

# Newton Armory Affordable Housing Development (RFP #21-79) Technical Proposal



September 30, 2021

City of Newton  
Purchasing Department  
Newton City Hall  
1000 Commonwealth Ave.  
Room 108  
Newton, MA 02459



utile



**EXHIBIT 1**

**TECHNICAL PROPOSAL COVER SHEET**  
**RFP #21-79 for Newton Armory Affordable Housing Development**

This form must be completed and placed, within your Technical Proposal and ensure your envelope is marked:

“TECHNICAL PROPOSAL: RFP #21-79 for Newton Armory Affordable Housing Development”

- A. The undersigned proposes to furnish all supplies accordance with the Project Manual prepared by the City entitled:

**NEWTON ARMORY AFFORDABLE HOUSING DEVELOPMENT**

This proposal includes addenda number(s) 1, 2, \_\_\_\_\_, \_\_\_\_\_,

The following documents, completed and executed, are submitted herewith:

1. Technical Proposal Cover Sheet (Exhibit 1)
2. Bidder's Qualifications & Reference Form (Exhibit 2), 2 pages
3. Certificate of Non-Collusion (Exhibit 3), 1 page
4. Certification of Tax Compliance (Exhibit 4), 1 page
5. Certificate of Foreign Corporation (if applicable) (Exhibit 5), 1 page
6. Debarment Letter (Exhibit 6), 1 page
7. IRS Form W-9 (Exhibit 7), 1 page

Name of Proposer: OnyxGroup Development, LLC

Address: 50 Moreland Street, Boston, MA 02119

Telephone: 617-792-2268

Signature of Duly Authorized Representative of Proposer:

Signature:



Name:

Shabnam Mashmasrmi

*(Please print clearly)*

Title:

Chief Operating Officer

Dated:

09/23/2021

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September 30, 2021

Eamon Bencivengo  
City of Newton Purchasing Department  
Newton City Hall  
1000 Commonwealth Avenue  
Room 108  
Newton Centre, MA 02459



RE: Proposal for Newton Armory Affordable Housing Development  
(RFP# 21-79)

Dear Mr. Bencivengo:

The OnyxGroup Development team in collaboration with, Novo Growth Partners, Commodore Builders, and Utile, Inc., are pleased to respond to the RFP for the West Newton Armory site at 1135 Washington.

Our goal is to create housing that nurture families and foster communities. The lack of affordable housing is a deterrent in upward mobility and we know that residents who require affordable housing should be privy to the tools and resources that enable them to live and thrive. We believe that housing should be a stepping stone for building personal and sustainable wealth for individuals and families, and this could be achieved through conscious community building.

For the West Newton Armory site, we are proposing 100% affordable housing with an ample outdoor space and inviting pavilion. Our development is rooted with the intent to utilize Newton's rich cultural community. The OnyxGroup Development team seeks to create lasting pathways to personal and economic growth for residents, community members and businesses.

We created a stellar team of Class A development professionals with a proven track record in design, building, and operating affordable, inclusive, and sustainable housing developments, who will work together to efficiently build this project from start to finish.

We thank you for your consideration and look forward to the opportunity to meet with you. We are pleased to present the 1135 Washington core team.

Sincerely,

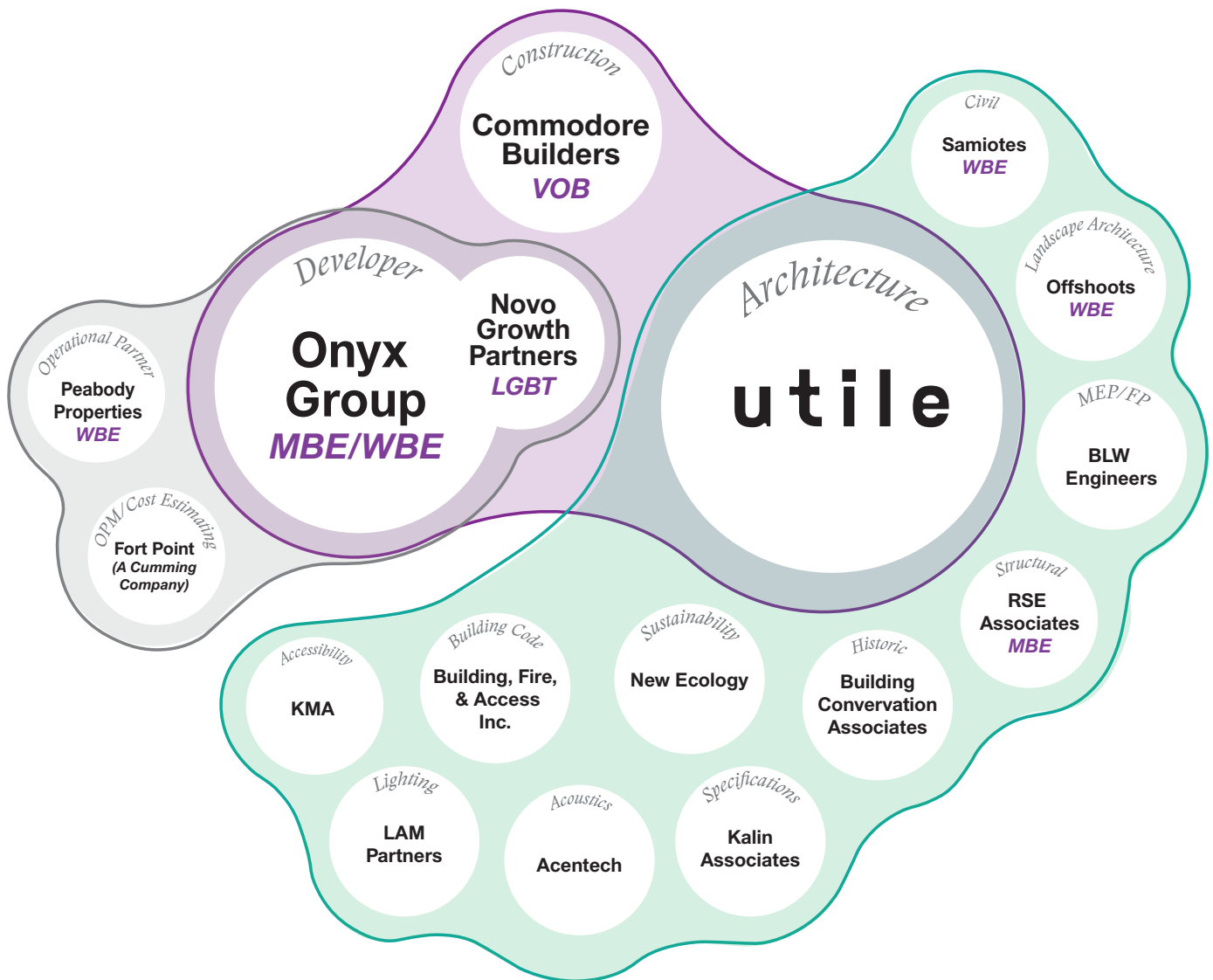
A handwritten signature in black ink, appearing to read 'CS', with a long, sweeping horizontal line extending to the right.

Chanda Smart, CEO  
OnyxGroup  
[www.onxyboston.com](http://www.onxyboston.com)



# Statement of Qualifications

## Team Organization



## Meet Our Development Team



**OnyxGroup** is the first minority- and women-owned development and realty company in Boston. Shabnam Mashmasarmi and Roxbury resident Chanda Smart founded OnyxGroup to develop communities focused on equity and inclusion of local residences without displacement.

We strive to provide affordable residential and commercial spaces in order to foster homeownership and entrepreneurship within our communities. We are intentional and strategic in our development plans and programming to create spaces and destinations as generational wealth creation corridors.

We believe developments can—and should—reclaim and preserve the integrity of our communities.

Our approach to development starts and ends with people. We bridge the communication and development gap between the community and the builder, forming partnerships to develop communities focused on inclusivity and tangible equitable growth, starting with local residents.

Onyx is motivated by building communities that reinvest in themselves and aim to be a bridge to developing equity and opportunity. We strive to be a viable resource for the communities we develop, partnering with major industries to increase financial resources, job growth and educational opportunities.

We build with a purpose; to create a community where residents can live and work, have access to wealth building resources, and receive equitable stakes in neighborhoods.

Onyx aims to integrate change with culture, transforming the face of development. Massachusetts is ready for a new paradigm, and we're here to lead.



Onyx has partnered with **Novo Growth Partners, Inc.** a full-service real estate development and consulting company led by Kyle Wilton. The firm works with strong regional and national tenants, as well as entrepreneurial real estate investment and development companies, to create successful and profitable ventures. Novo manages a pipeline of commercial transactions throughout the US, providing project management and development services.





**Utile, Inc.**  
*Architectural Design*

Utile is a Boston-based design firm built like a think tank. We thrive on solving complex problems in intelligent and pragmatic ways. From theoretical issues that frame policy to the practical implementation of architectural commissions, Utile develops a rigorous research-based approach for finding the best solutions. Utile currently has over 300 subsidized units in design or under construction throughout the region for various Community Development Corporations such as The Neighborhood Developers, Urban Edge, VietAID, and the Portland Housing Authority. The firm has provided strategic planning and urban design services involving public housing properties throughout New England.



**Fort Point**  
**A Cumming Company**  
*Owner's Project Management*

Fort Point will serve as the development team's project manager. In 2021, Fort Point merged with Cumming, a global project management and cost management company. Both Fort Point and Cumming hold a shared vision to improve project performance, and to provide clients with unmatched expertise in navigating the complex design and construction process. As an affiliate of Cumming, Fort Point enjoys the benefit and support of 1,000 team members across 36 offices in the US and UK.



**Peabody Properties, Inc. (WBE)**  
*Operational Partner*

Peabody Properties is an award-winning, family owned, full service real estate firm, established in 1976. Peabody specializes in the professional marketing, sales, leasing and management of residential multifamily properties, focusing on affordable and mixed-use communities. Services include but are not limited to; administration and compliance, marketing and branding of new developments, real estate brokerage, facilities management and the application of green building practices, procurement and vendor management, construction and capital improvement oversight.



**Commodore Builders (VOB)**  
*Construction Management*

Commodore is a Veteran-owned \$400M construction management firm based in Waltham that focuses on delivering an exceptional level of service for clients in the housing, commercial, tenant interiors, institutional, public, retail, and banking markets. They provide clients and partners with a construction process that eliminates the surprises, while elevating the experience by executing with excellence.

Please find full firm overviews and resumes, including team members' recent affordable housing experience, in the Appendix.

# Development Team References

## OnyxGroup Team

### Shabnam Mashmasarmi, COO

The Galante Architecture Studio  
Ted Galante, Founding Principal  
(617) 576-2500  
tg@galantearchitecture.com

Castillo & Co  
Carlos Castillo, Owner  
(617) 594-7147  
carloscastillo@alumni.tufts.edu

Christian Carter, LLC  
Clayton Weston  
(617) 212-9545  
Claytweston2@gmail.com

### Chanda Smart, CEO

The Galante Architecture Studio  
Ted Galante, Founding Principal  
(617) 576-2500  
tg@galantearchitecture.com

General Air  
Leroy Alexander, Owner  
(617) 427-7370  
info@genairheat.net

Law Offices of Donald E. Green  
Annette Green, Principal  
(617) 442-0050  
agreen@donaldegreen.com

## Novo Growth Team

### Kyle Wilton, Owner

DaVita, Inc.  
Brian Olsen, Senior Director of Dev't  
(801) 824-4685  
Brian.olsen@davita.com

Genesis KC Development/Fourtuity  
Heath Kennedy, RE Dev't Manager  
(303) 981-5742  
kennedy@fourtuity.com

Cushman & Wakefield  
Wendy Dobreff, VP  
(586) 604-1640  
wendy.dobreff@cushwake.com

## Utile Team

### Matthew Littell, Principal-in-Charge

The Neighborhood Developers, Inc.  
Steve Laferriere, Dir. of Real Estate  
(617) 545-8315  
slaferriere@tndinc.org

NeighborWorks Southern Mass  
Timothy Doherty, Dev't Director  
(617) 770-2227 x36  
t.doherty@nwsoma.org

Asian Community Development Corporation  
Angie Liou, Executive Director  
(617) 482-2380 x205  
angie.liou@asiancdc.org

### Nick Buehrens, Associate Principal

The Neighborhood Developers, Inc.  
Steve Laferriere, Dir. of Real Estate  
(617) 545-8315  
slaferriere@tndinc.org

NeighborWorks Southern Mass  
Timothy Doherty, Dev't Director  
(617) 770-2227 x36  
t.doherty@nwsoma.org

Peter Munkenbeck, Consultant  
(617) 224-0690  
munkenbeck@gmail.com

### Rachelle Ain, Project Manager

NeighborWorks Southern Mass  
Timothy Doherty, Dev't Director  
(617) 770-2227 x36  
t.doherty@nwsoma.org

Peter Munkenbeck, Consultant  
(617) 224-0690  
munkenbeck@gmail.com

The Hotchkiss School  
Sandra J. Lynch, CFO  
(860) 435-3159  
slynch@hotchkiss.org

## Peabody Team

### Karen Fish-Will, CEO

Affordable Housing and Services Collaborative  
Michael Mattos, President & Executive Director  
(781) 794-1095  
mmattos@ahscinc.org

Hearth, Inc.  
Mark Hinderlie, President & CEO  
(617) 369-1553  
mhinderlie@hearth-home.org

B'nai B'rith Housing  
Susan Gittelman, Executive Director  
(617) 731-5291  
susan@bbhousing.org

## Fort Point Team

### John Carciero, Vice President

Boston Medical Center  
Bob Biggio, Sr. Vice President  
(617) 414-2110  
Bob.biggio@bmc.org

Steward Healthcare  
Anthony Slabacheski, Program Dir.  
(339) 927-6651  
Anthony.slabacheski@steward.org

Steward Healthcare  
Arlene Champey, Sr. Dir. of EH&S  
(978) 245-3787  
Arlene.Champey@steward.org

### Walter Kucharski, Project Director

Studio Troika  
Robert Elfer, Principal  
(617) 233-9091  
robert@studiotroika.com

Amundi Pioneer  
Thomas Murphy, Director  
(617) 422-4531  
tom.murphy@amundi.com

Millennium Partners Management  
Tim O'Brien, Asset Manager  
(212) 875-4966  
tobrien@millenniumptrs.com

## Commodore Team

### Ed Whelan, Project Executive

William Rawn Associates  
Paul Governor, Architect  
(617) 598-3335  
pgovernor@rawnarch.com

LeMessurier  
Peter Cheever, President  
(617) 868-1200  
pcheever@lemessurier.com

CBT Architects  
Ellen Perko, Associate Principal  
(617) 646-5255  
perko@cbtarchitects.com

### Mike Dupuis, Sr. Project Manager

Mass Facilities  
Ken Wertz, Executive Director  
(781) 775-6131  
exec@massfacilities.com

Robert MacLeod, Associate Architect  
McKinnell, McKinnell & Taylor  
(781) 878.6223  
robert.macleod@neoscape.com

Sydney Project Management  
Joshua Sydney, Principal  
(617) 212-7431  
Js@sydneyopm.com



## Our Team's Experience



### Cass Crossing, Roxbury, MA

OnyxGroup and Novo Growth Partners submitted a proposal to the Boston Planning and Development Agency (BPDA) in April 2021 for redevelopment of the Crescent Parcel in Roxbury. Working with The Galante Architecture Studio, the team presented “Cass Crossing”, a mixed-use, mixed-income development including two connected buildings spanning 218,000 square feet with green roofs, and 154 units of market-rate and affordable housing. A 40,000 square-foot commercial component includes a food hall and restaurant.

Melnea Cass was a tireless community advocate and this site development and building proposal is based on the history of her great work. It considers how this portion of Roxbury might flourish because of her foundational community engagement, and seeks to extend her efforts

well into the future for the next generations to pick up and grow from. The project includes affordable housing developed on a unique model, a local grocer and marketplace, co-working and gathering spaces, a restaurant and performance venue, and underground parking, all integrated through a focus on health and fitness and a sustainable and resilient design.

The site is divided into three parts: a building footprint on Melnea Cass Boulevard, a mini forest of trees, and a rectangular portion fronting along Tremont Street. The site curves as a result of how Melnea Cass intersects with Tremont and thus forms the shape of a crescent. Preserving the mini forest is a goal of all involved in the project, and this forms an essential component for the site. The building footprint on Melnea Cass is curvilinear as it responds to the site, and our building develops this curve and extends it firmly nine stories tall.



# utile

88 Hudson Street  
Boston, Massachusetts

Built on land reclaimed from the Big Dig, this 51-unit affordable condominium project in the heart of Chinatown was jointly developed by the Asian Community Development Corporation and the New Boston Fund. The project features nine duplex townhouses with direct entrances from the street to enhance the neighborhood's urban vitality. Four stories of flats are located above the townhouses. The project fronts a new major public open space to the north and shelters an intimate private green space to the south.



**Client**  
Asian Community Development Corporation  
**Type**  
Affordable condominiums  
**Completion**  
February 2018  
**Cost**  
\$20M  
**Size**  
51 units  
**Scope of Services**  
Site Planning, Architecture

Upper Washington Street  
Dorchester, Massachusetts

Utile worked with VietAID to create this mixed-use development with 35 units of housing and 3,000 SF of commercial and community space in the Four Corners neighborhood. The project includes two buildings that bring essential density and definition to the neighborhood. Ground level retail and community space help create an active street edge to maintain "main street" qualities of the block.



**Client**  
VietAID  
**Type**  
Multifamily housing, retail  
**Completion**  
2017  
**Cost**  
\$14.5M  
**Size**  
35 units  
**Scope of Services**  
Architecture, site planning

Sycamore on Main  
Brockton, Massachusetts

Utile is working with NeighborWorks Housing Solutions to revitalize the site of the previously demolished Kresge Five & Dime building with 48 mixed-income rental units, below-grade parking, and ground floor commercial space. The building embraces the opportunity to infill a longstanding "missing tooth" along Brockton's important Main Street corridor.



**Client**  
NeighborWorks Housing Solutions  
**Type**  
Multifamily housing, mixed-income  
**Status**  
Fall 2021 completion  
**Size**  
48 units  
**Cost**  
\$15.4M  
**Scope of Services**  
Architecture

Hotel Grayson Adaptive Reuse  
Brockton, Massachusetts

Utile is working with Neighborworks Housing Solutions to adaptively reuse Hotel Grayson, currently in design, to provide 16 workforce micro-apartments, shared residential amenity spaces, and ground floor retail.



**Client**  
NeighborWorks Housing Solutions  
**Type**  
Multifamily housing, affordable  
**Status**  
Ongoing  
**Size**  
16 units  
**Scope of Services**  
Architecture



## utile

### One Beach Revere, Massachusetts

Utile worked with The Neighborhood Developers to bring 39 units of affordable senior housing to downtown Revere, as part of the city's ongoing revitalization. The new construction development features 39 rental apartments in a four-story building, with a mix of one-bedroom and two-bedroom homes.



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

### Acadia Chelsea, Massachusetts

Utile worked with non-profit developer The Neighborhood Developers to revitalize the site of Chelsea's former French Naturalization Club at 242 Spencer Avenue. Acadia creates 34 affordable apartments in Chelsea's Mill Hill Neighborhood, with three units targeted to low income renters with disabilities, and eight units for formerly homeless families.



**Client**  
The Neighborhood Developers  
**Type**  
Multifamily housing, affordable, rental  
**Year/Status**  
June 2019  
**Size**  
34 units; 42,000 SF  
**Scope of Services**  
Site planning, architecture

### Spencer Green Chelsea, Massachusetts

Spencer Green is a 48-unit affordable, sustainable rental housing project that re-establishes the continuity of a residential neighborhood whose fabric has been fragmented by intermittent industrial and non-residential uses. To enhance the notion of neighborhood development on a small scale, a variety of building and unit types are deployed. The main building along Spencer Avenue is a four-story elevator building with one- and two-bedroom units.



**Client**  
The Neighborhood Developers  
**Type**  
Multifamily housing, affordable, rental  
**Year/Status**  
2009  
**Size**  
56,000 SF, 48 units  
**Budget**  
\$9.2 million  
**Scope of Services**  
Site Planning, Architecture

### Jamaica Plain Branch of the Boston Public Library Renovation & Addition Jamaica Plain, Massachusetts

Utile worked with the Boston Public Facilities Department and the Boston Public Library on the design of a gut renovation and new addition to the Jamaica Plain Branch of the Boston Public Library. The project consists of a 3,000 square foot addition to an existing 8,000 square foot, 1909 historic building.



**Client**  
Boston Public Facilities Department  
Boston Public Library  
**Type**  
Renovation, addition  
**Year/Status**  
May 2017  
**Awards**  
2018 Boston Preservation Alliance Preservation Achievement Award  
2018 BSA Interior Design Award



Fort Point Project Management affiliate, Lehrer Cumming, and parent company Cumming, brings Northeast affordable housing experience to the portfolio.

**Senior Housing Renovations**

The Township of Woodbridge in New Jersey has six senior housing facilities. This project involved upgrades at three of these six buildings: Greiner, Cooper, and Olsen Towers. Our team was responsible for procurement of all materials and equipment for unit renovations, developed phasing, and working diligently with the Housing Authority to coordinate the movement of tenants in an efficient manner. Upgrades included new kitchen cabinetry, windows, flooring, bathroom upgrades, and painting.

**Jersey City Redevelopment Agency, 665 Ocean Avenue**

We provided project management services, including value engineering and cost management, for the renovation of 665 Ocean Avenue in Jersey City, New Jersey into eight studio apartments for Veteran Housing. This project was completed in 2015.

