consultant for the development of BU's Charles River Campus' 2013- 2023 IMP. The 10-year IMP guides the management of 12 million square feet of buildings and the development of future projects serving 48,000 students, faculty, and staff. Mr. Fay coordinated a large project team that included university administration from various departments, architects and urban designers, transportation engineers, and attorneys.

### **IMP, Boston College, Boston, MA**

Under Mr. Fay's leadership, FPA has managed the environmental review and permitting process for many redevelopment projects at BC over the past decade. FPA was recently selected to help BC prepare a comprehensive IMP to guide the campus for the next ten years. The IMP will provide the framework for managing the existing campus building stock and developing future projects on the Brighton, Chestnut Hill, Newton, and Brookline Campuses. FPA has already prepared an IMP Notification Form for Renewal on behalf of BC and filed it with the BPDA.

### **Institutional Master Plan (IMP), St. Elizabeth's Hospital, Brighton, MA**

Mr. Fay served as Principal-in-Charge of the preparation of the IMP for St. Elizabeth's Hospital, including campus-wide institutional planning and Article 80 Large Project Review filings for a new 610-space parking garage and other projects.

## Jamie M. Fay, AICP, CEP

### **Orient Heights Redevelopment, East Boston, MA**

Mr. Fay was Principal-in-Charge of the redevelopment of an existing 15-acre, 331-unit Boston Housing Authority public-housing development. The Project involved the demolition of all buildings and replacement of the 331 units with new townhouses and mid-rise buildings, and 42 non-public housing units provided at market rate. Under Mr. Fay's leadership, FPA guided the developer through the City of Boston's Article 80B review process and the State of Massachusetts' MEPA process to provide this critical upgrade to Boston's public housing stock.

### **Clippership Wharf, East Boston, MA**

Mr. Fay led FPA's efforts on behalf of Lendlease Development, Inc, including managing the environmental review and permitting of the mixed-use, transit-oriented redevelopment project. The project involved the construction of four six-story buildings containing up to 478 residential units, a public fitness club, public parking, a recreational boat dock, and 1,400 linear feet of Harborwalk. FPA secured approvals from the BPDA, BCC, BWSC, BTM, and other state and federal agencies including the EOEAA, CZM, DEP, USACE and FAA.

### **The Residences at Forest Hills, Jamaica Plain, MA**

Under Mr. Fay's leadership, FPA assisted Criterion Development Partners with Article 80 approvals, Boston Parks and Recreation Commission approval, and review from the Massachusetts Historical Commission. This mixed-use, transit-oriented development includes two new buildings with 250 new housing units and 50 affordable units.

### **Jan Karski Way Extension Project, Dorchester, MA**

Mr. Fay is Principal-in-Charge of Bass Realty's proposed a mixed-use development on nearly 170,000 square feet of land to include approximately 400 residential units, 18,000 square feet of retail space, and approximately 260 below-grade vehicle parking spaces, 25 on-street vehicle parking spaces, and new public open space. FPA provided planning, zoning, and environmental permitting for the project, which was approved by the BPDA and BZC in Fall 2021.

## **Education**

B.A., 1976: Hampshire College, Amherst, Massachusetts

## **Professional Affiliations**

Member, American Institute of Certified Planners

Trustee, Boston Harbor Now

Former Trustee and Executive Committee Member, Boston Harbor Associates (25 years)

Finance Committee Member, Town of Ipswich (30 years)

Public Affairs Committee Member, NAIOP Massachusetts Chapter

MassDEP Regulatory Reform Task Force

## **Publications and Presentations**

"Waterfront Resiliency: Architecture and Site Strategies," AIA National Convention, June 2019

"Coastal Development Best Practices" Urban Land Institute Coastal Forum, October 2018

"Rising Sea Levels; Design Strategies for Waterfront Projects," ABX, November, 2016

"Industrial Development and Clean-up of Mystic River," Mystic River Watershed Association/Tufts Institute on the Environment, October 28, 2014

"Climate Resilient Housing Types," Architecture Boston Expo, October, 2014



Director

## Summary

Ms. Moniz is a Director at Fort Point Associates with 18 years of experience in civil and site land development, and particular expertise in moving projects through the local, state, and federal regulatory approval process. She has worked extensively on urban and waterfront projects in Greater Boston, managing the Article 80 regulatory process and performing critical infrastructure vulnerability analyses and adaptive site designs to improve site resilience to the effects of climate change. A Massachusetts Municipal Vulnerability Preparedness (MVP) Certified Provider, Ms. Moniz has also helped numerous cities and towns update and enhance their climate resiliency planning and preparedness efforts.

Ms. Moniz is an active member of the Urban Land Institute (ULI) Climate Resiliency Committee, NAIOP Massachusetts Government Affairs Committee and Leadership Council, and the Massachusetts chapter of the American Planning Association (APA). She served as a member of the City of Medford Conservation Commission for 12 years including 4 years as Chair.

## Relevant Experience

### **Institutional Master Plan (IMP), St. Elizabeth's Hospital, Brighton, MA**

As Project Manager, Ms. Moniz is leading a multi-disciplinary team in preparing the St. Elizabeth's Hospital IMP for campus-wide institutional planning and Article 80 Large Project Review filings for a new 610-space parking garage and other projects. Work includes planning, zoning, and environmental permitting applications, as well as public engagement with the BPDA-appointed Task Force and the community.

### **Jan Karski Way Extension Project, Bass Realty, Dorchester, MA**

Ms. Moniz is Project Manager for planning, zoning, and environmental permitting for a mixed-use development that will include approximately 400 residential units, 18,000 square feet of retail space, approximately 260 below-grade vehicle parking spaces, 25 on-street vehicle parking spaces, and new public open space. The project was approved by BPDA and BZC in Fall 2021.

### **Orient Heights Redevelopment, East Boston, MA**

Ms. Moniz helped guide the developer through the Article 80B review process and the MEPA process to provide this critical upgrade to Boston's public housing stock. The project includes redevelopment of an existing 15-acre, 331-unit Boston Housing Authority public-housing development with new townhouses and mid-rise buildings and an additional 42 non-public housing units. New public open space includes a landscaped park, a play area, an 8,000 square foot on-site community center, and public way improvements.

## Katie Moniz, PE, AICP, CFM

### **355 Bennington Street, East Boston, MA**

Ms. Moniz assisted the developer with the EPNF and Draft Project Impact Report under Boston's Article 80B approvals process for the proposed 355 Bennington Street development and also supported the project in the preparation of a PDA under Boston's Article 80C approvals process. Redgate's project involves demolishing the existing structure occupying the site and constructing a mixed-use building (up to 6 stories) with up to 170 residential units, ground floor retail space, off-street vehicle parking, and public realm improvements.

### **28-46 Cross Street, 6M Development – Boston, MA**

Ms. Moniz is Project Manager for the proposed development of a 140-room boutique hotel along the Rose Kennedy Greenway. The project, which is located on multiple parcels totaling approximately one-third of an acre in Boston's North End, requires an extensive permitting and review process with multiple City of Boston agencies including the BPDA, ZBA, and Parks Commission. Coordinating the Article 80 Large Project Review process with BPDA, drafting the EPNF, and leading public meetings and outreach.

### **IMP, Boston College, Boston, MA**

FPA has managed the environmental review and permitting process for many redevelopment projects at BC over the past decade. FPA was recently selected to help BC prepare a comprehensive IMP to guide the campus for the next ten years. The IMP will provide the framework for managing the existing campus building stock and developing future projects on the Brighton, Chestnut Hill, Newton, and Brookline Campuses. Ms. Moniz is serving as Project Manager on the IMP.

### **1141 Bennington Street, East Boston, MA**

As Project Manager, Ms. Moniz assisted Redgate with the EPNF and Draft Project Impact Report under Boston's Article 80B approvals process for the redevelopment of the 1141 Bennington Street site into an approximately 249,534 gross square foot transit-oriented residential development, creating 220 new rental housing units, 1,144 gsf of retail space, 121 structured parking spaces, and significant improvements to the public realm. This project is currently under review by the BPDA.

## Education

MS, Urban and Environmental Planning and Civil Engineering, Tufts University, 2008

BS, Civil Engineering, Tufts University, 2003

## Professional Affiliations

Licensed MA PE No. 48183

Accredited Planner

Certified Floodplain Manager

Urban Land Institute (ULI)

NAIOP MA, Government Affairs Committee and Government Affairs Leadership Council

APA Massachusetts

Climate Resiliency Committee Member, Urban Land Institute

Corporate Member, EBC-NE



**Katie Moore, AICP,  
LEED AP ND**

**Environmental Planner**

## Summary

Ms. Moore joined Fort Point Associates in 2019 as an Environmental Planner. A Certified Planner and Massachusetts Municipal Vulnerability Preparedness (MVP) certified provider, Ms. Moore is LEED AP ND accredited and has over 18 years of professional experience in municipal and institutional master planning, waterfront development, and resiliency-related projects. She currently manages and supports local, state, and federal regulatory approvals for commercial, industrial, and institutional development within Greater Boston and its waterfront areas.

Prior to joining FPA, Ms. Moore worked at an urban design and planning studio in Boston where she was involved with a wide range of projects, including municipal harbor planning, municipal master plans, urban renewal master planning, regulatory analysis for potential development, and sustainability planning. She also has prior experience with economic analysis, technical and communications support, and public meeting support for a variety of federal agencies through her position as an economist and researcher.

Ms. Moore's professional involvement includes membership in the American Institute of Certified Planners (AICP), the Massachusetts Chapter of the American Planning Association (APA), and the US Green Building Council.

## Relevant Experience

### **415 Newbury Street, Boston, MA**

Ms. Moore is FPA's Project Manager for Trinity Financial's proposed project at 415 Newbury Street and 374 Commonwealth Avenue. The project consists of two buildings containing approximately 133 residential units, residential amenities, and Harvard Club replacement facilities within approximately 181,093 sf of building space, together with approximately 125 off-street parking spaces, and related site and public realm improvements. The site is presently occupied by the Harvard Club of Boston and a surface parking lot. The project will help to address Boston's need for transit-oriented housing units, with proximity to the Hynes Convention Center Station on the MBTA Green Line. Ms. Moore is assisting with the Expanded Project Notification Form (EPNF) process and Planned Development Area (PDA) process.

### **355 Bennington Street, East Boston, MA**

As Senior Planner, Ms. Moore assisted the developer with the EPNF and Draft Project Impact Report under Boston's Article 80B approvals process for the 355 Bennington Street development. FPA also supported the project in the preparation of a PDA under Boston's Article 80C approvals process. Redgate's project involves demolishing the existing structure occupying the site and constructing a mixed-use building (up to 6 stories) with up to 170 residential units, ground floor retail space, off-street vehicle parking, and public realm improvements.

## Katie Moore, AICP, LEED AP ND

### **Orient Heights Redevelopment, East Boston, MA**

FPA was retained by Trinity Orient Heights Limited Partnership to redevelop an existing 15-acre, 331-unit Boston Housing Authority public-housing development. The original development, constructed in 1951, received limited renovations in the more than 60 years it was in use. The Project involves the demolition of all buildings and replacement of the 331 units with new townhouses and mid-rise buildings. An additional 42 non-public housing units will be provided at market rate. New public open space includes a landscaped park, a play area, and a plaza. An 8,000 square foot on-site community center and public way improvements will also be constructed in association with the redevelopment. As Senior Planner, Ms. Moore helped guide the project through the City of Boston's Article 80B review process and the State of Massachusetts' MEPA process.

### **1141 Bennington Street, East Boston, MA**

As Senior Planner, Ms. Moore assisted Redgate with the EPNF and Draft Project Impact Report under Boston's Article 80B approvals process for the redevelopment of the 1141 Bennington Street site into an approximately 249,534 gross square foot transit-oriented residential development, creating 220 new rental housing units, 1,144 gsf of retail space, 121 structured parking spaces, and significant improvements to the public realm. This project is currently under review by the BPDA.

### **125-133 Sumner Street – Boston, MA**

The project at 125-133 Sumner Street calls for the demolition of the existing Boston Housing Authority public housing development and the construction of a mixed-use, mixed-income, transit-oriented development. Ms. Moore provided assistance with the Boston Conservation Commission permitting and Chapter 91 Waterways License commitments

## Education

M.A., Urban & Environmental Policy and Planning, Tufts University, Medford, MA

B.A., Political Science, University of Michigan, Ann Arbor, MI

## Professional Affiliations

Member, American Planning Association

LEED AP ND, United States Green Building Council

Municipal Vulnerability Preparedness (MVP) Technical Service Provider (TSP),  
Commonwealth of Massachusetts

BRYANT ASSOCIATES, INC. (BRYANT)

<https://www.bryant-engrs.com/>

# FIRM PROFILE

**F**ounded in 1976, Bryant Associates, Inc. (Bryant) is a professional consulting firm that provides civil, structural and traffic engineering, water resources, construction management and surveying services to public and private clients throughout the Northeast, Midwest and Mid-Atlantic regions.

Bryant is a minority and disadvantaged business enterprise (MBE/DBE) certified by various states, government agencies, counties, cities and towns. Our public sector clients include local, state and federal environmental management agencies, facility management agencies, housing authorities, parks and recreation departments, public works agencies, municipalities and transportation agencies. Our private sector clients include architects, contractors, developers, engineering firms, corporations and institutions.

For over four decades, Bryant has helped our clients change the shape of their communities by providing thoughtful, innovative solutions to a wide array of infrastructure challenges. Capabilities include:

## Site/Civil

- Feasibility Studies
- Grading & Erosion Control
- Land Use Planning & Permitting
- Site Development & Utilities
- Stormwater Management
- Stormwater Pollution & Prevention Plans
- Water & Wastewater Systems

## Survey

- 3D Laser Scanning
- Aerial Photogrammetry
- Airport Runway Surveys
- ALTA & As-Built Surveys
- Construction Layout
- Control/Location Surveys
- GIS Data Capture
- Global Positioning Systems
- Bathymetric
- Property Line/Right-of-Way
- Rail Survey
- Topographic & Utility Surveys
- Wetlands & Resource Surveys

## Water/Wastewater

- Combined Sewer Overflows
- Manhole Inspection
- Pipeline Rehabilitation
- Sanitary Sewer System Evaluation Study
- Trenchless Technologies

## Structural

- Ratings
- Culvert Design
- Rehabilitation
- Seismic Investigations and Retrofit
- Substructure & Superstructure Design
- Type Studies
- Utility & Water Facilities

## Transportation/Traffic

- ADA Compliance
- Bike Paths & Rail Trails
- Drainage Design
- Highways, Intersections & Roadways
- Parking & Pedestrian Studies
- Roundabouts
- Runways
- Sidewalks & Walkways
- Traffic Calming Methods
- Traffic Impact Analysis
- Traffic Signal Design
- Work Zone Control Plans

## Construction Management

- Agency/Utility Coordination
- As Built Drawings
- Claims Analysis/Resolution
- Constructability/Design Review
- Construction Admin. & Management
- Contract Closeouts
- Field Investigations
- Public/Community Outreach
- Resident Engineering & Inspection
- Value Engineering

Clients choose Bryant because of our commitment to quality, our knowledge of their needs, standards and constraints, and our proficient and thoughtful professional team, which includes registered engineers, professional land surveyors, construction managers and a skilled and creative technical staff.

We regularly work both as a prime and subconsultant and often collaborate with professional peers and organizations that complement our skills and experience, to build teams with diverse capabilities. We are quality driven and our leadership team is accessible, involved and available.

## Locations

**NORTHEAST**  
Boston, MA (headquarters)  
Lincoln, RI  
**MID-ATLANTIC**  
Landover, MD  
Baltimore, MD  
**MIDWEST**  
Louisville, KY

## Capabilities

Civil/Site Engineering  
Construction Management  
Structural Engineering  
Water Resources Engineering  
Survey & Mapping  
Transportation & Traffic Engineering  
Permitting

## Executive

Jeffrey C. Bryant, PE  
Chief Executive Officer  
(617) 603-2372  
jcbryant@bryant-engrs.com

## Certifications

Minority & Disadvantaged  
Business Enterprise  
DBE in 237110, 541990,  
236220, 541330, 237310,  
237990 and 541370

**Diversity is our history and**



## our future.

*As a certified Minority Business Enterprise and Disadvantaged Business Enterprise, we're engineering an inclusive culture to drive positive change for our employees, clients, and communities. Because at Bryant Associates, you belong.*



www.bryant-engrs.com

# Civil/Site

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Our clients are leaders and innovators, making essential and innovative contributions in their fields and communities. For over four decades, Bryant has helped clients attain their development goals by providing site/civil engineering services for an array of linear, environmental and building projects in urban, suburban and coastal areas. These include: street and sidewalk reconstruction; site development for airports, commercial, institutional and residential buildings and parks and playgrounds; highway, roadway and railroad earth retention systems; drainage design and utility relocations. In addition, we have extensive experience in the rehabilitation and design of new water distribution and wastewater collection systems.

Bryant is committed to incorporating principles of sustainable design and energy efficiency into our projects. The result is an optimal balance of cost, environmental, societal and human benefits, while meeting the mission and function of the intended facility. It is Bryant's intent that sustainable design will be integrated as seamlessly as possible into the existing design and construction process.

Bryant places a high emphasis on integrating green and sustainable design into our construction documents. Within the urban design space, Bryant has provided specifications for the installation of biofiltration tree boxes, as well as passive irrigation systems and structural soil installation in support of new streetscape trees. Other civil/site features designed by Bryant include stormwater infiltration systems to provide groundwater recharge, especially when working within the City of Boston Groundwater Overlay District. Bryant also works with design teams to mitigate stormwater flow rates in order to meet civil LEED credit goals.

Bryant has worked on several facilities that have achieved LEED silver, gold and platinum certifications as well as submitted project reviews for LEED certifications. Working with architects, engineers, and construction firms, Bryant has provided sustainable review and design on construction activity pollution prevention, site selection and development, development density and community connectivity, alternative transportation, stormwater design; water efficiency and innovative wastewater technologies; energy performance; construction waste management; recycle content, regional materials; and innovation in design.

Our clients choose Bryant because of our commitment to quality, our knowledge of their needs, standards and constraints, and our skilled and thoughtful professional staff. We also collaborate with professional peers and organizations that complement our skills and experience to build teams with diverse capabilities.

For over four decades, Bryant has helped our clients change the shape of their communities by providing thoughtful, innovative solutions to a wide array of infrastructure challenges. We also take great pride in being ecologically responsible and sustainable in our projects by taking a proactive approach in the materials being used and being cost- and utility-effective. Our capabilities include:

- Environmental Permitting
- Erosion & Sediment Control
- Feasibility Studies
- Infrastructure & Utility Design
- Land Use Planning & Permitting
- Low Impact Design
- Roadway & Transportation Facilities
- Parking Lots
- Permitting/Approvals
- Stormwater Pollution Prevention Plans
- Stream Crossings and Culverts
- Underground Storage
- Utility Infrastructure Design



# Transportation/Traffic

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Bryant provides a full range of transportation and traffic engineering services. Our licensed and experienced staff is skilled in the preparation of the design and contract documents for complex projects ranging from roadways and intersections in rural and urban settings, to airport installations, rapid transit facilities (rail and bus) and seaports. Our capabilities include:

## Transportation/Traffic

- ADA Compliance
- Benefit/Cost Analysis
- Bike Paths & Rail Trails
- Bridge Design
- Complete Streets
- Construction Zone Traffic Management/Traffic Control Plans
- Cost Estimating
- Design of Safety Improvements
- Drainage Design
- Expert Witness Testimony
- Highway & Roadway Design
- Intersection Design
- Parking & Circulation Studies
- Pavement Evaluation and Design
- Pavement Markings
- Pedestrian Studies
- Railway & Subway Facilities
- Roadway/Intersection Safety Analysis
- Roundabout Design
- Runways
- Sidewalks & Walkways
- Streetscapes
- Traffic Calming Methods
- Traffic Flow Modeling
- Traffic Impact Analyses
- Traffic Signal Design
- Utility Improvements &
- Infrastructure Upgrades
- Vehicular Turning Movement Analysis

Clients choose Bryant because of our commitment to quality, our knowledge of their needs, standards and constraints, and our proficient and thoughtful professional team of engineers who bring a wealth of knowledge to the study and design of safe, practical and cost-effective roadways that enhance vehicular and pedestrian traffic flow as well as improve safety.

Our staff has worked with numerous cities, towns and state agencies. In addition, Bryant's traffic engineers have undertaken traffic impact analyses for private developers, architects, attorneys and other engineering firms and frequently provide expert testimony before public boards and agencies.



NITSCH ENGINEERING

<https://www.nitscheng.com/>

## Building better communities with you



*3368 Washington Street  
Boston, MA*



*One Canal  
Boston, MA*



*Overlook Terrace at Orient Heights  
Boston, MA*



*Boston Public Library,  
Johnson Building  
Boston, MA*

**Nitsch Engineering is a multi-disciplined engineering and surveying firm offering an integrated suite of services to efficiently serve the needs of our building/site development and infrastructure clients. Our civil, transportation, and structural engineers; land surveyors; planners; and GIS specialists work collaboratively to deliver client-focused, creative, cost-effective, and sustainable project solutions. We have earned the confidence of our clients, as illustrated by the fact that 96% of our work comes from repeat clients.**

For over 30 years we have worked on major private development and public infrastructure projects in Massachusetts and throughout the northeast.

### **Civil Engineering**

Nitsch Engineering's professional engineers coordinate their efforts with architects, landscape architects, and owners to provide comprehensive solutions to site-development issues. Our proactive approach to addressing stormwater management, grading, site utility, and permitting issues allows us to identify and resolve potential problems before they become critical issues.

### **Transportation Engineering**

Nitsch Engineering recognizes that the transportation elements of a project – including vehicle, bicycle, and pedestrian traffic – often set the tone for how a project is balanced in the surrounding environment. We perform traffic studies, prepare transportation master plans, and provide roadway design and permitting.

### **Structural Engineering**

Bridges are an essential element of our nation's infrastructure, and Nitsch Engineering's structural engineers devise innovative, cost-effective, and sustainable solutions that keep our communities safe. Our staff are experienced in designing new bridges, rehabilitating older bridges, providing NBIS bridge inspection, and assessing bridge load rating.

### **Land Surveying**

Nitsch Engineering works with each client to determine the appropriate scope of services and level of accuracy to meet the client's objectives, whether for a property line, topographic, title insurance, construction layout, laser scanning, or building survey.

### **Green Infrastructure**

Using principles of biomimicry, ecohydrology, and ecological restoration, and often incorporating rainwater harvesting, Nitsch Engineering's integrated approach results in sites that more closely reflect natural ecological patterns than traditional engineering techniques, while accomplishing the program objectives.

### **Planning**

Nitsch Engineering works with our clients to prepare feasibility studies and master plan documents that evaluate alternatives with the goal of providing the "best use" plan for the site and environmentally sound solutions. We identify potential impacts, obtain project approvals, manage public participation, and follow through with the permitting process.