**Somerset Development, Westmont Station, Woodbridge, Nj**

This project is a new mixed-use transit village designed and developed to be a true live/work environment on the 67-acre tract of land formerly known as the Curtis Wright site in Woodbridge, New Jersey. As an area in need of redevelopment, the project consisted of multiple team members for the various components of residential, educational, recreational, retail, commercial and transit of public meetings, various state agency meetings, charrette design workshops, and local public meetings for redevelopment plan adoption.





Peabody Properties currently manages a combined portfolio in excess of 13,600 units, at 167 residential rental, condominium and mixed-use communities with more than 120,000 total square feet of commercial space. The Peabody managed portfolio extends throughout Massachusetts, Rhode Island, New Jersey and Florida.

### Affordable Housing Experience

Peabody Properties, Inc. is proud of its long-term relationships of trust with HUD, MassHousing, and other regulatory agencies, lenders and investors of affordable housing. Peabody has earned the reputation as the “go-to” company for developers of new affordable projects. Our on-site management teams take pride in their

accomplishments as they work every day to make a positive difference in the lives of all residents who call these communities “home”.

The company has been successful in managing complex properties with complex issues. Over time, and with small successes built on relationship-building and trust earned by delivering results, Peabody has worked with many community development corporations and board-controlled communities in urban neighborhoods throughout Massachusetts.

Peabody continues to earn its reputation on a daily basis, as property management is delivered in a hands-on, detailed manner by the Principals as well as front line and

supervisory staff. The Compliance team at Peabody works side by side with the property staff to ensure that all regulatory requirements of layered agency regulations are met.

Currently, 36% of Peabody affordable communities have multi-layered regulatory programs in place that require 100% compliance at all times.

Furthermore, the following Peabody managed communities are led by strong and dedicated NDC's, Resident Associations and Boards of Trustees, respectively. Peabody values the collaboration put forth by all parties to create vibrant communities where residents can live, grow and prosper in strong and comfortable neighborhood environments.



The Metropolitan  
1 Nassau Street, Boston, MA



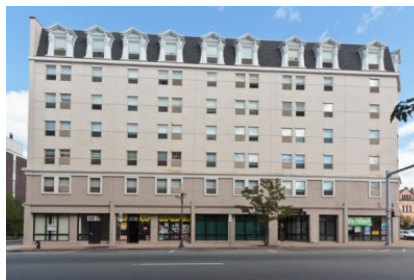
Roxse Homes  
1050 Tremont Street, Boston, MA



Humboldt Apartments  
51-57 Humbolt Avenue, Roxbury, MA



Mishawum Park  
338 Main Street, Charlestown, MA



Bixby Brockton Apartments  
103-106 Main Street, Brockton, MA



### **Court Square Press, South Boston, MA**

- Conversion of a former factory building into condominiums requiring the complete rehabilitation of over 200,000 SF of warehouse space along with a significant addition.
- Adaptive reuse of the former manufacturing building created 131 residential units.
- Originally constructed in 1906 as the MacAllen Manufacturing Company.
- Design Team: John Cunningham Associates, Inc.



### **Hebrew Senior Life's Orchard Cove, Canton, MA**

- Two-story addition, refreshed public spaces, renovated a large outdoor deck for leisure in an 8-month schedule.
- Construction on the addition was adjacent to the facility's loading dock and above their pool, necessitating consistent communication with hospital management
- Additional interior improvements were made to dining rooms comprising 30,000 SF over 14 months
- Design Team: Perkins Eastman Architects



### **100 Hemenway, Boston, MA**

- 52,000 SF, 50-unit, 5-story wood-frame apartment building.
- Included demolition of existing 104 Hemenway building, reconstructed with conventional wood framing.
- Masonry façade was reconstructed to replicate the original building facade.
- Scope for the 108 Hemenway existing building included partial demolition and full reconstruction/sistering utilizing wood framing.
- Design team: PCA





#### **The Whitney Hotel, Boston, MA**

- Renovation and addition of the historic Whitney Hotel featured significant interior upgrades and created 20 additional hotel rooms.
- To retain the building's historical accuracy and aesthetic, the new brick façade was carefully replicated to match the original sections.
- Logistically challenging due to the heavily restricted jobsite and high traffic and pedestrian volume in the area.
- Design team: Hacin + Associates



#### **Malden Place Condos, Malden, MA**

- 162,000 SF, 4-story, 116-unit condo development situated within walking distance Malden Center and public transportation to Boston.
- Structural steel & composite concrete deck building.
- Atop a concrete pile foundation, the building features two hydraulic elevators and offers adjacent covered parking.
- Design Team: Joseph D. LaGrasse & Associates, Inc.

# Conceptual Description of 1135 Washington

1135 Washington will be a welcoming residential community that embodies the values of inclusivity, diversity, and sustainability. The medieval revival architecture of the Armory Headhouse evokes the ideas of solidity and security, reflecting the collective strength of community. Together with a transparent and inviting pavilion, a new residential building, and ample outdoor spaces, 1135 Washington will become a vibrant destination and streetscape anchor for the greater Newton community.

## Celebrating the Armory

### Retaining & Integrating Character-Defining Features

The proposed design celebrates the architectural character of the Armory through a responsive design approach that sets the stage for the Armory to stand out. The Armory Headhouse exterior brick and windows will be restored. The interior will be thoughtfully designed to accommodate community, commercial, and residential uses with considerations to the detailing and proportions of the original architecture. A rooftop photo-voltaic (PV) canopy adds visual height and impact to the Armory while providing residents with a pleasant communal deck. Interventions on the sides of the Armory will have a light touch, and “dematerialize” such that the primary visual experience will be the facades and details of the historic building.

### A Complementary Design Approach

A new multifamily building will be constructed on the site of the existing field house. The design proposes to retain original exterior brick walls at the parking level on the West Side of the site, where possible, and to salvage and integrate the remaining bricks into site design features throughout the public plaza and community garden on Armory Street.

The exterior design of the new building will amplify the Armory’s Headhouse. This building’s overall proportions and the layout of its facade elements create elevations that complement the Armory and highlight its historic character. The building’s shaped roofline is a nod to the Armory’s parapet crenels while also referring to its own residential typology.

The new building creates a more intimate residential character on Armory Street to complement the more public facing elements on Washington Street. Porches, balconies, and residential garden plots provide human-scale design features for both the pedestrian perspective and adjacent neighbors.

In addition to the residential building, a new small Pavilion will be located to the east of the Armory. Hosting a commercial use, such as a cafe, and loose seating, the Pavilion will be an amenity for the residents and the Newton community while enhancing the streetscape along Washington St.

Together, the Pavilion and Armory defines the edges of a public plaza at the intersection of Washington and Armory streets. With its glassy exterior walls, the Pavilion will create a sense of welcome and connectivity from the plaza. A mostly-detached structure, the Pavilion connects to the Armory at its north-east (rear) corner and provides an accessible entry into the Armory’s commercial tenant.

## Project Narrative

### Objective 1: Sustainable, Resilient, and Healthy Development

The project’s design is centered around sustainable and resilient design for the new building and renovation to the Armory Headhouse. The project will pursue PHIUS certification; refer to page 26 for more detailed information about the PHIUS strategies along with other building performance design features. As a PHIUS project, the building will achieve significant operational carbon reductions along with an air-tight insulated envelope that is critical to





A new pavilion will create a welcoming place for the Armory and greater Newton Community. Outdoor seating, public art, and events will activate a new public plaza in front of the Armory and pavilion. The project is ideally located between Newtonville and West Newton villages.

passive house design. To complement this high performing building, the project team has prioritized a holistic framework for sustainability, including resiliency measures, lower embodied carbon, and healthier building materials. Residents will experience homes with good daylighting and acoustics, high indoor air quality, and durable healthier materials. The selection of outdoor spaces will provide opportunities for mental and physical regeneration.

Finally, the design will incorporate resiliency measures such as flood risks and preparation to be a zero carbon emission building as the state’s

electricity grid moves toward 100% clean energy.

**Objective 2: Affordable Income Restricted Housing**

The design and composition of 1135 Washington St. will provide Newton with high quality and thoughtful affordable housing to support the city’s long-term goals for stable housing solutions.

This project will create 48 mixed-income units of rental housing targeting families. To help meet the community’s needs, we intend to pre-lease and secure tenants for 1135 Washington St. as quickly as possible.

To achieve this goal, our experienced management team has recommended the AMI level distribution shown in Table 3.1 below.

We propose to provide housing for deep levels of affordability. The majority of the offerings are in the 50-60% AMI range. Indeed, we have found that filling 80% AMI units to be challenging. Though in recent years even 60% AMI units are becoming more difficult to fill, the Mobile Rental Voucher Program has proven to enable us to meet our affordable housing goals. In line with our intentions, public housing authorities prefer more vouchers to higher rents and are willing to provide the maximum tax credit for 60% AMI rather than 80% AMI.

Our AMI unit mix goals will help us avoid the lease-up pitfall of unoccupied units, enabling a thriving community. Our research has shown projects with majority 80% AMI housing have extended vacancy because the margin of minimum income requirement (40% rent to income ratio) is very narrow.

SUM of Count Unit Type	AMI					Group II Accessible Units
	30% AMI	50% AMI	60% AMI	80% AMI	Grand Total	
0 BR				1	1	
1 BR	1	3	10	2	16	1
2 BR		8	13	4	25	1
2BR				1	1	1
3 BR	1	1	1	2	5	1
Grand Total	2	12	24	10	48	4
Percentage of Total	4.17%	25.00%	50.00%	20.83%	100.00%	8.33%
Area by AMI	1,668	10,168	19,397	8,937	40,170	
Percentage of Area Total	4.15%	25.31%	48.29%	22.25%	100.00%	

Table 3.1



View from Armory Street. The new 5-story residential building stands within the footprint of the fieldhouse and connects back to the Armory building. Parking is accessed at the back of the building through a drive aisle on Armory Street. The new building creates a more intimate residential character on Armory St. as porches, balconies, and residential garden plots provide design elements at the human scale.

### **Objective 3: Equitable & Inclusive Economic Development & Supportive Services**

Our goal is to promote local business and job training in all aspects of the project. We intend to foster relationships that promote growth among small, minority, and women-owned businesses. Through our partnership with Commodore Builders (A Veteran owned company) and Peabody Properties, (a women owned company), we intend to hire and employ people of color and women in every aspect of our project and we are committed to maintaining our records according to the Good Jobs policy.

The Onyx Group is a Black woman owned and operated development company. As Black women, we understand the need for equitable resources and inclusive opportunities, which is why we source like minded development partners to realize our vision and goals for a more equitable and inclusive development team.

Our leadership team consists of women and minority leaders in different fields and we intend for our contractors, workers, subcontractors, consultants, and other participants and partners to reflect our mission and values. Wages and salaries of all jobs will be appropriate for their associated categories and provide for an enhanced quality of life and the

prospect of economic mobility for area residents. The estimated number of construction jobs is in the range of 200-250 (to be confirmed).

Included in our proposal is a 2,330 SF commercial space. We intend to be proactive in our marketing and outreach efforts to locate commercial tenants that are minority or women-owned businesses by engaging in grassroots efforts to drive interest and opportunity for these businesses. Retail and commercial businesses on the premises will also generate jobs

In addition to economic stimulation through employment, The Onyx Group offers community educational offerings in finance and vocational training. These community engagement courses will be hosted in the community center space. We believe empowering our residents with continuous improvement courses will strengthen the financial resilience of the community.

### **Objective 4: Consistency with Area Planning History & Vision**

The project aligns with the City's Washington Street Vision Plan by introducing a new transit oriented, sustainable, affordable, and accessible residential community. The proposed project will create equity-focused vitality and activation precisely at one

of the points along Washington Street most diminished by the construction of the Mass Pike in the 1960s, and will help to bridge West Newton and Newtonville by reviving a signature landmark at the meeting point of both village centers. With an eye toward placemaking by celebrating the site's history and unique location, the project will preserve and revivify the most architecturally significant component of this local landmark, introduce multigenerational green recreational space while appropriately managing rainwater conscious of proximity to Cheesecake Brook, and serve as a scalar transition between larger proposed developments to the west and shorter neighborhoods to the east.

### **Transportation Plan**

The project's transportation approach will help create parity between incentives to drive with incentives to bike, walk, or take a transit option. The project is nearly equidistant between West Newton's and Newtonville's Village centers, along two bus routes, and within walking distance to two commuter rail stations. A bike rental station, similar to what is at the site today, will continue to be located near the front of the building. A covered and secured bike room for the residents in the garage will provide one bike space per unit, in addition to



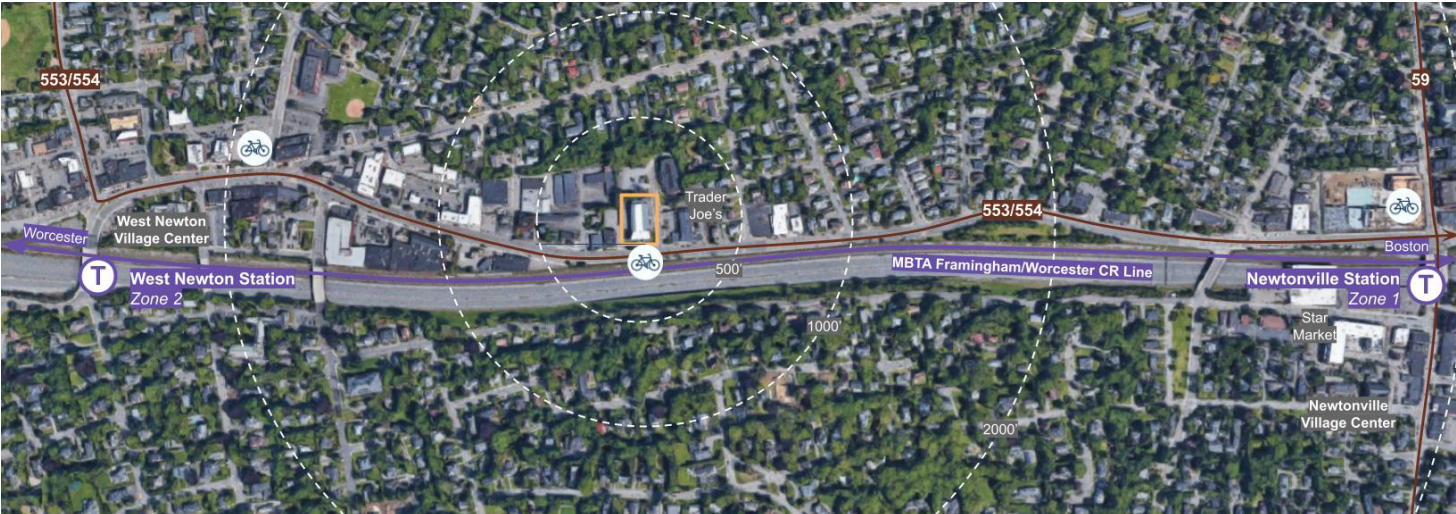


The Armory lawn and playground on the west side of the building provide recreational spaces while limiting visibility into parking. Above the Armory's roof, a bifacial solar panel array acts as a canopy for an outdoor deck while providing visual impact and broadcasting the project's sustainable features. Plantings throughout the outdoor spaces and roof deck will provide sound buffering from the Pike.

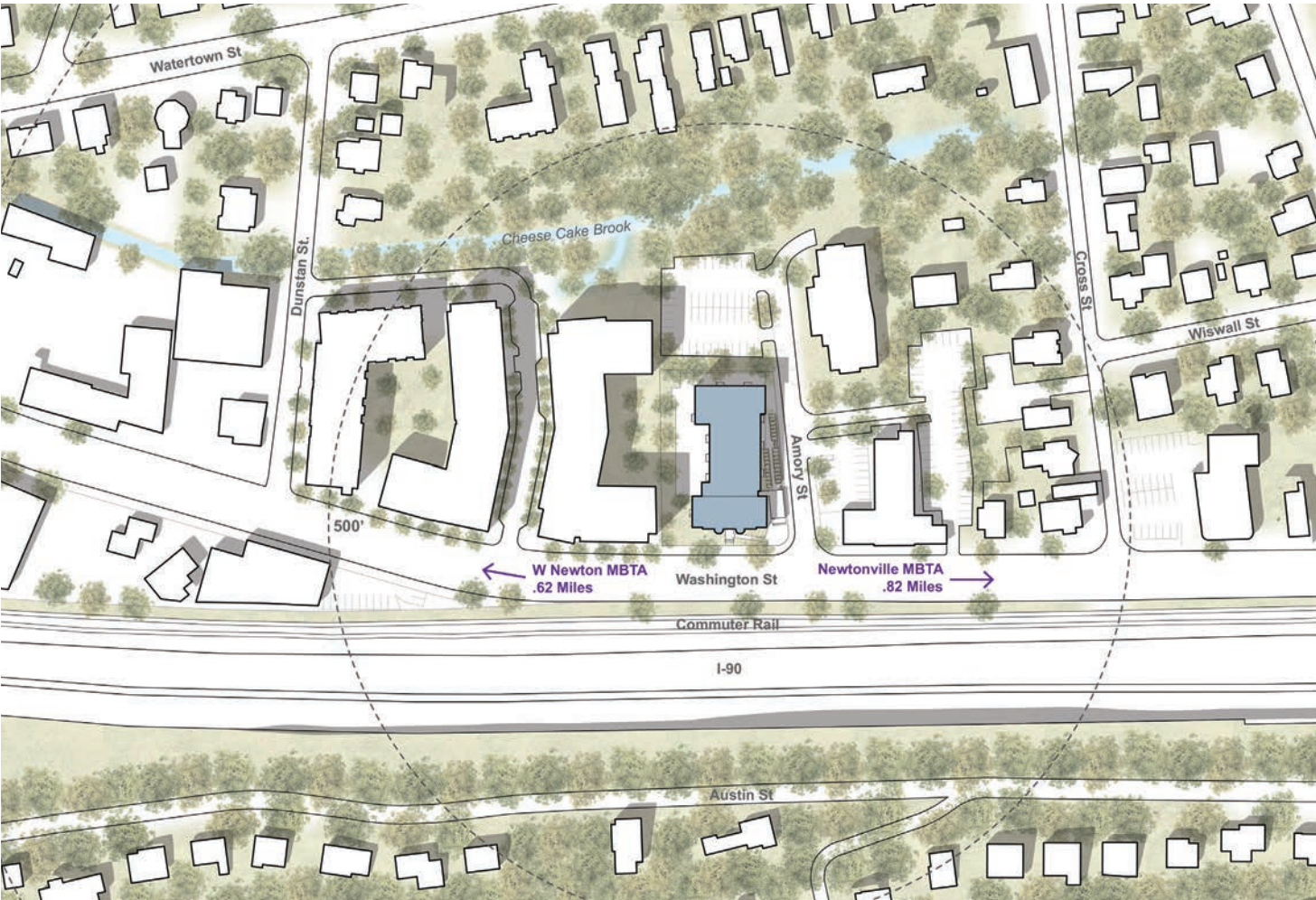


The Armory Headhouse exterior will be cleaned and repaired (where needed) to protect and extend the lifetime of this historic Newton gem. A new, low-slope gracious ramp will provide accessibility to the main entrance of the building. The front door landing will be expanded to create a "front stoop" experience for residents, further activating Washington street.





The new development is in a transit-rich location. Residents will be next door to a supermarket and within walking / biking distances to resources, stores, and restaurants in West Newton and Newtonville Villages. The project will provide a vibrant anchor for the greater Newton Community.



Site plan



outdoor bike racks along Armory St. for guests and patrons. The project will provide 36 vehicular parking spaces (0.75 spaces per dwelling unit) in the below-grade garage and on a small surface lot adjacent to the new building. The drive aisle is located on Armory St. to the rear of the lot.

### Common Areas

The following interior common areas will support and improve the quality of life for the residents:

- An Amenity Room on the ground floor, with living room seating and a small communal kitchenette
- A laundry room on the ground floor that overlooks the playground
- A lounge and recreation room on the second floor

The Project will provide ample, well defined open spaces areas, including:

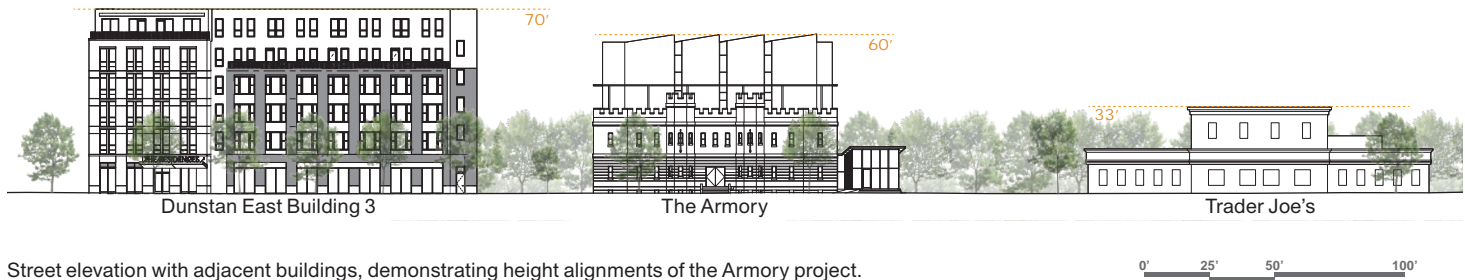
- A playground with bench seating
- A grassy lawn for sitting & play
- A community garden, with a plot for each unit
- A covered rooftop deck on the roof of the Armory.

In addition to the above spaces, there will be a public plaza with seating in front of the Pavilion. Aligned with the Washington Street Plan Vision, the plaza will provide a vibrant scene and can host public art and outdoor events.

### Accessibility

The project is designed to be welcoming to all and fully accessible, allowing people with disabilities to

integrate into the community as fully as possible. The main entrance at the front of the Armory will host a large and gracious low-slope ramp, signifying the building's inclusive design approach. All units will be accessible in accordance with applicable codes and standards, including 521 CMR, UFAS, FHA, ADAAG, and CBH. Group II accessible units will be scattered throughout the development. (Refer to Table 3.1) All common rooms inside the building are designed to be accessible through a new elevator, and all units will be visitable. The project will employ universal design features for residents and visiting guests. All accessible parking spaces, including the van space, will be located close to the elevator in the basement garage.



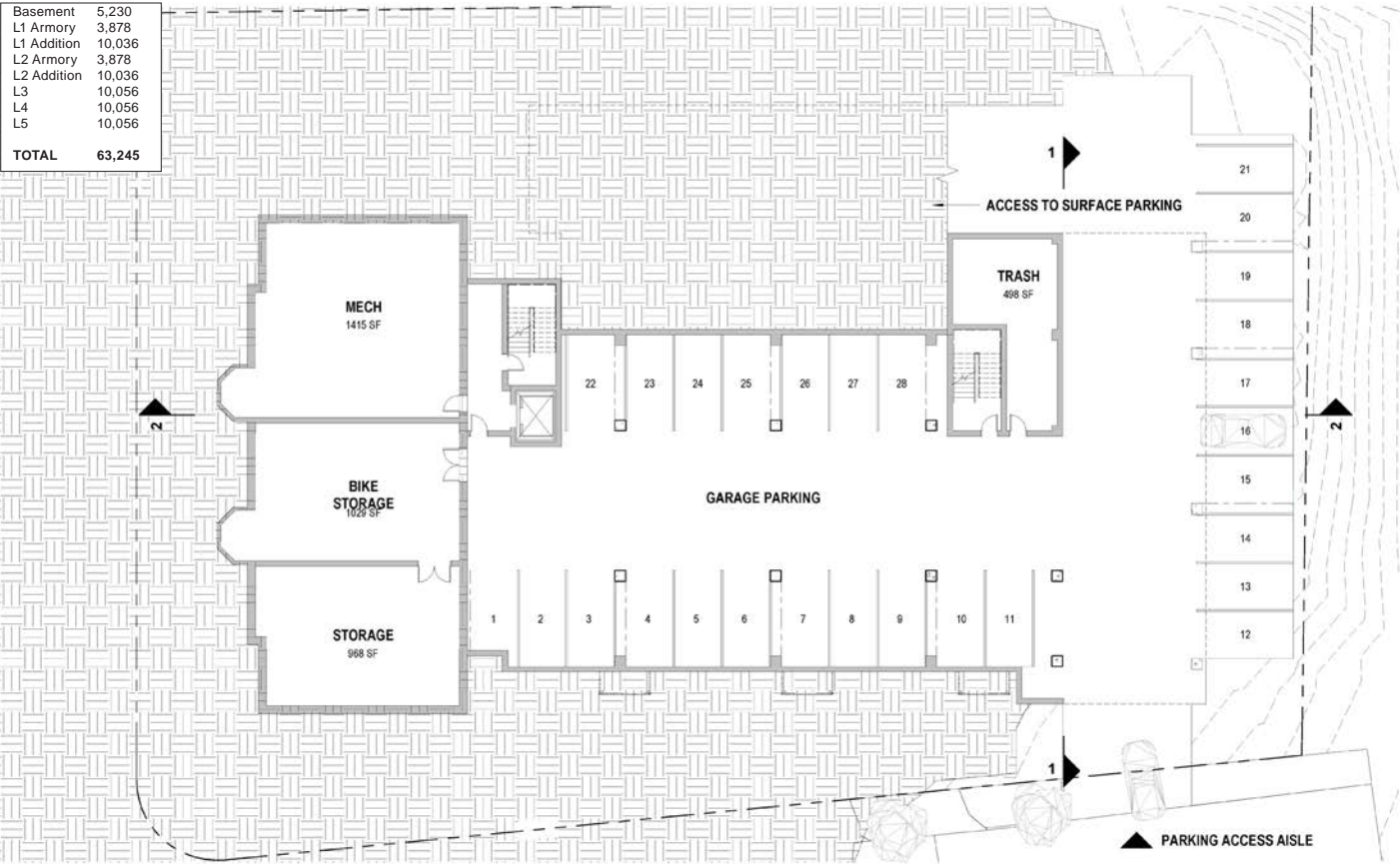
Street elevation with adjacent buildings, demonstrating height alignments of the Armory project.



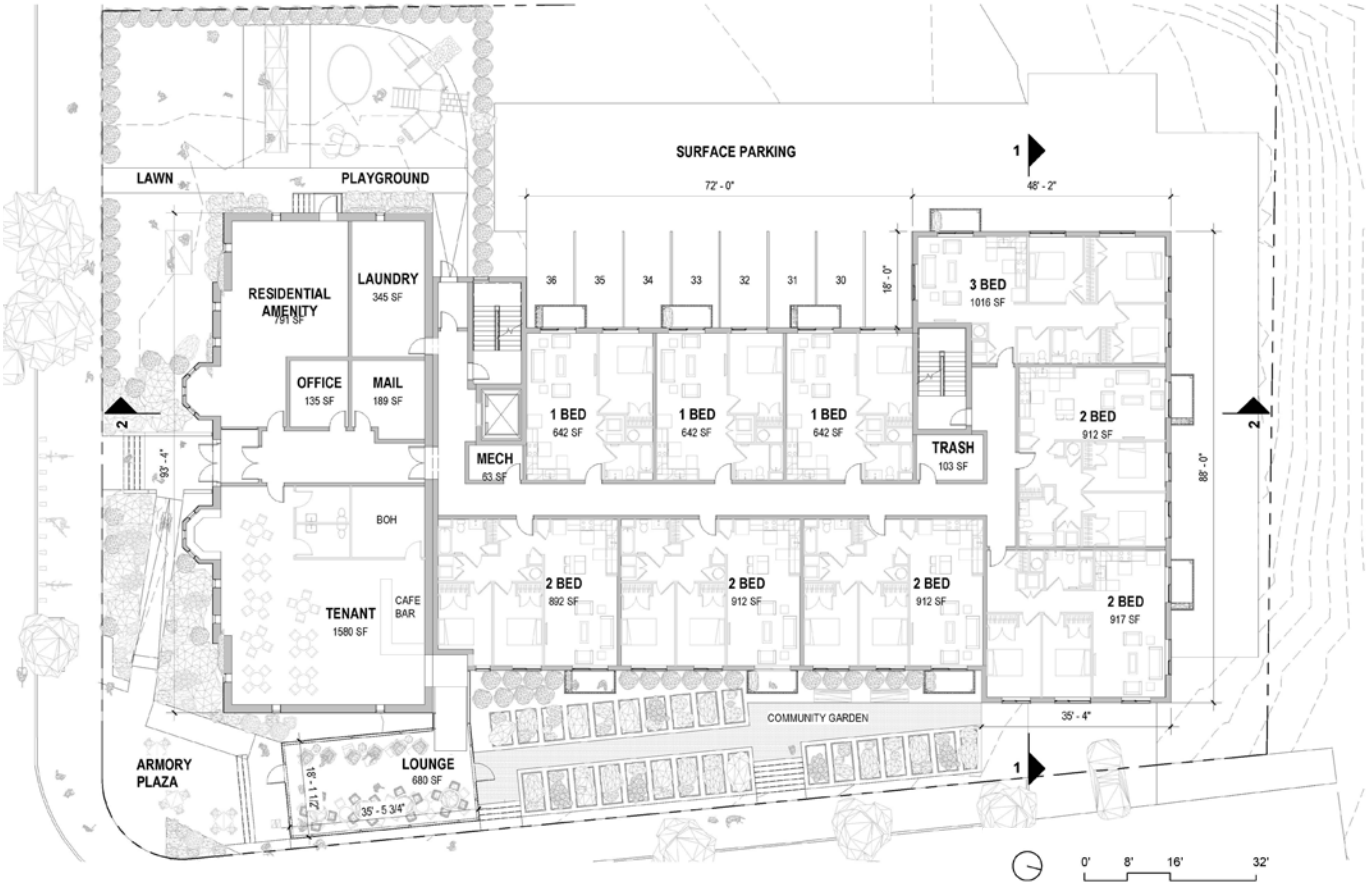
View from Mass Pike

Basement Plan

Basement	5,230
L1 Armory	3,878
L1 Addition	10,036
L2 Armory	3,878
L2 Addition	10,036
L3	10,056
L4	10,056
L5	10,056
<b>TOTAL</b>	<b>63,245</b>



Level 1 Plan





1

39'-0"

17'-6"

72'-0"

48'-2"

1

93'-4"

35'-3"

102'-4"

35'-4"

1

0' 8' 16'

32'

L2 Armory	3,878
L2 Addition	10,036
L3	10,056
L4	10,056
L5	10,056
<b>TOTAL</b>	<b>63,245</b>

2

39'-0"

17'-6"

72'-0"

48'-2"

ROOF DECK  
750 SF

MECH  
63 SF

1 BED  
642 SF

1 BED  
642 SF

1 BED  
642 SF

3 BED  
1010 SF

TRASH  
103 SF

2 BED  
912 SF

2 BED  
911 SF

2 BED  
912 SF

2 BED  
912 SF

2 BED  
917 SF

39'-0"

102'-4"

35'-4"

8'-0"

15'-0"

8'-0"

1

0'

8'

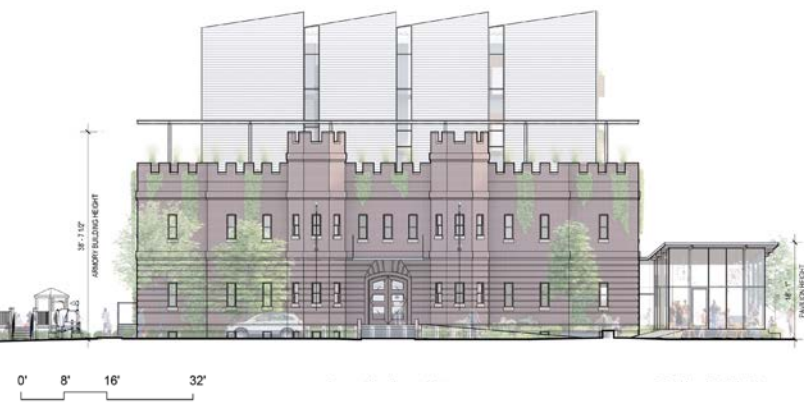
16'

32'

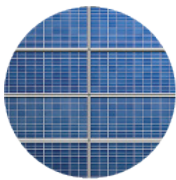
Elevation—East




Elevation—Washington




Materials Key




Rooftop / Canopy  
Photovoltaic Panels (PV)




Triple-Glazed  
uPVC Windows




Powder Coated  
Galvanized Steel  
Railing System



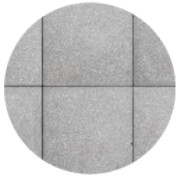
Integral Color High  
Density Fiber Cement  
Rainscreen Cladding




Anodized  
Aluminum Trim



Phenolic Wood  
Accent Panels



Integral Color  
Concrete Pavers



Field House Salvaged  
Brick Accent Pavers

Elevation—North



## Elevation—West



## Building Section 1



## Building Section 2





# Sustainability Approach



1135 Washington will pursue Passive House (PHIUS) certification. Building on past experience with Passive House projects, the design team will integrate energy modeling into the design process to optimize building envelope insulation, thermal and air barrier continuity, and high performance glazing to drive down heating and cooling loads. The design will incorporate high-efficiency

mechanical, electrical, and plumbing systems, with a priority for all-electric equipment, including balanced energy recovery ventilation and cold-climate air source heat pumps. Photovoltaic (PV) panels on the new building's roof and a bifacial PV canopy over a new roof deck in the armory comprise an estimated 90kW system, offsetting a significant portion of the building's use and enabling the building to

prepare for future transition of the state's grid to 100% clean energy. Surrounding ample green spaces and gardens will mitigate stormwater runoff. At least 20% of the parking spaces will be equipped with EV charging infrastructure. Finally, the project will minimize the embodied carbon footprint of structural systems and construction materials through design and LCA analysis.

# Zoning Analysis

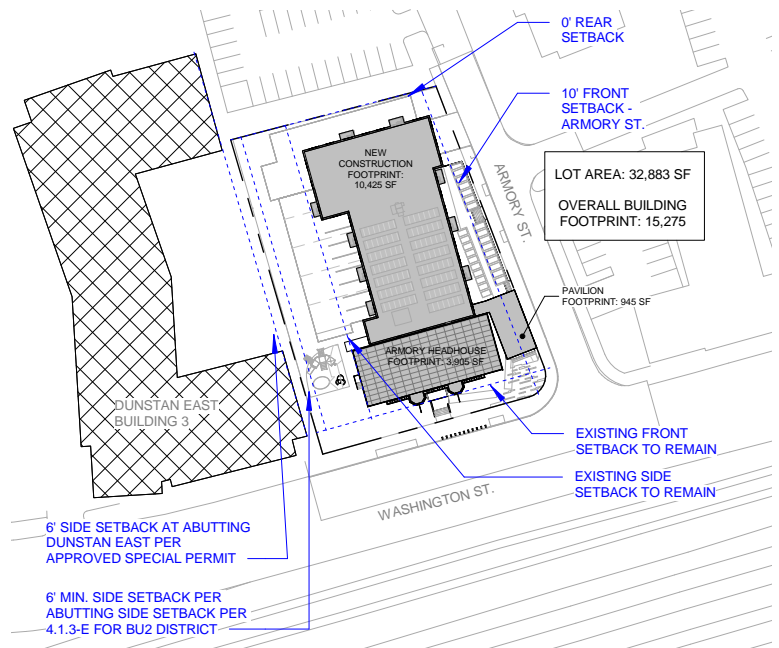
## Zoning District:

Business Use District 2 (BU2)

## Proposed Development:

63, 245 GSF

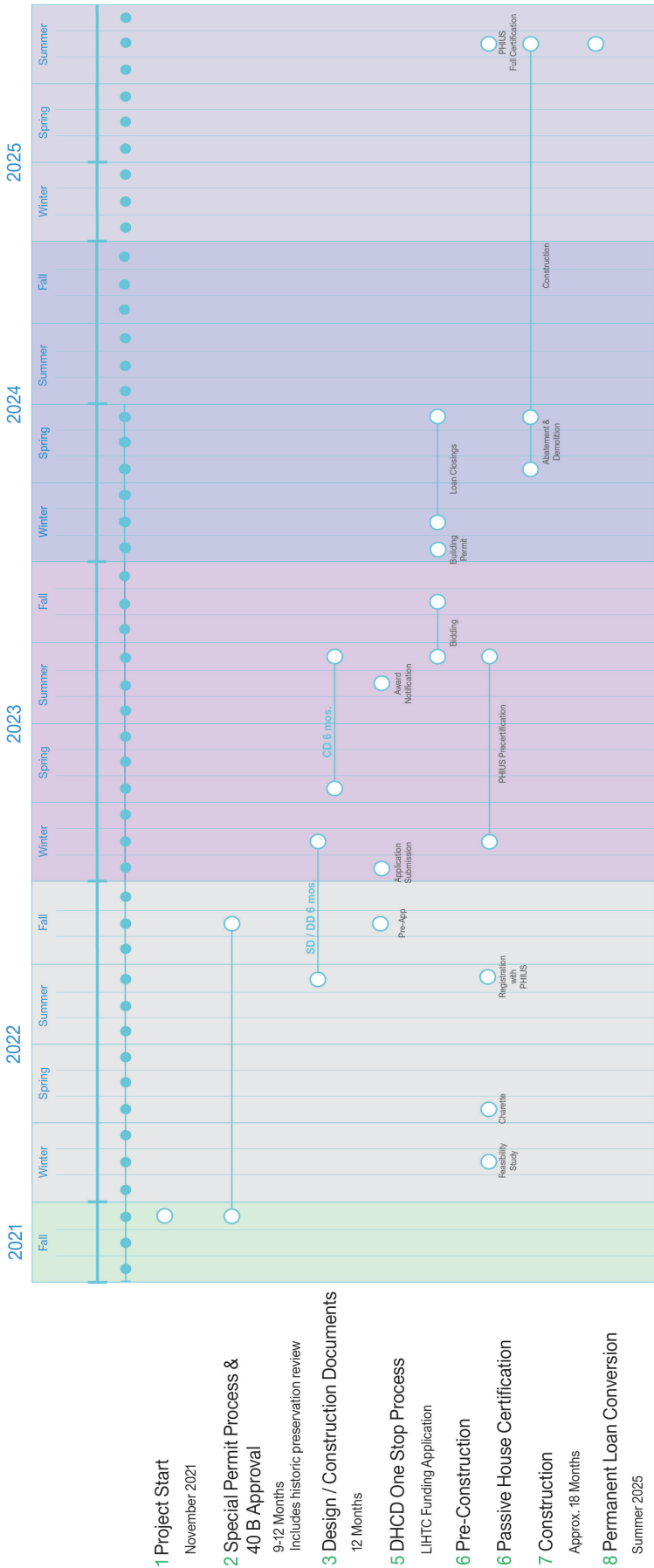
Special Permit will be required.



ITEM	SECTION	ALLOWED / REQUIRED	PROPOSED	AS OF RIGHT	RELIEF REQUIRED
Lot Area Minimum	4.1.3 - A	10,000 sf	32,883 sf	YES	
Lot Area Min / DU	4.1.2-A.2	1,200 sf	685 sf	NO	X
Total Units / Lot Area		27 per Lot Area Min/DU	48	NO	X
Building Height	4.1.3 - G	48' / 4 stories	60'+ / 5 stories	NO	X
FAR	4.1.3	2	1.92	YES	
Max Lot Coverage	4.1.3-B	-none specified-	N/A	N/A	
Beneficial Open Space	4.1.3-C	-none specified-	N/A	N/A	
Front Setback	4.1.3-D	10'	Washing St.: Existing 15'; Armory St: 0'	NO	X
Side Setback	4.1.3-E	½ bldg ht or equal to abutting side yard setback (6' side setback at abutting Dunstan East Project)	6' side setback abutting Dunstan East Bldg 3	YES	
Rear Setback	4.1.3-F	0'	0'	YES	
Residential Parking Stalls	5.1.4	2 per unit for multifamily 1 per 2 for low income allowed by special permit	.75 per DU	SP*	X
Commercial Parking Stalls	5.1.4	Parking stalls by use type as prescribed in Section 5.1.4	0	NO	X
Off-Street Loading	5.1.12	Business / Retail: 0 if under 5,000 sf		YES	
Parking Setback Distances	5.1.8.A.1	No parking shall be located within any required setback distances from a street and side lot lines, and shall, in any case, be set back a minimum of 5' from the street.	Conforming	YES	
	5.1.8.A.2	No outdoor parking space shall be located within 5' of a building or structure containing dwelling units.	Non Conforming	NO	X
Parking Minimum Dimensions	5.1.8.B.1-2	1. Stalls shall be at least 9 feet 2. Stall depth shall be at least 19 feet for all angle parking and 21 feet for parallel parking	1. Conforming; 2. Non-Conforming	NO	X
Handicapped Stalls	5.1.8.B.3	2 stalls	2	YES	
Sustainable Development Requirements	5.13.4	LEED Gold / Passive House / Enterprise Green Communities	Passive House	YES	
EV Charging Stations	5.13.4.B	10% min. EV Charing; Add'l EV-ready	20% EV Charging	YES	
Use Regulations for Multifamily in BU2	6.2.4.A	Residential Use in Upper Stories	Ground Floor Residential Use behind Armory Headhouse	NO	X

\*SP = By Special permit

# Project Schedule





# Project Proforma

**Please find on our enclosed thumb drive the following excel spreadsheets:**

- **Sources & Uses and Proforma sheets of Version 4 of the Excel Crosswalk file**
- **20-year operating proforma in a separate excel file that includes Revenue, Vacancy, Expenses, NOI, Debt Service, and Debt Service Coverage Ratio for each year**

**Please find on the following pages:**

- 20-year Operating Proforma Summary
- Financial Narrative
- Banking references

# 20-year Operating Proforma Summary

## PROJECT SUMMARY

Project Name and Unit Count:	West Newton Armory : 48 Units
Address:	1135 Washington Street
Developer:	The Onyx Group Development LLC & Novo Growth Partners, Inc
Date of Analysis:	09/28/21
City:	Newton
State:	MA
Development Type:	Elevator Buildings 6+ Stories

## DEVELOPMENT SOURCES SUMMARY

Funding Sources	Amount	Comment
First Mortgage Loan (proposed amount)	\$5,000,000	
Amortizing Second Mortgage Loan	\$0	
HOME	\$1,400,000	
	\$0	
	\$0	
	\$0	
Deferred Developer Fee	\$1,466,138	
Developer Cash Investment	\$0	
Tax Credit Equity (proposed amount)	\$9,868,553	
State LIHTC	\$2,800,000	
DHCD Soft	\$4,202,984	
Newton CPA	\$2,760,000	
	\$0	
	\$0	
	\$0	
<b>Total Sources of Funds</b>	<b>\$27,497,675</b>	

## DEVELOPMENT USES SUMMARY

Development Uses	Amount	Comment
Acquisition Costs	\$50,100	
Site Work Costs	\$2,000,000	
Construction / Rehabilitation Costs	\$19,417,035	
Architectural / Engineering Costs	\$1,108,000	
Other Owner Costs	\$455,000	
Construction Interest	\$280,000	
Other Interim Financing Costs	\$15,000	
Permanent Financing Costs	\$192,540	
Developer's Fee	\$3,750,000	
Initial Project Reserves	\$175,000	
Project Management Costs	\$55,000	
Other Development Costs	\$0	
<b>Total Uses of Funds</b>	<b>\$27,497,675</b>	

## UNIT SUMMARY

Unit Types	Number of Units	Total Rents (Year 1, without vacancy)
High HOME Units	0	
Low HOME Units	0	\$0
Market Rate Units	0	\$0
Other Affordable Units	48	\$886,608
<b>Total</b>	<b>48</b>	<b>\$886,608</b>

## OPERATIONS SUMMARY

Project Income	Year 1	Year 2	Year 5	Year 10	Year 15	Year 30
HOME/CDBG/LIHTC Rents	\$0	\$0	\$0	\$0	\$0	\$0
Market Rents	\$0	\$0	\$0	\$0	\$0	\$0
Other Affordable Rents	\$886,608	\$908,773	\$978,649	\$1,107,252	\$1,252,754	\$2,399,351
<b>Gross Potential Rent</b>	<b>\$886,608</b>	<b>\$908,773</b>	<b>\$978,649</b>	<b>\$1,107,252</b>	<b>\$1,252,754</b>	<b>\$2,399,351</b>
Vacancy Loss	\$0	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$127,200	\$130,380	\$140,405	\$158,855	\$179,730	\$260,303
<b>Effective Gross Income</b>	<b>\$1,013,808</b>	<b>\$1,039,153</b>	<b>\$1,119,054</b>	<b>\$1,266,107</b>	<b>\$1,432,484</b>	<b>\$2,659,654</b>
Total Expenses	(\$456,100)	(\$467,503)	(\$503,450)	(\$569,606)	(\$644,457)	(\$933,366)
<b>Net Operating Income</b>	<b>\$537,208</b>	<b>\$550,637</b>	<b>\$592,976</b>	<b>\$670,900</b>	<b>\$759,063</b>	<b>\$1,684,340</b>
Total Debt Service	(\$466,313)	(\$466,313)	(\$466,313)	(\$466,313)	(\$466,313)	(\$1,400,000)
<b>Cash Flow (After Debt Service)</b>	<b>\$70,895</b>	<b>\$84,324</b>	<b>\$126,663</b>	<b>\$204,587</b>	<b>\$292,750</b>	<b>\$284,340</b>

## RETURNS SUMMARY

Developer Returns on Equity	Year 1	Year 2	Year 5	Year 10	Year 15	Year 30
<b>Cash on Cash</b>	<b>4.8%</b>	<b>5.8%</b>	<b>8.6%</b>	<b>14.0%</b>	<b>20.0%</b>	<b>2543.0%</b>
<b>IRR (Year 1 through sale of project)</b>	<b>18.3%</b>					

# Financial Narrative

## **Anticipated financial and management interests in the development**

The West Newton Armory affordable housing development is a joint venture of Onyx Group Development LLC (66% interest) and Novo Growth Partners, Inc (33% interest).