### **GIS Services**

Nitsch Engineering meets our clients' planning, engineering, and land surveying needs with Geographic Information Systems (GIS) technology. By overlaying many different site factors, GIS analysis can help simplify the planning process when complex site or land issues are involved.

# Mark E. Violette, PLS

## Senior Project Manager, Land Surveying

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<b>Years of Experience</b>	38 in Industry 7 at Nitsch Engineering
<b>Registration</b>	Massachusetts: Professional Land Surveyor #40768, 1998 Connecticut: Professional Land Surveyor #70481, 2018 Transportation Worker Identification Credential (TWIC) OSHA (10-hour) Certified Notary Public, 2002
<b>Education</b>	A.S., Applied Technologies, Central New England College, 1985 Diploma in Architecture and Construction, Worcester Industrial Technical Institute, 1983 Continuing Education Seminars, 1985 to Date
<b>Expertise</b>	Mark has 38 years of experience in the land surveying field, including both field and management experience. He has managed public and private survey projects, including extensive work on a variety of building, utility, and highway and roadway projects. He is experienced in performing GPS, property line, ALTA/NSPS Land Title, Land Court, topographic, subdivision, construction, deformation monitoring, easement, photogrammetric, wetland delineation, and flood elevation surveys. Mark has a strong background in using a wide range of land surveying technologies and software to meet his clients' needs. He previously served as president of MALSCE's Central Massachusetts chapter, and received the 2015 Surveyor of the Year Award from MALSCE.

NEW ECOLOGY

<https://www.newecology.org/>

# NEW ECOLOGY

## FIRM PROFILE

New Ecology is a mission-driven nonprofit, seeking to address global environmental and equity issues by making the built environment more efficient, healthier, durable, and resilient. We are nationally recognized for our work on affordable and multifamily housing, community and government buildings, educational facilities, renewable energy and local infrastructure and for the positive effect we have on the people who live and work in these places.

Our reputation is based on our focus on practical and cost-effective strategies. We work with developers and design teams to achieve significant positive environmental and economic impact by emphasizing measures to reduce energy and water use, improve indoor air quality and occupant health, and make buildings more durable and less costly to maintain. We also work with building owners to analyze their building performance, track their energy use, and recommend improvements. We have pioneered the effort to use cost/benefit analysis to inform greening decisions and measure their impact. We have worked with financing agencies to help them understand how to incorporate sustainability criteria into their lending decisions. We have helped to train the next generation of practitioners and disseminated much of what we have learned by conducting trainings, speaking at conferences, and publishing our findings.

Our scope of work for projects includes leading integrated design teams, facilitating design charrettes, providing technical assistance on sustainable design, writing specifications that ensure that projects are built as intended, providing field inspection of green features, conducting renewable energy assessments, interfacing with local utilities, developing energy management strategies for existing buildings, facilitating certifications, fundraising, and ground-breaking work in measuring the costs and benefits of green building. NEI staff have experience with energy modeling, life cycle cost assessments, and climate resilience auditing.



### **BOSTON**

294 Washington St. | Suite 830  
Boston, MA 02108

### **BALTIMORE**

2526 Saint Paul St. | First Floor  
Baltimore, MD 21218

### **WILMINGTON**

100 West 10th Street | Suite 1015  
Wilmington, DE 19801

# NEW ECOLOGY

New Ecology is a leader in the cost-effective implementation of Passive House design and construction in Massachusetts. Our staff includes multiple Certified Passive House Consultants (CPHCs) as well as certified Passive House Builders and Raters/Verifiers. We completed the first certified multifamily affordable passive house project in MA in 2020, and have completed several more similar projects since. We are currently working on twenty five Passive House certification projects for affordable housing and mixed use buildings at various phases of design and construction. We are often consulted for our expertise on implementation of this deep energy reduction approach within the multifamily affordable housing context.

NEI provides consulting services to approximately 200 projects a year, which enables us to continually learn and apply what we learn from one project to the next. We have provided green technical assistance to over 202,000 units of multifamily housing, historic buildings, community facilities, arts buildings, day care centers, health care facilities and office buildings. We have LEED certified over 100 buildings and assisted with the successful execution of one of the City of Boston E+ housing projects, taking affordable housing beyond “net zero” into energy production.

New Ecology is an approved vendor to the MA Statewide Contract PRF-74 Energy Consulting Services in all three categories of work, including:

- Energy and Climate Action Research, Analysis, Advisory and Consulting Services
- Energy and Climate Action Project Advisory and Consulting Services
- Energy and Climate Action Facilities Management, Operations, and Maintenance Advisory and Consulting Services

In addition to our fee-for-service sustainable design consulting on multifamily new construction and rehabilitation refinancing, and energy efficiency technical assistance, we have raised millions of dollars in funding for energy efficiency and green building projects benefitting affordable housing, from a variety of sources that include foundations, MA Clean Energy Center, MA DOER and other government agencies, and utility companies.

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Wilmington, DE 19801

# NEW ECOLOGY

## WHO WE ARE

Founded in 1999, New Ecology, Inc. (NEI) is an innovative, nationally-recognized Green Building and Sustainable Design non-profit consulting firm. We work with our clients to develop and implement practical, cost-effective ways to reduce energy and water use, improve indoor air quality and occupant health, and make buildings more durable, resilient, and less costly to maintain.



NEI has greened over 202,000 units of housing and helped owners articulate and achieve their sustainability goals in settings including schools, day care centers, health care facilities, office buildings, community centers, and more. The common thread among these projects is that they are better buildings—for owners, for residents, for the environment—because of NEI's involvement.

## WHAT WE DO

NEI's services include:

- Integrated Green Design
  - Charrette Facilitation
  - Peer Review
  - Contractor Training and Field Inspections
  - Life Cycle Cost Analysis
- Audits and Analysis
- Green Building Certification
  - HERS Rating
  - Energy Star
  - LEED
  - Enterprise Green Communities
  - Passive House
  - NGBS Green Verifier
- Renewable Energy
- Energy Modeling
- Decarbonization and Zero Over Time Planning
- Rebates and Incentives
- Operations and Maintenance Planning and Training
- Remote Monitoring and Data Acquisition
- Owners Representative Services

*"New Ecology has an amazing team of experts who optimize our systems by contributing to the efficient design of buildings, assisting with heating system upgrades, and applying for large energy rebate programs. We have worked with other energy consultants that are basically in the business to produce reports- New Ecology does much more than that- they are true partners in our efforts and go the extra mile to get it done right."*  
~Frank Alvarez, Sr. Vice President,  
Beacon Communities



# NEW ECOLOGY

## The Joseph M. Tierney Learning Center At the Anne M. Lynch Homes



SOUTH BOSTON, MA • BEACON COMMUNITIES, LLC

- LEED New Construction Gold
- LEED Neighborhood Development Gold

The Learning Center is a 10,000 SF community center within the Old Colony development. It houses service providers who work to address the educational, employment, financial stability, and health and wellness of low-income families in South Boston.

Green features include:

- Highly efficient heating and cooling systems and HRV
- Sustainable, recycled, and regionally-sourced building materials and low VOC paints

## HOW WE GET RESULTS

NEI works as an integrated part of the project team, providing the technical expertise and capacity to ensure that the project achieves its sustainability and energy-efficiency goals in the most cost-effective and complementary way possible. We are constantly refining our knowledge and approach based on what we learn and the results we measure and achieve. We are not merely advisors; we do the actual work of ensuring that the team's green and sustainability goals are clear and well communicated, adequately documented, and built as designed. We are expert in achieving the highest certification levels attainable for a project and in qualifying for the maximum incentives and rebates. Whether the design team has chosen to build a conventional high performance building or to break new ground as an early adopter, the NEI team has a track record of delivering cost-effective results.



BOSTON | BALTIMORE | WILMINGTON  
617-557-1700 | [www.newecology.org](http://www.newecology.org) | [info@newecology.org](mailto:info@newecology.org)



**MACIEJ KONIECZNY, CPHC, LEED AP BD+C, C.E.M.,  
CBCP**

New Ecology, Inc.  
294 Washington St., Suite 830, Boston, MA 02108  
konieczny@newecology.org 617-557-1700 x 7024



**SUMMARY**

Mr. Konieczny joined New Ecology, Inc. in 2013. At NEI he manages the energy efficiency and sustainability components of NEI's retrofit, rehabilitation, and new construction projects, including LEED, Enterprise Green Communities and Energy Star certification processes as well as securing utility rebates. He has extensive experience with private and public sectors, having worked with multiple engineering and architectural firms, contractors, city, state and federal agencies. Previously, he worked for the Energy Efficiency and Sustainable Buildings Group for the Commonwealth of Massachusetts where he managed energy efficiency and renewable energy projects. Mr. Konieczny managed the sustainability office for the city of Newton, MA where he managed the planning, development and implementation of capital and energy efficiency projects, as well as energy management and procurement. He holds a Bachelors in Science in chemistry from Colorado College and a Masters in Landscape Architecture from UMass Amherst.

**EXPERIENCE**

**New Ecology, Inc.** June 2013–Present  
Boston, MA

**Senior Project Manager, Project Manager**

Sustainability consultant and technical assistance provider for high performance, green affordable housing

- Technical assistance and certification for LEED New Construction, Homes and Mid-Rise and Energy Star Homes and utility rebates
- Analysis and technical assistance for renewable and alternative energy
- Analysis and technical assistance for sustainable, energy efficient, high performance new construction and renovation/retrofit projects

**City of Newton** 2011–June 2013  
Newton, MA

**Sustainability Project Manager** – Public Buildings Department

- Responsible for managing projects focused on energy efficiency
- Technical review of designs and specifications to assure compliance with high performance building guidelines
- Performing energy audits and implementing appropriate ECMs
- Building benchmarking, BMS operation, commodity purchase, energy modeling

**Commonwealth of Massachusetts** 2009–2011  
Boston, MA

**Project Manager/Planner** – Division of Capital Asset Management, Energy Efficiency and Sustainable Buildings Group

- Responsible for managing capital improvement projects focused on the reduction of energy consumption and greenhouse gas emissions at multiple state facilities
- Completed energy and water conservation construction projects across the Commonwealth through all phases of energy performance contracts
- Project phases included planning, study, procurement, investment grade audit, construction, commissioning, and measurement and verification

# MACIEJ KONIECZNY, CPHC, LEED AP BD+C, C.E.M., CBCP

## City of Boston

2008–2009

Boston, MA

### **Project Manager** – Capital Improvements Division

- Responsible for the oversight of the design and construction of capital improvements across the City of Boston
- Accountable for representing the City of Boston during capital improvement projects by managing designers and contractors, and by interfacing with non-profit “friends” groups and the public

## Foliaire, Inc.

2006–2008

Boston, MA

### **Project Manager/Designer**

- Experienced in all aspects of small business management, including staff and subcontractor recruitment, development and supervision; project estimation, budgeting, and cost analysis; client relations and community networking; quality control, organizational and efficiency assessment, training, and evaluation of staff.

## EDUCATION AND TRAINING

**Colorado College**, Colorado Springs, CO  
Bachelor of Science, Chemistry, Physics

1998

**University of Massachusetts**, Amherst, MA  
Master of Landscape Architecture

2005

## CERTIFICATIONS

**Association of Energy Engineers (AEE)** – Certified Building Commissioning Professional (CBCP)

**Association of Energy Engineers (AEE)** – Certified Energy Manager (C.E.M.)

**Passive House Institute US** – PHIUS Certified Builder

**Passive House Institute US** – Certified Passive House Consultant

**US Green Building Council** – LEED Accredited Professional Building Design and Construction (BD+C) and Homes rating systems

**U.S. Department of Labor OSHA** – Ten-Hour Certification

**State of Massachusetts** – Certified Public Purchasing Program

**State of Massachusetts** – Pesticide Applicator License: Commercial – L

## TECHNICAL PROFICIENCIES

Microsoft Office Suite, Adobe Suite, QuickBooks, Delta Controls (BMS), AutoCAD, eQuest, Dialux, Rhino, Microsoft Projects, Primavera, ArcGIS

## **ASHLEY WISSE, EIT, CEM, CPHC, LEED AP, Green Rater**

New Ecology, Inc.

294 Washington St., Suite 830, Boston, MA 02108

wisse@newecology.org 617-557-1700 x7043



## **SUMMARY**

Ms. Wisse joined New Ecology, Inc. (NEI) in 2012. At NEI, she manages the greening of new construction and renovation projects, primarily in multi-family affordable housing. Ms. Wisse provides technical assistance to meet certification criteria for green building programs including numerous LEED rating systems, Enterprise Green Communities, and Energy Star; as well as securing applicable utility rebates for project owners and developers. Ms. Wisse also continues to research new technology and equipment to improve the intersection of construction and sustainability. During the 2016-2017 school year, Ms. Wisse also taught undergraduate courses in the Construction Management Department at the Wentworth Institute of Technology, located in Boston, MA. Ms. Wisse holds a Bachelor of Science degree in Civil Engineering from Syracuse University and a Master of Science degree in Architectural Engineering from The Pennsylvania State University.

## **EXPERIENCE**

### **New Ecology, Inc.**

October 2012–Present

Boston, MA

#### ***Director of Green Building Services, Senior Project Manager, Project Manager***

Sustainability technical assistance consultant for high-performance, green affordable housing.

- LEED Accredited Professional and Green Rater
- Enterprise Green Communities, Energy Star Homes, and utility rebate coordination
- Integration of renewable and alternative energy
- Design assistance and construction oversight of sustainable, energy efficient, and high-performance new construction and major renovation

### **Wentworth Institute of Technology**

September 2016 – May 2017

Boston, MA

#### ***Assistant Professor***

- Assistant Professor in the department of construction management, courses taught include: Construction Graphics and Revit Modeling – lab and lecture, Materials Testing and Quality Control – lab and lecture, and Construction Surveying – lab and lecture.

### **Wiss, Janney, Elstner Associates, Inc**

November 2010–September 2012

Boston, MA

#### ***Architectural Engineer***

- Team Coordinator & Manager of Test Preparation and Execution for ASHRAE Whole-Building Air Tightness Testing
- Document Control & Construction Activity Observation of building upgrades and repairs
- Exterior envelope commissioning and peer review.
- Owner's representative for OPR compliance and local code requirements
- General research, proposal writing, budget estimation, site visit reporting, testing reports, creation and investigation of inspection openings, and infrared verification

# **ASHLEY WISSE, EIT, CEM, LEED AP, Green Rater**

## **The Pennsylvania State University**

University Park, PA

August 2008–August 2010

### **Graduate Research Assistant**

- Researcher – Interviewed construction/design stakeholders and observed internal processes related ongoing construction; developed implementation strategies for campus-wide sustainable design goals and lean execution
- Co-researcher – Collaboration between the Green Building Alliance, Burt Hill, Inc., and the Lean & Green Research Initiative to understand phasing, decision-making, and key players within typical building projects to improve, lean, and increase sustainability within existing processes
- Residential Home Auditor – student teams visited volunteer area residents to review existing energy usage and provide possible improvements through long-and short-term investment strategies

## **EDUCATION AND TRAINING**

**The Pennsylvania State University**, College of Engineering, State College, PA

2010

Master of Science – Architectural Engineering

**Syracuse University**, L.C. Smith College of Engineering and Computer Science, Syracuse, NY

2008

Bachelor of Science – Civil Engineering

## **CERTIFICATIONS**

**Association of Energy Engineers** – Certified Energy Manager

**National Council of Examiners for Engineering and Surveying (NCEES)** – Engineer in Training (EIT)

**Passive House Institute of the United States (PHIUS)** – Certified Passive House Consultant (CPHC).

**United States Department of Labor and Training, Occupational Safety and Health Administration** – Ten hour Certified

**United States Green Building Council** – LEED Accredited Professional (AP) in the following rating systems: Building Design and Construction, Neighborhood Development, Interior Design and Construction, and Homes/Homes Midrise as well as Green Rater for LEED for Homes and Homes Midrise.

## **TECHNICAL PROFICIENCIES**

AutoCAD Architecture, AutoCAD Revit, Google Sketch-Up, **Wärme Und Feuchte Imitational (WUFI)** Modeling, THERM Modeling, and PHIUS Modeling

## **PROFESSIONAL ASSOCIATIONS**

**ASHRAE** – Member

**Association of Energy Engineers (AEE)** – Member

**PHIUS** – Member

**USGBC** - Member

**CANstruction** – Industry Mentor to Northeastern University team, 2011 and 2012

**North East Sustainable Energy Association** – Member

**Young Professionals in Affordable Housing** – Member

## **PUBLICATIONS**

**Thesis:** Process-Based Policy Development for Sustainable Implementation on Pennsylvania State University Renewal Projects

# JOHN BEAUMONT, P.E., CEM

New Ecology, Inc.

294 Washington St., Suite 830, Boston, MA 02108

john.beaumont@newecology.org 617-557-1700 x7093



## SUMMARY

Mr. Beaumont joined New Ecology in 2022 and serves as director of engineering, providing technical support for energy audits, modeling and calculations, project design reviews, and green building rating programs. Prior to New Ecology he served as Senior Project Engineer at Thornton Tomasetti, generated whole building energy models, parametric conservation measure studies, performed site assessments, developing savings calculations, produced schematic design concepts, feasibility studies, and reports. This work has included a range of commercial, residential, healthcare, laboratory, institutional, and municipal buildings. Mr. Beaumont brings experience in decarbonization and low energy designs, collaborating with project teams to successfully develop and implement ambitious goals. He holds a Bachelor of Science in Mechanical Engineering Technology from Wentworth Institute of Technology.

## EXPERIENCE

### **New Ecology, Inc.**

Boston, MA

September, 2022-Present

#### *Director of Engineering*

This position provides technical support to NEI project teams and directly to clients; as well as providing mentorship and coaching to a growing engineering department.

- Completes multifamily energy and water efficiency assessments and recommendations
- Participates in mechanical, plumbing and electrical design reviews for renovated or new multifamily and community buildings to maximize efficiency and ensure compliance with best practices, project design goals and green building standards
- Provides technical support to New Ecology's green building projects
- Prepares Owners Project Requirements for use by owners' consulting engineers and other team members; Working with building owners to improve the energy performance of their buildings; preparing conceptual designs, specifications and bid packages; Conducting forensic studies and quality control inspections of completed projects; assisting with the development of remote monitoring systems and interpreting data generated by these systems and other building energy management systems

### **Thornton Tomasetti**

Portland, ME

October, 2014 – August, 2022

#### *Senior Project Engineer*

Provided clients and supporting internal team with LEED, Passive House, and green building projects.

Existing building work included conducting audits of ASHRAE Levels 1-3 and calibrated energy models.

- Performed Energy Analysis for high-performance green buildings (new & retrofit) retro-commissioning and green building certification (LEED, LBC Core, Green Globes, Enterprise Green Communities)
- Provided energy and decarbonization consulting for a variety of project typologies including K-12 schools, university classroom buildings, dormitories, multi-family residential, hospitals throughout the east coast and nationally
- Conducted ASHRAE Level I, II, III energy audits

# **JOHN BEAUMONT, P.E., CEM**

**SMRT, Inc.**  
Portland, ME

September, 2009 – October, 2014

## *Energy Engineer*

- Conducted energy audits to evaluate energy use, costs, or conservation measures
- Performed energy modeling, measurement, verification, commissioning, or retro-commissioning.
- Design HVAC systems, including ductwork, piping, layout, and system selection
- Provided Green Building consulting services and analysis to support LEED, and other green certification projects
- Master planning site surveys and utility tracking

## **EDUCATION AND TRAINING**

**Wentworth Institute of Technology**

2009

Bachelors of Science Mechanical Engineering Technology

## **MEMBERSHIPS AND CERTIFICATIONS**

- Maine Professional Engineer, Mechanical License #PE13758
- AEE Certified Energy Manager, CEM #19726
- ASHRAE

# NICHOLAS HERNANDEZ

New Ecology, Inc.  
294 Washington St., Suite 830, Boston, MA 02108  
hernandez@newecology.org 617-557-1700 x7047



## SUMMARY

Mr. Hernandez joined New Ecology, Inc. (NEI) in January 2019. As Energy Engineer, he reports to NEI's Director of Engineering and collaborates extensively with project managers and other technical staff.

## EXPERIENCE

**New Ecology, Inc.**

July 2018-Present

Boston, MA

**Energy Engineer**

- Provides technical support to green building projects, including evaluating existing buildings to improve their performance, peer reviewing the designs of others to maximize efficiency and ensure compliance with best practices, project design goals and green building standards, creating conceptual designs for efficiency upgrades, and commissioning of mechanical systems.
- Builds auditing, energy analysis and savings calculations, estimating implementation costs, and writing relevant sections of technical reports; including site visits to assess building HVAC, plumbing, electrical, and enclosure systems, and may involve the use of various measuring devices and data loggers. This may require development of conceptual design or owner's project requirements and conducting forensic studies and quality control inspections of completed projects. At times the Energy Engineer will work directly with clients and their staff and may present results at meetings.
- Supports the building HVAC system monitoring and optimization (M&O) project. This includes on site assessments, preparation of piping and instrumentation diagrams, documenting the project, interpreting collected usage data, developing analysis methods, and other related duties.
- Provides energy modeling using many different types of simulation tools, plus two and three dimensional drawing software. Modeling involves reviewing building plans to extract important information for use in an energy simulation, developing building geometry from CAD and other types of files, identifying and modeling building envelope components and HVAC systems, and using building codes to develop baselines
- Accompanies NEI staff to on site audits

## EDUCATION AND TRAINING

**Worcester Polytechnic Institute**

2018

Worcester, MA

Bachelor of Science in Mechanical Engineering

McPHAIL ASSOCIATES  
<https://www.mcphailgeo.com/>



## Statement of Qualifications

### **Brief History of the Firm**

Since 1976 McPhail Associates, LLC has been providing geotechnical engineering services to architects, owners, contractors, institutions, and developers, primarily in the Boston area but also throughout New England. Over the years our services have expanded to include geoenvironmental, geothermal energy and below-grade waterproofing consultation. In addition, we offer a wide variety of contractor support services including design of temporary and permanent excavation support systems, pile and specialty foundations, and construction dewatering systems. We remain true to the vision of our founder, Robert E. McPhail, and continue to be creative, practical, respected problem solvers, always keeping our clients' best interest and vision in mind.

Our leadership team is comprised of four managing principals, Amy D. Apfelbaum, Peter J. DeChaves, Thomas J. Fennick, and Jonathan W. Patch, who oversee our business operations and provide executive-level project management alongside principals Ambrose J. Donovan and Chris M. Erikson. Our professional staff consists of approximately sixty (60) individuals with backgrounds in Civil Engineering, Geotechnical Engineering, Environmental Engineering and Geology. The senior engineering staff has advanced degrees in the geotechnical or geoenvironmental engineering discipline. Our key engineers have had extensive experience in subsurface explorations, geotechnical analysis and design, geoenvironmental site evaluation and remediation, design assistance to structural engineers and architects, and construction monitoring for more than 6,000 building, environmental, waterfront, and heavy construction projects.