The West Newton JV intends to hire Peabody Properties to create and manage its affordable housing program. Likewise, The West Newton Armory JV intends to hire Peabody Properties as the property manager.

## **Strategy for securing equity and financing**

Both West Newton Armory members, Onyx Group and Novo Growth Partners, maintain relationships with institutional investors and high net worth individuals and families that are eager to provide equity to well conceived and well-located real estate developments like the West Newton Armory. It is likely an institutional investor will co-invest up to 90% of the required equity.

Likewise, The Onyx Group and Novo Growth Partners, Inc maintain relationships with numerous area banks that have interest in providing construction and permanent financing. Please find attached an expression of interest to provide financing from two such banks, Redstone Equity Partners and Arc70 Capital.

## **Banking References/ Expression of Interest**

Nick Keefe  
Senior Vice President  
Redstone Equity Partners  
(212) 225-8296

Denny Hou  
Manager  
Arc70 Capital  
(415) 483-5730



**Proforma Summary:**

**DETAILED SUMMARY OF ASSUMPTIONS**

Please see the accompanying pro forma projections.

**Total Project Cost**

**Total Project Cost** consists of three components:

1. Acquisition Cost
2. Hard Costs
3. Soft Costs

**Acquisition Cost**

Our proposal budgets \$100,000 towards closing costs. It is understood the real property located at 1135-1137 Washington Street, Newton, Massachusetts shall be leased to the proponent developer for one dollar (\$1.00) per year.

**Hard Costs**

These are costs of physical construction and based on recent experience and consultation with Commodore Builders who is active an active builder in the greater Boston area. These are divided into:

- Building costs (\$155 per square foot) related to both residential and retail components, and including the refresh of the main armory building;
- Parking costs (\$90 per square foot) associated with the partial underground garage as well as the covered parking at grade but below the building; and,
- Site Improvements (\$20 per square foot) related to at-grade parking, open space landscaping and sidewalks.

In addition, a 10% contingency is carried to address latent conditions such as environmental clean-up and substandard soils as well as changes in construction pricing due to inflation or scope.

**Soft Costs**

Soft costs are budgeted at 22% of Hard Cost based on recent experience:

Architectural and Engineering Fees – 5% of Hard Costs

Financing Costs – construction period interest and lease-up carry ~ 5% of hard cost

Legal / General & Administrative / Testing / Permits / Miscellaneous -- 4% of hard cost (Some inhouse legal, and other items have reduced this target budget)

Development Fee and Project Overhead -- 15% of total development costs (utilizing deferred developer fee as project equity)

### **Net Operating Income**

**Net Operating Income** is calculated as:

**Gross Potential Revenue**

**Less: Vacancy and Credit Loss**

**Less: Operating Expenses** **Net Operating Income**

**Gross Potential Revenue** consist of three components:

1. Gross Apartment Revenue
2. Parking Revenue
3. Laundry/Storage Revenue
4. Retail Revenue

### **Gross Apartment Revenue**

Gross Apartment Revenue is the largest source of revenue and consists of revenue from 48 mixed affordability apartments which rents are set based on the 4 – person 100% AMI average for Newton, MA of \$120,800. 10 units are provided at 80% AMI, 24 units are provided at 60% AMI, 12 units are provided at 50% AMI, and 2 units are provided at 30% AMI. The blended average for all levels of affordability is \$1,607 per unit per month. Affordable rents are projected to increase annually based on inflation, currently assumed to be 2.5%.

### **Parking Revenue**

Parking revenue includes both underground parking revenue from monthly residential and retail employee parkers projected at \$50 per month.

### **Retail Revenue**

**Retail revenue** is projected at \$25 per square foot per year, net of all operating expenses and real estate taxes based on comparable rents.

**Vacancy and Credit Loss** is assumed to be 5% based on recent experience and industry average. This reflects the general vacancy rate, downtime between tenants and bad debt losses.

**Total Operating Expenses** are the sum of all Operating Expenses, and are based on historical costs of similar developments in the Peabody Properties database.

**Operating Expenses consist of the following categories:**

**Engineer expense** assumes that an engineer will be on-site a majority of the time attending to building systems as well as making small repairs and maintenance.

**Property Manager** expense assumes that a property manager will be on-site during normal operational hours for leasing and management activities.

**Advertising & Marketing** expense refers to the cost of internet and newspaper advertising and marketing to attract new tenants. This process is outlined in Peabody Properties management plan.

**Grounds & Landscaping** expense refers to the cost of maintaining the landscaped areas as well as snow removal for sidewalks and parking areas controlled by the project.

**Building Services** expense refers to preventative maintenance contracts for items such as the elevator, HVAC and fire alarm.

**Repairs & Maintenance** expense refers to major repairs and maintenance necessary for the building.

**Make Ready / Turnover** expense refers to the cost of preparing an apartment for a new tenant and may include painting, carpet or appliance replacement.

**Common Area Utilities** expense refers to the cost of heating, cooling and lighting all of the non-tenanted spaces in the building.

**Insurance** expense refers to the cost of insuring the building.

**Real Estate Taxes** are the largest operating expense and are estimated based on an analysis of comparable apartment projects in the Peabody properties database. Given the development consists of all affordable apartment units which reduces revenues and value, the real estate taxes are projected at the lower end of the range.

**Management Fee** is projected at 2.5% of net revenue, which is a market based fee.

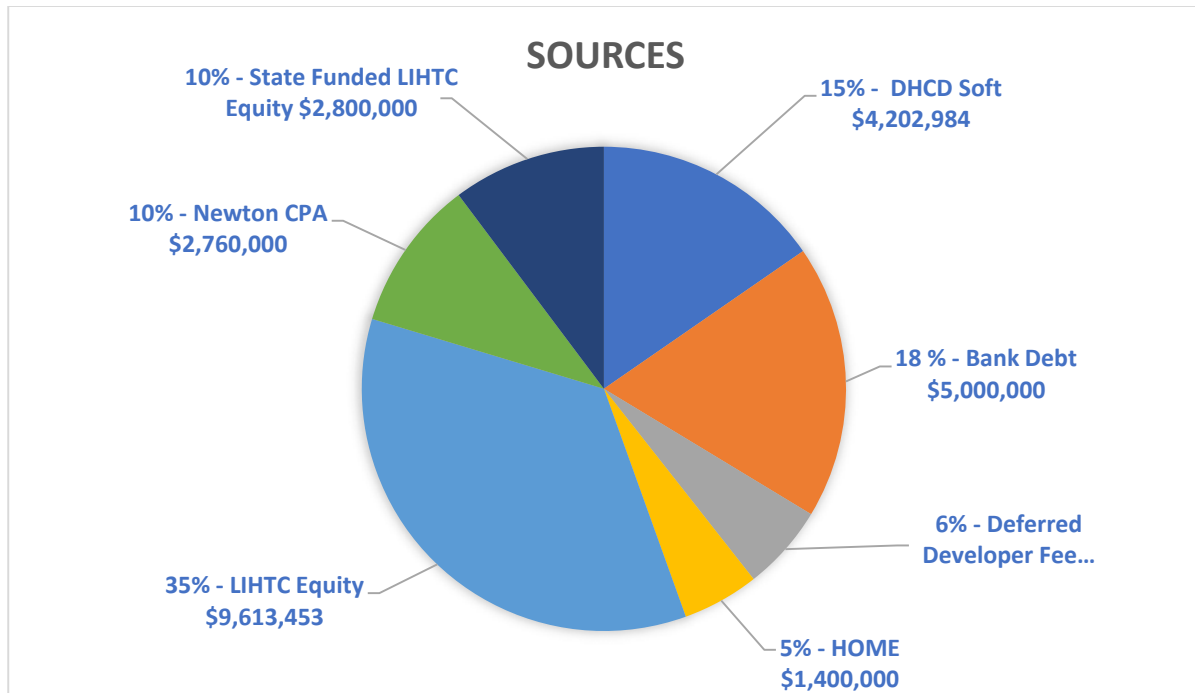
**Administrative Costs** include professional services including legal and accounting.

#### **Pro Forma Capitalization**

**Total Equity Required** assumes that 35% of project cost will be funded with LIHTC equity. Additional state, and local funding sources, and applicable bonds and grants have been accounted for in the estimates below. The LIHTC Basis is based on a credit factor of 4%, with no additional boost factor, and an estimated \$0.96 LIHTC Equity price (per dollar). The additional source of funds are additional resources from DHCD and a higher debt financing supported by higher rents for the larger units.

Total Debt assumes that 18% of project cost will be funded with debt.





**Debt Service** is the annual interest and amortization cost and assumes a so-called “construction mini-permanent loan” with five to seven year term, 30 year amortization after construction completion and 4% interest rate.

**CFADS** or **Cash Flow After Debt Service** refers to money available after Net Operating Income is reduced by payment of Debt Service.

### Return Summary

**Net Operating Income** divided by **Total Project Cost** yields **Return on Cost**.

Based on current investor yield expectations, 5% return on cost is judged to be the minimally acceptable return on cost.

**Leveraged Return on Cost** refers to **CFADS** divided by Total Equity Required and is a measure of project profitability.

The 7 Year Leveraged IRR or Internal Rate of Return refers to the equity return achieved over a hypothetical period including construction and five years from construction completion and stabilization and includes cash flows from operations as well as from a hypothetical sale. 15% - 18% IRR is judged to be the minimum acceptable return based on investor’s current return expectations and perception of development risk.

In order to calculate the 7 Year Leveraged IRR, the expected sale price is projected based on estimates of investors’ yield expectations, or Exit Cap Rate, which is judged currently to be 6%. Hence the sales price

equals the CFADS divided by the Exit Cap Rate. The Net Proceeds from Sale assumes that the Cost of Sale (brokerage, marketing and legal costs) is 2% of the sales price which is reduced accordingly.

**Timing & Inflation**

The pro forma assumes that the project is completed and stabilized in 2024 and that annual inflation is 2.5%, based on recent inflation expectations. Annual inflation increases both rents and operating expenses.

# Banking References

**ARC70**

CAPITAL

Letter of Interest

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September 28, 2021

Ms. Shabnam Mashmasarmi  
Ms. Chandra Smart  
The Onyx Group  
1359 Hancock Street, Suite 7  
Quincy, MA 02169

**Re: West Newton Armory on 1135 Washington Street, Newton, MA 02465**

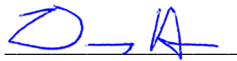
Dear Ms. Mashmasarmi and Smart:

This letter serves as our interest in the construction and permanent financing for the West Newton Armory redevelopment project. We have completed a preliminary review of the materials for the adaptive reuse into 48 affordable units in the West Newton neighborhood.

Arc70 Fund III, LP ("Arc70") is grateful for the opportunity to be a potential lender and has a high degree of expertise with the financing of affordable housing projects in the Boston MSA. We look forward to discussing the project again soon.

Sincerely,

Arc70 Fund III, LP



Denny Hou  
Its: Manager

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**Arc70 Capital LLC**  
3 East Third Avenue, Suite 200  
San Mateo, CA 94401





September 29, 2021

Mike Gurtovoy  
JS Coats Capital, LLC  
570 Kirkland Way  
Kirkland, WA 98033

Re: West Newton Armory  
Newton, Massachusetts

Dear Mike,

Red Stone Equity Partners, LLC ("Red Stone") is pleased to be given an opportunity to submit a proposal on West Newton Armory (the "Project") located in Newton, Massachusetts. This letter serves as an outline of the business terms regarding the acquisition of investor member interests in a to-be-formed limited liability company, (the "Company") that will own the Project. Red Stone or its designee (the "Investor Member") will acquire a 99.990% investor member interest (the "IM Interest") and a 0.001% special investor member interest (the "SIM Interest") in the Company. The terms of this proposal are subject to ratification and countersignature by Red Stone's investment committee as described below. Furthermore, this proposal is neither an expressed nor implied commitment by Red Stone or any of its affiliates to provide equity financing to the Project. Any such commitment shall only be as set forth in a to-be-negotiated operating agreement and will be subject to, among other things, (i) satisfactory transaction structure and documentation, (ii) satisfactory due diligence, including third party reports and (iii) other standard conditions for transactions of this type as described more fully in Paragraphs 13 and 14 below.

1. **Project Information.** The Company has been formed to acquire, own, develop and operate the Project, which is anticipated to be eligible to claim Low Income Housing Tax Credits ("Housing Credits") under Section 42 of the Internal Revenue Code. The Project will consist of 48 apartments for rent to low-income families. The Project will be located at 1135 Washington Street, in the City of Newton, Middlesex County, within the Commonwealth of Massachusetts. Within the Project, all of the units are expected to be Housing Credit compliant. The residential units mix shall reflect the detail below and shall conform to any other set-asides as required by the Massachusetts Department of Housing and Community Development (the "Agency"). The means for such conformance shall be reviewed by and be acceptable to Red Stone.

10 Cabot Road, Suite 210, Medford, Massachusetts 02155

TEL: 646-690-6110 WEB: [www.rsequity.com](http://www.rsequity.com)

Boston ■ Charlotte ■ Chicago ■ Cleveland ■ Los Angeles ■ New York ■ San Diego

The construction and lease-up schedule expected for the Project, and upon which the credit pricing and deal terms are contemplated herein, are as follows:

Closing Date	May 1, 2022
Completion Date	July 1, 2023
First Unit Leased	July 1, 2023
Last Unit Leased	October 31, 2023
Stabilized Operations	January 1, 2024

2. **Project Ownership.** A to-be-formed entity controlled by The Onyx Group Development (“Onyx”) (the “Managing Members”) will be a taxable, single purpose, bankruptcy remote entity with a 0.009% ownership interest in the Company. Any change in the ownership of the Managing Member shall be subject to Red Stone’s consent. The anticipated ownership structure and other key Project participants are set forth below.

Entity	Name	Ownership Interest
Managing Member	A to-be-formed entity	0.009%
Investor Member	RSEP Holding , LLC, or its designee	99.990%
Special Investor Member	Red Stone Equity Manager, LLC, or its designee	0.001%
Developer	The Onyx Group Development (“Onyx”)	
Guarantors <sup>1</sup>	The Onyx Group Development (“Onyx”)	
General Contractor	TBD	
Property Manager	TBD	

3. **Tax Credits.** The Project is expected to receive an allocation of 4% Housing Credits from the Agency for the year 2022 in an annual amount of \$909,345. The total Housing Credits anticipated to be delivered to the Company is \$9,093,450 (the “Projected Federal LIHTC”).
4. **Capital Contribution.** Red Stone will acquire its IM Interest in the Company for a total capital contribution of \$8,729,713 subject to adjustment in Paragraph 5 below. This capital contribution is based on the following pricing:

Credit Type	Total amount	LP amount	Pricing Factor	Equity
Projected Federal LIHTC	\$9,093,450	\$9,092,450	\$0.96	\$8,729,713
			<b>Total</b>	<b>\$8,729,713</b>

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<sup>1</sup> The Guarantors will guarantee certain of the Managing Member’s obligations set forth in Paragraph 7 herein, will do so on a joint and several basis, and will be subject to the review and approval of Red Stone.

*\*The project is expected to receive an additional allocation of State LIHTC's in the anticipated amount of \$560,000 per year for five (5) years, totaling State LIHTC's of \$2,800,000. Red Stone is aware of the anticipated State LIHTC award and has the ability to assist in the process of obtaining a State Tax Credit Investor for the Project at the discretion of the Developer.*

The above pricing assumes 100% of residential depreciation being taken over 30 years; 100% of depreciation on site improvements being taken over 1 year; and 100% of depreciation on personal property being taken over 1 year. The allocation of the depreciable line items is subject to Red Stone's review and approval.

Red Stone will fund its Federal LIHTC capital contributions pursuant to the following schedule:

- A. 10.00% (\$872,971) shall be paid upon the later of (a) the execution of the Operating Agreement, (b) receipt and approval of all due diligence items on Red Stone's due diligence checklist, (c) receipt by the Company of commitment for a non-recourse permanent loan acceptable to Red Stone, (d) receipt of commitments of the additional financing sources described in Paragraph 11, and (e) closing and initial funding of the construction loan and the soft loans.
- B. 15.00% (\$1,309,457) upon the later of (a) satisfaction of the funding conditions described in (A) above, (b) receipt of permanent certificates of occupancy, (c) achievement of 100% qualified occupancy (d) receipt of the final cost certification from an independent certified public accountant (e) receipt of an architect's certificate of lien-free substantial completion, and (f) July 1, 2023.
- C. 73.00% (\$6,372,690) upon the later of (a) satisfaction of the funding conditions described in (B) above, (b) repayment of the construction loan and funding of the Project's permanent mortgage (or such condition will be met concurrently with the payment of this installment), (c) satisfaction of all funding conditions required for the permanent mortgage, including without limitation, three consecutive months of a 1.15 to 1.00 Debt Service Coverage ratio ("DSC") and 90 days of 90% occupancy, (d) calculations of the preliminary adjusters have been prepared, and (e) January 1, 2024.
- D. 2.00% (\$174,594) upon the later of (a) satisfaction of the funding conditions described in (C) above, (b) achievement of Stabilized Operations, (c) receipt of IRS Form 8609s and a recorded extended use agreement, (d) receipt and review of an acceptable initial tenant file audit and (e) calculations of final adjusters have been prepared.

5. **Adjusters.**

- A. Increase or Decrease in Housing Credits. In the event that actual Housing Credits as determined by the cost certification and 8609s exceeds Projected Federal LIHTC, Red Stone will pay an additional capital contribution equal to the product of (i) \$0.96 multiplied by (ii) the difference between the actual Federal LIHTC and the Projected Federal LIHTC. In the event that actual Housing Credits as determined by the cost



certification and 8609s are less than Projected Federal LIHTC, Red Stone's capital contribution will be reduced by an amount equal to the product of (i) \$0.96 multiplied by (ii) the difference between the Projected Federal LIHTC and the actual Federal LIHTC ("Adjustment Amount"). If the Adjustment Amount exceeds the total of all unfunded capital contributions, then the Managing Member will make a payment (which payment shall be guaranteed by the Guarantors) to the Company equal to the amount of such excess, and the Company will immediately distribute such amount to Red Stone as a return of its capital contribution.