### **McPhail's Role on this Project**

Having worked over the years with many design teams representing a broad spectrum of engineering disciplines and with the Massachusetts Department of Environmental Protection (DEP) who administers the Massachusetts Contingency Plan (MCP), we developed an in-depth understanding of the role of the geotechnical engineer and the geoenvironmental professional in performing the subsurface design of construction projects in terms of both geotechnical and geoenvironmental considerations.

Our geotechnical services may include subsurface explorations, geotechnical analysis and design, foundation recommendations, and construction quality assurance/quality control observation. Our geoenvironmental services may include environmental site assessments, subsurface explorations and analysis of soil, groundwater, soil gas, and/or indoor air), state and federal regulatory compliance, dewatering permit applications and regulatory compliance, air and dust monitoring, radon testing and radon mitigation design, soil disposal pre-characterization, UST assessment and closure, and soil receiving facility profile preparation.



## **Design Team Background**

Our success is due to our knowledgeable staff and experienced leadership who work with unparalleled collaboration to deliver comprehensive solutions to our client's development plans. The following are the key personnel that would be assigned to this project:

- Principal-in-Charge: Jonathan W. Patch, P.E.
- Senior Environmental Engineer [Associate Principal]: William J. Burns, L.S.P., L.E.P.
- Environmental Project Manager: Kathryn H. Lucey, P.G.
- Geotechnical Project Manager: Anna M. Pelletier

Resumes, which include professional experience, education, and relevant projects, are included herein.

## **Experience Working with Trinity Financial and the Design Team**

McPhail has been responsible for the geotechnical design, geoenvironmental consultation or provided major geotechnical construction consultation services for approximately seventy-five (75) projects with Trinity Financial. In addition, McPhail has collaborated with the key members of the proposed design team on numerous projects.

## **Relevant Experience**

McPhail Associates, LLC has provided geotechnical engineering consulting services for numerous projects in Charlestown and nearby areas, including the following:

- Avenir [with Trinity Financial]
- One Canal [with Trinity Financial]
- DCR North Point New Operations and Maintenance Facility
- Bunker Hill Housing Redevelopment
- Bunker Hill Community College Student Center Addition
- Education First Headquarters
- The Beverly
- Massachusetts General Hospital (MGH) Cambridge Street Project
- MGH Yawkey Center
- MGH Lunder Building
- Shriners Children's Boston
- The Liberty Hotel
- Bruce C. Bolling Municipal Building
- Horace Mann School Relocation
- Charlestown Police Station
- Charlestown Navy Yard Various Projects
- North End Community Center Feasibility Study



## **Diversity, Equity & Inclusion**

Our people come from a wide variety of backgrounds whether it be race, color, age, sex, national origin, or basis of disability. The diverse background of our people makes McPhail stronger and this diversity benefits both McPhail and our clients by fostering a close-knit community that encourages new thoughts and perspectives on old problems, leading to new and innovative solutions.



# JONATHAN W. PATCH, P.E.

## PRINCIPAL

### Education

Union College;  
Schenectady, NY  
Bachelor of Science  
in Civil Engineering (2000)

Cornell University;  
Ithaca, NY  
Master of Engineering in Civil and  
Environmental Engineering (2001)

### Professional Registration

Registered Professional Engineer:  
Connecticut, Massachusetts,  
New Hampshire, New York,  
Rhode Island, Vermont

### Professional Affiliations

American Society of Civil Engineers  
Boston Society of Civil Engineers  
Deep Foundations Institute  
Geoprofessional Business  
Association  
International Ground Source Heat  
Pump Association



Since 2001, Jonathan W. Patch has been directly responsible for a variety of geotechnical, geothermal and/or geoenvironmental projects with McPhail Associates.

Jonathan's responsibilities have included coordination of subsurface exploration programs, geotechnical analysis and design, geothermal well field design, geotechnical instrumentation, design assistance in preparing construction documents, and project coordination with other disciplines. His foundation construction experience includes both design and/or field monitoring of shallow and deep foundations including spread footing systems, ground improvement systems, drilled and driven piles, slurry walls, load bearing elements, caissons, pressure-injected footings, underpinning, and temporary earth support design for building and transportation projects.

Mr. Patch's geoenvironmental experience includes performing site assessments for the presence of oil and hazardous materials, and preparation of soil disposition plans and monitoring of site remediation operations in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000).

Mr. Patch has also been responsible for the geothermal well field design, test well installation and/or thermal conductivity testing for several projects that have utilized conventional closed-loop U-bends, quad-loops or High-Performance Geo Xchange (HPGX) materials.

### Representative Experience:

Avenir; Boston  
One Canal; Boston  
Fan Pier; Boston, MA  
Isabella Stewart Gardner Museum Expansion; Boston, MA  
MGH Cambridge Street Project; Boston  
The Quinn: 370 Huntington Avenue; Boston, MA  
Bruce C. Bolling Municipal Building; Boston, MA  
Omni Boston Hotel at the Seaport; Boston, MA  
Arthur D. Healey Schoolyard Renovation; Somerville  
Arlington High School; Arlington, MA  
100 College Street; New Haven, CT  
UMass Lowell University Crossing; Lowell, MA



# WILLIAM J. BURNS, L.S.P., L.E.P.

## ASSOCIATE PRINCIPAL

### **Education**

University of Maryland - College Park, Maryland  
Bachelor of Science in Environmental Science and Policy (2000)

Certificate in Geographic Information Systems: University of Maryland

Personnel Protection and Safety Training for Hazardous Waste Site Activities in compliance with OSHA Standard 29 CFR 1910 and SARA section 126(d) (1988)

### **Professional Registration**

Licensed Site Professional: Massachusetts (No. 4381)  
Licensed Environmental Professional Connecticut (No. 619)



Since 2002, Mr. Burns has been directly responsible for a variety of geoenvironmental and geotechnical engineering projects with McPhail Associates.

William's geoenvironmental responsibilities have included development and coordination of environmental subsurface exploration programs, completion of ASTM Phase I and II environmental site assessments, soil management plans, preparation of various comprehensive response action submittals, management and monitoring of site remediation operations, and environmental risk assessment in accordance with the applicable environmental laws and regulations of Massachusetts, Connecticut, Rhode Island and New Hampshire as well as project coordination with other design disciplines. His geotechnical experience includes coordination of subsurface exploration programs, preparation of foundation engineering reports, technical specifications and oversight of construction control.

### Representative Experience:

Kendall Square Initiative South of Main; Cambridge, MA  
The Landmark Center; Boston, MA  
Arlington Point; Lawrence, MA  
60 King Street; Providence, RI  
MGH Cambridge Street Project; Boston, MA  
The Marriner Building; Lawrence, MA  
Arlington High School; Arlington, MA  
The Green District; Allston, MA  
399 Congress Street; Seaport District of Boston, MA  
West End Yards; Portsmouth, NH  
Kenmore Square Redevelopment; Boston, MA  
The Residence at Westford Senior Living; Westport, CT  
Edith Johnson Apartments, New Haven, CT  
Parkside Village Apartments, Branford, CT  
Novartis Global Research Campus Expansion; Cambridge, MA  
The Modera Apartments; Framingham, MA  
Massachusetts General Hospital Museum and History Center; Boston, MA  
640 Memorial Drive; Cambridge, MA  
The Cambria Hotel; Somerville, MA  
Intercontinental Hotel; Boston, MA  
Shaw's Market at the Chestnut Hill Shopping Center; Chestnut Hill, MA

### **Professional Affiliations**

Licensed Site Professional Association  
Environmental Professionals' Organization of Connecticut



# **KATHRYN E. LUCEY, P.G.**

## **ENVIRONMENTAL SCIENTIST**

### **Education**

University of Connecticut;  
Storrs, Connecticut  
Bachelor of Science  
in Environmental Science

Trinity College of Dublin;  
Dublin, Ireland  
Master of Environmental Science

### **Professional Registration**

Registered Professional Geologist:  
New Hampshire

### **Certifications and Training**

National Radon Proficiency  
Program Residential Measurement

### **Professional Affiliations**

Licensed Site Professional  
Association



Since 2015, Kathryn has acquired extensive experience in monitoring soil borings and test pit explorations and classifying soil and rock samples. Kathryn also has extensive experience performing geoenvironmental sampling of air, soil gas, soil, and groundwater.

Kathryn has served as a geoenvironmental engineer at McPhail Associates since 2017 and her responsibilities have included planning and monitoring of subsurface explorations, completion of American Society of Testing and Materials (ASTM) Phase I and Phase II Environmental Site Assessments for the presence of oil and hazardous material in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000), New Hampshire Department of Environmental Services Administrative Rules, performance of geoenvironmental analysis based on data obtained through exploration programs, and preparation of dewatering permit applications.

### Representative Experience:

MGH Cambridge Street Project; Boston, MA  
Former Van Brodie Building; Lawrence, MA  
Beryl Garden Apartments; Boston, MA  
Bayside Doubletree Hotel Expansion; Boston, MA  
West End Yards; Portsmouth, NH  
530 Wellington Avenue; Cranston, RI  
100 Shawmut Avenue; Boston, MA  
Kenmore Square North Development; Boston, MA  
450 Massachusetts Avenue; Boston, MA  
Old Colony Housing Development; South Boston, MA  
Michael E. Haynes Arms; Boston, MA



# **ANNA M. PELLETIER**

## **PROJECT ENGINEER**

### **Education**

University of Massachusetts – Lowell; Lowell, Massachusetts  
Master of Science in Geotechnical Engineering

University of Massachusetts – Lowell; Lowell, Massachusetts  
Bachelor of Science  
in Civil and Environmental Engineering

University of Massachusetts – Boston; Boston, Massachusetts  
Bachelor of Arts  
in Economics



Anna M. Pelletier has worked for McPhail Associates since 2017 as a field engineer and project engineer. Her responsibilities as a project engineer have included planning and monitoring of subsurface explorations, geotechnical analysis and design, and overseeing construction monitoring by field engineers. Her foundation construction experience includes monitoring the construction of shallow and deep foundation systems including conventional spread footings, ground improvement systems, drilled and driven piles, slurry wall construction, load bearing elements, and various types of temporary and permanent earth support systems.

Ms. Pelletiers' geoenvironmental experience includes preparation of soil disposition plans and monitoring of site remediation operations in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000).

### Representative Experience:

Kendall Square Initiative; Cambridge, MA  
45 E. Central Street; Natick, MA  
Council Towers II; Roxbury, MA  
112 Rantoul Street; Beverly MA  
65 Washington Street; Salem, MA  
City of Boston Engagement Center; Boston, MA  
Flying Horses Carousel House; Salisbury, MA  
The 600; Everett, MA  
254 Lynnway; Lynn, MA  
526 Hartford Turnpike; Shrewsbury, MA  
The Lighthouses; Salem, MA  
640 Ocean Avenue Development; Revere, MA  
Element Care; Lynn, MA  
Quincy Central Fire Station; Quincy, MA

DIMEO

<https://www.dimeo.com/>



PRE-CONSTRUCTION MANAGEMENT SERVICES

**Austin Street  
Parking Lots  
Boston, MA**



*For over 90 years, the core principles of quality, value, experience, service, excellence, and tradition have served as hallmarks of Dimeo Construction Company. This third generation, privately held, family-owned -and-operated construction manager and builder is widely recognized throughout the northeast as a leader in providing high quality, innovative construction management and general contracting services for educational, residential, healthcare, municipal, retail, life science, and corporate clients.*

Dimeo is recognized as an industry leader offering comprehensive preconstruction planning and operational resources to ensure high quality, on time, and safe execution of its projects. Since 1971, Engineering News Record has ranked Dimeo among the Top 100 Construction Managers in the country. The organization has completed single projects ranging in size from several hundred thousand to over \$400 million. ***Dimeo's exclusive New England focus includes regional full-service offices in New Haven and Boston, in addition to our headquarters in Providence.***

*"Dimeo's culture and mindset is built upon providing outstanding service to clients and project stakeholders and maintaining long term relationships. Stephen has been instrumental in cultivating the 'builder's mindset' philosophy in everything we do in service to our clients."*

*Brad Dimeo*

## Company Principals

Founded in 1930 by Joseph Dimeo as a small, regional contractor, Dimeo Construction Company has steadily grown to become recognized as an industry leader performing at a consistently high level while exceeding client expectations in a transparent and predictable fashion.



Bradford S. Dimeo, Chair, is the leader and sole owner of Dimeo Construction Company. As Chair, Brad interfaces regularly with clients and all levels of company personnel, and provides strategic direction for the company.



Stephen F. Rutledge, President and CEO, stays connected with our client teams to ensure that the work is running smoothly and that outstanding issues are resolved in a timely and equitable manner. He attends key meetings throughout preconstruction and construction and visits project sites on a regular basis to review the progress of the work.

Stephen establishes and implements policy, procedures, and organizational strategy with an eye toward exceptional client relations. He has been involved with all aspects of the organization, including project management, planning, and estimating, purchasing, administration, and marketing. With over four decades of experience in construction management, Stephen is a hands-on manager.



Chris Doepper, Executive Vice President/Chief Operating Officer, leads the efforts of the Dimeo offices and project teams, while engaging our customers to ensure their projects are built on time, under budget and with the highest level of attention to quality and safety. With nearly 25 years in the construction industry, Chris directs the overall construction operations of the company, including project administration, contract management, preconstruction planning and estimating, purchasing, construction operations and safety compliance. He serves as a resource to the firm's project executives in the management of specific project operations and is also a liaison to owners and consultants on the overall performance of Dimeo's efforts.

## Qualifications of the Firm and Team

*Our team is uniquely positioned to successfully deliver this project based on their respective and collective experience of building and renovating Residential projects in the Boston area and throughout New England.*

*Specific qualities of our firm include:*

**170+ PROFESSIONALS**  
average longevity  
**15+ years**



**LOCAL EXPERIENCE**  
& community  
engagement



**ORGANIZATIONAL DEPTH**  
local offices &  
employee base



- » Over \$5 billion in work-in-place since 2010
- » Extensive portfolio of experience as construction managers for Residential projects
- » In-house resources including comprehensive (Site/Civil, Architectural, BIM and MEP) preconstruction planning
- » Approach and track record to engaging local communities and workforce development.
- » MWBE contracting and commitment to creating a diverse workforce
- » Members of Minority Construction Council (MCC)
- » Strong market presence among subcontractors and excellent buying leverage
- » Decorated Safety program (Dimeo has been the recipient of the CCIA Platinum award for 12 consecutive Years)
- » Comprehensive and well-integrated technology services platforms including Procore, Sage Estimating, Navisworks, Revit, Bluebeam, Holo Builder, and Predictive Solutions, among others
- » Financial Strength including AM Best Rating AA+ (Superior) bond rating and capacity of over \$900 million

### Principal Contact

**Mike Fuchs, Vice President of Preconstruction**  
**Dimeo Construction Company**

75 Chapman Street, Providence, RI 02905

T. 401.781.9800 M. 401.639.4535 F. 888.661.7388

mfuchs@dimeo.com

www.dimeo.com

## General Scope of Company Services

Dimeo can provide a full range of integrated project planning, general contracting and construction management services that are specifically tailored to complement the requirements of any project. Below is a categorization of services we provide as builders and construction managers:

### Integrated Preconstruction Planning Services

- » Integrated Design Planning (IDP)
- » Detailed Estimating (All phases)
  - CSI
  - Unifomat
  - What-if scenarios (Focus Estimates)
  - Architectural, Civil, MEP specialists
- » Schedule Development
  - Milestone and Master
  - CPM
  - Gantt
  - Resource based
- » Constructability and Value Management
  - VM tracking
- » BIM Clash Detection - Navisworks - Revit Platform
  - BIM Implementation Plans
- » Bid Package Scope Development
- » S/M/WBE Business Outreach
- » Long Lead Procurement
- » Logistics Planning
- » Sustainability Planning
- » Safety Planning
- » QC/QA Planning
- » GMP Formulation

### Construction Management – provide services including at risk GMP as well as owner-held contracts as an owner’s agent.

- » At Risk
- » Agency

### General Contracting – encompassing select list and public lump sum, as well as fixed price negotiated processes.

- » Fixed Price, Stipulated Sum
- » Lump Sum Bid

### Design/Build – engaged services under basis of design competitions and QBS/negotiated selection process.

- » Basis of Design
- » Turnkey

### Self-Perform – employment of 75 individuals encompassing both labor and carpentry trades. These team members are utilized to varying degrees in the execution of our self-perform contracts and direct work.

- » General Conditions
- » Select Demolition
- » Carpentry, rough and finish trades

### Construction Consulting – advisory services to various owner entities and consultant teams.

- » Planning Advisory
- » Project Oversight



## Safety

Dimeo views safety as the most important element of our role as CMR. Safety planning will commence as part of the planning for the project, implementing a *Prevention by Design (PbD)* methodology to review at the elements of the design and their requirements for safe construction execution. This early evaluation within the context of project and worker safety helps better inform the planning and steps that will become part of our actual plans during construction. Dimeo's safety record is among the best in the construction industry.

***Dimeo's current EMR is .77.***

***Our program will specifically address the following:***

- » Coordination with the project stakeholders and specifications
- » A list of Prevention by Design (PbD) opportunities listed by risk level during and after construction
- » The development of controls that will be incorporated into related divisional work scopes
- » The development of specific Job Hazard Analysis
- » Subcontractor on-boarding meetings for planning and coordination of work
- » Implementation of the Site-Specific Safety & Loss Control Program
- » OSHA 10 certification of all participants



## BIM

The Dimeo team will be supported through the latest digital and virtual project platforms involving cost estimation, LEAN processes, scheduling, design review and BIM as well as document control and team communications. It is the goal of Dimeo to use BIM at the highest and most efficient manner to support the project from design to delivery, demonstrating our commitment and progressive track record of embracing technology, including over 3.0 million sf of BIM projects. As early as possible, we will collaborate with our project partners to develop a detailed BIM Execution Plan (BIMxP).



## QAQC

The entire quality management process involves both definable and documented control and assurance plans beginning early in design and continuing throughout each phase of the project including completion, turnover and owner utilization of their new building. As part of the initial project kickoff meeting, the entire team will discuss the QAQC plan for the project and each specific phase.



## Financial Strength

Dimeo's Bonding Capacity is \$415M Single and \$900M Aggregate, with an AM Best Rating A++ (Superior). We do not have any long or short-term debt and have not utilized our available line of credit over the past twenty-five years.



## Dimeo + Tara

Dimeo Construction Company's approach to all assignments includes unsurpassed planning and operational services with cost, quality, schedule, and safety at the forefront of each decision. As the Lead Construction Manager, Dimeo will continue our ongoing relationship with Tara Construction, Inc. for the execution of the Austin Street Parking Lots project. The management teams at both Dimeo and Tara have longstanding relationships in the industry that span across several decades. Dimeo Construction Company will bring the construction management depth and expertise, along with extensive, large, and complex project experience in the Boston area and Northeast corridor to lead the project. Dimeo and Tara will jointly staff the project with Dimeo assuming the primary positions of Project Executive, Project Manager and Superintendent with Dimeo and Tara will draw from their respective staffs, sharing the balance of the team positions (PM, APM's, Asst. Supers, Project Engineers etc.). Additionally, we will draw on the well-established self-performance capabilities of both firms to execute strategic components of the project. It is important to note that this project will serve as one of several projects that Dimeo and Tara will be utilizing under the mentor-protégé model to grow Tara's Construction Management expertise and project size capabilities to increase their potential for future opportunities as a major Boston area minority contractor in a substantive way. Dimeo and Tara believe this teaming arrangement will result in a positive venture that benefits all parties moving toward a successful completion of the project. Through their involvement, Tara Construction will experience the entire life cycle of a large scale, logistically intricate project. This experience will serve as an education platform to help Tara continue their impressive growth in the Boston market.



### **MBE/WBE and Workforce Compliance Record**

Dimeo Construction Company has a deep commitment to the principles of providing equal employment opportunities for subcontractors and trades workers. Dimeo takes pride in being a part of projects that showcase our commitment to creating a diverse workforce that not only is representative of the local community but supports it as well. Our objective is not to meet the Owner's workforce goals for their project, but to exceed that number where possible with combined MWBEs, and/or SLBEs participation on total contract value. Additionally, Dimeo Construction Company will put forth maximum effort to ensure that all anti-discrimination and anti-harassment laws are enforced, and the work environment is free of harassment and discrimination.

Dimeo continually seeks opportunities to strengthen our links to community agencies that are potential sources of referrals for workers, subcontractors, and suppliers. Our alliance with the **Greater New England Minority Supplier Development Council** enhances our efforts and business partnerships with the MBE/WBE businesses and we take an active role in helping these companies be successful on our projects, as they are truly an extension of the Dimeo team we provide to you. On a day-to-day basis we assist many aspiring MBE/WBE-owned companies and provide guidance and training in completing documents/forms and navigating the various state processes for obtaining certified status.

This effort helps sustain a legacy that will far outlast the duration of any construction project. Our ability to reach and exceed the project goals is due to a continuous and immersed participation in the communication distribution and solicitation of information to and from prospective workers and subcontractors.

The Dimeo strategy and business template for ensuring compliance and diversity in the workforce is overseen by our dedicated full-time Manager of Diversity, Equity, and Inclusion, Darche' Hood. Dimeo's Affirmative Action/ EEO outreach efforts go one step further as we have an internal Diversity and Inclusion task force made up of full-time Dimeo employees to drive and oversee all EEO requirements set forth in conjunction with the Project Manager and collaborate with the Owner's compliance representative.

We take pride in providing opportunities for the individuals within the communities where we work. Dimeo Construction Company is committed to diversity, inclusion, and community relations to the same extent we dedicate ourselves to building great buildings. Our team is organized in a way that allows us to successfully strategize and implement successful programs customized to each project and community that we work in. Through our extensive network of partnerships and core commitment to diversity in the workforce, we have set ourselves apart, and our track record reflects that.

Our plan is active throughout the entire project duration from Preconstruction to Closeout. Below is listing of the key elements associated with the plan broken down by phase, with further explanation and examples following the outline.



### **Project Award**

#### **Preconstruction**

- » Cost Estimate
- » Workforce Projections
- » Identify M/WBE Opportunities / Bid Packages

#### **Procurement**

- » Outreach
- » Advertise
- » Bid
- » Confirm Scope/Schedule/Resources/Commitment
- » Award to Subcontractors

#### **Construction**

- » Forecast Labor Requirements
- » Communicate to Subcontractors
- » Monitor subcontractor workforce
- » Adjust plan if necessary
- » Report progress monthly
- » Repeat process

#### **Closeout**

- » Obtain final reports from subcontractors
- » Submit final project performance numbers
- » Perform project debrief and identify lessons learned

During the preconstruction phase we will work with the estimates developed by Estimator Jarod Wasserman to identify values of potential bid packages that will align with M/WBE subcontracting opportunities. The information is further utilized to calculate the values of labor vs. material/equipment. To be successful we need to understand the number of workforce hours needed on the project, which in turn allows us to calculate the number of Minority, Women and Section 3 workforce opportunities. During the preconstruction period we calculate the potential number of employment opportunities on the project. We do this by developing a time-scaled workforce matrix that identifies the number of total workforce hours by trade for each month of the project's original duration. This process is similar to developing the initial cash flow on the project.

Once the workforce projections have been determined, we multiply the project workforce goals (percentages) times the anticipated workforce hours for each trade (obtained from the estimate) to identify the projected hours of each worker classification (minority, female, Section 3, etc). This information is communicated to each of the bidders and included within each subcontractor bid package to insure compliance when awarded.

As a normal course of business, Dimeo regularly employs small business subcontractors that are also minority or woman owned. Our commitment to working with any subcontractor or supplier that displays expertise and responsibility in its field, regardless of size or ownership, has earned us a reputation of fairness throughout the region and enhanced M/W/SBE participation percentages

***Dimeo Construction Company is sensitive to the important link that exists between the city, its residents, and creating new business and employment opportunities for local citizens.***

### **Workforce Plan Summary**

In summary, the process of recruiting and identifying Minority, Women, and Section 3 workforce along with M/WBE and Section 3 businesses can be summarized as noted below:

- » Utilize outreach programs, job fairs, advertisements, social media, on-line and traditional news sources, local unions, and word of mouth to identify employment opportunities.
- » Interview applicants and, once certified, add to the list of individuals available for employment.
- » Introduce and pair available individuals with subcontractors that have available employment opportunities.
- » Have subcontractors interview individuals selected from the approved list.
- » Following a successful interview, the new employees begin work with the subcontractor.

### **Dimeo Strategic Compliance Planning & Implementation Development Of Bid Packages**

In order to comply with the project goals Dimeo prepares bid packages to ensure as much participation by M/W/SBE contractors as possible. The documents are reviewed and split into bid packages by trade, and in many cases, a trade bid package will be broken up into multiple smaller packages as "set-asides" which are available only to M/W/SBE contractors. These smaller packages provide more opportunities for M/W/SBE bidders. For example, concrete is often broken up into foundations, flatwork, and site concrete, making the packages smaller and available to more M/W/SBE contractors. In addition to creating "set-aside" packages Dimeo also requires large subcontractors to achieve the same workforce and subcontracting goals.

### Bidding Process

Once the bid packages are developed and reviewed, advertisements are posted in the local newspapers with the bid date and time as well as the purchasing agents contact information. The advertisement also includes a pre-bid conference date and time to review the public bid requirements, project schedule, logistics, bid package breakdowns, etc. In addition, mini pre-bid conferences are held with the local small and minority groups, and public events, to ensure the project information is adequately relayed to all possible interested parties. All bids are required to be submitted on the Bid Proposal form provided along with supporting paperwork. Dimeo then requests additional follow up information within 10 days from the bid date, including all lower tier contractors, M/W/ SBE Certificates, their set-aside plan, workforce plan, etc. Dimeo reviews all the bids received and selects the low two bidders to attend scope review meetings. Once the bid is confirmed in compliance, the lowest qualified subcontractor is selected and begins their work as scheduled.



### Workforce Tracking and Reporting

Once construction begins we will hold our initial kick off meeting with the subcontractors, where we outline and emphasize the project requirements, submission dates, and workflow of reporting associated with the prevailing wage requirements, and workforce goals. Internal tracking and projection spreadsheets are updated from payroll reports that the subcontractors submit monthly which identify their monthly percentages regarding resident, Section 3, minority, female and other requirements as requested.



As the project continues our onsite management team, the Project Manager and Superintendent, will monitor a daily count of each subcontractor's resident, Section 3, minority, and female workforce. This data is cross referenced with the weekly certified payrolls they provide. This level of detailed review ensures compliance by all parties. Our team regularly performs evaluations of each subcontractor's progress towards reaching their goals. If we determine that the subcontractor's projected workforce is not on track to attain the project goals, we will immediately meet with the subcontractor to assist them in developing of a recovery plan to meet the project goals.

## M/WBE Tracking and Reporting

Our project management and purchasing teams understand your goals, and effort to not only meet, but exceed, those goals and pursue them from subcontractors across all tiers. M/WBE disclosure from subcontractors and notice of use of their lower tier subs is completed at bid time. Subcontractors agree up front to meet the requirements and are requested to provide a list of subcontractors they plan to use in order to meet the requirements per project and our project management team tracks this participation on an internal spreadsheet and any specified reporting format as required by public or private agencies. If a subcontractor is not meeting the M/WBE requirements, we will hold a corrective action meeting and assist them with finding qualified M/WBE contractors to correct any deficiencies.

Below is a sample project Form 257, which feeds into a master sheet for a global project snapshot. Dimeo Construction Company will submit monthly workforce utilization reports to the owner and state agencies as required.

SUBCONTRACTOR :		<b>MONTHLY EMPLOYEE</b>														PROJECT									
ADDRESS																REPORTING FROM:									
PHONE : ( ) -																									
TOTAL FEDERAL & NON-FEDERAL CONSTRUCTION WORK																									
Constr	Classificat	Total All Empl		Black (Not of		Hisp		Asi an or		America n Indian or		Secti on 3		Stat e		State Reside		Minor	Fema	Sectio n 3	Appren	Total Number		Total Number	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F					M	F	M	F
	Journey workers																0%	0	0	0	0				
	Apprentices																0%	0	0	0	0	#DIV/			
	Subtotal																0%	0	0	0	0	#DIV/			
	Journey workers	5															0%	0	0	0	0	0			
	Apprentices																0%	0	0	0	0	0			
	Subtotal	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0			
	Journey workers																0%	0	0	0	0	0			
	Apprentices																0%	0	0	0	0	0			
	Subtotal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0	#DIV/		
	Journey workers																0%	0	0	0	0	0			
	Apprentices																0%	0	0	0	0	0			
	Subtotal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0	#DIV/		
	Journey workers																0%	0	0	0	0	0			
	Apprentices																0%	0	0	0	0	0			
	Subtotal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0	#DIV/		
	Total Journey	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0			
	Total Apprentices	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0			
	Grand Total	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%	0	0	0	0	0			
11. Company Official's Signature & Title								Phone								Date				Page					

## State Diversity Program Resources

A Dimeo Construction Company list of various public and private workforce agencies; as a regional construction manager, we have developed many great resource relationships over the years.

Massachusetts
Boston Residents Jobs Policy (BRJP) 26 Court Street, 7th Floor Boston, MA 02108 Sheryc Hearn, Equity Strategy Manager/Compliance Monitors (617) 635-3449 Phone Sheryce.hearns@boston.gov
Boston Planning & Development Agency (BPDA) Formerly known as BRA One City Hall Square Boston, MA 02201 Aaron K. Hallquist, Assistant Compliance Manager (617) 918-6218 Aaron.Hallquist@boston.gov
Peter Sasso Director of Compliance (BPDA) peter.sasso@boston.gov
Christopher Brown (City Office) Boston Residents Jobs Policy Manager christopher.brown@boston.gov
Mayors Office of Economic Development John A. Smith, Policy Analyst john.smith2@boston.gov
UMass Building Authority (UMBA) One Beacon Street, 31st Floor Boston, MA 02108 Maggie Drouineaud, Compliance Analyst mdrouineaud@umassp.edu
Division of Capital Asset Management and Maintenance (DCAMM) McCormack State Office Building One Ashburton Place, 15th Floor Boston, MA 02108 Brian K. McPherson, Director of Access & Opportunity Brian.mcpherson@state.ma.us
Carol Gladstone, Commissioner DCAMM carol.gladstone@state.ma.us
Workforce Reporting & Development Manager (DCAMM) Samilys Rodrigues (857) 204-1534 Phone Samilys.rodriguez@state.ma.us
Policy Group on Tradeswomen's Issues (PGTI) 2201 Washinton Street, Roxbury, MA Kate Harrison, Pipeline Navigator katenctc@gmail.com
Susan Moir, ScD Director of Research Susan.moir@umb.edu
New England Regional Council of Carpenters (NERCC) 750 Dorchester Avenue Boston, MA 02125 Elizabeth Skidmore, Business Rep/Organizer NERCC (603) 491-2406 eskidmore@nercc.org
Associated General Contractors of Massachusetts (AGC MA) 888 Worcester Street, Suite 40 Wellsley, MA 02482
Robert Petrucelli, President & CEO (781) 235-2680 ext. 14 petrucelli@agcmass.org
Lisa Frisbie, Director of Marketing & Communications frisbie@agcmass.org
Brendan Carter, Esq. , Director of Industry Advancement & Labor Relations carter@agcmass.org
Emily Sheedy, Director of Member Services (781) 296-9862 sheedy@agcmass.org
Northeast Center for Tradeswomen's Equity (NCTE) Kate Harrison, Pipeline Navigator katenctc@gmail.com

Building Pathways Boston 2201 Washington Street, 1st Floor, Roxbury, MA 02119 Mary Vogel, Executive Director (617) 238-5292 Phone mary@buildingpathwaysboston.org
Community Labor United Lindsay McCluskey, Senior Organizer (617) 758-9681 lindsay@massclu.org
Connecticut
Commission on Human Rights & Opportunities (CHRO) 450 Columbus Blvd Suite 2 Hartford, CT 06103-1835 Alvin Bingham, Supervisor AA/CC Unit (860) 541-3449 Phone / (860) 541-3432 Fax alvin.bingham@ct.gov
Section 3 Business Directory <a href="https://portalapps.hud.gov/Sec3BusReg/BRegistry/SearchBusiness">https://portalapps.hud.gov/Sec3BusReg/BRegistry/SearchBusiness</a>
CCIA/ AGC of Connecticut 912 Wethersfield, CT 06109 John Butts, Executive Director AGC CT (860) 529-6855 / (860) 803-6805 jbutts@ctconstruction.org
Building Pathways Connecticut Amy Blackwood (860) 258-6640 amyblackwood@ctula.org
Office of Diversity & Equity Connecticut (ODEO) 450 Columbus Blvd, Suite 1, Hartford, CT 06103 Penny Potter, Equal Employment Opportunity Manager (860) 297-5708 penny.potter@po.state.ct.us
Rhode Island
Office of Diversity, Equity & Opprtunity (ODEO) Cheryl A. Burrell, Associate Director (401) 222-6397 Cheryl.Burrell@doa.ri.gov
Building Futures Rhode Island (BFRI.ORG) Andrew Cortes, Director (401) 919-5928 acortes@bfri.org
Beth Ashman, Program Manager Apprenticeship bashman@bfri.org
RI Supplier Diversity Office Elvys Ruiz, Chief Program Development (401) 574-8253 elvys.ruiz@doa.ri.gov
MBE Compliance One Capitol Hill, 3rd Floor Providence, RI 02908 Dorinda Keene, Assistant Administrator (401) 574-8670 dorinda.keene@doa.ri.gov
Department of Labor & Training RI Scott Jensen, DLT Director scott.jensen@dlt.ri.gov
Govenors Workforce Board Heather Hudson, Executive Director heather.hudson@gwb.org
Rhode Island Black Business Association 3 Regency Plaza, Ste. 3E Providence RI 02903 Lisa Ranglin, President (401) 465 - 3669 Lisa@ri-bba.org www.ri-bba.org

## Dimeo M/WBE Track Record, Boston Area

Project Name And Location	Contract Value	MBE Goal	Actual MBE Partic	WBE Goal	Actual WBE Partic	Workforce Goals	Actual Workforce Partic
Old Colony Phase B South Boston, MA	\$72,019,017	30%	19.66%	10%	9.43%	MWF-25% FWF-10% BR-50%	MWF-42.54% FWF-4.44% BR-21.53%
Lowell Trial Court, Lowell, MA	\$141,684,737	*10.4%	* 15.8%	Combined with MBE	Combined with MBE	MWF-15.3% FWF-6.9% D/V-3%	MWF-18.4% FWF- 4.4% D/V-0%
UMass Amherst Isenberg School of Mgmt, Amherst, MA	\$53,318,632	*10.4%	*11.75%	Combined with MBE	Combined with MBE	MWF-15.3% FWF-6.9%	MWF-17.65% FWF- 6.91%
Avenir Residential & Mixed Use Development, Boston, MA	\$107,176,896	N/A	*33%	N/A	N/A	MWF-25% FWF-10% BR-50%	MWF-26.2% FWF-6.7% BR-24.9%
Duxbury New Middle/High School Duxbury, MA	\$111,000,000	7%	3%	4%	2%	N/A	N/A
UMass Amherst Commonwealth Honors College Campus, Amherst, MA	\$179,035,912	N/A	10%	N/A	8%	N/A	N/A
HUB 25 Morrissey Blvd New Residences, Boston, MA	\$64,727,791	N/A	N/A	N/A	N/A	MWF- 25% FWF- 10% BR-50%	MWF-43.8% FWF-6.7% BR-28.4%
Copley Mall Renovations, Boston, MA	\$20,953,662	N/A	N/A	N/A	N/A	MWF-25% FWF-10% BR-50%	MWF-31.15% FWF-1.74% BR-23.14%
860 Harrison Avenue Northampton Towers Residential Complex, Boston, MA	\$16,700,000	7.4%	20.1%	4.0%	9.1%	MWF-25% FWF-10% **S3-3% BR-50%	MWF-42.34% FWF-4.13% **S3-3.4% BR-35.07%
Northeast Regional Youth Detention Center, Middleton, MA	\$41,747,918	*10.4%	*16.3%	Combined with MBE	Combined with MBE	MWF-15.3% FWF-6.9%	MWF-16.1% FWF-1.1%
Jackson Gardens & Lincoln Way Neighborhood Revitalization, Cambridge, MA	\$40,575,418	*10.4%	*16.46%	Combined with MBE	Combined with MBE	MWF-20% FWF-10% A-N/A S3-3%	MWF-21% FWF-6% A-6.75% S3-2.1%
Massachusetts College of Art Art Museum, Boston, MA, MSCBA	\$21,019,078	N/A	N/A	N/A	N/A	MWF-15.3% FWF-6.9%	MWF-35.69% FWF-3.59%

\*MWBE Combined \*\*Section 3 (S3) Required BR: Boston Resident



Old Colony Building 3C - PHIUS, LEED Platinum

## Experience in Energy Efficient Buildings and Enclosures

Dimeo Construction Company is an engaged participant in the effort to support and build sustainable buildings and is one of the top 50 contractors named in the ENR Top 100 Green Contractors. As builders and construction managers, we understand the importance of sustainable construction and its critical impact on creating cleaner, healthier, more energy efficient, and environmentally conscious environments in which to live and work. Dimeo regularly works under several rating certification systems including Passive House, LEED, Energy Star, Green Globes, SITES, and NE-CHPs.

The Dimeo team includes many LEED and PHIUS Certified Builders and has extensive experience with sustainability projects. We have managed many of the key elements that are an integral part of the Zero-Net Carbon design on many projects, including Photovoltaic arrays and High-Performance Envelope construction. We understand the critical importance of a Zero-Net Carbon facility and when this is required, work closely with the design team during preconstruction to ensure that all requirements are met.

Going beyond simple, common-sense economic drivers in terms of intelligent material use, the Dimeo team and leadership understand their responsibility to deliver buildings that are efficient, resilient, and friendly to the planet. As a company, Dimeo was an early adopter of LEED, constructing one of the first LEED Certified Projects in the region (The Mark Twain House). Roughly 90% of its operations employees have been LEED trained, and roughly 50% have received accreditation and certainly all have participated in a building project designed or positioned to obtain LEED certification. We are encouraged to see this industry trend reflecting what was once a differentiator, has now evolved to become an expected baseline service.

In 2013 the company began individual Passive House and Net Zero training. The company presently employs 15 Passive House Certified Builders and recently completed a Net Zero/Passive House project (Old Colony Apartments Building 3C in Boston, MA).

There are several opportunities for meeting Zero-Net Carbon targets that are within reach to achieve Zero-Carbon ready design including:

- » Photovoltaic Opportunities
- » Geothermal Opportunities
- » Carbon offset purchases
- » High Performance Façade Treatments
- » Enhanced Air Barrier and Air Tightness Measures
- » Enhanced Building Management and Daylighting Strategies
- » All electric system usage in combination with on-site renewables

As it relates to material selection and embodied carbon reduction, our approach develops in parallel with formulation of specific building systems for consideration. Carbon sequestering property analysis, carbon footprint of material manufacturing, carbon-related shipping requirements, along with life cycle and functionality all play a role in determination of suitability for each assignment and involves a collective study from all stakeholder perspectives.



Lowell Justice Center - LEED Platinum

# Dimeo LEED Projects

## Platinum

- » Lowell Justice Center New Trial Court, Lowell, MA
- » Harvard University, Stone Residence Hall Renovation, Cambridge, MA
- » Old Colony Phase 3 Building C, South Boston, MA

## Gold

- » Old Colony Phase 3 Building B, South Boston, MA
- » Yale University Schwarzman Center Renovation, New Haven, CT
- » Yale University Science Building, New Haven, CT
- » Yale University, Benjamin Franklin and Pauli Murray Residential Colleges, New Haven, CT
- » Citizens Bank Corporate Campus, Johnston, RI
- » MetLife Corporate Office, Warwick, RI
- » Johnson & Wales University, John J. Bowen Center for Science & Innovation, Providence, RI
- » Yale University, Sterling Chemistry Lab, New Haven, CT
- » Duxbury New Middle/High School, Duxbury, MA
- » Oracle, 6 van de Graaf Renovations, Burlington, MA
- » FM Global Northwoods Renovations, Johnston, RI
- » Harvard University, Leverett-McKinlock Hall
- » Newton North High School, Newton, MA
- » Yale University, Kline Chemistry Laboratories, New Haven, CT
- » Yale University, Edward P. Evans Hall School of Management, New Haven, CT
- » Gateway Community College, New Construction, New Haven, CT
- » Kent Hospital, New Medical Office Building, Warwick, RI
- » CVS Health, New Call Center, Data Center, and Parking Garage, Woonsocket, RI
- » Fall River Justice Center, New Court Facility, Fall River, MA
- » FM Global New Corporate Offices, Johnston, RI
- » University of New Haven, Soundview Residence Hall, New Haven, CT
- » Blue Cross Blue Shield of RI Corporate Office Facility, Providence, RI
- » Avenir Residential & Mixed Use Development, Boston, MA

## Silver

- » College of the Holy Cross Performing Arts Center, Worcester, MA
- » The Residences at Forest Hills Station, LLP, Jamaica Plain, MA
- » MassArt Art Museum Renovation, Boston, MA
- » University of Rhode Island College Fascitelli Center for Advanced Engineering, Kingston, RI
- » University of Rhode Island Bliss Hall, Kingston, RI
- » UMass Amherst Isenberg School Of Management, Amherst, MA
- » Northeast Regional Youth Detention Center, Middleton, MA
- » Central Connecticut State University New Residence Hall, New Britain CT
- » University of Connecticut Health Center Ambulatory Care Center Fit-out, Farmington, CT
- » Yale University 43 Hillhouse, President's Official Residence Restoration, New Haven, CT
- » Ridgefield Library Renovations and Additions, Ridgefield, CT
- » Western Connecticut State University Visual & Performing Arts Center, Danbury, CT
- » UMass Amherst Commonwealth Honors College Campus, Amherst, MA
- » Town of Grafton New High School, Grafton, MA
- » Jonathan E. Reed Elementary/Middle School, Waterbury, CT
- » Brown University Metcalf Laboratories, Providence, RI
- » University of Connecticut Burton Football Complex & Shenkman Training Center, Storrs, CT

## Certified

- » Maverick Landing New Residential Development, Phases I-IV, East Boston, MA
- » IKEA New Retail Store, Stoughton, MA
- » The Mark Twain House New Museum Center, Hartford, CT

## Ongoing (Or Awaiting Certification)

- » Yale University 87 Trumbull Street Economic Center, New Haven, CT
- » University of Connecticut STEM Research Center (Science 1) Building, Storrs, CT

**TOTAL SF OF COMPLETED and ONGOING LEED PROJECTS:**

**Ongoing 232,367+ sf**

**Completed 10.7+ million sf**

**Total 11 million+ sf**





# Old Colony Public Housing Community



**AFFORDABLE WOOD FRAME SENIOR HOUSING, PHASE 3 B & C**



South Boston, MA



\$72,019,017



Lump Sum



182,360 sf

The Boston Housing Authority proposed to demolish the existing public housing buildings and construct two affordable housing residential projects on the project sites.

**Phase Three B** construction included an approximate 105,000 sf development comprised of one hundred fifteen (115) one, two, three and four-bedroom residential units in one four-story elevator building, known as Building B, with accessory property management and maintenance space located on the first floor.

**Phase Three C** construction included an approximate 51,000 sf development comprised of fifty-five (55) one bedroom units in one four-story elevator building, known as Building C, with first floor resident service space for low-income seniors.

MassHousing provided Beacon Communities with construction and permanent financing; other financing sources for Phases Three B and Three C included federal and state Low Income Housing Tax Credit (LIHTC) equity, BHA, the Massachusetts Affordable Housing Trust Fund, the state's Community Based Housing program, and a grant from the Massachusetts Clean Energy Center.

## SCHEDULE/COMPLETION DATE

27 Months, November 2022

## OWNER REFERENCE

Beacon Communities Services LLC  
Two Center Plaza, 7th Floor  
Boston, MA 02108

Darcy Jameson, Development Director  
617-574-1100 x585  
djameson@beaconcommunitiesllc.com

## ARCHITECT REFERENCE

The Architectural Team  
50 Commandant's Way at Admiral Hill  
Chelsea, MA 02150

Nate Thomas, Project Manager  
617-889-4402  
nthomas@architecturalteam.com

## CERTIFICATION

LEED Gold (Building 3B)  
PHIUS (Building 3C)  
LEED Platinum (Building 3C)



Images ©Ed Wonssek





## Brown University

### BROOK STREET RESIDENCE HALLS



Providence, RI



\$69,000,000



CM/Design-Build



124,800 sf

#### SCHEDULE/COMPLETION DATE

19 Months, June 2023

#### OWNER REFERENCE

Brown University  
295 Lloyd Avenue  
Providence, RI 02912

Paul Dietel  
Assistant Vice President of  
Planning, Design and Construction  
Facilities Management  
401-863-7844 (office)  
paul\_dietel@brown.edu

#### ARCHITECT REFERENCE

Deborah Berke Partners,  
Berke Architects D.P.C., Inc.  
220 Fifth Avenue  
New York, NY 10011

Noah Bilken  
212-229-9211 (office)  
nbilken@dberke.com

This two-building project, located on opposite sides of Brook Street on the southern end of campus, will provide an additional 355 beds and common spaces. Located adjacent to existing residence halls on the East and West sides of the project and with residential neighbors to the south, the new residence hall is for Brown upperclassmen who wish to balance living individually in single rooms with life in a residential community supported by kitchens, study and living spaces. The unit typology includes two and four person suites with clusters of students around communal living facilities.