- B. Timing of Housing Credit Delivery. In addition to the Adjustment Amount, Red Stone's capital contribution will be similarly reduced in the event that the actual delivery of Housing Credits is slower than the anticipated schedule set forth in Paragraph 3. The amount (the "Late Delivery Adjustment") of this reduction will equal the product of (i) \$0.55 multiplied by (ii) the difference in the Projected Federal LIHTC and actual Housing Credits for such years are less than the amounts shown in Paragraph 3. Conversely, in the event that the actual delivery of Housing Credits exceeds the anticipated schedule set forth in Paragraph 3, Red Stone will pay an additional capital contribution (the "Early Delivery Adjustment") equal to the product of (i) \$0.45 multiplied by (ii) the difference between actual Housing Credits and the Projected Federal LIHTC. Red Stone will pay such additional capital contribution at the funding of its final capital contribution installment.

Notwithstanding the above, in no event will the net additional Capital Contribution to be paid by Red Stone exceed 5% of the total original Capital Contribution amount, and Red Stone will pay such additional Capital Contribution at the funding of its final capital contribution. Such additional Capital Contribution will be used to pay any outstanding fees owed to Red Stone and then will be distributed in accordance with the provisions of Paragraph 10(B), below.

6. **Reserves.** The Company will fund the following reserves:

- A. Operating Reserve. The Company will fund and maintain an Operating Reserve to be funded from the Third Capital Contribution in an amount of \$570,000. Any release of funds from the Operating Reserve will be subject to Red Stone's consent. Pursuant to Paragraph 10(B), the Operating Reserve will be replenished up to \$570,000 (the "Minimum Balance") from cash flow to the extent withdrawals are made. No withdrawals may be made from the Operating Reserve until the Maximum ODG Amount (as defined in Paragraph 7(B) below) is funded by the Managing Member, as required pursuant to Paragraph 7(B)(ii) below. Notwithstanding the foregoing, the Managing Member shall be entitled to withdraw funds from the Operating Reserve in excess of the Minimum Balance without Red Stone's consent; provided, however the Managing Member shall provide notification of any such withdrawals. To the extent the balance of the Operating Reserve is less than the Minimum Balance at the expiration of the ODG Period as described in Paragraph 7(B)(ii) below, the Managing Member shall cause the Operating Reserve to be replenished back to the Minimum Balance and the ODG Period shall be extended until such Operating Reserve has been replenished. The

Operating Reserve shall remain an asset of the Company and shall be subject to distribution in accordance with Paragraph 10(C) below, subject to the approval of any project lenders.

- B. Replacement Reserve. The Project operating expenses will include the funding of a Replacement Reserve in the amount of \$427 per unit or such other amount specified by the project lenders increasing by 3% per annum. Any release of funds from the Replacement Reserve will be subject to Red Stone's consent.

7. **Guarantees.** The Guarantors will guarantee the following obligations of the Managing Member:

- A. Construction Completion Guarantee. The Guarantors shall guarantee the Managing Member's obligation of lien-free completion of the Project in accordance with the plans and specifications approved by Red Stone for the amount set forth in the approved project development budget. The Construction Completion Guarantee will provide that the Guarantors shall pay any amount in excess of the approved project development budget as well as any Project deficiency arising prior to Stabilized Operations (as defined in Paragraph 7(B) below). Payments made under this guaranty will not constitute loans to the Company or capital contributions and no Guarantors will have any right to receive any repayment on account of such payments.
- B. Operating Deficit Guarantee. The Guarantors will agree to advance to the Company any amounts required to fund operating deficits arising after the expiration of the Construction Completion Guarantee, if needed, as follows:
  - (i) The guarantee shall be unlimited until the Project achieves "Stabilized Operations". Stabilized Operations is to be defined as the later to occur of (i) construction loan payoff and conversion to approved non-recourse permanent financing; and (ii) rental income generated from the Project is sufficient to pay all operating expenses of the Project, including, without limitation, all actual or anticipated mandatory debt service; real estate taxes; insurance premiums; management fees; and replacement and operating reserve deposits and maintain a debt service coverage ratio of not less than 1.15 to 1.00 for 6 consecutive months after funding and commencement of amortization of the Project's permanent loan. To the extent applicable, if Project income is insufficient to enable the Project to attain the required debt service coverage necessary for the closing or conversion of all permanent loans, the Guarantors will agree to pay down the construction loan in an amount necessary to allow the Project to cause the closing or conversion of all permanent loans by the conversion date required by the lender(s). Payments made under this guarantee will not constitute loans to the Company or capital contributions and no Guarantors will have any right to receive any repayment on account of such payments.

- (ii) Following (i) above, for a period of 60 months following the achievement of Stabilized Operations (the “ODG Period”), the amount shall be limited to \$570,000 (the “Maximum ODG Amount”), and will be released provided the Project maintains a minimum of 1.15 to 1.0 debt service coverage ratio over each of the last consecutive 4 quarters of the ODG Period and the subsidy Contract’s remains in place. Any amounts so advanced will constitute interest-free loans (“Operating Deficit Loan”) repayable out of future available cash flow or out of available proceeds of a sale or refinancing described in Paragraph 10.
  - C. Repurchase Guarantee. The Guarantors will repurchase Red Stone’s interest upon the occurrence of certain events described in the Operating Agreement.
  - D. Housing Credit Shortfall and Recapture Guarantee. In addition to the Housing Credit and Timing Adjusters set forth in Paragraph 5, if the actual amount of Housing Credits for any year is less than Projected Federal LIHTC set forth in Paragraph 3, as adjusted by Paragraph 5, the Guarantors will guarantee payment to the Investor Member of an amount equal to the shortfall, or recapture amount, plus all applicable fees, penalties or other costs incurred by the Company and/or Red Stone as a result of such shortfall or recapture. The Guarantors will pay, on an after-tax basis, the Investor Member \$1.00 for each dollar of Housing Credits lost, plus any related interest or penalties. Notwithstanding the foregoing, the Guarantors shall not be responsible for loss or recapture of Housing Credits attributable to changes to the Code after the achievement of Stabilized Operations.
  - E. Environmental Indemnification. The Company and the Guarantors, jointly and severally, shall indemnify and hold harmless the Investor Member from and against all claims, actions, causes of action, damages, costs, liability and expense incurred or suffered based upon a violation of environmental laws, or respecting the presence of environmental hazards.
  - F. Guarantors. The Guarantors will guarantee all of the Managing Member’s obligations including those set forth above. The Guarantors will maintain a minimum liquidity of \$1,000,000 and a minimum net worth of \$5,000,000. The Guarantors will provide Red Stone with annual financial statements evidencing compliance with the liquidity and net worth covenants above.
8. Construction. The Managing Member will arrange for a fixed or guaranteed maximum price construction contract in the anticipated amount of \$18,088,934 in addition to a 5% hard cost contingency. The Managing Member shall cause lien-free completion to occur and shall provide either a payment and performance bond or letter of credit to secure the contractor’s obligations. Red Stone may, in its sole discretion, engage a construction consultant to review plans and specifications and evaluate the construction progress by providing monthly reports to the Company. The cost of the construction consultant shall be borne by the Company.



9. **Fees.** The following fees will be paid by the Company for services rendered in organizing, developing and managing the Company and the Project.
- A. **Developer Fee.** The Developer will earn a developer fee of \$3,750,000. The portion of the developer fee that will not be paid out of the Capital Contributions will be deferred and payable by the Company to the Developer as a distribution of net cash flow in accordance with Paragraph 10(B). The deferred amount is projected to be \$0 and will accrue interest at the rate of 5.00% per annum, or such other interest rate acceptable to tax counsel, in effect as of the placed-in-service date of the project. The balance of the developer fee that is not projected to be permanently deferred is projected to be \$3,750,000 (“Cash Development Fee”) will be paid out of the Capital Contributions.
- The deferred amount will be payable out of available cash flow and will mature on the 15th anniversary of the placed-in-service date (“Maturity Date”). If the deferred portion of the developer fee has not been repaid upon the Maturity Date, the Managing Member will be required to advance the Company the amount equal to the unpaid balance of the deferred amount.
- B. **Property Management Fee.** The property management fee will be approximately 5.00% of gross collected rents. The appointment of, and terms of the property management agreement, are subject to the prior approval of Red Stone.
- C. **Asset Management Fee.** The Company will pay Red Stone an annual asset management fee in an amount equal to \$7,500 per annum. The asset management fee will be paid annually and such fee shall accrue beginning at Closing, with the first payment due and payable on or before March 1, 2023, and each anniversary thereafter. The asset management fee will increase annually by 3%.
- D. **Incentive Management Fee.** An incentive management fee may be payable to the Managing Member on an annual basis in an amount equal to 90% of net cash flow, or such other amount as determined by and acceptable to tax counsel to Red Stone.

10. **Distribution of Tax and Cash Benefits.**

- A. **Tax Benefits.** Tax profits, tax losses, and tax credits arising prior to the sale or other disposition of the Project will be allocated 99.990% to the Investor Member, 0.001% to the Special Investor Member and 0.009% to the Managing Member. The Investor Member will have the right in its sole discretion to undertake a limited deficit restoration obligation at any time during the term of the Company.
- B. **Net Cash Flow Distributions.** Distributions of net cash flow, as defined in the Operating Agreement, but generally all cash receipts less cash expenditures (e.g., payment of debt service and property management fee), will be made as follows:

- (i) to the Investor Member in proportion to any tax liability incurred by such partner;
- (ii) to the Investor Member, to make any payment of any unpaid tax credit adjuster or any tax credit shortfall or other debts owed to the Investor Member;
- (iii) to the Investor Member as payment of any unpaid Asset Management Fee;
- (iv) to replenish the Operating Reserve account to the Minimum Balance;
- (v) to the payment of any unpaid developer fee, until such fee has been paid in full;
- (vi) to the payment of any outstanding debt on the soft loans;
- (vii) to the payment of any debts owed to the Managing Member;
- (viii) 90% to the payment of any incentive management fee, or such other amount as determined by and acceptable to tax counsel; and
- (ix) the balance, 0.009% to the Managing Member, 0.001% to the Special Investor Member, and 99.990% to the Investor Member, or such other amount determined by and acceptable to tax counsel.

C. Distributions upon Sale or Refinance. Net proceeds resulting from any sale or refinance will be distributed as follows:

- (i) in accordance with subparagraphs 10B(i) through (iii) above;
- (ii) in accordance with subparagraphs 10B(v) through (vi) above;
- (iii) to the Special Investor Member, 1% of such gross proceeds as a company liquidation fee;
- (iv) to the Investor Member in an amount equal to any projected exit taxes;
- (v) the balance, 90.000% to the Managing Member, 9.999% to the Investor Member, and 0.001% to the Special Investor Member, or such other amount as determined by and acceptable to tax counsel.

11. **Debt Financing.** As a condition to funding the capital contribution described in Paragraph 4, the Managing Member will deliver the loan commitments described below. The terms of these loans and/or financing sources are subject to Red Stone's consent and all loans will be made directly from the lenders to the Company.

- A. Permanent Loan. The Company expects to receive non-recourse permanent loan commitments in the maximum amounts, and with the terms set forth below:

Name	Hard / Soft Debt	Interest Rate	Term (mos.)	Amort. (mos.)	% of cash flow
Perm - \$6,876,999	Hard	4.00%	240	360	N/A
HOME - \$1,400,000	Soft	0.00%	360	360	0%
DHCD Soft - \$4,202,984	Soft	0.00%	360	360	0%
Newton CPA- \$2,760,000	Soft	0.00%	360	360	0%
State LIHTC Loan - \$2,800,000	Soft	0.00%	360	360	100%

- B. Construction Loan. In addition to the permanent financing sources described above, it is expected that the project will be financed with a first-lien position construction loan in the approximate amount of \$6,876,999 with a to-be-determined interest rate and a term of no less than 24 months.

12. **Purchase Option and Right of First Refusal.** For a period of 2 years following the compliance period, the Managing Member shall have an option to purchase the Project at the end of the compliance period for a purchase price equal to the greater of (i) fair market value or (ii) the sum of the amount of indebtedness secured by the Project, which indebtedness may be assumed by the Managing Member at its discretion, the amount of the federal, state, and local tax liability that the Investor Member would incur as a result of the sale and any amount of credits below the amount stated in Paragraph 3. If the Managing Member is a not for profit entity, the purchase price shall be the amount required pursuant to Section 42(i) of the Code.
13. **Due Diligence, Opinions and Financial Projections.** The Managing Member will satisfy all of Red Stone's due diligence requirements, including an acceptable local law opinion. The Investor Member's tax counsel will provide the tax opinion. The Company will reimburse the Investor Member an amount equal to \$50,000 toward the costs incurred by the Investor Member in conducting its due diligence review and for the costs and expenses of Red Stone's counsel and in connection with the preparation of the tax opinion, and for the costs of Red Stone's other third party reports. Red Stone may deduct this amount from its first Capital Contribution and such amount will be payable to Red Stone in the event the Managing Member elects not to close the transaction for any reason. The financial projections to be attached to the Company Agreement and that support the tax opinion will be prepared by Red Stone based on financial projections provided by the Managing Member. The Managing Member financial projections will include eligible basis calculations, sources and uses, and cash flow statements.
14. **Company Closing.** Final Company closing will be contingent upon Red Stone's receipt, review and approval in its sole discretion of all due diligence including the items set forth on its due diligence checklist to be delivered to the Managing Member. Final Company closing also is contingent upon (i) a satisfactory site visit conducted by Red Stone to determine overall market



feasibility, including an analysis of proforma rents and expenses, (ii) Red Stone's review and approval of all third party reports, and (iii) final approval of Red Stone's investor. Red Stone's agreement to acquire the IM Interest on the pricing, terms and conditions contained in this letter are further based on the assumption that the Company closing will occur on or before the Closing Date set forth in Paragraph 1. Terms and credit pricing herein shall be valid until the Closing Date. Red Stone will use reasonable efforts to keep the tax credit pricing and terms outlined in this letter constant through such date, but Red Stone reserves the right in its sole discretion to modify the tax credit pricing or other terms to be consistent with market conditions.

15. **Exclusivity.** Upon the execution of this Letter of Intent, the Managing Member agrees to cease its efforts to obtain financing from other sources. This exclusive arrangement shall terminate should Red Stone notify the Managing Member in writing that it does not intend to proceed with this investment any time prior to ratification by the Red Stone investment committee.

Remainder of page left intentionally blank

It is hereby acknowledged and understood that this proposal is not a commitment to invest, nor is it intended to be a letter of commitment, and Red Stone is not bound to any of the terms and conditions herein outlined. The terms of the financing set forth in this letter are not set until formally approved by Red Stone and the transaction documentation has been executed by Red Stone and the Managing Member. Please confirm your acceptance of the terms described in this letter by signing the enclosed counterpart and returning to us at the address set forth on the first page of this letter.

Sincerely,

By: Nick Keefe

Name: Nick Keefe

Title: Senior Vice President

The undersigned approves and accepts the terms of this letter agreement and agrees to work with Red Stone.

**MANAGING MEMBER:**

By: \_\_\_\_\_  
Its: \_\_\_\_\_  
Date: \_\_\_\_\_

**GUARANTOR:**

By: \_\_\_\_\_  
Its: \_\_\_\_\_  
Date: \_\_\_\_\_

# Minimum Criteria

Please find our Minimum Criteria on the following pages, with the exception of the Technical Proposal Cover Sheet (Exhibit 1), which is located on page 2 of our proposal.

- Technical Proposal Cover Sheet (Exhibit 1) **page 2**
- Bidder's Qualifications & Reference Form (Exhibit 2) **page 50**
- Certificate of Non-Collusion (Exhibit 3) **page 52**
- Certification of Tax Compliance (Exhibit 4) **page 53**
- Certificate of Foreign Corporation (Exhibit 5) **page 54**
- Debarment Letter (Exhibit 6) **page 55**
- IRS Form W-9 (Exhibit 7) **page 56**

## EXHIBIT 2

### CITY OF NEWTON

#### BIDDER'S QUALIFICATIONS AND REFERENCES FORM

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City for purposes of determining bidder responsiveness and responsibility with regard to the requirements and specifications of the Contract.

1. FIRM NAME: OnyxGroup Development, LLC
2. WHEN ORGANIZED: March 4, 2021
3. INCORPORATED? ☒ YES ☐ NO DATE AND STATE OF INCORPORATION: MA
4. IS YOUR BUSINESS A MBE? ☐ YES ☐ NO WBE? ☐ YES ☐ NO or MWBE? ☒ YES ☐ NO
- \* 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:  
None at this time  


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- \* 6. HAVE YOU EVER FAILED TO COMPLETE A CONTRACT AWARDED TO YOU?  
☐ YES ☒ NO  
 IF YES, WHERE AND WHY?  


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- \* 7. HAVE YOU EVER DEFAULTED ON A CONTRACT? ☐ YES ☒ NO  
 IF YES, PROVIDE DETAILS.  


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- \* 8. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT:  
Our partners and contractors will have their own equipment to carry out the required services.  


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- \* 9. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM



OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.

The following projects were completed by our Construction Management partner, Commodore Builders:

**PROJECT NAME:** The Boulevard - 110 Broad Street  
**OWNER:** New Boston Ventures  
**CITY/STATE:** Boston, MA  
**DOLLAR AMOUNT: \$** \$56,000,000  
**DATE COMPLETED:** 12/1/2018  
**PUBLICLY BID?** No  
**TYPE OF WORK?:** New construction of a 100,000 SF, 12-story cast-in-place post tension concrete residential building on the corner of Broad Street and the Greenway in Downtown Boston.  
**CONTACT PERSON/Reference** George Deligiannides  
**TELEPHONE #:** 617-593-6601  
**CONTACT PERSON'S RELATION TO PROJECT?:** Project Owner

**PROJECT NAME:** Taunton Men's Recovery  
**OWNER:** Division of Capital Asset Management & Maintenance  
**CITY/STATE:** Taunton, MA  
**DOLLAR AMOUNT:** \$32,494,660  
**DATE COMPLETED:** 9/13/2021  
**PUBLICLY BID?** No  
**TYPE OF WORK?:** 36,000 SF gut rehab and renovation of the second and third floors.  
**CONTACT PERSON/Reference :** Stephen O'Connor, DCAMM  
**TELEPHONE #:** (857) 204-1482  
**CONTACT PERSON'S RELATION TO PROJECT?:** Project Owner

**PROJECT NAME:** Wheaton College Pine Hall  
**OWNER:** Wheaton College  
**CITY/STATE:** Norton, MA  
**DOLLAR AMOUNT:** \$22,373,542  
**DATE COMPLETED:** 7/15/2019  
**PUBLICLY BID?** No  
**TYPE OF WORK?:** 47,500 SF new 178-bed dormitory, 3-story and 4-story elevations spanning grade changes at the site. Designed and constructed to Passive House building standard.  
**CONTACT PERSON/Reference :** Stephen Wilusz, Nauset Builders  
**TELEPHONE #:** (617) 293-4977  
**CONTACT PERSON'S RELATION TO PROJECT?:** Owner's Project Manager

**PROJECT NAME:** Lasell Senior Living  
**OWNER:** Lasell Village  
**CITY/STATE:** Auburndale, MA  
**DOLLAR AMOUNT:** \$5,605,475  
**DATE COMPLETED:** 5/10/19  
**PUBLICLY BID?** No  
**TYPE OF WORK?:** Additions and renovations.  
**CONTACT PERSON/Reference :** Ben Bailey  
**TELEPHONE #:** 774-270-5257  
**CONTACT PERSON'S RELATION TO PROJECT?:** Owner

**PROJECT NAME:** Hebrew Senior  
**OWNER:** Hebrew Senior Life  
**CITY/STATE:** Canton, MA  
**DATE COMPLETED:** 6/8/2009  
**PUBLICLY BID?** No  
**TYPE OF WORK?:** Addition and renovation.  
**CONTACT PERSON/Reference:** Paul Hollings  
**TELEPHONE #:** (781) 821-3131  
**CONTACT PERSON'S RELATION TO PROJECT?:** Owner

10. The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City in verification of the recitals comprising this statement of Bidder's qualifications and experience.

DATE: 09/23/2021 BIDDER: OnyxGroup Development, LLC

SIGNATURE: 

PRINTED NAME: Shabnam Mashmasarmi TITLE: COO

**EXHIBIT 3**

**CERTIFICATE OF NON-COLLUSION**

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



\_\_\_\_\_  
(Signature of individual)

\_\_\_\_\_  
OnyxGroup Development, LLC

Name of Business

EXHIBIT 4

CERTIFICATION OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A and requirements of the City, the undersigned acting on behalf of the Contractor certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth relating to taxes including payment of all local taxes, fees, assessments, betterments and any other local or municipal charges (unless the Contractor has a pending abatement application or has entered into a payment agreement with the entity to which such charges were owed), reporting of employees and contractors, and withholding and remitting child support.\*

\_\_\_\_\_  
\*\*Signature of Individual (Mandatory)

\_\_\_\_\_  
\*\*\* Contractor's Social Security Number  
(Voluntary) or Federal Identification Number

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

OR

Onyx Group Development, LLC

Company Name  
(Corporation, Partnership, LLC, etc.)

By: [Signature]  
\*\*Corporate Officer (Mandatory)

Print Name: Shabnam Mashmasarni

Date: 9.23.2021

\* The provision in this Certification relating to child support applies only when the Contractor is an individual.

\*\* Approval of a contract or other agreement will not be granted until the City receives a signed copy of this Certification.

\*\*\* Your social security number may be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended.