Preparation of the sites will include removal of parking lots and the demolition of two houses and one commercial building. Scope will include all-electric buildings with VRF heating and cooling.

The project delivery will be Design-Build with the assigned firm of Deborah Berke Partners.

The Brook Street Residence Halls is Dimeo's twelfth assignment on the Brown University campus.





## Lowell Justice Center

### NEW TRIAL COURT



Lowell, MA



\$148,580,966



CM/GMP  
MGL Chapter 149A



277,000 sf

### SCHEDULE/COMPLETION DATE

42 Months, March 2020

### OWNER REFERENCE

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

Shawna Correll  
857-204-1470  
shawna.correll@mass.gov

### ARCHITECT REFERENCE

Finegold Alexander & Associates  
77 North Washington Street  
Boston, MA 02114

Jeff Garriga, AIA, LEED AP, Principal  
617-227-9272 x307  
jgarriga@faainc.com

### CERTIFICATION

LEED Platinum

The new 277,000 sf, 7-floor Lowell Justice Center in the historic Hamilton Canal District of downtown Lowell is a modern, energy efficient building that sets a new courthouse standard for sustainable design and quality of environment for visitors and staff. There are seventeen courtrooms with state-of-the-art security and technology features. An artist has been commissioned to integrate Lowell's historic architecture and diversification as well as judicial influence into the front entry glass curtain wall system.

The completed facility contains the operations of the District, Housing, Superior, Juvenile and Probate and Family Courts. It also contains office space for court staff, a Law Library, a detainee holding area, the Registry of Deeds, office of the District Attorney, and a Grand Jury Room.

The Lowell Justice Center acts as the cornerstone for the entry into this historic area and is the first new building constructed for Lowell's Hamilton Canal District development master plan.

Consistent with the state's commitment to the environment, this model courthouse was designed to achieve LEED Platinum certification and is the first Courthouse in the country to receive that designation. The building was also awarded the 2021 Boston Society of Architecture (BSA) Accessible Design Award.





## Orient Heights Phase 3

**WOOD-FRAMED PUBLIC HOUSING  
RESIDENTIAL REDEVELOPMENT AND RENOVATION**



East Boston, MA



\$59,622,517



CM/Lump Sum



142,630 sf

### SCHEDULE/COMPLETION DATE

20 Months, December 2022

### OWNER REFERENCE

Trinity Financial, Inc.  
75 Federal Street, 4th Floor  
Boston, MA 02210

Kevin McCarthy  
Senior Design and Construction Manager  
617-720-8400  
kmccarthy@trinityfinancial.com

### ARCHITECT REFERENCE

ICON Architecture  
101 Summer Street  
Boston, MA 02110

Jonathan Lashley, AIA  
617-541-3333  
jlashley@iconarch.com

### CERTIFICATION

Seeking LEED Gold

Dimeo Construction Company is currently building the BHA-owned public housing development Orient Heights Phase 3 in East Boston, Massachusetts. Designed by ICON Architecture, this residential project began in the spring of 2021 and includes the demolition of five existing apartment buildings and one community building. The new construction will include three new mid rise town-home buildings, one new 4-level midrise building and the renovation of seven existing rowhouse buildings. A total of 123 new apartments will be provided as well as complete sitework and landscaping.





# Washington Village

## PHASE 1



Boston, MA



\$86,644,603



CM/GMP



270,000 sf

### SCHEDULE/COMPLETION DATE

23 Months, August 2023

### OWNER REFERENCE

Samuels & Associates  
136 Brookline Avenue  
Boston, MA 02115

Kevin Luczkow, Vice President of Construction  
617-247-3434  
kluczkow@samuelsre.com

### ARCHITECT REFERENCE

Prellwitz Chilinski Associates (PCA)  
221 Hampshire Street  
Cambridge, MA 02139

Keith Jones, Associate  
617-547-8120  
kjones@pcadesign.com

### CERTIFICATION

Seeking LEED Silver

Dimeo Construction Company was recently awarded the Washington Village Phase 1 project by developer Samuels & Associates in Boston, MA. The project is a multi-phased mixed-use development proposed in the Andrew Square neighborhood of South Boston.

Phase 1, designed by PCA, Inc. will consist of 214 units of housing, approximately 20,000 sf of ground floor retail, interior and exterior parking and associated site improvements.

The Phase 1 Project site is located within the 4.7-acre main parcel with adjacent residential properties which require sensitivity to daily construction activities and mitigation. The project will include a single varying height structure consisting of a 2-story steel podium with 5 stories of wood framed residential (units and amenity space) above, interior podium parking with mechanical parking system (puzzle system), and associated site improvements. The site improvements include but are not limited to outdoor parking, amenity and/or recreation spaces, roadways/driveways, and utilities.





## Whittier Choice Apartments

### AFFORDABLE HOUSING AND MIXED-USED DEVELOPMENT PHASE 3



Boston, MA



\$115,000,000



Lump Sum



227,526 sf

#### SCHEDULE

27 months, October 2024 (In Progress)

#### OWNER REFERENCE

Preservation of Affordable Housing (POAH)  
40 Court Street, Suite 700  
Boston, MA 02108

Deanna Savage  
617-449-0895  
dsavage@poah.org

#### ARCHITECT REFERENCE

The Architectural Team, Inc.  
50 Commandant's Way at Admiral Hill  
Chelsea, MA 02150

Jason Gier  
617-889-4402  
jgier@architecturalteam.com

Dimeo recently began the Whittier Choice Apartments Phase 3 project in Boston, MA. The project consists of 2 Levels of Post Tensioned Podium under 10 Levels of LG Frame and will offer 172-Units of housing. The project will also feature, 2nd Level Parking (45-spaces) over Retail, Lobby, and BOH spaces.



## Allston Yards

### BUILDING A, MIXED USE, TRANSIT ORIENTED DEVELOPMENT



Allston, MA



\$117,250,000



CM/GMP



430,000 sf

#### SCHEDULE/COMPLETION DATE

28 Months, April 2024

#### OWNER REFERENCE

New England Development  
75 Park Plaza  
Boston MA 02116

David R. Pellegri, P.E.  
Senior Construction Manager  
617-243-7849 (office); 617-610-8906 (cell)  
DPellegri@NEDevelopment.com

#### ARCHITECT REFERENCE

Stantec Architecture, Inc.  
311 Summer Street  
Boston, MA 02210

Matt Roberts, Senior Associate  
617-960-6115 (cell)  
Matt.Roberts@stantec.com

#### CERTIFICATION

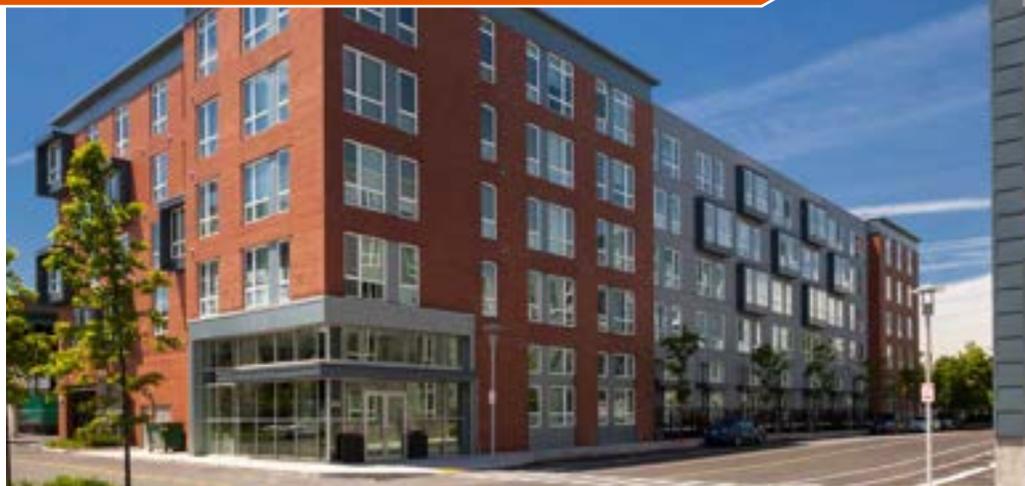
Seeking LEED Silver

Allston Yards, Building "A," is a mixed-use project that includes a four-story residential building over a podium level. Below the podium level is two stories of lobbies, retail, fit out of a Stop & Shop grocery store with parking, storage and MEP services. Below grade is another two stories of underground delivery corridors and parking.

The site is located within the existing parking lot area of the Stop & Shop Shopping Center and is bound by the Mass Pike/Commuter rail line (Boston Landing Station) immediately to the north.

In total the building is eight levels high and approximately 430,000 sf. The overall footprint covers approximately 65,000sf. The residential apartment complex includes 165 units, an amenity space and fitness center. The structured parking includes approximately 295 spaces. The lower four levels for the retail structure is a post-tensioned, reinforced concrete structure and the upper four levels for the residential structure is wood framed.

Included with the project (early on) is construction of an enlarged parking lot to offset the parking needs for the existing Stop & Shop Grocery Store, utility and roadway work for the future Guest and West Streets and the demolition of the existing Home Goods/Dollar Tree building for future development.



## HUB 25

### WOOD-FRAMED RESIDENTIAL DEVELOPMENT



Boston, MA



\$66,453,017



CM/GMP



219,000 sf

#### SCHEDULE/COMPLETION DATE

19 Months, August 2016

#### OWNER REFERENCE

Qianlong Criterion Ventures  
1601 Trapelo Road, Suite 280  
Waltham, MA 02451

Jack Englert,  
Executive Vice President/Principal  
781-890-5600  
Jenglert@criteriondp.com

#### ARCHITECT REFERENCE

ICON Architecture  
101 Summer Street  
Boston, MA 02110

David Stockless, AIA, LEED AP  
Associate Principal  
617-451-3333  
DStockless@iconarch.com

Located in the Dorchester section of Boston, HUB 25 includes 278 suites or apartments in two buildings nestled on a 2.35 acre site, situated directly adjacent to the JFK Redline Transit station (with bus, train and commuter rail services). The east building has a parking garage for 128 cars under the building.

Hub 25 mixes commercial and live/work ground level spaces with innovative apartments. Each building is five stories tall, clad in unique combinations of metal shingles, corrugated metal siding, metal panels and brick. The buildings are designed with a structural steel frame on the lower levels and a panelized wood frame on the upper floors. Amenities include a fitness room, a club room and an outdoor pool.

The residences cater to Boston working professionals looking to live in a diverse, transit-oriented community with rents less expensive than downtown. Sheltered from the bustle of the city and the expressway beyond, the Courtyard is serene and peaceful. Pockets of seating and small gathering areas provide areas for individuals or small groups, while allowing privacy for patio and deck areas.





## The Residences at Forest Hills Station, LLP

WOOD-FRAMED RESIDENTIAL & MIXED USE DEVELOPMENT, P I



Jamaica Plain, MA



\$77,329,461



CM/GMP



267,452 sf

### SCHEDULE/COMPLETION DATE

26 Months, March 2020

### OWNER REFERENCE

Criterion Development Partners  
1601 Trapelo Road, Suite 280  
Waltham, MA 02451

Jack Englert  
Executive Vice President/Principal  
781-890-5600  
Jenglert@criteriondp.com

### ARCHITECT REFERENCE

ICON Architecture  
101 Summer Street  
Boston, MA 02110

Michelle Apigian, AIA, LEED AP, AICP, CPHC,  
Associate Principal  
617-939-0721 (cell)  
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### CERTIFICATION

LEED Silver

This Jamaica Plain project in the Forest Hills section consists of a mixed-use development with apartments and future retail/restaurant space.

Criterion Development Partners (CDP) transformed the existing parking lot at the corner of Washington Street and the Arborway into a vibrant, pedestrian-friendly, transit-oriented, mixed-use development with market-rate, affordable workforce housing and access to the Orange Line. Two building complexes include 250 residential units. The design for the buildings is comprised of a structural steel frame with composite concrete slabs supported by spread footing foundations bearing on existing soils that have been "improved" via rigid grouted inclusions up to the 2nd level slab elevation. Above the 2nd level slab podium is 5 levels of structural wood framing. The building exterior includes a mix of cement fiber board panels, vinyl doors & windows, pvc trim and aluminum storefront with a PVC roof membrane. Interior construction is traditional metal stud with gypsum wallboard partitions, vinyl plank flooring, carpet, Dolce Vita kitchen cabinets and GWB ceilings. Mechanical systems are composed of a Navien system in each unit feed by rooftop condensing units.

Building 1 consists of a single retail level and five levels of residential space above. Building 2 is composed of two towers and is connected at the basement level by a 120-vehicle parking garage. Its six levels of residential space include a fitness center, yoga studio, clubhouse with teaching kitchen, gathering areas, theater room, bicycle storage/maintenance areas and electric vehicle charging stations.

An area of 5,500 sf of street-front retail/restaurant space for local merchants complements the neighborhood retail offerings abutting the project site along Washington Street.





## Avenir

### RESIDENTIAL & MIXED USE DEVELOPMENT, NEW CONSTRUCTION



Boston, MA



\$107,176,896



CM/GMP



380,000 sf

#### SCHEDULE/COMPLETION DATE

24 Months, June 2009

#### OWNER REFERENCE

Trinity Financial, Inc.  
75 Federal Street, 4th Floor  
Boston, MA 02210

Jim Keefe, Principal  
617-720-8400  
jkeefe@trinityfinancial.com

#### ARCHITECT REFERENCE

ICON Architecture  
101 Summer Street  
Boston, MA 02110

Janis Mamayek, AIA, LEED AP  
Principal  
617-541-3333  
jmamayek@iconarch.com

#### CERTIFICATION

LEED Gold

Located within Boston's historic Bulfinch Triangle, the Avenir site is bounded by Causeway, Canal and Haverhill Streets, and Rip Valenti Way. The development is a 241 unit 'high end' rental development, with 17 below-market units, in a ten story steel-framed structure.

Included within the structure are 116 parking spaces, 28,000 sf of commercial space, and 7,000 sf of reworked MBTA station entries. The project is situated above, and is partially supported by the structure of the MBTA's Orange and Green Line North Super Station. On a daily basis, 15,000 passengers traverse through the building through two exits/entrances located on the north and south sides of the building. The Dimeo team maintained an excellent rate of safety in this busy, active environment.

Units consist of one-level condominiums with studio, one, one plus, or two bedrooms; and duplexes with loft space and double-height windows. Other features include a roof deck and French balconies and terraces.

The block-long building was designed to appear as a series of varied building masses ranging from three to ten stories, reminiscent in character of the separate buildings along existing streets in the district.





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



TARA CONSTRUCTION, INC



# CORPORATE OVERVIEW

Tara Construction is a Hispanic-owned MBE that is certified under the Small Business Administration, the Commonwealth of Massachusetts, and the City of Boston. We are a general contractor with over two decades of experience in this market. In addition to managing programs from concept to completion, we self-perform all facets of carpentry from rough to finish including installation of all building envelope components on existing structures and new vertical construction for residential, commercial, institutional, retail, and historic restoration.

We pride ourselves in our efforts and results in hiring locally with an emphasis on providing the opportunity to create a lifelong career with one of our affiliated Local Carpenter Unions in the Massachusetts area.

Our experienced estimators, project managers, and OSHA 30 trained field staff can provide you with the comfort that the project will be completed within budget and on schedule.

## Services That We Provide:

- \*Project Management
- \*Davis Bacon compliance
- \*Records & Document Management
- \*Residency Requirements
- \*Scheduling
- \*Section 3 Compliance
- \*Estimating

## Clients:

- \*Chelsea Jewish Nursing Home as GC
- \*Dellbrook JKS
- \*Dimeo Construction
- \*U.S. Army & Air Force as GC
- \*Trinity Financial Corp.
- \*Suffolk Construction, Corp.

## Projects:

- \*Ft. Devens–Barracks Renovation Bldg. 674 (GC)
- \*Ft. Devens–UG Utility Infrastructure Upgrade (GC)
- \*South Bay Expansion Project
- \*Chelsea Jewish Nursing Home (GC)
- \*Orient Heights Phases II & III East Boston
- \*West Newton Rutland Apartment
- \*Reno. JJ Carrol Redevelopment
- \*Lenox Apartments Rehabilitation
- \*Mass Pike Towers Rehab-Boston (GC)

*“Tara Construction has been an incredible partner towards our projects’ diversity goals, notably going above and beyond the “Best Faith Efforts” box checking. Tara has attended our job fairs and made long term hires. They have hosted youth groups on site tours and had all carpenters available to speak with the students. And perhaps because of these consistent efforts, Tara routinely has workforce diversity participation that exceeds industry averages.”*

*Dakota Jones  
Director of Operations  
Senior Diversity Consultant  
InOrder Business*

Bonded and Insured:  
DUNS # 806013723  
CAGE # 58LK6

NAICS: \_\_\_\_\_ 236116,  
236117, 236210, 236220, 238130,  
238160, 238170, 238310, 238330,  
238350, 238390

## Staff:

- Pedro Pirez – CEO** PPirez@taraconstructioninc.com (781) 391-6400 x202
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- Hannah Pirez– Director of Project Management** – HPirez@taraconstructioninc.com (781) 391-6400 x216
- Mike Torridi - Director of Operations** - MTorridi@taraconstructioninc.com (781) 391-6400
- John Donovan – Accountant/Workforce Compliance** (781) 391-6400 x 200

115+ Union Carpenters and Carpenter Apprentices at Various Sites

GOULSTON&STORRS

<https://www.goulstonstorr.com/>

## Firm Overview

Goulston & Storrs is an Am Law 200 firm with offices in Boston, New York, and Washington, D.C. We have one of the largest, most diverse, and most highly acclaimed real estate practices in the United States, including a top tier ranking in Massachusetts by Chambers and Partners for over 20 consecutive years. With nearly 250 lawyers across multiple disciplines, we are a real estate powerhouse, with leading-edge development, land use, zoning, permitting, affordable housing, and Brownfields remediation and redevelopment capabilities.

## Real Estate - Massachusetts

The attorneys and paralegals in our market-leading real estate practice have the judgment, experience, pragmatism, and technical skill needed to help clients achieve their goals in complex and challenging real estate projects and transactions nationwide, with expertise across all asset classes, product types, and transaction structures in Greater Boston.

## Real Estate: Zoning/Land Use - Massachusetts

We are especially familiar with regulatory programs unique to the City of Boston. We have helped guide countless projects through Large Project Review under Article 80B of the Boston Zoning Code, including associated reviews, mitigation requirements, and public benefit expectations. Our experience extends to a diverse array of more granular approvals for such subjects as green building requirements; climate resilience; diversity, equity, and inclusion; environmental justice; transportation; sewer infrastructure; public realm and open space improvements; and design review. We appear regularly before the Boston Planning & Development Agency, Zoning Board of Appeal, Zoning Commission, Public Improvement Commission, Landmarks Commission, and other municipal bodies.

## Work Highlights

**Boston Properties** in the development of the **Back Bay/South End Gateway Project**, which will revitalize the underutilized Back Bay Station site, transform the adjacent public realm, and integrate and connect the surrounding Back Bay, South End and Bay Village historic neighborhoods. The project comprises approximately 1.26 million square feet of mixed-use redevelopment, consisting of a new office building with ground-floor retail, two new residential buildings, a one- to two-story vertical retail expansion of the existing Back Bay Station building, and the partial redevelopment of the existing 165 Dartmouth Street Garage.

**Centre Street Partners** in connection with **Mildred Hailey - Phase One Development**, which is located at the southeast portion of the existing Mildred C. Hailey Apartments housing development in Jamaica Plain. The redevelopment will consist of a total of approx. 690 apartments, which will include the one-to-one replacement of the existing 253 public housing units and the construction of approximately 435 new affordable and upper-middle-income apartments. Proposed improvements will seek to align with City of Boston Planning goals as outlined in Imagine Boston 2030 and in PLAN:JP/Rox with focus on preserving diversity, preventing displacement, accelerating creation of affordable housing, improving mobility, and enhancing public realm.

**CIM Group** in the redevelopment (through a joint venture with Boston Global Investors) of the eight-story **201 Stuart Street-Motor Mart Garage** into a vibrant, mixed-use building by

converting current parking areas to ground-floor retail and restaurant space and upper-floor apartments and constructing a new 20-story residential condominium tower rising out of the existing building. The project will create a mix of approximately 231 new residential units, 46,000 square feet of retail and restaurant space, and 672 parking spaces.

**Codman Square Neighborhood Development Corporation** in obtaining a precedent-setting win for low-income renters in Dorchester and Mattapan. Fifty-nine homes in this area are now preserved as affordable housing after a federal bankruptcy judge ruled that Codman Square Neighborhood Development Corporation (CSNDC) could purchase the properties located at **91-101 Waldeck St.** and **25-35 Orlando St.** from the bankrupt landlord.

**Leggat McCall Properties** in connection with the **Bunker Hill Housing Redevelopment**, which involves the redevelopment of the existing BHA Bunker Hill public housing development in Charlestown. The project scope includes the demolition of the existing 1,100-unit BHA site and the construction of 2,699 mixed-income residential units, approx. 73,000 square feet of retail/civic, off-street parking, and new public open space.

**Nuestra Comunidad Development Corporation** in connection with **Bartlett Place Development**, a multi-phase project which consists of elements that include housing - rental and homeownership - retail, commercial, and other community uses including the creation of a public plaza and enhanced pedestrian walkways and infrastructure in Roxbury. The various phases of the project (also referred to by lot designation) correspond with separate parcels within the six-acre site, each of which has a corresponding review process. Proposal for Phase I calls for 102 residential units in two buildings along with 16,839 square feet of commercial space and structured parking for 130 vehicles. Lot A proposes the creation of mixed-use commercial. Lot B provides for the creation of 60 units. Additional residential units to complete the anticipated 60 will come online as part of the future construction on this portion of the site. Lot D proposes approximately 55 units of affordable senior housing. Lot E consists of 16 homeownership units. Lot F will consist of new rental and homeownership opportunities.

**Planning Office for Urban Affairs** in connection with the development of the BPDA- and MassDOT-owned **Crescent Parcel** in Roxbury's Nubian Square. The proposal responds to the community vision laid out through the BPDA's planning initiative for the neighborhood, PLAN: Nubian Square. The proposal plans to create a mixed-use development that includes affordable housing and community space across the Crescent Parcel and the neighboring parcel owned by the Roman Catholic Archdiocese of Boston, as well as parish space for the historic, Roxbury-based St. Katharine Drexel Church. The property is located on a prominent corner at the intersection of Melnea Cass Boulevard and Tremont Street.

**Trinity Financial** in connection with **Orient Heights Redevelopment**, which consists of the demolition of 289 of the existing 331 BHA-owned residential units and the construction of 289 direct replacement units in a combination of townhomes and mid-rise buildings and the renovation of 42 townhouse units in East Boston. The project also involves the creation of community use spaces throughout the project site.

NIXON PEABODY

<https://www.nixonpeabody.com/>

JUNE 2023

# NIXON PEABODY QUALIFICATIONS

Prepared for Trinity Financial for the City of Boston –  
Austin Street Parking Lots



# ABOUT NIXON PEABODY

Nixon Peabody (NP) is a full-service law firm with more than 600 attorneys collaborating in 16 offices throughout the U.S. and abroad in major business, finance, and litigation practice areas. Our clients range from nonprofit institutions and governmental entities to FORTUNE 100 companies. The firm is recognized for its diversity and pro bono initiatives and recently has been awarded top-tier honors in “Best Law Firms” rankings by *U.S. News & World Report/Best Lawyers*.

## Affordable Housing

For more than 40 years, NP’s Affordable Housing team has been involved in the financing, preservation, and development of affordable housing. With approximately 30 attorneys and affordable housing professionals possessing significant experience working with federal and local governmental agencies, we have one of the largest affordable housing legal practices in the country. We represent:

- / For-profit and nonprofit developers of government-financed and -assisted multi-family and seniors housing
- / Public housing authorities
- / State housing finance agencies and other public bodies
- / Financiers and equity syndicators of affordable projects

## Experienced Team

We bring a legal team with extensive experience in affordable and public housing development and financing, as well as regulatory advice and compliance. Our team works closely with developers, investors, lenders, and public agencies to preserve existing affordable housing assets and develop new affordable housing. Our experience means we have been here before, we can spot issues and trends as they evolve, and problem-solve—and we are efficient.

We represent nonprofit and for-profit developers, syndicators, and issuers in financing or refinancing of affordable housing projects. Almost every transaction we close entails both public and private sources of funding, so we can address the needs and requirements of numerous funding sources to ensure a smooth closing process.

## Sophisticated Full-Service Developer Counsel Representation

Our team works with developers on large-scale, mixed-use, and mixed-income urban development and redevelopment projects. Many of these projects involve complex ownership structures and financing arrangements (both public and private), tax credits, lease negotiations, and equity arrangements. A broad-based team of attorneys with concentrations in real estate, tax, and corporate law assist affordable housing developers in structuring and forming a variety of investment vehicles and pass-through entities, including joint ventures, which can be particularly complex in the affordable housing context. From forming complicated business ventures to navigating complex tax matters, we steer clients through the most sensitive and challenging issues and transactions. Our representation includes:

- / Negotiating real estate documents to ensure the best financial position with respect to other transaction participants;
- / Negotiating and reviewing various agreements, such as regulatory and operating agreements, restrictive covenants, management agreements, joint venture agreements, and partnership agreements;
- / Reviewing and negotiating the terms of ground leases; and
- / Advising on regulatory, statutory, and other legal issues, including related real estate work as needed.

## Zoning, Land Use, and Permitting

Local zoning and permitting regulations and requirements can be quite complex. We advise clients on many of the legal requirements for using and developing real estate projects and properties, including:

- / Zoning, land use, and environmental approvals
- / Permits and entitlements
- / Variances
- / Amendments
- / Map changes
- / Rezonings

Our attorneys regularly appear before zoning, planning, and conservation boards and commissions, working with our environmental attorneys as the need arises. We also provide counsel regarding handicapped access, brownfields issues, historic preservation, and similar issues.

## Other Tools in Financing Affordable Housing

We have broad experience with all of the most common forms of affordable housing development financing on national, as well as state, and local levels. Our national practice encompasses all forms of secured debt, including bridge, acquisition, construction, and permanent financing secured by fixed and floating rate mortgages, mezzanine debt, and fee and leasehold mortgages. Some common forms of financing include:

- / **Low-income housing tax credit financing (LIHTC)**—The firm is among the nation’s foremost legal authorities in transactions involving the federal low-income housing tax credit. The firm’s attorneys helped shape the legislation that created the LIHTC program, and the team has contributed to the creation and implementation of major federal housing programs. The group’s knowledge of the transactional, regulatory, and legislative history of the LIHTC program helps to solve common and uncommon problems associated with it.
- / **Tax-exempt bond financing**—Many of our transactions include tax-exempt bonds used in connection with LIHTCs. We have broad experience with public offerings as well as private placement bonds and novel structuring forms.
- / **HOME and CDBG**—Our group works with public organizations and developers that use the HOME and Community Development Block Grant (CDBG), which includes CDBG’s Section 108 loan guarantee program. NP attorneys advise on all aspects of community development programs and confer with HUD’s implementing offices to aid in program implementation.



- / **Government-backed and conventional financing**—We are familiar with government-backed loan products, including FHA-insured financing (including without limitation, 221(d)(4)s) and financing products from Fannie Mae and Freddie Mac. We are also well versed in conventional financing options from large and small banks alike.

## General Real Estate

Our Affordable Housing team also has the ability to draw on the firm's strong real estate attorneys to handle a variety of work. In conjunction with development projects, our real estate attorneys routinely handle a variety of general real estate tasks, including:

- / Negotiating real estate documents to ensure the best financial position with respect to other transaction participants;
- / Negotiating and reviewing various agreements, such as regulatory and operating agreements, restrictive covenants, management agreements, joint venture agreements, and partnership agreements;
- / Reviewing and negotiating the terms of ground leases; and
- / Advising on regulatory, statutory, and other legal issues and handling other related real estate work as needed.

## Real Estate Finance

We represent both borrowers and lenders in loans secured by all types of commercial real estate. Our national practice encompasses all forms of secured debt, including bridge, acquisition, construction, and permanent financing secured by fixed and floating rate mortgages, mezzanine debt, and fee and leasehold mortgages.

## Section 8

Members of our group have been involved in Section 8 financing and program rules since the inception of many of these programs and the contracts governing these programs, so we can address any legal question raised regarding Section 8 project-based housing assistance payments contracts. We represent owners in the preparation of applications for rent increases under the various Section 8 renewal options including obtaining post rehab rents at closing for certain preservation transactions. We also advise clients on the moving of Section 8 contracts and/or use agreements to other properties under section 8bb or certain provisions of the HUD appropriations bills. We have worked on numerous transactions where new project-based voucher (PBV) assistance is provided and are very familiar with all of the rules regarding its implementation.

## New Construction

Our team works with clients on large-scale, mixed-use, and mixed-income urban development and redevelopment projects. Many of these projects involve complex ownership structures and financing arrangements (both public and private), tax credits, lease negotiations, and equity arrangements. A broad-based team of attorneys with concentrations in real estate, tax, and corporate law assist affordable housing developers in structuring and forming a variety of investment vehicles and pass-through entities, including joint ventures, which can be particularly complex in the affordable housing context. From forming complicated business



ventures to navigating intricate tax matters, we steer clients through the most sensitive and challenging issues and transactions.

## REPRESENTATIVE EXPERIENCE

- / Working with Trinity Financial on a Faircloth to RAD conversion in Worcester, Massachusetts. The new vision of Curtis Apartments involves the demolition of all existing state public housing units on site to be replaced with five hundred and twenty-seven (527) units of new construction affordable housing: three hundred and seventy-two (372) of which will be one for one replacement of the existing public housing residences and the addition of one hundred and fifty-five (155) new units of affordable housing for families earning up to 60%, making between 30% and 80%, of area median income. The entire redevelopment will be accomplished in four phases. The Worcester Housing Authority will be utilizing available Faircloth authority to provide rental assistance to some of the newly developed units.
- / Represented the developer in the acquisition of a ground lease interest in property located in East Boston, Massachusetts. The project represents Phase III of the developer's acquisition of a public housing development formerly run by the Boston Housing Authority. The development is financed with a loan sourced from bonds issued by MassHousing, a loan from Boston Housing Authority, LIHTC equity, and state LIHTC funds.
- / Represented a Cambridge-based developer in the adaptive reuse of the Knight building, a former shoe, heat press, and sports equipment factory, into twenty-five (25) units of mixed-income housing in Brockton, Massachusetts. Representation included negotiating and closing the property acquisition and financing for the project, which included LIHTCs, federal and state HTC, and financing from a variety of public and private sources.
- / Represented a nonprofit organization with the acquisition and financing of buildings in Westfield, Massachusetts, containing two hundred and forty-eight (248) residential apartment units. This was a 4% low-income housing tax credit and state low-income housing tax credit transaction, with additional financing from Massachusetts Housing Finance Agency and MassDocs lenders.
- / Represented the developer in connection with Phases I through V of its ground lease acquisition and redevelopment of certain public housing known as Old Colony located in Boston, Massachusetts, and owned in fee by the Boston Housing Authority. The phases were financed by 4% Federal Low-Income Housing Tax Credits, 9% Federal Low-Income Housing Tax Credits, and Massachusetts State Low-Income Housing Tax Credits, with additional financing from Massachusetts Housing Finance Agency, City of Boston IDP Funds, and MassDocs lenders.
- / Represented a nonprofit developer in connection with the site acquisition, financing, and construction of a new seniors affordable housing complex in Brookline, Massachusetts. Financing for the project included a construction loan, bond proceeds from Massachusetts Development Finance Agency conventional financing, LIHTCs, and financing from the Commonwealth of Massachusetts Department of Housing and Community Development and the Town of Brookline.
- / Represented a real estate developer in the permitting and acquisition of a senior apartment community in Ashland, Massachusetts, from the Town of Ashland. In connection with the financing of the construction and



development of the property, the fee owner ground leased the property to an entity controlled by a nonprofit housing developer at the initial closing. The developer will take control of the ground lessee entity just prior to completion of construction. The project will provide sixty-four (64) units of affordable housing for seniors in the community. The project received eight Section 8 vouchers and eight MRVP vouchers.

- / Represented a joint venture on an affordable housing project involving the redevelopment of a former schoolhouse in Bridgewater, Massachusetts. We advised the developers on the predevelopment, acquisition, permitting, and construction financing. The financing included construction and permanent financing, state funding, Town of Bridgewater CPA funds, federal and state low-income housing tax credits, federal and state historic tax credits, and solar tax credits.
- / Represented the developer in the construction of a six-story building on the south parking lot of Tai Tung Village residential development in Boston's Chinatown. The new building will contain eighty-five (85) affordable rental units, ground floor non-residential space, and ground floor/surface parking for approximately thirty-seven (37) vehicles. All of the dwelling units will be rented to households earning 60% or less of the area median income. The developer partnered on the development with the Chinese Consolidated Benevolent Association of New England, Inc., a local nonprofit organization. The project was financed with 4% federal low-income housing tax credits, state tax credits, tax-exempt bond financing through MassDevelopment, a private construction loan, a permanent loan from MHP, and subordinate debt sources through MassDocs, including funds from the City of Boston.

#### **Land Use Experience**

- / Representing an affordable housing developer in a multi-phased project to redevelop deeply affordable housing units on property owned by the Boston Housing Authority. Each phase of the project involved Large Project Review, approval under MGL c 121A, and MEPA compliance.
- / Representing the owner of a multi-acre parcel in Dorchester, Massachusetts, seeking to redevelop its current facilities serving homeless families and young mothers to develop over fifty (50) units of new transitional housing. Representation includes Large Project review, approval under MGL c 121A, and MEPA compliance.
- / Representing the owner of a Jamacia Plain institution serving low- to moderate-income seniors through the Article 80 Large Project Review.



# NIXON PEABODY TEAM BIOGRAPHIES





## Dara Newman Histed

### Partner

Dara Newman Histed represents developers, landowners, and investors in commercial real estate transactions. Her clients execute transactions ranging from complex tax credit and affordable housing deals to market-rate housing transactions, both involving joint ventures, development agreements, acquisitions, financings, and refinancings.

Her practice is focused on Massachusetts and the Washington DC area.

#### CONTACT

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#### EDUCATION

Boston College Law School, J.D.,  
*cum laude*  
Haverford College, B.A.

#### ADMISSIONS

District of Columbia  
Massachusetts

### / My focus

#### ACQUISITION, FINANCING, AND DEVELOPMENT

I work with developers and owners on all aspects of acquiring, financing, and developing multifamily housing. I recently worked with a developer to recapitalize and rehabilitate a 967-unit affordable apartment complex in Boston, Massachusetts. As another example, I work closely with the country's largest apartment owner to sell its investments in affordable housing communities financed with low-income housing tax credits (LIHTCs).

#### JOINT VENTURE TRANSACTIONS AND GENERAL REAL ESTATE TRANSACTIONS

I work with developers and institutional investors to draft and negotiate joint venture agreements for companies that are acquiring, developing, and operating multifamily properties across the country, some located within opportunity zones.

I represent landowners and developers with their general real estate transactions and assist with all aspects of real estate sales or acquisitions, including negotiating purchase and sale agreements and loan documents, as well as managing the due diligence review process.

#### LAND USE AND PERMITTING

Another important part of my practice is land use and permitting work for buildings of all sizes. In one recent project, I helped obtain the needed permits and approvals to construct a market-rate apartment building in the Boston area.





## Deborah VanAmerongen

Strategic Policy Advisor / Deputy Practice Group Leader, Affordable Housing & Real Estate

Deborah VanAmerongen is a strategic policy advisor and deputy practice group leader of the Affordable Housing and Real Estate group, heading the firm's Affordable Housing team. She works with attorneys in our firm and a range of clients, including developers, owners, managers, and funders, to craft creative solutions to affordable housing development and preservation issues.

### CONTACT

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### EDUCATION

State University of New York,  
Rockefeller College, M.P.A.

Syracuse University, Utica College,  
B.S.

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### / My focus

#### AFFORDABLE HOUSING TRANSACTIONS

I focus my practice on complex affordable housing transactions, including those that entail interaction with several governmental agencies and numerous funding sources. I also introduce clients to new opportunities and markets and build partnerships between clients and community groups where that partnership will facilitate the success of a transaction.

#### UNIQUELY POSITIONED TO ASSIST OUR CLIENTS

Our Affordable Housing team, representing both transactional and regulatory experience, works with developers, owners, public housing agencies, and numerous municipal, state, and federal agencies to develop and preserve affordable housing around the country. The unique combination of our deep regulatory understanding (including HUD policies and programs) and years of experience closing complex affordable housing financial transactions puts us in the center of the affordable housing industry.

#### STAYING AT THE FOREFRONT OF DEVELOPMENTS IN HOUSING POLICY

Our firm has always placed a strong emphasis on staying ahead of developments in affordable housing policy at the city, state, and federal levels. Through my role on the Executive Committee of the New York State Association for Affordable Housing (NYSFAFH) and on the board of the Housing Advisory Group (HAG), along with the roles that several of the other practitioners in our firm have with other national and local housing advocacy organizations, we are able to stay in the forefront of policy discussions with the various governmental agencies. This enables us to



better advise our clients and spot opportunities and risks that may impact their business.

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## / Representative experience

- Representing all the developer teams joint venturing with the New York City Housing Authority (NYCHA) in its RAD/Section 18 PACT transactions, with over 14,000 units rehabilitated through twelve closings in the last six years and over 15,000 additional units scheduled to close in the next few years.
  - Provided regulatory counsel to Nuveen in their acquisition of 46 properties comprising roughly 12,000 affordable units from Omni Holding Co. This included approvals from HUD and several New York City, New York State, and other state agencies. The transaction increases the value of Nuveen's affordable housing assets under management to \$6.4 billion.
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## / Looking ahead

There has been increased recognition from all quarters of the affordable housing crisis around the country. We are hopeful that, in time, this will also result in additional resources being provided by the federal government. The extraordinary demand on the resources available from housing agencies has forced ever more creative deal structuring, and these challenges will continue for the foreseeable future. I believe there will be a continued and enhanced emphasis on combining supportive services with affordable housing development. I also see HUD continuing its emphasis on the Rental Assistance Demonstration (RAD) program and other tools to reposition public housing developments.



## Karla L. Chaffee

### Counsel

Karla Chaffee focuses her practice on land use permitting and real estate due diligence. She helps her clients maximize efficiency by charting a coordinated permitting strategy through a deal's lifecycle.

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#### EDUCATION

Vermont Law School, J.D.  
University of Massachusetts,  
Amherst, B.S.

#### ADMISSIONS

Massachusetts  
U.S. District Court, District of  
Massachusetts

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### / My focus

#### LAND USE PERMITTING

I provide guidance to clients seeking zoning approvals and other development entitlements. I lay the groundwork for successful projects by working with clients, planning staff, and elected and appointed officials to navigate local, state, and federal permitting. My experience facilitates real estate objectives for clients and helps to build public benefits for all involved in the development process. I also serve on my local zoning board of appeals.

#### LAND USE TRANSACTIONAL

I perform due diligence work for nationwide real estate transactions prior to acquisition and financing. I also assess environmental risk of properties and determine what mitigation measures are needed to help clients make the best business decisions and avoid potential liability. Finding appropriate mitigation measures has given me the opportunity to negotiate the terms of purchase and sale agreements, liability transfer documents, and insurance policies. I work with sellers, buyers, and lenders to ensure a successful transaction.

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### / Looking ahead

The prevalence of online retail has changed our day-to-day lives in many ways. It influences land use patterns and transforms the market for warehouse and industrial space across the country. The opportunities for development in these sectors vary significantly by region, and clients will need to understand how the prevalence of e-commerce has impacted local markets and regulatory conditions.

Locally, the lack of adequate housing supply in Massachusetts is at crisis levels. Recent changes to the Massachusetts Zoning Enabling Act have lowered the voting thresholds for projects and zoning amendments that encourage market-rate and affordable housing development. These changes have given developers and housing advocates a new opportunity to work with community leaders to produce sorely needed housing stock.





## Ali Sisson

### Associate

Ali Sisson represents developers, landowners, and investors in all aspects of affordable and market-rate real estate transactions.

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### / My focus

#### AFFORDABLE HOUSING

I work with owners and developers of multifamily affordable housing on several aspects of the acquisition, rehabilitation, and new construction of projects financed with low-income housing tax credits (LIHTCs). I also represent a top asset manager in the affordable housing space in the sale of its investments and limited partner interests in communities financed with low-income housing tax credits.

#### GENERAL REAL ESTATE

I work with clients on various general real estate matters involving both commercial and multifamily residential property, including site acquisition, project equity and loan matters, property diligence review, title and survey review, and zoning matters.

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### / Looking ahead

With the continued need for affordable housing in the Commonwealth, I anticipate a significant boom in the multifamily affordable housing industry. I look forward to working with clients to revitalize communities around the country.

#### CONTACT

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#### EDUCATION

Northeastern University School of  
Law, J.D.  
Tulane University, B.A., *cum laude*

#### ADMISSIONS

Massachusetts

SUNGBUG SOLAR

<https://sunbugsolar.com/>

SunBug Solar is a solar energy consulting and installation company with offices in Woburn and Westfield MA. We offer turnkey solar solutions for homeowners, businesses, and non-profit organizations. Our integrated approach incorporates site analysis, system design, incentive processing and system monitoring, allowing our team of professionals to anticipate questions and challenges while managing a project from start to finish.

## Is Solar Right for You?

The decision to go solar can be complicated. With advances in technology, product manufacturers entering the market each week, pricing fluctuations, and government incentives hardly standing still, it is no wonder that people get confused about solar. **SunBug helps you make sense of it all.** We guide you through the following to help you make the best choice for your situation:

- Solar technologies
- Utility interconnects and net metering
- Site considerations
- Financing options
- Costs and Incentives
- Environmental impact

## Why SunBug?

We are **professional solar integrators**, not general contractors, so we think several steps ahead and anticipate questions and challenges.

We do not manufacture solar equipment ourselves, so we are not tied to any particular brand or technology. We take advantage of the best-suited, **most cost-effective solution**, be that conventional photovoltaic, thin-film, or whatever tomorrow's technology offers.

We are the most responsive solar installers in the field. If you ask a question, we have an answer. However, we also know that a well reasoned answer is better than a quick unconsidered one, and we'll describe your options in language that makes sense to you. **Not into kilowatts? Let's talk dollars and cents.**

The SunBug team is excited to bring practical energy solutions to our clients. We think widespread solar adoption is an important component of meeting our planet's energy needs, but we are not alternative energy preachers. **We offer you the tools you need to decide if solar is right for your organization.**



## Experience Matters

SunBug has over 2,400 Solar customers across MA. SunBug is certified by **NABCEP, the National Board of Certified**



**Energy Practitioners** for photovoltaic installation and service. We are members of the **New England Clean Energy Council** as well as the **Environmental Business Council of New England.**

## Top Quality

SunBug is the highest rated solar provider in Massachusetts on independent review sites such as Yelp and Angie's List, and is the only solar company to be awarded the coveted **Angie's List Super Service Award** ten years running, determined exclusively from independent customer reviews.



## For More Information

on how SunBug works with customers, visit: [www.sunbugsolar.com](http://www.sunbugsolar.com) or contact us at 617 500 3938 or [info@sunbugsolar.com](mailto:info@sunbugsolar.com)



SunBug Solar is an employee-owned solar installer serving all of Massachusetts from our Woburn and Westfield offices. We design and build all types of solar systems, ranging in size from 1kW to over 1MW, including residential, commercial, carports, and ground-mounts.

Find out what the sun can do for you  
617 500 3938 [info@sunbugsolar.com](mailto:info@sunbugsolar.com)

Since 2009, Sunbug Solar has provided best-in-class renewable energy solutions to a wide range of residential, commercial, and nonprofit customers, as well as expertise in solar for new construction and EPC services. Our helpful, responsive team brings deep expertise, experience, and a customer-first approach to every project. Each of us embraces a method and a mindset that's equal parts craftsmanship, collaboration, and accountability. Sunbug is supplying assessment, design, engineering, procurement and construction of the photovoltaic arrays for the West End Library project.

Contact: Nick d'Arbeloff, VP Commercial at SunBug Solar /  
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BRIGHTCORE ENERGY  
<https://www.brightcoreenergy.com/>

## COMPANY OVERVIEW

Founded in 2015, Brightcore Energy, LLC (“Brightcore”) is a Delaware limited liability company with approximately 60 employees spanning business development, project development, engineering, geothermal drilling and piping system installation, construction management, project management, operations and maintenance, regulatory policy and finance. Brightcore is headquartered in Armonk, NY with a warehouse and geothermal drilling yard in Newburgh, NY and a satellite office in Brooklyn, NY.

Brightcore is focused on delivering turn-key energy efficiency and renewable energy solutions to large commercial, institutional, municipal and utility clients throughout the Northeast and Mid-Atlantic states. Brightcore provides project design, development, implementation, construction management, funding, operations, maintenance, and monitoring for a wide range of technologies including geothermal heating and cooling systems, solar PV, battery storage, EV charging, LED lighting and building controls. Our team has decades of experience across each of these disciplines, enabling us to optimize and deliver projects to our customers of the highest quality, on time, on budget and safely. As part of our delivery, Brightcore leverages its deep financial expertise, together with its institutional capital base, to enable customers to pursue projects with \$0 investment and immediate savings under our “Energy as a Service” model. The Brightcore management team has spent over a decade financing and investing in clean energy projects (through Brightcore as well as a predecessor company, Smart Energy Capital), having deployed and financed over \$500 million of on-site clean energy projects.