**EXHIBIT 5**

**CERTIFICATE OF FOREIGN CORPORATION**

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of:

(Not Applicable)

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**(Jurisdiction)**

**The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L (if applicable) and with the requirements of M.G.L. c. 156D, §15.03 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.**

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**Name of person signing proposal**

---

**Signature of person signing proposal**

---

**Name of Business (Please Print or Type)**

*Affix Corporate Seal here*

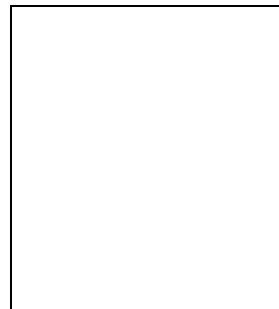




EXHIBIT 6



Mayor  
Ruthanne Fuller

**Purchasing Department**  
Nicholas Read @ Chief Procurement Officer  
1000 Commonwealth Avenue  
Newton Centre, MA 02459-1449  
purchasing@newtonma.gov

Telephone  
(617) 796-1220  
Fax:  
(617) 796-1227  
TDD/TTY  
(617) 796-1089

Vendor

Re: Debarment Letter for Invitation For Bid #21-79

As a potential vendor on the above contract, the City requires that you provide a debarment/suspension certification indicating that you are in compliance with the below Federal Executive Order. Certification can be done by completing and signing this form.

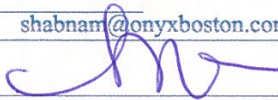
**Section 1.01**     Debarment:

**Federal Executive Order (E.O.) 12549 "Debarment and Suspension" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.**

I hereby certify under pains and penalties of perjury that neither I nor any principal(s) of the Company identified below is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Shabnam Mashmasarmi \_\_\_\_\_ (Name)  
OnyxGroup Development, LLC \_\_\_\_\_ (Company)  
50 Moreland Street \_\_\_\_\_ (Address)  
Boston, MA 02119 \_\_\_\_\_ (Address)  
PHONE 617-676-4034 FAX \_\_\_\_\_

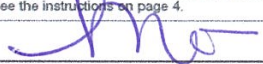
EMAIL shabnam@onyxboston.com \_\_\_\_\_

 \_\_\_\_\_ Signature

09/23/2021 \_\_\_\_\_ Date

.If you have questions, please contact Nicholas Read, Chief Procurement Officer at (617) 796-1220.

EXHIBIT 7

<p>Form (Rev. October 2007) Department of the Treasury Internal Revenue Service</p>	<p><b>W-9</b></p> <p><b>Request for Taxpayer Identification Number and Certification</b></p>	<p>Give form to the requester. Do not send to the IRS.</p>
<p>Name (as shown on your income tax return) <b>OnyxGroup Development LLC</b></p> <p>Business name, if different from above</p>		
<p>Check appropriate box: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership  <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt  <input type="checkbox"/> Other (see instructions) ▶ <input type="checkbox"/> payee</p>		
<p>Address (number, street, and apt. or suite no.) <b>50 Moreland Street</b> City, state, and ZIP code <b>Boston, MA 02119</b></p>		
<p>Requester's name and address (optional)</p>		
<p>List account number(s) here (optional)</p>		
<p><b>Part I Taxpayer Identification Number (TIN)</b></p>		
<p>Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.</p> <p>Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.</p>		
<p>Social security number</p>		<p>OR</p>
<p>Employer identification number <b>86 2769606</b></p>		
<p><b>Part II Certification</b></p>		
<p>Under penalties of perjury, I certify that:</p> <ol style="list-style-type: none"> <li>The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and</li> <li>I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and</li> <li>I am a U.S. citizen or other U.S. person (defined below).</li> </ol> <p><b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.</p>		
<p>Sign Here</p>	<p>Signature of U.S. person ▶ </p>	<p>Date ▶ <b>9.23.2021</b></p>
<p><b>General Instructions</b></p> <p>Section references are to the Internal Revenue Code unless otherwise noted.</p> <p><b>Purpose of Form</b></p> <p>A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.</p> <p>Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:</p> <ol style="list-style-type: none"> <li>Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),</li> <li>Certify that you are not subject to backup withholding, or</li> <li>Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.</li> </ol> <p><b>Note.</b> If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.</p>		
<p><b>Definition of a U.S. person.</b> For federal tax purposes, you are considered a U.S. person if you are:</p> <ul style="list-style-type: none"> <li>An individual who is a U.S. citizen or U.S. resident alien,</li> <li>A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,</li> <li>An estate (other than a foreign estate), or</li> <li>A domestic trust (as defined in Regulations section 301.7701-7).</li> </ul> <p><b>Special rules for partnerships.</b> Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.</p> <p>The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:</p> <ul style="list-style-type: none"> <li>The U.S. owner of a disregarded entity and not the entity.</li> </ul>		

Cat. No. 10231X

Form W-9 (Rev. 10-2007)

# Appendix

Please find on the following pages resumes and additional firm information for our core development team:

- OnyxGroup
- Novo Growth Strategies
- Utile, Inc.
- Fort Point
- Peabody Properties
- Commodore Builders



Shabnam  
Mashmasarmi  
COO, OnxyGroup

Shabnam Mashmasarmi is the owner and founder of Mashmasarmi Law, P.C., a Massachusetts based law firm with offices in New York and Florida, specializing in the areas of Bankruptcy, Business Formation, Estate Planning, Real Estate and Personal Injury. In 2015, Regional Counsel Minard Culpepper designated Shabnam to serve as a Foreclosure Commissioner for the U.S. Department of Housing and Urban Development. Shabnam additionally serves on the board of the National Bar Association Region 1 as Treasurer , Co-Vice Chair of the Real Estate and Probate Section and the Vice Chair of the Programming Committee for the Bankruptcy Section.

Appointed by the Governor of Massachusetts to the Black Advisory Commission for her work and commitment to diversity and inclusion. Shabnam went on to receive a Certificate in Diversity and Inclusion from Cornell University. In 2014, Shabnam partnered with Suffolk University Center for Real Estate as Program Consultant and developed five certificate courses, 1) a case study of Suffolk University 62M -20 Somerset Project, 2) Architecture, 3) Construction, 4) Sustainability, and 5) Property Management. Shortly after, Shabnam entered the commercial space, representing local developers acquiring off market properties and partnering with local developers such as Castillo & Company, Contemporary Home Remodeling, and L&M Real Estate Investments, LLC to provide quality & affordable homes. Shabnam received her undergraduate degree from Boston College and received her Juris Doctorate from Suffolk University Law School and is a member of the Massachusetts Bar, New York Bar, Florida Bar and the United States District Court of Massachusetts.

Chanda Smart  
CEO, OnxyGroup



Chanda Smart is a long time resident of Roxbury, MA, after living in Belo Horizonte, Brazil, studied (pre)law at University of Massachusetts and most recently served as an Executive Administrator to Lani Guinier and Yochai Benkler, at Harvard Law School. Her experience with executing operational strategy and delivering results included employers such as Deloitte & Touche LLP, The Gillette Company, American Express, Andersen Consulting and the Ritz Carlton (Atlanta, GA).

Mrs. Smart formally entered into the Boston Real Estate market in August 2016, with a focus on the residential market, assisting local residents realize homeownership and creating local partnerships with businesses such as The Law Offices of Donald E Green to create Estate planning series for local Roxbury residents. After commercial space, acquiring off market properties and partnering with local developers, including, but not limited to General Air who are building 4-6 Townhomes at 6-6a - 8 Howland St Dorchester, MA and projects such as: 53 Hutchings St & the Condominiums located at 101 Heath Street.

OnyxGroup | Developer



*OnyxGroup*



# KYLE N WILTON

REAL ESTATE DEVELOPMENT &  
CONSULTING



## PERSONAL SUMMARY

I am a commercial real estate professional who has built and lead teams across a wide variety of asset class development, portfolio management, and transactions for over ten years. My approach is strategic and collaborative, keeping the end goal in focus at all times. I am a dedicated researcher and mentor.

## ASSET CLASS EXPERIENCE

- Multi-site retail medical
- Medical Lab
- Medical Office
- R&D Industrial
- High Rise Office
- Specialized lab space

## SPECIALIZATIONS

- Conceptual Project Development/Origination
- Financial Modeling & Proforma Evaluation
- Transactions & Commercial negotiations
- Entitlements
- Design & Planning Management
- Permitting
- Project Management
- Construction Management
- Stakeholder & Investor Relations/Communications
- Portfolio Management
- Facility Lifecycle Management

## CONTACT DETAILS

**Address:** P.O. Box 5835 Winter Park, FL 32793

**Phone:** (801) 888-9105

**Email:** [Kyle@novogrowthpartners.com](mailto:Kyle@novogrowthpartners.com)

**Website:** [www.KyleWilton.com](http://www.KyleWilton.com)

## WORK SUMMARY

### Consultant

*Commercial Real Estate Development Enterprises (CREDE) | February 2021 - present*

- Commercial Real Estate consultant and advisor

### Principle

*Novo Growth Partners, Inc. | January 2020 - present*

- Partner with strong regional and national tenants, as well as entrepreneurial real estate investment and development companies to create successful and profitable ventures.
- Consulted a global tenant in the development of research facilities and labs.

### Development Manager

*DaVita Healthcare, Inc.. | August 2012 - January 2020*

- Built and led a high functioning, collaborative, cross functional team through all phases of business development, due diligence, entitlements, design, development, construction management, and turnover.
- Developed and implemented a new multi-site design guide.
- Developed a standardized ground up prototype.
- Opened 150,000 SF + of new or relocated dialysis facilities, office space, labs, and corporate training centers annually.

## EDUCATION BACKGROUND

### Middle Tennessee State University

*Bachelor's degree, Liberal Arts and Sciences/Liberal Studies | Graduated December 2018*

- Emphasis in business finance, accounting, and communications.

Novo Growth Partners | Development Partner

*Onyx Group*

## About Utile

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



### Design Process

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

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

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

### Design Expression

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

#### Name and Address

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

#### Company Type

Corporation  
Management Team  
Tim Love, Principal and President  
Michael LeBlanc, Secretary and Principal  
Matthew Littell, Treasurer and Principal  
Mimi Love, Principal  
Brett Bentson, Principal

#### Employees

72 total (21 licensed architects, 65 professional design staff, 5 admin, 2 interns)

#### Major Areas of Focus

Urban design, urban planning, architecture

## Utile's Commitment to Sustainable Design

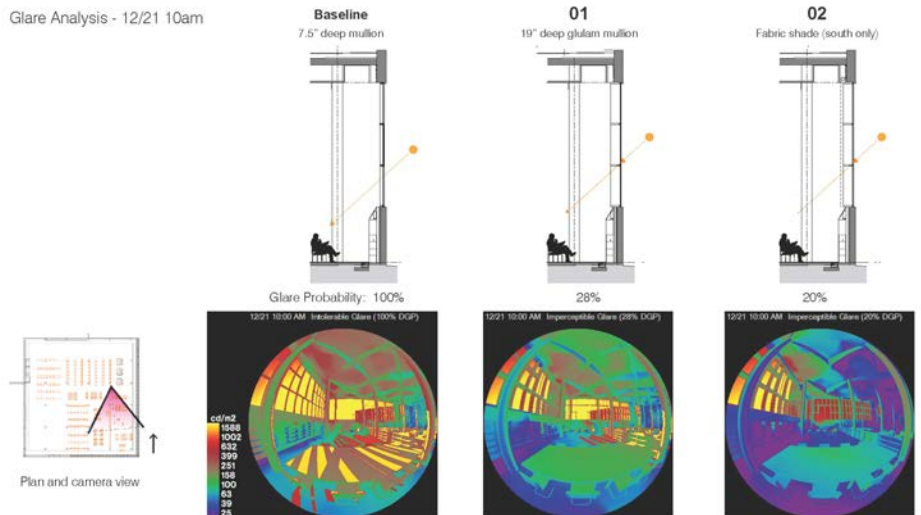
Health, resiliency, and energy-efficiency is integral to Utile's design approach. We see the Passive House standard as a relevant framework to achieve these objectives. We frequently perform Certified Passive House Consultant (CPHC) services in-house, which has resulted in more integrated design outcomes, more efficient use of design fees, and more streamlined communication between the owner and design team.

Even for projects not seeking certification, we guide our clients throughout the process to make sure sustainable design goals are in full alignment with our clients' mission. Our integrated process includes:

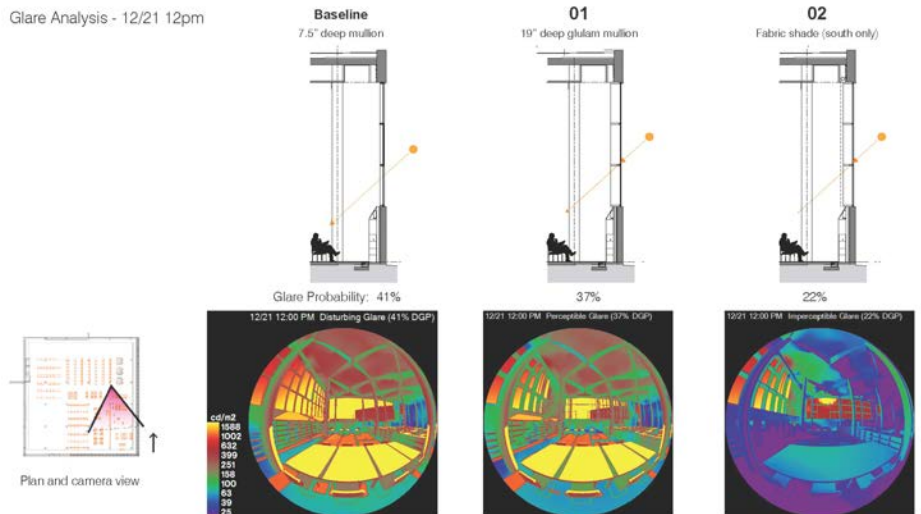
- Design charrettes focused on passive strategies, systems alternatives, and resiliency
- Building envelope and mechanical systems evaluation matrix, including all-electric design solutions
- Simple box energy modeling for initial decision making
- WUFI Passive energy modeling for projects seeking certification
- Energy codes and standards decision "toolkit"
- Communication and administration with Passive House Institute US (PHIUS) for projects seeking certification

Solar glare analysis for Utile's renovation of the Roxbury Branch of the Boston Public Library in Nubian Square.

Glare Analysis - 12/21 10am



Glare Analysis - 12/21 12pm





In addition to our in-house process, we engage in highly effective partnerships with engineering, third-party green verification, and pre-construction advisors to optimize high-performance, cost-effective building design. We engage these consultants early in the process to ensure proper integration of design elements requiring construction phase verification and for an additional layer of quality assurance. Lastly, we work closely and proactively with the owner’s pre-construction advisor to facilitate cost-informed decision making around building envelope and systems.

Utile is committed to sustainability in all aspects of our practice. In November 2018, we signed on to the AIA 2030 Commitment, and have pledged to take concrete steps towards making every building we design carbon neutral by the year 2030. We have four Certified Passive House Consultants (CPHC’s) in addition to several LEED APs on staff, and our portfolio includes several LEED Gold and Platinum Certified buildings and net zero energy projects.

Utile is leading the design of the Front Street Development in Portland, ME for the Portland Housing Authority as well as 152-158 Broadway in Somerville, MA for Construction Managers & Developers, LLC, both of which are currently pursuing Passive House certification. Utile also led the design of the net-zero energy Catherine Street E+ Housing in Jamaica Plain, which incorporates a highly efficient building envelope and on-site energy generation strategies to yield a zero carbon footprint.

Additional projects pursuing Passive House that are currently under Pre-Certification review with Passive House Institute US (PHIUS) include 1599 Columbus Ave in Boston for Urban Edge, 1005 Broadway in Chelsea for The Neighborhood Developers (TND) and Traggoth Companies, and 25 Sixth Street in Chelsea, also for TND. The firm’s additional sustainable residential work includes our LEED Platinum certified Catherine Street E+ Housing in Jamaica Plain; MetroMark Apartments in Jamaica Plain (LEED

Gold); and First + First Townhomes in South Boston (LEED Gold).

Utile’s sustainable institutional projects include ZUMIX—achieving LEED Gold and designed as a green building demonstration project for other non-profit organizations to emulate—and the Hiphop Archive & W.E.B. DuBois Institute for African and African American Studies at Harvard University, which is LEED Silver certified. Utile completed a commercial interiors project involving 35,000 square feet of corporate office space in Kendall Square that received LEED (Version 4) Silver certification.

Utile also recently led the planning for Boston’s Flood Resiliency Zoning Overlay and Design Guidelines, which incorporates recommendations from the MA Climate Change Adaptation Report to advance individual building adaptations as well as district-level coastal resiliency solutions.

**152-158 Broadway**  
Somerville, MA | 45 Units



**1599 Columbus Ave.**  
Boston, MA | 65 Units



**1005 Broadway**  
Chelsea, MA | 38 Units



**25 Sixth St.**  
Chelsea, MA | 62 Units



**Front St.**  
Portland, ME | 113 Units



**3371 Washington St.**  
Boston, MA | 39 Units



Utile’s current residential projects pursuing Passive House Certification





## Matthew Littell LEED AP Principal-in-Charge

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

Matthew specializes in multifamily residential, particularly affordable and middle income housing. Under his direction, Utile currently has over 300 subsidized units in design or under construction throughout the region for various Community Development Corporations such as The Neighborhood Developers, Urban Edge, VietAID, and the Portland Housing Authority. Matthew has provided strategic planning and urban design services involving public housing properties throughout New England, including Boston, Portland, Holyoke, and Providence, and has served on Enterprise Communities Design Leadership Workshops.

Matthew has taught in the graduate architecture program at Northeastern University, and currently teaches a course in Urban Design and sustainable practices at Boston College. Matthew earned his M.Arch. from Harvard's Graduate School of Design in 1997, where he received the Boston Society of Architects' James Templeton Kelly award for the best final design project, as well as the Clifford Wong prize for outstanding design in housing.

### Education

Harvard University Graduate School,  
Master of Architecture, 1997

Columbia College, Bachelor of Arts in  
Religion, 1989

### Affiliations

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

### Selected Projects

25 Sixth Street Housing, Chelsea,  
MA—62 units of affordable housing  
for The Neighborhood Developers

1005 Broadway, Chelsea, MA—38  
units of affordable housing for The  
Neighborhood Developers

Acadia, Chelsea, MA—34 units  
of affordable housing for The  
Neighborhood Developers

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

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

1599 Columbus Ave, Jamaica Plain,  
MA—65 units of affordable housing in  
Jackson Square for Urban Edge

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



## Michael LeBlanc AIA Advising Principal

Michael is a principal at Utile, where he has been in charge of numerous residential, institutional, and renovation projects such as the 160-unit mixed-use Girard in Boston's South End and The Quinn mixed-use development at 380 Harrison Avenue in the South End. He managed the Rethink Boston City Hall & Plaza Master Plan and the addition to and renovation of the Jamaica Plain Branch of the Boston Public Library. His interests range from the logics of construction and material research, to investigating the parametric relationships between code, cost, sustainability, and experiential qualities in building design.

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

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

### Education

Arizona State University, Master of Architecture, 1997

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

### Affiliations

American Institute of Architects

Boston Preservation Alliance (Board of Directors)

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

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

### Selected Projects

Front Street Development Design, Portland, ME—85-units for the Portland Housing Authority

Webster Block, Chelsea, MA—141 units of multifamily housing

E+ Housing, Boston, MA—Two zero energy townhouses

Girard, Boston, MA—160-unit mixed-use development for New Atlantic

The Quinn, Boston, MA— 14-story, 356,500 SF mixed-use building for Related Beal



## Nick Buehrens AIA, CPHC® Advising Associate Principal

Nick Buehrens is a registered architect and an associate principal at Utile. He leads a diverse range of projects, focusing on affordable, sustainable, multifamily housing for mission-driven organizations. Nick is a Certified Passive House Consultant (CPHC) with expertise in building science, systems and energy use. His experience at Utile has been grounded in exposure to project types at all scales and for commercial, institutional, and non-profit clients. He has taught at the Boston Architectural College (BAC), and served as a guest critic at the BAC, Northeastern University and RISD.

Trained as an artist and an architect, Nick has worked across the country on a variety of interdisciplinary, collaborative projects focusing primarily on ecological, social, and urban issues. Prior to joining Utile, Nick worked at Stoss Landscape Urbanism, where he was the lead architectural designer on public infrastructure improvements for Harvard University. He has also been a design consultant for Stack+Co. and a project manager for DSA Architects (Berkeley, CA), where he oversaw the design and construction of net-zero energy urban housing prototypes. Born and raised in Boston, Nick holds a BA in Studio Art from The Colorado College and an M.Arch. from Rhode Island School of Design.