## EXECUTIVE LEADERSHIP



### MIKE RICHTER

President

- 15 years as a clean energy entrepreneur (private equity and project development)
- Aspen Institute Environmental Fellow class of 2012
- 15-year NHL career including Stanley Cup champion, All-Star, Olympic medalist, and Hall of Fame inductee



### ROB KRUGEL

Co-CEO

- 15 years as a clean energy entrepreneur with a successful exit (sale of C&I solar PV developer to NextEra in 2013)
- 15 years of structured finance experience on Wall Street (Managing Director, Head of Structured Finance Banking at Lehman Brothers)



### KONSTANTIN BRAUN

Co-CEO

- 15 years as a clean energy entrepreneur with a successful exit (sale of C&I solar PV developer to NextEra in 2013)
- 12 years of structured finance experience on Wall Street (Managing Director, Head of ABS/MBS Structuring at Lehman Brothers)



## GEOTHERMAL SERVICES

### DIFFERENTIATED GEOTHERMAL BUSINESS MODEL

Brightcore has assembled a comprehensive geothermal business model to maximize value for its customers. Our unique model has several attributes:

- **Turnkey Model:** Project Feasibility, Engineering, Drilling, Financing, Incentive Optimization, O&M
- **Technical Expertise:** Geothermal Assessments, Design, Policy, Incentives
- **In-House Drilling:** Company-Owned Rigs, Licensed Master Drillers, Fully Staffed Drill Teams
- **Innovation:** Proprietary Water Hammer, Custom Mini-Rig, Incline Drilling, Electric Drilling, High-Performance Heat Exchangers, Thermal Demand Response
- **Energy as a Service:** In-House Capital to Fund 100% of Project Cost
- **Financial Strength:** Backed by Leading Sustainability Investor, Strong Bonding / Insurance Program
- **Local Presence:** On-the-Ground Resources, Drilling Yards in NY & MA, Northeast Licensed Drillers, Strong Relationships with Local Utilities and State Energy Agencies

## GEOTHERMAL LEADERSHIP



### DAVE HERMANTIN, P.E.

SVP, Renewable Heating & Cooling

With years of experience designing open loop, closed loop, and standing column well geothermal systems, Dave has designed thousands of tons of geothermal capacity in NY, New England as well as other areas in the United States.



### TRACEY OGDEN

VP, Drilling Operations

With more than 30 years of experience, Tracey is responsible for the oversight and project management of some of New England's most complex drilling, geothermal installations, and groundwater exploration.

## KEY PROJECTS



### The Beresford Cooperative at 211 Central Park West, NY

The Beresford is a legendary landmark multi-family building built in 1929. This installation is projected to reduce peak cooling demand by 18%. In addition, this solution will provide heating while using 60% less energy than an equivalent air source heat pump system. This proposed geothermal system will reduce GHG emissions by over 40%.



### One Java Street: A premiere waterfront property in the Greenpoint section of Brooklyn, NY

This will be the largest geothermal installation for a multi-family building in New York, with more than 300 boreholes drilled to 500 feet. Brightcore was selected for this project because of their proprietary specialized drilling technology.

## **West End Library RFP- Brightcore Energy's Role**

Primary Contact: Cory Klausmann, Director of Business Development,  
cory.kalusmann@brightcoreenergy.com

### Project Role

Brightcore Energy is to serve as the geothermal project designer and developer as well as the potential owner, operator, and quality assurance monitor of the geothermal system proposed for the West End Library in Boston, MA. Brightcore will deliver a turnkey solution to fully design, fund, implement, and maintain the ground system. This scope of work includes a phased approach which will start with providing geologic due diligence and performing a thermal conductivity test well to inform site-specific design parameters. Brightcore will design the ground source heat exchanger based on the geologic conditions to serve the West End Library's HVAC loads and pursue necessary permitting for implementation for the deployment of the full-scale system. Brightcore will also be the geothermal installation manager and oversee the construction, operation, and maintenance of the ground source heat exchanger. As part of Brightcore's delivery, our institutional capital base allows us to fund the upfront capital for the ground loop to enable a \$0 investment and to provide the West End Library with immediate savings. This follows a Geothermal as a Service model where Brightcore will be the owner of the system for a set term with monitoring and maintenance included.

EVERSTREET

<https://everstreet.co/>



## About Everstreet.

Everstreet(WBE) is a creative retail firm that navigates the rapidly changing brick + mortar environment by replacing conventional brokerage with a Planning + Activation model. We work with visionaries and market-makers who want their street level to be more than just another copy + paste plaza.

Our work amplifies and elevates what is special about a location and then syncs design, merchandising + pro-forma with location, resulting in increased rental income and enhanced property value.

Everstreet creates places for everyone by promoting the healthy growth of local and minority/women-owned retailers and restaurants. We accomplish this by partnering with landlords, developers, community leaders and activists to make connections to resources and provide technical assistance in writing and executing a retail business plan. This practice is rooted in the belief that investing the city's bench of retail and restaurant talent delivers outsized returns for all stakeholders.

Ann V. Ehrhart, an 18-year industry leader, heads the firm. She is a seasoned entrepreneur and dealmaker who has earned a reputation as a closely trusted advisor. Ann has been handpicked by global landlords and tenants to represent their interests in complex, multi-million-dollar transactions, often stepping into assignments that previous providers were unable to execute. Ann's strategic planning and urban design capabilities allow her to uncover untapped revenue opportunities for her clients and create plans for maximum marketability. As a visionary and industry thought-leader, Ann spots market trends early and guides her clients to take action accordingly. Prior to launching Everstreet, Ann was a founding member of a boutique brokerage firm that facilitated nearly \$1 billion in transactions during her tenure.





## Press.

["A Woman-Owned Retail Advisory Firm is Taking a New Approach to Real Estate,"](#)

*Boston Business Journal*

["Breaking Down Barriers into Brick and Mortar,"](#) *Banker & Tradesman*

["A Nu Look: Ann Ehrhart,"](#) *NuMarket Stories*

["New Brokerage Caters to Retail's Changing Role,"](#) *Banker & Tradesman*

REITZ REALTY GROUP

<https://www.janereitz.com/>



# REITZ

REALTY GROUP

| 617-959-1624 | [jane@reitzre.com](mailto:jane@reitzre.com) | @janereitzrealestate

PREPARED FOR: TRINITY FINANCIAL

## MY BACKGROUND

Jane Reitz is one of Boston's top revenue producing realtors and has worked in the real estate industry for over 14 years in residential real estate and real estate development. Jane sets herself apart by offering added value services above and beyond the industry norm.

Jane recommends any home improvements needed in order to get you the most money for your home. She seamlessly manages the entire process from start to finish, taking all of the headaches out of the home buying and selling process.

Jane has been consistently ranked one of the top revenue producers in the Charlestown market from 2009-2021. In 2013, Jane was ranked 11th in revenue production out of all Boston agents. In 2014, She was ranked #1 of all of Keller Williams Boston agents for highest revenue production. Jane went out on her own to create Reitz Realty Group. Jane has remained one of top selling brokers in Charlestown and she continues to get her clients the best return on their homes.

From 2008-2012, despite a weaker real estate market, Jane's unique approach to real estate set her apart from other agents. Even during a market correction, she consistently got her clients their asking price or above and achieved the highest list to sales price percentage in Charlestown.

Prior to real estate, Jane had worked in sales in Corporate America for 10 years selling enterprise level solutions to C-Level executives in various capacities. During that time she was involved in complex negotiations throughout major organizations.

Jane began her real estate development career in 1998 in Charlestown. She has completed multi-million dollar projects throughout the city. Most recently she has gutted and rehabbed her own brownstone on Cedar street in Charlestown.

Jane draws on her own experiences with realtors and developers, identifying what consumers need from a broker and what was lacking in the marketplace. Providing her clients with superior customer service and dedication, Jane strongly employs a sense of professionalism, knowledge of technology and superior negotiating skills - all critical to today's complex marketplace.

### Jane Reitz

(617) 959-1624 | [jane@reitzre.com](mailto:jane@reitzre.com) |  
Follow me on instagram @janereitzrealestate



## **MY EXPERIENCE**

13 years corporate sales selling to “C” level executives

Began real estate development- 1998 developed multi-family buildings in South End and Charlestown

Entered Charlestown real estate market - 2007

September 2008, when sellers had little leverage, created a business strategy to maximize seller’s leverage so sellers would get the true market value and the highest price

Ranked #11 highest revenue producer in all of Boston - 2013

Ranked #1 highest in Keller Williams Team Boston Metro 2013, 2014, 2015 & Top 1% internationally of 70,000 agents

Started Reitz Realty Group - 2015

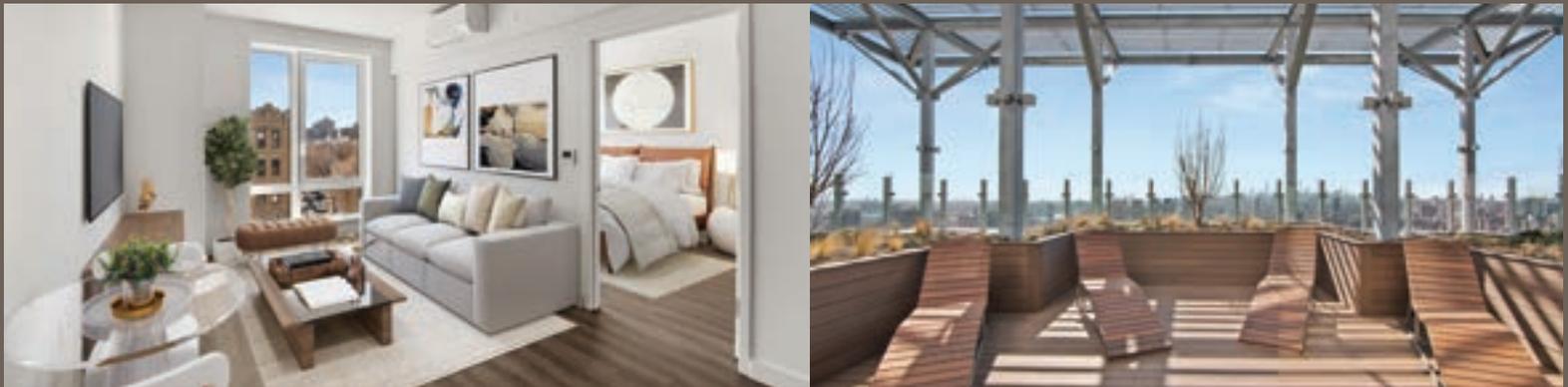
Ranked one of Charlestown highest revenue producers 2012-2023

TRINITY MANAGEMENT  
<https://trinitymanagementllc.net/>

# TRINITY MANAGEMENT



*Enhancing Communities, Changing Lives*



A full-service property management company

275 employees

8,700 units under management / 385,000 sf retail + commercial

Communities located in NY, CT, MA & RI

Headquarter offices in Boston & Manhattan

## Our Mission

The mission of Trinity Management, LLC is to meet the programmatic and financial goals of our owners by providing exceptional customer-focused property management services. We specialize in managing properties in urban communities. Our aim is to aid in revitalizing these communities, enhancing the lives of our residents and neighbors, strengthening local commerce and fostering opportunities for positive growth



## A Company for All Reasons

Trinity Management, LLC offers a full range of real estate services, including effective marketing, careful applicant screening and eligibility determinations, rent collections, resident/management relations, maintenance and repairs, and accounting and compliance services. The procedures and systems of accounting and compliance for our entire portfolio, regardless of individual property size, are identical: we apply the highest level of scrutiny and integrity to all. Our maintenance program is proactive and stresses preventative maintenance. The properties we manage are assets to the communities in which they are located, and they encourage other property owners to take pride and interest in the well-being of the neighborhood.

### Professional Affiliations

- Citizens' Housing and Planning Association
- Community Associations Institute
- Institute of Real Estate Management
- National Affordable Housing Management Association
- National Apartment Association
- National Association of Housing Cooperatives
- New England Affordable Housing Management Association
- Rental Housing Association, Greater Boston Real Estate Board

### Services

- Apartments
- Condominiums
- Resident Associations
- Cooperatives
- Affordable Housing
- Market-Rate Housing
- Commercial Properties
- Low-Income Housing Tax Credits (LIHTC)
- Public Housing
- Transit-Oriented Housing

# Trinity's Executive Leadership Team

Adam Ameden, CPA - *Senior Vice President of Administration and Finance*



Mr. Ameden leads the company's financial services group. He brings over 20 years of accounting experience to TMLLC. Prior to joining TMLLC, Adam was with Barkan Management Company, where he was responsible for managing all the financial aspects of that company's growing multifamily real estate company along with providing accounting services to the Ritz Carlton. He has a Bachelor of Science degree in Accounting from Bentley College, and he is a licensed Certified Public Accountant in Massachusetts. He is also a Chartered Global Management Accountant.

Maribel C. Batista, CPM - *Chief Operating Officer*



Mrs. Batista began her career in property management 20+ years ago, quickly winning promotions to site management and multi-site management. Maribel's expertise is in property finances, budgeting, capital improvements and facilities management. Maribel has earned the designations of Certified Property Manager, Accredited Residential Manager, National Affordable Housing Professional Executive, Registered Cooperative Manager, Specialist in Housing Credit Management, and Fair Housing Certification. Maribel has a degree in Criminal Justice, Business Operations and is a retired member of the Rhode Island Army National Guard.

## Senior Leadership

Regional Directors

Director of Facilities

Senior Director of Compliance

Marketing Manager

Senior Property Managers

Regional Facilities Managers

Director of Public Housing

Social Media Specialist

Property Managers

Maintenance Superintendents

Director of Information Systems

Risk and Legal Manager

Trinity has a full-service accounting team led by its Controller, Accounting Manager, and several site accountants.

We also have a fully developed Human Resources department led by the HR Director with a dedicated Talent & Acquisition Manager, Payroll & Benefits Manager, and Administrative Assistant. This allows us an advantage to recruit internally and ensure that we provide the best level of employee service available.

## Orient Heights East Boston, MA

The original Orient Heights Development was comprised of 331 units of state-funded public housing terraced into the steep hillside of this 15-acre site on the northern edge of the East Boston neighborhood. The redeveloped community replaces the old, obsolete housing with new, state-of-the-art replacement public housing that includes State-aided public housing, MRVP-supported units, and Project-Based Section 8 units.



Phase One of this multi-phased redevelopment was completed in 2018 and made up 120 of the 331 replacement public housing units, in a mix 1- to 5- bedroom sizes. Phase Two was comprised of 88 units and completed construction in 2020. The third and final phase is currently under construction, with an anticipated completion date of early 2023, and will provide the replacement and preservation of 123 units. The completed Phases One and Two have been design designed and constructed to meet high-sustainability standards. Phases One achieved LEED Platinum Certifiability and Phase 2 achieved LEED Gold sustainability.



## 425 Grand Concourse Bronx, NY

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

The 425 Grand Concourse Project is also designed to meet Passive House Standards - aimed at providing superior energy efficiency within the building and helping to greatly reduce the project's carbon footprint. When completed 425 Grand Concourse will be one of the largest Passive Houses in North America and a major example of innovative and energy efficient development.

TRINITYMANAGEMENTLLC.NET

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Fax: 617-542-2213



*Enhancing Communities, Changing Lives*

COHNREZNICK

<https://www.cohnreznick.com/>

# Firm Resume

**COHN  REZNICK**  
ACCOUNTING • TAX • ADVISORY

Submitted by:

**CohnReznick LLP**  
One Boston Place, 5<sup>th</sup> Floor  
Boston, MA 02108



CohnReznick is an independent  
member of Nexia International

ACCOUNTING • TAX • ADVISORY

## Firm Profile

**CohnReznick** is a national audit, tax, and business advisory firm with origins dating back to 1919.

Bringing the deep resources and technical acumen of a large national accounting firm without sacrificing the hands-on, entrepreneurial approach that today's dynamic business environment demands.

CohnReznick has developed specialized practices in key industries, including affordable housing and tax-incentivized real estate. CohnReznick is respected by developers, syndicators, investors, housing agencies, and not-for-profit organizations as a leading service provider to the affordable housing industry.

### CohnReznick

- 11<sup>th</sup> largest audit, tax, and advisory firm in the United States
- 300+ partners/principals
- 2,700+ employees
- More than \$575 million in annual revenue
- Offices in 30 cities throughout:
  - California
  - Massachusetts
  - Texas
  - Connecticut
  - New Jersey
  - Washington, D.C.
  - Georgia
  - New York
  - Virginia
  - Illinois
  - North Carolina
  - Cayman Islands
  - Maryland
  - Pennsylvania
  - India
- International reach via Nexia member firms in more than 100 countries

We foster collaboration across every level and branch of our organization, so that the professionals who will serve you will have access to our firm's deep resources. Our service offerings include:

Accounting and Assurance Services	Tax Services	Advisory	Affiliated Companies and Subsidiaries
<ul style="list-style-type: none"> <li>• Audits, Reviews, and Compilations</li> <li>• Employee Benefit Plans</li> <li>• IFRS</li> <li>• SOC 1, 2, 3 / SSAE 16</li> <li>• Agreed upon procedures</li> <li>• Accounting outsourcing and consultations</li> <li>• Public company services</li> <li>• IT audit and controls review</li> </ul>	<ul style="list-style-type: none"> <li>• Tax compliance and preparation</li> <li>• Strategic tax planning</li> <li>• Corporate tax outsourcing</li> <li>• Private clients</li> <li>• Federal tax</li> <li>• Trust and Estate</li> <li>• International tax</li> <li>• State and local tax</li> <li>• Transfer pricing</li> <li>• Cost segregation studies</li> <li>• New market tax credits</li> <li>• Tax specialty services</li> <li>• Tax credit advisory</li> </ul>	<ul style="list-style-type: none"> <li>• Bankruptcy and restructuring</li> <li>• Computer Forensics and eDiscovery</li> <li>• Forensic and litigation</li> <li>• Governance, Risk and Compliance</li> <li>• Government</li> <li>• Management and Technology Consulting</li> <li>• Transactional</li> <li>• Valuation</li> </ul>	<ul style="list-style-type: none"> <li>• CohnReznick Benefits Consultants</li> <li>• CohnReznick UIC Consultants LLC</li> <li>• Cohn Real Estate LLC</li> <li>• CohnReznick Professional Services PVT, Ltd.</li> <li>• CohnReznick Wealth Management LLC</li> </ul>

## Affordable Housing Industry Practice

As a first mover in the Affordable Housing industry, CohnReznick has been at the forefront of every major industry development and our passion remains affordable housing and community redevelopment. Inspired by Reznick Group's founder, David Reznick, CohnReznick has been an industry leader and trendsetter since the enactment of affordable housing legislation under the Johnson Administration in the early 1960s. With the addition of Section 42 to the U.S. Tax Code in 1986, the majority of new affordable housing developments, both new construction and rehabilitation, have used low income housing tax credits.

Today, we continue to help shape the policy of the industry, connect its people, and implement best practice solutions to help improve developer and investor outcomes. CohnReznick has one of the largest and most technically savvy affordable housing practices in our industry. More than 750 experienced professionals in 26 offices provide our clients with value-added services at each stage in the life cycle of a project—from pre-application to Year 15 to the post-tax credit period. Our clients benefit from dedicated practice groups in tax credit advisory, real estate development, renewable energy, valuations, and transactions for an integrated, one-stop resource. Our Office of Governmental Affairs provides a direct connection to the federal and state legislative initiatives impacting project development, grant applications, and transactional activity.

CohnReznick has experience with both—not-for-profit and for-profit affordable housing industry clients. Clients include but are not limited to, partnerships, developers, owners, syndicators, investors, mortgage companies, property managers, HUD, state agencies, and Public Housing Authorities (PHAs) These clients receive assistance from Federal or State programs including low income housing tax credits, HUD held or HUD insured mortgages, tax exempt bond funding, Federal and state rental subsidies, and USDA rural development loans. We serve over 5,000 clients in this area, with projects ranging in size from less than 20 units to those with more than 500 units. CohnReznick prepares applications on behalf of developers for project financing and tax credit allocations in accordance with each state's procedures and Qualified Allocation Plans. In addition, our firm has extensive experience advising not-for-profit affordable housing clients on exit strategies for low income housing tax credit projects that are at the end of the initial 15-year compliance period.

## Low Income Housing Tax Credits (LIHTC) Experience

CohnReznick has earned its reputation as an industry leader in connection with federal tax credit and community development programs, most significantly, with the Low Income Housing Tax Credit program. Since the inception of the LIHTC program in 1986, we have been at the forefront in shaping the evolution of the program. The majority of new affordable housing developments, both new construction and rehabilitation, have used low income housing tax credits. CohnReznick:

- Represents clients in all areas of affordable housing including property managers, partnerships, developers, owners, syndicators, investors, mortgage companies, HUD, state agencies, PHAs and others
- Represents approximately 60 percent of the equity providers to affordable housing
- Submits over 1,100 REAC filings annually
- Provides more than 10,000 audits firm-wide
- Provides audit and tax services to over 5,000 real estate entities, including institutional and corporate investment companies
- Audit more than \$2 billion of federal funds

## Familiarity with Applicable Affordable Housing Regulations

CohnReznick is exceedingly experienced in the various rules and regulations surrounding the development and operation of affordable, mixed income, and market rate housing. From the low-income housing tax credit to tax-exempt bond finance, HUD funding, Section 8, and public housing, we are very well-versed in the federal, state, and local legal and regulatory requirements and issues surrounding them. Indeed, in many cases, CohnReznick has been instrumental in the development of some of these regulations, whether in a state's qualified allocation plan for allocation of the housing credit, HUD requirements, or IRS rulings and pronouncements.

We have been involved in several developments which utilize multiple funding sources, with various permutations of the subsidies and financing involved, including:

- Low-Income Housing Tax Credits
- Tax-Exempt Bonds
- Rental Assistance Demonstration (RAD)
- HOME Investment Partnerships Program
- HOPE VI Public Housing Replacement
- Capital Fund Financing
- HUD Multifamily Programs (Sections 221, 223, 238, 202, and 811)
- Housing Choice Vouchers and HAP Contracts
- Annual Contribution Contracts
- New Markets Tax Credits and other CDFI Fund Programs

## HUD Experience

The collective experience of the accounting and real estate professionals of CohnReznick makes the firm one of the nation's deepest pools of knowledge in affordable housing, particularly about HUD financed properties. CohnReznick is one of the largest providers of audited financial statements filed with HUD and other regulatory bodies in the country.