CPHC® is a certification mark of Passive House Institute US (PHIUS).  
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### Education

Rhode Island School of Design,  
Master of Architecture

Colorado College, Bachelor of Arts in  
Studio Art

### Selected Projects

25 Sixth Street, Chelsea, MA—63  
units of affordable housing for The  
Neighborhood Developers

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

Acadia, Chelsea, MA—34 units  
of affordable housing for The  
Neighborhood Developers

1005 Broadway, Chelsea, MA—38  
units of affordable housing for The  
Neighborhood Developers

191-195 Bowdoin Street, Dorchester,  
MA—41-unit affordable housing and  
retail development for VietAID

1599 Columbus Ave, Jamaica Plain,  
MA—Affordable housing in Jackson  
Square for Urban Edge

Sycamore on Main, Brockton, MA—48  
units for NeighborWorks Housing  
Solutions

88 Hudson Street Condominiums,  
Boston, MA—51 affordable condos for  
Asian CDC





#### **Education**

Harvard University Graduate School of Design, Master of Architecture

Williams College, Bachelor of Arts in Art History & Studio Practice  
Environmental Design

#### **Selected Projects**

Hotel Grayson, Brockton, MA—  
Affordable housing development for NeighborWorks Housing Solutions

1200 Montello, Brockton, MA—  
Multifamily development for NeighborWorks Housing Solutions

Yale Divinity School The Living Village (Living Building Challenge), New Haven, CT—*while with Bruner/Cott in Boston, MA*

Childrens Museum & Theatre of Maine, Portland, ME—*while with Bruner/Cott in Boston, MA*

Brandeis University Center for Jewish Learning, Waltham, MA—*while with Bruner/Cott in Boston, MA*

Boston University Pappas Law Library, Boston, MA—*while with Bruner/Cott in Boston, MA*

Boston University School of Law, Boston, MA—*while with Bruner/Cott in Boston, MA*

## **Rachelle Ain AIA, CPHC®, WELL AP Project Manager**

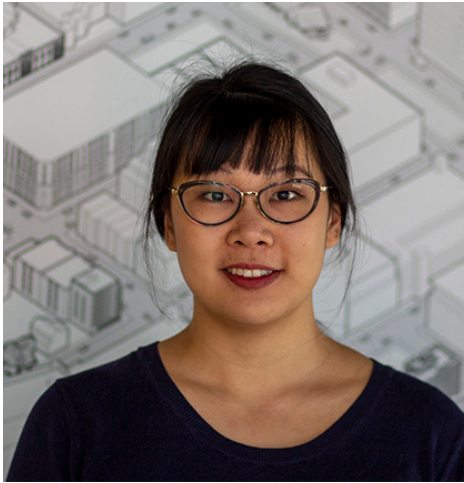
Rachelle joined Utile in 2020 as an Architect & Project Manager, bringing with her a decade of experience in a variety of project types and scales.

Rachelle previously worked at several Boston-based architecture firms encompassing civic, institutional, residential, and educational projects. At Bruner/Cott, she was the project architect for the Children's Museum & Theatre of Maine, a major community and cultural anchor for the redevelopment of Thompson's Point in Portland, Maine. She was also the project architect for the Yale Divinity Regenerative Village, a multi-use residential development with 155-units on a 19-acre site that is targeting Living Building certification. Her project experience also includes adaptive reuse and renovation projects, planning, programming, and feasibility studies.

Rachelle holds an M.Arch from Harvard GSD, and is a lifelong advocate for sustainable design and healthier buildings, both of which she ties to social justice and equity. She is a certified practitioner for the Passive House Institute US and the International Well Building Institute. She currently co-chairs the Boston Chapter of the Carbon Leadership Forum and serves on the BSA's Women in Design ABX sub-committee.

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Used under license.





## Jessica Yuan Designer

Jessica joined Utile in 2020 as an architectural designer. She has contributed to the design of several residential projects, including the 25 Sixth Street and 1005 Broadway developments, both in Chelsea, MA for The Neighborhood Developers.

Jessica earned her Master of Architecture from Harvard Graduate School of Design, and her Bachelor in Architecture from Yale University. She previously interned with Utile, and has work experience with Handel Architects and Apicella + Bunton Architects in New Haven, CT. As a Community Service Fellowship recipient, Jessica worked on affordable housing design guidelines with the Boston Department of Neighborhood Development.

### Education

Harvard Graduate School of Design,  
Master of Architecture

Yale College, Bachelor of Arts in  
Architecture

### Selected Projects

25 Sixth Street Housing, Chelsea,  
MA—62 units of affordable housing  
for The Neighborhood Developers

1200 Hancock, Quincy, MA— 201-  
unit mixed-use development for  
Foxrock Properties

1005 Broadway, Chelsea, MA—38  
units of affordable housing for The  
Neighborhood Developers

Sycamore on Main, Brockton, MA—48  
units for NeighborWorks Housing  
Solutions

36-48 Rutland Street Renovation,  
Boston, MA—for United South End  
Settlements

Mio at 1500 Main Street, Weymouth,  
MA—237-unit mixed-use development  
for JM Corcoran & Co



## Chimaobi Izeogu Designer

Chimaobi Izeogu joined Utile as an architectural designer in November 2019. Native to southern California, Chimaobi holds a B.A. in Architecture with concentration in History, Theory, and Criticism from Yale College and a Master of Architecture from the Rice School of Architecture in Houston, TX. While at Rice, Chimaobi participated in the Paris semester abroad program, studying French culture and traveling around Europe in the process. He also served as Co-Editor-in-Chief for PLAT Journal, a student-run, bi-annual publication, across two issues: PLAT 2.5 On the Bias, which explores the role of bias in representation, and PLAT 3.0 Collective Disruption, which mines the inherent opportunity following disaster or crisis to bring about impactful architectural and political change.

Prior to joining Utile, Chimaobi worked with numerous firms across several building typologies, including Epstein Joslin Architects in Cambridge, MA, focusing on performing arts, cultural, and civic endeavors, particularly, the Welcome Center at the Breakers and the Conrad Prebys Performing Arts Center. He also worked at RDLR Architects in Houston, TX, specializing in education and community centers, and EYP's embassy design studio in Albany, NY.

### Education

Rice School of Architecture, Master of Architecture

Yale College, Bachelor of Arts in Architecture

### Selected Projects

25 Sixth Street Housing, Chelsea, MA—62 units of affordable housing for The Neighborhood Developers

7600 Fay Ave, La Jolla, CA—3,000 SF terracotta trellis for the Conrad Prebys Performing Arts Center (while with Epstein Joslin Architects in Cambridge, MA)

44 Ochre Point Ave, Newport, RI—5,000 SF welcome center at The Breakers for The Preservation Society of Newport County (while with Epstein Joslin Architects in Cambridge, MA)

Old Ayer Road, Groton, MA—125,000 SF music center and school (while with Epstein Joslin Architects in Cambridge, MA)



**Jeff Geisinger AIA, LEED AP, CPHC®**  
**Director of Sustainable Design**

Jeff Geisinger leads Utile’s building performance and resilience initiatives. As a Certified Passive House Consultant (CPHC), he has guided the design of several multifamily projects pursuing Passive House certification. He works intimately with project teams to set sustainability goals from the start and to integrate cost-effective solutions for energy efficiency through in-house energy modeling. Jeff also advances resilience best practices within the firm’s architecture and urban design practice. In 2019, he co-authored the City of Boston’s Coastal Flood Resilience Design Guidelines, which outlines strategies to make buildings more resilient to sea level rise. In addition to project-based work, Jeff leads Utile’s AIA 2030 Commitment benchmarking.

Jeff holds a Master of Science from the Building Technology Program at MIT and a B.Arch from Rice University. He is a lecturer at the Rhode Island School of Design’s Department of Architecture, where he teaches courses on environmental building performance.

CPHC® is a certification mark of Passive House Institute US (PHIUS).  
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**Education**

MIT, Master of Science in Building Technology

Rice University, Bachelor of Architecture

**Affiliations**

Certified Passive House Consultant

**Selected Projects**

25 Sixth Street, Chelsea, MA—62 units of affordable housing for The Neighborhood Developers

1599 Columbus Ave, Jamaica Plain, MA—65-unit affordable housing in Jackson Square for Urban Edge

1005 Broadway, Chelsea, MA—38 units of affordable housing for The Neighborhood Developers

Sycamore on Main, Brockton, MA—48 units for NeighborWorks Housing Solutions

Highland Yard Energy Positive Housing, Roxbury, MA

domestiCITY for an Affordable Atlanta Competition, Atlanta, GA

Boston Flood Resiliency Zoning Overlay District & Resiliency Design Guidelines, Boston, MA

Scape Mixed-Use Developments, Boston & Somerville, MA



WHO WE ARE

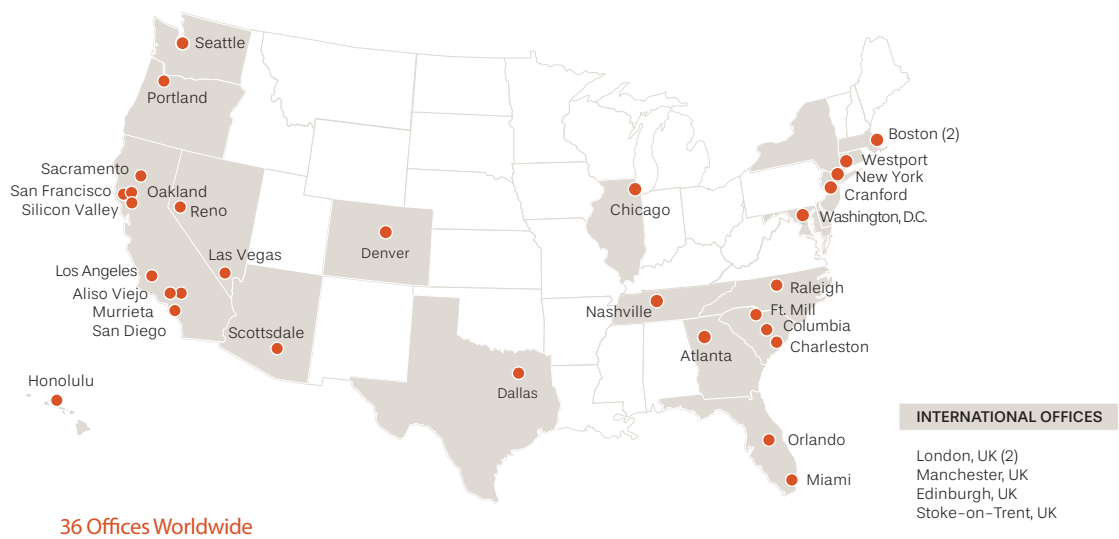
Christine Mosholder and Steve Fox founded Fort Point Project Management in 2000, after holding positions in corporate real estate at BankBoston.

Their combined facilities management, architecture, planning, construction and business backgrounds offer a unique breadth of knowledge and sound judgment that will immediately provide value to your project. As of 2020, the firm has grown to 22 full time employees, with 20 of them being experienced project managers.

In 2021, Fort Point merged with Cumming, a global project management and cost management company. Both Fort Point and Cumming hold a shared vision to improve project performance, and to provide clients with unmatched expertise in navigating the complex design and construction process.

As an affiliate of Cumming, Fort Point enjoys the benefit and support of 1,000 team members across 36 offices in the United States and United Kingdom.

Our people are our heartbeat and we believe our culture, education, and diversity of experiences are paramount to our success. Our team members come from unique educational backgrounds, having studied architecture, interior design, construction management, facilities management, allowing us to customize each project team with varying perspectives to help bring your goals and vision to life. A testament to the firm's 20 years in business, our co-founders leading by example, are proactively working towards shifting the real estate and construction industry to be more inclusive of women, resulting in their founding Wellness for Women in Real Estate (WWIRE), a networking organization focused on promoting women in the industry through healthy networking events.







## JOHN J. CARCIERO

### Vice President

John brings more than 25 years of construction and engineering experience in healthcare and higher education to the Boston team. He understands the various nuances associated with leading large, complex projects and is skilled at collaborating with all stakeholders to ensure a successful outcome. His experience includes roles such as project director, senior project manager, and facilities director and he has held leadership positions on projects valued up to \$400M. He is dedicated to the vision of each client and offers innovative and strategic project management oversight and communication skills to lead an effective team.

#### References

Bob Biggio  
Sr. Vice President, Boston  
Medical Center  
617-414-2110  
Bob.biggio@bmc.org

Anthony Slabacheski  
Program Director, Steward  
Healthcare  
339-927-6651  
Anthony.slabacheski@steward.org

Arlene Champey  
Sr. Director of EH&S. CREF  
978-245-3787  
Arlene.Champey@steward.org

#### RELEVANT EXPERIENCE

##### Brigham Health, Boston and Jamaica Plain, MA

Our firm successfully completed the first phase of a multi-phase project for Brigham and Women's Hospital located in Boston, MA and Faulkner Hospital located in Jamaica Plain, MA. The team provided Project Management and Cost Estimating oversight of the deferred maintenance project portfolio that consists of 20 projects (ten per hospital) valued at more than \$100M. The projects include the replacement of mechanical and electrical equipment and building envelope such as the replacement of the OR air handler units, motor control centers, switchboard and breaker panels, domestic hot water heaters, an elevator project, and roof replacements. The first phase entailed the prioritization of the projects, an assessment and peer review of the designs (performed by an engineering firm that was selected as part of the phase 1 scope), an assessment of the project readiness to bid the work and begin, a detailed cost estimate for budgeting, and a multi-year schedule.

##### Boston Medical Center, Boston, MA

John managed the Mechanical, Electrical, and Plumbing (MEP) infrastructure coordination for the Clinical Campus Redesign Project, a four-year, \$400M project. The plan included managing the Combined Heat and Power Cogeneration Project (\$14M) and associated Grant Reimbursement (\$3.68M) as well as the Pneumatic Tube Project which entailed the construction of a new mechanical front-end system and the relocation of the network front-end system from the Newton Pavilion Building. The project included renovations to the Menino Pavilion Building, Moakley Building, Yawkey Building, and supporting projects in the BCD Building and Doctor's Office Building (DOB). A new patient transport bridge was also constructed over a city street. The work included a 100,000 square-foot addition and 230,000 square-foot renovations to six floors to enhance the Emergency and Trauma Department, Diagnostic Imaging, and Intensive Care Units, among other departments. The project utilized multiple project delivery methods including Integrated Project Delivery (IPD) for the largest portion of scope. The project provided operational efficiencies and substantial cost savings.

##### Division of Capital Asset Management and Maintenance (DCAMM) State of Massachusetts

John was responsible for assisting the state with their Covid-19 second wave readiness plans for buildings that were significantly challenged by the pandemic. These services included evaluating existing HVAC systems and conducting an elaborate risk assessment to generate risk mitigation recommendations. Through these efforts, John learned various technologies, products, and best practices that are used to combat Covid-19 such as UV light technologies, needlepoint bipolar ionization, antimicrobials, increased filtration, and maximizing fresh air intake – to name a few.

**Boston University Children's Center, Brookline, MA**

John served as Project Manager for the renovation and expansion of an historic home. The renovation of the existing 17,000 square-foot house included a complete rehabilitation with structural updates, new stairs, new MEP systems, and a new elevator. The building was designed to meet LEED-Silver certification and preservation commission guidelines. The expansion to the house totaled 3,000 square feet. The project budget was \$13.5M.

**Tufts Medical Center, Boston, MA**

John was Lead Project Director responsible for replacing the building electrical infrastructure. The project is ongoing, and the plan required the development of a space solution for a new electrical room to enable the replacement equipment to be in place alongside the existing operational equipment for cut over ease. Additionally, the plan involves significant shutdown planning to minimize the operational invasiveness. The project cost is approximately \$3M.

**Holy Family Hospital (formerly Merrimack Valley Hospital), Haverhill, MA**

John managed multiple projects for the hospital and implemented process improvements including a computerized maintenance system that helped track over 5,000 work orders per year. He managed multiple 24-7 high pressure boiler plants with licensed operators and provided oversight of plant systems including fuel oil systems, condensate return systems, steam sterilization, kitchen steam, and electrical distribution. He was also responsible for the development and oversight of an \$8M operations budget, between 26 and 32 FTEs, and a \$22M capital project budget (for new building construction spanning multiple years). His notable projects included:

- Generator and Switchgear Replacement, \$3M
- New Emergency Department, \$22M
- Fenton Building Envelope Renovation, \$3M
- New CT Suite, \$800K
- HVAC Upgrade, \$140K
- New Trilogy Linear Accelerator and Control Room, \$3.4M
- New MRI Suite, \$2.2M

**Lowell General Hospital, Lowell, MA**

John was responsible for engineering, construction, clinical engineering, and safety for the hospital. He chartered a path for the Master Planning Committee and assembled a project team to redesign the campus. He was responsible for a \$4M operations budget, 18 FTEs, and a \$4M capital project budget. His projects for Lowell General Hospital included:

- Endoscopy Suite Expansion, \$350K
- Data Center Expansion, \$650K
- Chiller Replacement, \$1M
- OR Renovation and Storage Expansion, \$125K

**Melrose Wakefield Hospital, Melrose, MA**

As Director of Facilities, John was responsible for engineering, construction, safety, clinical engineering, and security for the hospital. He managed a \$2.5M operations budget, 16 FTEs, and a \$3M capital project budget. He led a multi-phased Emergency Department renovation and expansion project that included a new nurses' station, triage area, five new fast track bays, 19 exam/trauma rooms, two psychiatric holding rooms, one radiology room, and an expanded waiting area valued at \$2.5M. Other projects included:

- Endoscopy Suite Expansion, \$1.2M
- Medical Floor Transitional Care Unit Renovation, \$1.2M
- Cath Lab Suite Renovation, \$1.8M



#### References

Robert Elfer  
Principal, Studio Troika  
robert@studiotroika.com  
617-233-9091

Thomas P Murphy  
Director, Amundi Pioneer  
617-422-4531  
tom.murphy@amundi.com

Tim O'Brien  
Millennium Partners  
Management LLC  
212-875-4966  
tobrien@millenniumptrs.com

## WALTER KUCHARSKI

### Project Director

As a Project Director at Fort Point Project Management, Walter combines his background of architecture, construction management and real estate with his experience in owner's representation and project management. He applies this diverse skill set to each project to achieve client goals while managing all aspects of planning, design and construction.

Prior to joining Fort Point Project Management, Walter worked as a project manager and architectural designer for Pizzuti Development in Boston, MA. During his tenure there he was exposed to a wide variety of projects from 1,500 SF. tenant fit-outs to 115,000 SF. mixed-use buildings. Regardless of project size he was responsible for overseeing all aspects of the design and construction from initial planning through final occupancy while reporting directly to the developers and building owners.

Walter holds a Master of Architecture from Boston Architectural College and a Bachelor of Science in Architectural Engineering and Technology from Wentworth Institute of Technology. He currently holds Massachusetts licenses as a Construction Supervisor and Real Estate Salesperson and has completed OSHA 30-HR Construction Certification Training. He is proficient in Revit, AutoCAD, Sketch-up, Adobe Photoshop, and Smartsheet.

#### RELEVANT EXPERIENCE

##### **Forest Cove Condominiums, Falmouth, MA**

Ground up project of 32 townhomes for sale across 150,000 sq. ft. Project was Chapter 40B and purchased out of bankruptcy with a pre-existing 40B approval. Services provided included Permit Alterations/Amendments, Design, Construction Management, Financial Management (including 40B requirements).

##### **The Residences at Rose Court, Danvers, MA**

Ground up construction of (2) garden style buildings of 71 for sale units totaling 105,000 sq. ft. The project was purchased as a raw site with defunct restaurant and permitted as a 40B project. Services included site selection, Site approval through 40B, ZBA/Building Permitting, Design, Construction Management, Financial Management (Through 40B audit process).

##### **Forecaster Condominiums, Boston, MA**

Adaptive reuse of an existing 6-story building with a 2.5 story addition - 80 units of for sale condominiums across 110,000 sq. ft. The project had City of Boston Affordable Housing Requirements and services included City of Boston Permitting (ZBA & BPDA), Design, Construction Management

##### **Ginkgo Bioworks, Cambridge, MA**

Managing multiple project team members supporting internal Ginkgo design and construction, facilities management, and site services groups. Strategized design and implementation of project management organization practices and documents.

##### **Ritz Carlton Boston, Cambridge, MA**

Managed the design and construction coordination of a multi-phased and fast-tracked renovation of the lobby, Avery Bar, and Artisan Bistro spaces. Oversaw the integration of all hotel controlled vendors including sound, security, I.T., and cabling. Maintained a project schedule for all design, permitting, construction, and hotel vendor efforts.

THE PEABODY COMPANIES



ABOUT US

PEABODY'S HISTORY & LEGACY

Founded in 1976, The Peabody Companies (Peabody) is a family-owned business with an extraordinary legacy. For 45 years; Peabody has been focused on delivering excellence in professional real estate services to our client communities from New England to New Jersey, to Florida. We take pride in our reputation and are admittedly proud of our history of accomplishments; creating and maintaining vibrant, award-winning communities where people from all backgrounds live, play, grow, and prosper together.

OUR VISION

We put the **HOME** in housing.

We recognize that our managed communities are places where people are born, nurtured, grow and prosper among family and friends.

OUR MISSION

- To deliver exemplary service through:
- **Fiscal** responsibility to our clients;
  - **Integrity** in all aspects of our business practices;
  - **Stability** of 40 years of meeting our client's business needs;
  - **Humility** in relationships with clients, residents and employees and, a commitment to always listen.

WHAT WE DO

With a growing workforce of more than 580 team members, Peabody Properties, Inc. (PPI) manages in excess of 13,900 units of residential housing and provides the platinum standard for our areas of expertise; residential, condominium, commercial and construction management, marketing, and leasing, capital improvement, relocation, resident support services, assisted living and real estate brokerage services. Our portfolio includes conventional and multi-family housing (single high-rise to scattered sites), senior communities, veteran's housing, and supportive housing services.

RESIDENT SERVICES | BRINGING SERVICE DELIVERY HOME

**Health care and affordable housing go hand-in-hand in promoting wellness and quality of life for our residents.** Peabody Resident Services, Inc. (PRSI) was established in 1995, representing our long-term commitment to resident services as a unique area of expertise within property management. Dedicated solely to the development of supportive services and programs for residents of affordable housing, our Resident Service Coordinators serve as a link among management, residents, and the community and work in a nonclinical environment to coordinate wellness, education, and programs to enhance the overall quality of life for all residents.

Our award-winning team of more than 70 professionals includes HUD certified resident service coordinators, licensed social workers, registered nurses, multilingual and multicultural case managers, grant writer, program founder and president with over 30 years experience and a program director with over 15 years experience.