CohnReznick's HUD service team consists of individuals who have been servicing clients in this arena for multiple years. Clients in the HUD service group include, but are not limited to, multifamily housing, housing authorities, supervised mortgagees, housing projects, and projects that participate in the mark to market program, and those that receive low income tax credits.

Working with HUD and state agencies can be a complex and lengthy process, one that requires advice and assistance from people with very precise expertise. Our clients' needs include the services of a full-service accounting and business consulting firm that understands, and deals with daily, the specific areas that are most crucial to you:

- HUD regulatory requirements
- Construction and development
- Structure of ownership entities
- Cost certifications
- Tax accounting
- HUD electronic submission requirements

Our services offer a number of benefits:

- We currently service more than 1,200 HUD insured or Section 8 properties located throughout the United States and Puerto Rico, who utilize federal, state and local financing programs, including various HUD subsidies and financing programs.

- We have addressed virtually every major accounting and reporting issue affecting the affordable housing industry, and we work continuously with our clients to generate information on management and performance “Best Practices” within the affordable housing industry.
- We are actively involved in monitoring changes implemented under HUD’s various housing programs and assist our clients in implementing and capitalizing on recent changes to these programs.
- We are experienced in HUD’s electronic submission process and have a staff devoted to resolution of set-up and validation errors.

## Public Housing Authority Experience

Across the United States, housing authority executives are engaging CohnReznick professionals for a multitude of value-added tasks including organizational structure assessments, process and technology reviews and management consulting. CohnReznick provides a superior level of service to public housing authorities and their affiliates including audit, accounting, and tax advisory; assistance in preparing competitive HOPE VI, LIHTC, and tax-exempt bond financing applications; analysis of Section 8 contract administration and asset management; as well as numerous operational review engagements. In addition, CohnReznick has experience in evaluating the effectiveness of existing internal controls implemented by management, identifying additional internal controls that should be implemented, and communicating deficiencies to management via a management letter or other memorandum.

CohnReznick has relationships with many affordable housing professionals and is able to utilize those resources to validate or challenge interpretations and assumptions. These relationships include HUD staff, IRS representatives, lawyers, syndicators, and others with extensive experience in the affordable housing area.

We have assisted many public housing authorities with structuring issues on new and rehabilitated LIHTC developments. Our audit team works closely along with our consulting division in resolving any issues that may arise in the cost certification process or during the annual audits throughout the life span of the project. We also work with many private developers in conjunction with public housing authorities on the redevelopment of public housing utilizing the Hope VI Program.

## Commercial Real Estate Experience

In addition to our experience in the affordable housing industry, CohnReznick helps a wide variety of real estate clients grow and succeed by providing insight, ideas, and advice driven by our real estate industry expertise. We remain at the forefront of vital, topical issues that affect the real estate industry as a whole and our staff will be able to quickly address any issues and concerns as they arise. We have all the resources of a Big Four firm within the commercial real estate industry; but with the advantage of operating in a smaller, more highly focused environment. This allows us to provide the client service and close, personal communication that will continue to exceed your expectations.

CohnReznick’s Commercial Real Estate Industry Practice manages complex, high profile engagements for institutional commercial real estate buyers, sellers, owners, developers, and investors. We help our clients:

- Navigate the complex, constantly evolving regulatory and compliance environment
- Identify and capitalize on real estate opportunities in a highly volatile marketplace
- Maximize investor returns through sound transactional and tax advice
- Maximize revenues through improved, across-the-board operating efficiencies

- Advise funds from inception through fund-raising, operations, portfolio acquisitions and evaluation of internal controls

Our Commercial Real Estate Industry Practice serves hundreds of high profile companies across the country, providing us with the experience and the resources to help you tackle challenging issues such as taxes, strategic growth, financing alternatives, cash flow, and cost controls.

## Historic Rehabilitation

The rehabilitation of historic buildings brings new life to old structures, repurposing them for today's business and housing needs. Since 1976, The Federal Historic Preservation Tax Incentives Program has provided incentives to do just that, and today a tax credit can be applied to the preservation of historic properties for offices, rental housing, and retail stores. Since the inception of the program, savvy investors, developers, and owners have turned to CohnReznick for our technical knowledge and guidance on projects that qualify for historic tax credits as well as our experience with thousands of rehabilitation projects across the country. We fully understand the competing interests of all parties in historic rehabilitation projects and the range of tax credit opportunities available from state to state. We help developers manage the compliance process and qualify for other tax credits that can be combined with the historic tax credit such as low-income housing tax credits and state tax credits.

## Representative Affordable Housing Clients

CohnReznick has served organizations across the affordable housing spectrum. A sample list of relevant clients that have benefitted from our expertise includes:

A sample list of relevant clients that have benefitted from our expertise includes:

### For-Profit Affordable Housing/Community Development Clients

- Affordable Housing Development Company
- AIMCO
- AMCAL Housing
- Atlantic Development Group LLC
- Beacon Communities
- Columbia Residential Properties, Inc
- Cornerstone Group
- Global Premier Development, Inc.
- Pennrose Properties
- Picerne Development Corporation
- Reiner Communities
- RPM Development
- Shelter Development Corp
- Trinity Financial, Inc
- USA Properties
- WinnCompanies

### Not-for-Profit Affordable Housing/Community Development Clients

- Abode Communities
- Arlington Partnership for Affordable Housing
- BRIDGE Housing Corporation
- Mid-Bronx Desperadoes Community Development Corp
- Montgomery Housing Partnership

- Caritas Communities, Inc.
- Catholic Charities of Brooklyn/Queens
- Community Preservation Corporation
- Corporation for Supportive Housing
- Enterprise Community Investment
- Enterprise Community Loan Fund
- Enterprise Community Partners
- Homes for America, Inc.
- Madison Park Development Corporation
- Manna, Inc.
- Mercy Housing, Inc.
- National Community Renaissance
- National Housing Trust
- NeighborWorks® Capital Corporation
- NHP Foundation
- Ohio Capital Corporation for Housing
- Pathway Homes, Inc.
- Preservation of Affordable Housing
- RuralEdge Community Development Corp
- So Others Might Eat
- Wesly Housing Development
- Westside Federation for Senior Supportive Housing

#### Other Not-for-Profit Clients

- American Institute of Certified Public Accountants
- American Society of Mechanical Engineers
- America's Health Insurance Plans
- Association of Foreign Investors in Real Estate
- Community Foodbank of NJ
- C-SPAN
- Easter Seals New Jersey
- Federation of Jewish Philanthropies of New York
- Financial Executives International
- Fund for the City of New York
- Greater Boston Food Bank
- Metropolitan Council on Jewish Poverty
- Metropolitan Museum of Art
- Mystic Seaport
- National Association of Real Estate Investment Trusts
- National Development Council
- Panasonic Foundation
- Sidwell Friends Schools
- Trust for the National Mall
- United Neighborhood House
- Washington National Cathedral
- YMCA of San Diego County and Los Angeles
- YWCA National Capital Area
- Zoological Society of San Diego

#### Syndicators for whom we audit their syndication entity

- Alliant Capital, Ltd.
- Boston Capital Partners
- Boston Financial Investment Management
- Enterprise Community Investment
- Ohio Capital Corporation for Housing
- R4 Capital LLC
- The Richman Group
- WNC & Associates, Inc.

### Syndicators/Investors for whom we perform LIHTC fund audits

- Affordable Equity Partners
- Alden Torch
- Alliant Capital, Ltd
- Bank of America
- Boston Capital Partners
- Boston Financial Investment Management
- Cinnaire
- CREA, LLC
- Enterprise Community Investment
- First Sterling Financial Inc
- Hawaii Housing Finance
- Hudson Housing Capital LLC
- Ohio Capital Corporation for Housing
- PNC Bank
- Redstone Partners
- R4 Capital LLC
- Raymond James
- The Richman Group
- Texas Housing Finance Corp
- US Bank
- Wells Fargo
- WNC & Associates, Inc

### Public Housing Authorities (PHAs)

- Dallas Housing Authority
- Denver Housing Authority
- Greenwich Housing Authority
- Houston Housing Authority
- Housing Authority of New Orleans
- Housing Authority of the County of Santa Clara
- San Diego Housing Authority
- Yolo County Housing

## Client Resources

At CohnReznick, we believe that a more informed client is a more successful client. As such, we offer a variety of educational programs and information briefs to our clients. Our interactive seminars, most of which qualify for continuing professional education (CPE) credits, are valuable networking vehicles. We also issue alerts and updates to our clients to assist them with staying abreast of current business issues and industry-related trends.

These resources include:



Industry-specific news, articles and thought leadership on a range of affordable housing and not-for-profit related topics as well as complementary articles including: market-rate real estate, private equity, renewable energy, and government.

 <p>Reports</p>	<p>In-depth reports and analysis, at the national and local level, including the series on LIHTC property performance, Operating Expense study, and a special report on The Community Reinvestment Act.</p>
 <p>Training</p>	<p>Industry Practice professionals can provide on-site training in areas such as Low-Income Housing Tax Credit 101 or 201, Bonds, HUD, RAD, and Historic Rehabilitation Tax Credits.</p>
 <p>Advocacy</p>	<p>Bob Moss, National Director of Governmental Affairs, provides legislative updates to our clients and the industry at large. He works to create support in Congress for the LIHTC and awareness of its benefits.</p>
 <p>Events</p>	<p>Industry conferences, webinars, and executive roundtables provide peer-to-peer connections, guidance, trends and strategies on industry topics. Tuition and non-tuition programs are available.</p>
 <p>Client Alerts</p>	<p>Timely email updates with relevant and impacting changes in accounting and tax laws broken out with what you need to know and who to contact for more information.</p>
 <p>Database Access</p>	<p>Access to the ARM database (at a discounted rate through CohnReznick's relationship with CCH), which provides standards, regulations, and statements from the SEC, FASB, GASB, AICPA, and other accounting-related information.</p>

## Active Involvement

Keeping abreast of current industry issues and challenges is critically important to be able to deliver relevant and actionable guidance to our clients. As such, our professionals remain actively involved with national and local real estate, affordable housing, non-profit, and governmental industry associations and are often sought after as speakers, moderators, and thought leaders.

National associations to which CohnReznick belongs include:

- Affordable Housing Tax Credit Coalition (AHTCC)
- Affordable Housing Association of Certified Public Accountants (AHA CPA)
- America Bar Association (ABA) Forum Committee on Affordable Housing and Community Development Law
- Council of Development Finance Agencies (CDFA)
- Council of Independent State Housing Associations (CISHA)
- Historic Tax Credit Coalition
- Housing Advisory Group (HAG)
- Housing Partnership Network (HPN)
- Institute for Responsible Housing Preservation (IRHP)
- National Affordable Housing Management Association (NAHMA)
- National Association of Housing and Redevelopment Officials (NAHRO)
- National Association of Local Housing Finance Agencies (NALHFA)
- National Association of State and Local Equity Funds (NASLEF)
- National Board Officers Association (NBOA)
- National Council of State Housing Agencies (NCSHA)
- National Housing and Rehabilitation Association (NH&RA)
- National Housing Conference (NHC)
- National Leased Housing Association (NLHA)
- National Low Income Housing Coalition (NLIHC)
- National Multifamily Housing Council
- National Association of Home Builders
- New Markets Tax Credit Coalition
- New York State Association for Affordable Housing
- New York Housing Conference
- Public Housing Authorities Directors Association (PHADA)
- Stewards of Affordable Housing for the Future
- Strength Matters/Neighborworks



## Nicholas Ratti

Principal

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Nick Ratti is a Principal with CohnReznick's Project Finance Consulting Practice in Boston, Massachusetts. He has more than 15 years of experience in the tax credit industry. Nick is currently responsible for developing and evaluating tax credit syndication structures, providing tax compliance advice, evaluating tax credit recapture or tax-loss reallocation issues, strategizing post compliance period exits and providing syndication advisory services. Nick has extensive experience structuring a wide range of Historic, Low-Income Housing, and New Markets tax credit and Opportunity Zone transactions for his developer and investor clients.

Additionally, Nick is a frequent speaker at national conferences and seminars including but not limited to; CohnReznick New Markets Tax Credit Summit, National Housing and Rehabilitation Association, American Bar Association Forum on Affordable Housing and Community Development, IPED, and the New Jersey Governor's Conference.

### Education

- Providence College: Cum Laude, Bachelor of Science, Accounting and Finance

### Professional Affiliations

- Preservation Massachusetts, Executive Committee and Chair of LLC Committee
- National Housing & Rehabilitation Association

### Sample of Low Income Housing/Historic Tax Credit Transaction Closings

Appleton Mills	Lowell, MA
New England Center for Homeless Veterans	Boston, MA
Ames Shovel Works	Easton, MA
Randolph Houses	New York, NY
Billings Forge Apartments	Hartford, CT
Westward Ho Apartments	Phoenix, AZ
Wayne Apartments	Boston, MA
Cotton Mill Apartments	Nashua, NH

WANG COMMISSIONING  
<https://wangcommissioning.com/>

**C P P E**

Wang Commissioning, LLC (WCX) provides comprehensive commissioning services for mechanical, electrical, plumbing, fire protection and security systems in both new constructions and major renovations. Founder and principal Ivy Wang, PE, CCP has over 20 years of commissioning and design experience and has covered over 16 million square footage of total building area. In addition of being certified as a Building Commissioning Professional, Ms. Wang is a registered Professional Engineer. Ms. Wang founded WCX in 2016 with the vision of serving building owners and operators by providing a responsive, unbiased and thorough commissioning process. WCX is a certified WBE and MBE company.

**E CE**

LEED Certification | Design Review | Submittal Review | Installation Inspection | Contractor Tests Reports Review | Functional Performance Tests | Trend Data Analysis | O&M and Warranty Review | Systems Manual | Training Verification | Seasonal Tests | Non-conformance List | Smoke Control Special Inspector

**P EC PE**

Offices | K-12 | Municipal Buildings | Mixed Use | Hospitality | High-end Condominiums | Apartments | High-rise | Healthcare | Animal Research Facilities | Life Sciences | Higher Education | Laboratories

**E P E C PE**

*[Mechanical]* Boiler Plant | Chiller Plant | Steam Generators | Air or Water Source Heat Pumps | Energy Recovery Systems | Geo Thermal System | Cooling Towers | Air Handling/Rooftop Units | Energy Recovery Units | Chilled Beams | Underfloor Ventilation | Terminal Heat Exchangers | Fans | Pumps | Radiant Heat | Fuel Oil System | Critical Space Pressurization | Cryogenic Purging | Variable Refrigerant Flow Systems | Split AC Units | Computer Room AC Units | Data Centers |

*[Electrical]* Switchgears | Panel Boards | Power Transfer | Uninterrupted Power Supply | Photovoltaic Panels | Lighting Controls | Occupancy Sensors | Day Light Sensors | Heat Trace

*[Plumbing]* Hot Water Heaters | pH Neutralization | RODI | Gas Manifolds | Vacuum | Compressed Air | Booster Pumps | Recirculation Pumps | Sump Pumps | Storage Tanks

*[Fire Protection]* Fire Alarm System

*[Security]* Intruder Alarm/CCTV/Door Access

*[BMS]* AI/AO/DI/DO Points Verification | Alarms Verification | Graphic Interface Verification | Trend Data Analysis | Integration with MEP/FA/Security Systems

**PRINCIPAL'S C E**

Trinity Financial | Hobbs Brook Management | Town of Lexington | Town of North Andover | Hyatt | BR+A Engineers | WSP Parsons Brinkerhoff | AvalonBay Communities | City Point Capital | Preotle, Lane and Associates | Avison Young | Reward Gateway | 495 BC Acquisitions | Rubenstein Partners | R. W. Sullivan Engineering | CV Properties | Hines | Group One Partners | Starwood Hotels | Biomed Realty | Mathworks | Children's Hospital | Harvard University | Suffolk University | Boston University | Massachusetts Institute of Technology | Northeastern University | Wellesley College | Simon Properties | Massachusetts School Building Authority | DiMella Shaffer Architects | Elkus Manfredi Architects | Icon Architecture | CBT Architects | TBA Architects | Margulies Perruzzi Architects | Steffian Bradley Architects | Mills Whitaker Architects | Sasaki Associates | VVA Sweett | Boston Scientific | Takeda Pharmaceuticals

**C P E P E C E**

**i e e ea are e ear l i e**

**an al a**  
507,000 sqft lab/office/CUP. Fundamental and enhanced commissioning for LEED.

**rl ra e Cen er ve n**  
600,000 sqft 16-story office tower plus 15,000 sqft parcel. Enhanced commissioning for LEED.

**e ir n**  
266,000 sqft lab/office R&D. Enhanced commissioning for LEED.

**inne Ca ri ge**  
375,000 sqft lab/office R&D. Enhanced commissioning for LEED.

**in r are n**  
Commissioning subconsultant for 1,450,000 sqft development.

**ar n**  
625,000 sqft, 28-story office tower. Enhanced commissioning for LEED.

**n Children’s Hospital, Boston, MA**  
Multiple renovations

**a e a P ar a e i al Ca ri ge**  
50,000 sqft fit-out, LEED Silver certified.

**n ien i i C r ra i n C ven r**  
Aerator upgrade, office renovations, chiller replacement

**l al Ele ri al a ar a ra r e l e er**  
28,000 sqft laboratory space

**400 River’s Edge Dr, Medford, MA**  
116,000 sqft office building core and shell, LEED Gold certified.

**Ca ri ge aving an al a**  
85,000 sqft office building, LEED Platinum certified.

**a e l n n**  
227,000 sqft mixed use programming. Enhanced commissioning for LEED.

**Par el a n**  
397,000 sqft luxury apartments in seaport district. Enhanced commissioning for LEED.

**En re Ca in e r a Evere**  
Commissioning subconsultant for Hotel Tower of the 3,000,000 sqft resort.

**Cli er i ar n**  
Four (4) buildings totaling 652,000 sqft of waterfront luxury apartments and condominiums. Fundamental commissioning for LEED.

**e l l erville**  
525,000 sqft 28-story mixed use. Enhanced commissioning for LEED.

**l n evere**  
Three (3) buildings totaling 899,000 sqft of luxury apartments/condominiums/retail/office. Fundamental and enhanced commissioning for LEED.

# Peter N. Kochansky

*Director*

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Peter Kochansky is a real estate development and public law and policy lawyer. In his real estate development work, Peter specializes in securing land use approvals for complex, mixed-use projects in the city of Boston, including waterfront sites.

Peter's expertise involves all aspects of zoning compliance and other public approvals, environmental impact reviews, and regulatory compliance. He assists clients from the conceptual stages of complex projects through to the issuance of building permits, project completion, and occupancy.

In his public law and policy work, Peter specializes in structuring and effecting public-private partnerships to fund and deliver real estate development and transportation projects.

He has advised both public and private clients on novel projects that leverage multiple funding sources to finance public-private projects, including the management and operation of public open space and the delivery of effective social services.

Peter's work with public entities involves advising them on Public Records Law and Open Meeting Law compliance, and he counsels public and private clients on compliance with the State Ethics Law, the Massachusetts Lobbying Law, and state procurement laws.

Peter has deep expertise in public transportation matters, having represented the MBTA and MassDOT on the acquisition of railroad assets and the negotiation of agreements among those public agencies, Amtrak, and private freight railroads.

Prior to law school, Peter worked for Clinton-Gore '96 and the Democratic National Committee as the Deputy Finance Director for New York and New Jersey.

## **Accolades**

- *Boston Magazine*, Top Lawyers, Land Use Environment, 2022
- *Chambers USA*, Real Estate: Zoning/Land Use, Massachusetts, 2022-2023 (Band 2)

- Best Lawyers in America® (2023): Land Use and Zoning Law, Real Estate Law
- NAIOP Government Affairs Champion Award, Recipient

### **Affiliations**

- Co-Chair, Pro Bono Committee, Goulston & Storrs

### **Admissions**

- Massachusetts

### **Education**

- Dartmouth College (B.A., *cum laude*, 1994)
- Yale Law School (J.D., 2000)

## **Representative Matters**

### **Rose Fitzgerald Kennedy Greenway Conservancy, Inc. Formation of Greenway Business Improvement District**

Representation of the Rose Fitzgerald Kennedy Greenway Conservancy, Inc. in connection with A Better City on the formation of a Greenway Business Improvement District that will contribute \$1.5M each year to sustain the Rose Kennedy Greenway.

### **Development of Bulfinch Crossing Project**

Representation of National Real Estate Advisors, LLC and The HYM Investment Group, LLC in connection with development of the approximately 2.9 million square-foot Bulfinch Crossing project, in Boston, MA (on the approximately 4.8 acre site of the former Government Center parking garage), including the creation of a tiered, phased, mixed-use, office, retail and residential condominium.

### **Berkeley Investments Rehabilitation and New Construction**

Represents Berkeley Investments, Inc. a full-service real estate investment and development company, in connection with multiple City of Boston development projects, including the rehabilitation of historic buildings and new construction in the Fort Point District and the Charlestown neighborhood.

### **Massachusetts Bay Transportation Authority and the Massachusetts Department of Transportation Acquisition of South Coast Rail, Framingham Secondary Lines and Other Railroad Assets**

Advised the Massachusetts Bay Transportation Authority (MBTA) and the Massachusetts Department of Transportation (MassDOT) in connection with the acquisition by MassDOT of the South Coast Rail lines, the Framingham Secondary lines, and other railroad assets from CSX Transportation and other freight railroads. Peter's railroad works has included the negotiations of trackage rights and operating agreements with CSX, Amtrak, the Rhode Island Department of Transportation, and Pan Am Railways and other freight railroads.

**Massachusetts Convention Center Authority Procurement of Hotels**

Represented the Massachusetts Convention Center Authority in the procurement for a developer of hotels in proximity to the Boston Convention and Exhibition Center.

**Roca Securing Funding**

Represented Roca, Inc., a non-profit provider of services to high-risk young men, in securing funding through the Massachusetts Juvenile Justice Pay for Success Initiative, the largest social innovation financing project in the nation.

**Rose Fitzgerald Kennedy Greenway Conservancy Operate and Maintain Greenway**

Counsel to the Rose Fitzgerald Kennedy Greenway Conservancy, Inc. in its public-private partnership to operate and maintain the capacity as the steward of the Greenway in downtown Boston.

**Seaport Square Project Securing Permits and Approvals**

Represented the owner and developer of the 23-acre Seaport Square Project, located in the South Boston Seaport district, in securing permits and approvals for the development of 6.3 million square feet of mixed-use development. Serves as land use counsel to WS Development, the current owner of the remaining development parcels within Seaport Square, in connection with approvals for changes to the master plan.

## Publications

December 18, 2020

**BPDA Approves Fair Housing Zoning Amendment**

May 6, 2020

**City of Boston Announces Staged Construction Restart, Outlines Expanded Categories and Key Dates**

November 2014

**"Goulston Helps At-Risk Youth Program Get \$27M Funding," Law360**