COMPANY HIGHLIGHTS

- Award-winning, privately held corporation and Accredited Management Organization (AMO)
- A Woman Business Enterprise (WBE); certified by the Massachusetts Office of Minority and Women Business Assistance (SOMWBA)
- Our workforce of 500+ team members hold positions of leadership in industry organizations; including, Institute of Real Estate Management (IREM); National Affordable Housing Management Association (NAHMA), New England Affordable Housing Management Association (NEAHMA), Rental Housing Association (RHA) and Greater Boston Real Estate Board (GBREB)
- Procured energy saving equipment upgrades valued in excess of \$20M to-date with on-going total energy savings forecasted to exceed \$2M annually.

RECENT AWARDS

- Boston Globe – Top Places to Work in Massachusetts – Ranked 19 of 35 for Large Companies
- Glassdoor – Best Places to Work - Ranked 10 of 50 Top Small and Medium Companies
- Glassdoor – Top CEO's – Employees' Choice – U.S. Small Business Companies
- National Affordable Housing Management Association (NAHMA) Affordable 100 – ranked #59 out of 100
- New England Family Business Magazine – Family Business Exchange Award
- MassHousing – Minority and Women-Owned Businesses (MBE/WBE) High Achiever
- Outstanding Women in Family Business; Family Business Association





## I. Peabody's Management Overview, Experience and Capacity

**Peabody Properties, Inc. (Peabody)** is an award-winning, family owned, full service real estate firm, established in 1976. Peabody specializes in the professional marketing, sales, leasing and management of residential multi-family properties, focusing on affordable and mixed-use communities. Services include but are not limited to; administration and compliance, marketing and branding of new developments, real estate brokerage, facilities management and the application of green building practices, procurement and vendor management, construction and capital improvement oversight; as well as a variety of resident supportive and assisted living services customized to the needs of our client communities.

- Peabody is an Accredited Management Organization (AMO) and a SOMWBA-Certified Women Business Enterprise.
- Our current management portfolio consists of over 13,900 units of residential rental, condominium, and mixed-use communities, located throughout Massachusetts, Rhode Island, New Jersey and Florida.
- Our workforce of nearly 550 employees hold a combined total of over 458 licenses and professional designations, and many hold positions of leadership in industry organizations such as the Institute of Real Estate Management (IREM), the National Affordable Housing Management Association (NAHMA), the Rental Housing Association (RHA), the National Association of Realtors (NAR) and the Greater Boston Real Estate Board (GBREB).
- Peabody enjoys a strong reputation for integrity and excellence in service without exception. We are considered one of the most respected and trusted real estate firms in the Northeast.

### Our Commitment to Excellence

For 45 years Peabody has demonstrated a commitment to its clients that has become the standard by which other companies are measured. At Peabody we recognize that property management involves so much more than bricks and mortar – it's about cultivating relationships. Property management is a *people business* and protecting our client's investment while providing services that respond to the needs of our residents means that we also must be successful in establishing a connection to the community at large. We strive for excellence on all levels and work to enhance the quality of life of the individuals who make their homes in our managed communities.

For additional information about the structure and philosophy of Peabody Properties, Inc., including a comprehensive account of our company's experience and accomplishments, with details of recent projects, press releases, testimonials and a multi-year list of industry awards, please visit our website at [www.Peabodyproperties.com](http://www.Peabodyproperties.com).

### Our Standards of Excellence





The graphic above demonstrates how Peabody's commitment to its Standards of Excellence in both housing quality and property management business practices directly benefits our managed-communities in three important categories:

- *REAC Scores,*
- *The to-date total Energy Saving Upgrades,*
- *The to-date total of Projected Annual Energy Cost Savings from those upgrades to property operations.*

### **Energy Conservation/Cost Management Technology**

For over 15 years Peabody Properties, Inc. has demonstrated its commitment to the adoption of green building development and maintenance practices throughout its managed portfolio. Peabody recommends the practical application of energy-efficient systems and environmentally safe building materials and products, and the integration of green technology in whole-building systems and maintenance procedures.

Peabody Property Managers and Service Managers are encouraged to become certified in Green Management. The National Apartment Association Education Institute (NAAEI) and the National Affordable Housing Management Association (NAHMA) offer credentials for Green Property Management (CGPM) to property management professionals.

Through the innovative efforts of the Facilities Management and Capital Planning Department, Peabody has enjoyed extraordinary success in the procurement of no-cost/low-cost utility-sponsored programs for energy saving upgrades and cost saving incentive programs for participating managed-communities.

- At the present time the value of these programs and upgrades to client properties exceeds \$21 million.
- The resulting collective projected savings to these communities is projected to be in excess of \$2 million per year going forward.
- Peabody continues to bring to its managed-properties advancements in energy/cost saving technology.

### **Organizational Structure**

Peabody Properties, Inc. was established in 1976 by Edward A. Fish, as the property management affiliate of the EA Fish family of companies. Over the next four decades, Peabody grew from a small property management company to an industry-leading organization offering full service real estate services to clients and investors of multifamily and mixed-use developments in Massachusetts, Rhode Island, New Jersey and Florida.

Securing their long family legacy of achieving excellence without exception, Karen Fish-Will as Principal and CEO and Melissa Fish-Crane as Principal and COO, have merged their complementary areas of expertise, talent and skill to jointly take Peabody's helm. The sisters lead their talented Executive Leadership team and their award-winning company into new markets, seeking opportunities for enhancing the lives of others through the delivery of exceptional quality residential housing services.

Provided in the appendix is an organizational chart and bios of the Peabody Leadership Team members most relevant for the purposes of this RFP response. For a complete list of the members of the Peabody Leadership Team, please visit our website, [www.Peabodyproperties.com](http://www.Peabodyproperties.com).



## **A. Multifamily Housing & Commercial Management Experience**

Peabody Properties currently manages a combined portfolio in excess of 13,600 units, at 167 residential rental, condominium and mixed-use communities with more than 120,000 total square feet of commercial space. The Peabody managed portfolio extends throughout Massachusetts, Rhode Island, New Jersey and Florida.

Included within the appendix is a listing of all public, permanent supportive and private housing currently managed by Peabody Properties, including the property name, address (city/state), number of units, management inception date.

### **Affordable Housing Experience**

Peabody Properties, Inc. is proud of its long-term relationships of trust with HUD, MassHousing, and other regulatory agencies, lenders and investors of affordable housing. Peabody has earned the reputation as the “go-to” company for developers of new affordable projects. Our on-site management teams take pride in their accomplishments as they work every day to make a positive difference in the lives of all residents who call these communities “home”.

The company has been successful in managing complex properties with complex issues. Over time, and with small successes built on relationship-building and trust earned by delivering results, Peabody has worked with many community development corporations and board-controlled communities in urban neighborhoods throughout Massachusetts.

Peabody continues to earn its reputation on a daily basis, as property management is delivered in a hands-on, detailed manner by the Principals as well as front line and supervisory staff. The Compliance team at Peabody works side by side with the property staff to ensure that all regulatory requirements of layered agency regulations are met.

Currently, 36% of Peabody affordable communities have multi-layered regulatory programs in place that require 100% compliance at all times.

Furthermore, the following Peabody managed communities are led by strong and dedicated NDC's, Resident Associations and Boards of Trustees, respectively. Peabody values the collaboration put forth by all parties to create vibrant communities where residents can live, grow and prosper in strong and comfortable neighborhood environments.

### **Commercial Experience**

With more than 120,000 square feet of commercial space under management, Peabody is well versed in the proactive administration of these highly utilized spaces.

Examples of mixed-use communities currently under management include; Mishawum Park in Charlestown, Bixby Brockton Apartments in Brockton, Humboldt Apartments in Boston, Metropolitan in Chinatown and Roxse Homes in Boston.



**The Metropolitan**  
1 Nassau Street  
Boston, MA 02111



**Roxse Homes**  
1050 Tremont Street  
Boston, MA 02120



**Mishawum Park**  
338 Main Street  
Charlestown, MA 02129



**Bixby Brockton Apartments**  
103-106 Main Street  
Brockton, MA 02301



**Humboldt Apartments**  
51-57 Humbolt Avenue Roxbury,  
MA 02119

## **B. Peabody Resident Services, Inc.: Demonstrated Experience in Providing Effective Resident Service Programs**

Peabody Properties, Inc. (PPI) recognized from its inception that providing housing for our residents involved much more than building bricks and mortar and originated resident services into our management services in 1984 with an initial focus on aging-in-place for seniors. Property management is a *people business* and providing services that respond to the needs of our residents while also offering a connection to the larger community in which they reside are important tools for a company with a stated mission, “We Put the HOME in Housing!”

PPI's well-established Resident Services program led to the development of a separate entity in 1995, Peabody Resident Services, Inc. (PRSI), dedicated solely to the provision of supportive services for residents of affordable housing.

### **Our Core Values:**

#### **Respect is Key**

Our Respect Is Key Policy sets the tone for a respectful and harmonious environment at our housing communities and the expectations we have for our staff, residents, visitors and vendors to the properties.





### **Team Approach**

The Peabody Resident Services in Housing Model, established nearly 30 years ago, starts with a Team Approach between Management and Resident Services. We strive for excellence on all levels, helping to enhance the quality of life for those individuals who call a PPI managed community home.

### **Resident Services Mission**

Our goal is to promote successful tenancies for our residents by linking them to the supportive services they may need to assist with lease compliance, benefit well-being, and support aging-in-place. We also enrich the quality of life for all residents through the coordination of on-site educational, wellness, and social programs and activities that foster community-building.

### **Community Connection**

Collaboration and partnerships with community-based providers is essential to being a “good neighbor” in the communities where our housing is located and connects residents to local resources and services. Our approach to program development is resident and stakeholder inclusive, and together, we aim to “bring the community in” by accessing program and grant funding opportunities.

### **Role of the Resident Service Coordinator**

The Resident Service Coordinator, in coordination with the site’s Resident Association, wherever applicable, works with area provider agencies, in a non-clinical environment, to coordinate wellness, educational, cultural, and other enrichment programs to enhance the overall quality of life for all residents of the property. This position serves as the link among management, residents, and community.

For our seniors and families, the programs and activities we have coordinated include:

- Smoke-Free housing initiatives
- Meals programs and nutrition sites
- Health screenings and wellness programs
- Exercise programs and walking clubs
- Intergenerational and multi-cultural programs
- Life-long learning programs
- Computer learning centers and computer training
- Horticultural education and site beautification programs
- Life skills training
- Job readiness, job training, internship opportunities
- Scholarship programs

The youth living in our properties are very important members of the communities in which they live. We coordinate educational, recreational, musical, artistic, and supportive programs to increase their knowledge and experiences. Programs are youth driven and are supportive by resident volunteers who assist in the day-to-day operation and supervision of the programs.

For our youth, the programs and activities we have coordinated include:

- Summer day camps and field trips
- Kids clean-up crews
- Horticultural education and site beautification programs
- National Park Service Junior Ranger programs
- Community service stipend volunteer activities



- Homework mentoring
- Karate, martial arts, soccer, arts & crafts, theatre groups
- Police substations, basketball leagues, and safety awareness training
- Youth media production programs in on-site youth centers
- Scholarship programs

For special populations, our supportive housing program models serve the following residents:

- Formerly homeless families and individuals
- Veterans
- Persons with disabilities
- Frail elders

The Peabody Resident Services in Housing model has proven to be beneficial for both residents and management. In many ways, resident services and programs assist with the successful day-to-day management of the property and provide:

- Supportive tools to assist resident in meeting the terms of their lease
- Uniform incident report follow-up policy
- Support for the property management staff
- Response to requests for reasonable accommodation
- Volunteer, stipend, and employment opportunities for residents
- Amenities to assist in the marketing of the property
- Community rapport, partnerships and positive public relations

### Grant Funding

Funding is essential in order to develop and sustain resident programming and PRSI is committed to community partnerships, obtaining in-kind donations, and proactively pursuing grant funding opportunities. To-date we have raised \$4,523,312.69 in grant funding for resident services, programs, and staff.

### Grant Funding History

Pre-2000	\$2,336,597.00
2000-2005	\$1,139,152.79
2006-2010	\$312,621.40
2011-2015	\$653,978.50
2016 - Present	\$80,963.00
<b>Total</b>	<b>\$4,523,312.69</b>

THE PEABODY COMPANIES

# KAREN FISH-WILL

## PRINCIPAL & CEO



Karen Fish-Will's career in the multi-disciplines of real estate spans more than 35 years. A licensed real estate broker and the principal of PPI's affiliate brokerage firms in Massachusetts and Florida, Ms. Fish-Will focuses on the pre-development, development and marketing of newly-formed communities, whether created through new construction, the rehabilitation and expansion of existing communities or the preservation of historic buildings through their adaptive re-use to housing.

Ms. Fish-Will is a real estate professional with an unwavering passion for and mastery of the leasing, sales and marketing process. Working in collaboration with members of the Leadership Team, Ms. Fish-Will unites marketing, leasing/sales and administrative professionals and guides them to consistently achieve or exceed client occupancy projections. She brings determination and creativity to everything she does and has successfully fostered the growth of PPI while adhering to a strict commitment to service and integrity.

## INDUSTRY AFFILIATIONS, DESIGNATIONS & SERVICE

- Designated REALTOR® Member of the Greater Boston Association of REALTORS® (GBAR), participating in the GBAR Broker-Owner Inner Circle Forum.
- President of the Executive Committee of the Greater Boston Real Estate Board (GBREB).
- Serves on the Board of Directors and Government Affairs Committee for the Greater Boston Real Estate Board (GBREB)
- Member of the Board of Directors of the Rental Housing Association (RHA) and served as a past President.
- Serves on the Mass Housing Community Services Advisory Committee.
- Serves on the Board for New Lease for Homeless Families.
- Serves on the Board of Affordable Housing and Services Collaborative, Inc.
- Affiliated with both the Massachusetts and Florida Chapters of the Community Association Institute (CAI).
- Member of the South Florida National Association of Realtors, the Realtor Association of Greater Miami and the Coral Gables Chamber of Commerce.
- Named to the prestigious "Woman of FIRE" list; the annual recognition award acknowledging key female players in the local FIRE (Finance, Insurance and Real Estate) sectors, celebrating the best and brightest women in their industries.
- Recipient of Boston Chapter No. 4 IREM Professional Women of the Year Award.
- Holds Broker's License in Massachusetts and Connecticut.

## RECENT AWARDS

- Glassdoor – Top CEO – Employees' Choice Award – U.S. Small Business Companies.
- Honored with "Outstanding Women in Family Business" Award – given by The Warren Group.
- Named to the prestigious "Woman of FIRE" list; the annual recognition award acknowledging key female players in the local FIRE (Finance, Insurance and Real Estate) sectors, celebrating the best and brightest women in their industries.
- B'nai B'rith Housing Distinguished Achievement Award recipient – remarkable leadership in the Real Estate Industry; providing quality affordable housing..

## EDUCATION

- Attended Pine Manor College, majoring in Marketing and Early Childhood Education

536 Granite Street, Braintree, MA 02184 | P: 781.794.1000 | F: 781.794.1087 | [PeabodyProperties.com](http://PeabodyProperties.com) 



We are a \$400M Construction Management firm that focuses on delivering an exceptional level of service for clients in the housing, commercial, life sciences, tenant interiors, institutional, public, retail, and banking markets. Our teams accomplish this by providing clients and partners with a construction process that eliminates the surprises, while elevating the experience by executing with excellence.

Commodore is certified as a Veteran Owned Business (VOB). Joe Albanese, CEO & President, served in the U.S. Navy Civil Engineer Corps from 1984 to 2009, attaining the rank of Captain and being awarded the distinguished Legion of Merit medal for outstanding service and achievement. Joe's experience in the military has helped shape Commodore's mission and provides the company with experienced leadership.



COMPANY PRINCIPALS



Joseph J. Albanese  
CEO & PRESIDENT



Thomas F. Comeau  
COO & EXECUTIVE VP



Lauren M. Larson  
SENIOR VP, ORGANIZATIONAL  
DEVELOPMENT



Michael P. Roche  
VP & GENERAL COUNSEL

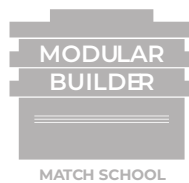
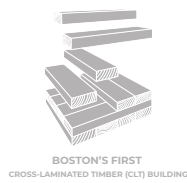
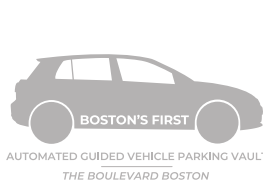


David W. Jolin  
CHIEF FINANCIAL OFFICER



## FIRST & UNIQUE

Commodore's innovative approach helps clients achieve their project goals:



## FIRM RECOGNITION

### AGC EXCELLENT SAFETY RECORD AWARD

### BOSTON BUSINESS JOURNAL LISTS

- » Best Places To Work
- » Largest Charitable Contributor
- » Largest Construction Project
- » Largest General Contractor
- » Largest Private Company
- » Fastest Growing Private Company
- » Largest Veteran Owned Business

### THE BOSTON GLOBE

- » Top Places To Work

### CBA ACHIEVEMENT AWARD WINNER

- » Collaborative Professional

### ENGINEERING NEWS RECORD

- » The Top 400 Contractors

### GREEN INITIATIVE AWARD

### NAVY CIVIL ENGINEER CORPS / SEABEE HISTORICAL FOUNDATION

- » Admiral Ben Montoya Award

### AGC MA BUILD NEW ENGLAND AWARDS

- » Cimpress/Vistaprint HQ - 275 Wyman Street
- » Room & Board - 375 Newbury Street

### BOSTON PRESERVATION ALLIANCE

- » Preservation Achievement Award  
*The Whitney Hotel*

### BRICK INDUSTRY ASSOCIATIONS

- » Silver Award, Brick in Architecture Awards  
*The Whitney Hotel*

### BOSTON SOCIETY OF LANDSCAPE ARCHITECTS

- » Design Merit Award  
*Franklin Park Zoo - Nature's Neighborhoods*

### FIRE INDUSTRY EDUCATION RESOURCE ORGANIZATION

- » Merit Award, Fire Station Design Awards  
*Newton Fire Headquarters & Station #3*

### IIDA NE INTERIOR DESIGN AWARDS

- » Best Office Over 80,000 SF  
*Havas/Arnold Worldwide*

### IFMA BOSTON AWARDS OF EXCELLENCE

- » Awards of Excellence  
*OSRAM Sylvania HQ*

### NEW ENGLAND CHAPTER CONSTRUCTIONS MANAGEMENT ASSOCIATION OF AMERICA (CMAA)

- » OSRAM Sylvania HQ
- » LogMeIn Headquarters



ED WHELAN

Project Executive

Professional Experience

28 Years of Industry Experience

Education

Union College  
B.S. Civil Engineering

Certifications/Licenses

OSHA 10-Hour Certification  
OSHA 30-Hour Certification  
City of Boston ABC Construction Supervisor License (B19210)  
Massachusetts Hoisting Engineer License (HE-163614)  
Massachusetts Construction Supervisor's License (CS 65787)  
City of Quincy Class A License for Control of Building Operations (1801)  
Hot Work Safety Certification (01028)

References

Paul Governor  
Architect  
William Rawn Associates, Architects  
(617) 598-3335  
pgovernor@rawnarch.com  
  
Peter Cheever  
President, Chairman  
LeMessurier  
(617) 868-1200  
  
Ellen Perko  
Associate Principal  
CBT Architects  
(617) 646-5255  
perko@cbtarchitects.com  
  
Brendan O'Rourke  
Senior Associate  
McNAMARA/SALVIA  
Structural Engineers  
(617) 850-4123  
orourke@mcsal.com

100 Hemenway, Boston, MA

This project consists of a 52,000 SF, 50-unit, 5-story apartment building with approximately 120 beds. Scope includes the demolition in its entirety of the 104 Hemenway building and reconstruction with conventional wood framing, as well as reconstruction in kind of the masonry facade. Building 108 Hemenway scope consists of partial demolition and full reconstruction/sistering of existing, utilizing wood framing.

1785 Columbus Avenue, Horizons WaterMark Development, Roxbury, MA

Construction of a new 140,000 SF, 8-story mixed-used building with one level of below-grade parking and one level of at-grade parking. The structures frame was comprised of steel framing and concrete decks. Exterior façade is a combination of rain screen, brick, curtain wall, metal panel. Some key features included two roof top units, roof top mounted generator, fuel storage room, and a Fire Command Center.

25 Channel Center, Boston, MA

New 13-story luxury condominium building in the Seaport District in Boston. The project utilized the latest cast-in place concrete technology. The building contains 74 luxury condominiums as well as 5,000 SF of retail space on the ground floor and the shared underground parking garage for 350 cars.

Harvard University Law School, Gropius Dorms, Cambridge, MA

Over a 10-week summer period renovations to the five residence halls that make up the Gropius Complex were completed at this well-known law school. Extensive renovations were completed in the 364 rooms within the Graduate Common Dormitories, a five-building historic dormitory complex designed by Walter Gropius. The work included converting entrances and dormitory rooms for ADA compliance, replacement of all showers with individual glazed structural tile showers, and other cosmetic work. The fire alarm system throughout the entire 5-building complex was also upgraded.

Four Point Sheraton, Norwood, MA

Renovations and additions to the 4 Points Sheraton Hotel, located in Norwood, MA. The additions were carried out while the facility was operational and consisted of a state-of-the-art 800-person capacity conference/seminar facility, along with spacious meeting rooms and support areas. A grand 500 person capacity ballroom was designed for both business and social functions. 110 new guest rooms were added, along with an enclosed swimming pool, hot tub and sitting area, locker and fitness facilities. New and improved service areas include updated laundry area, kitchen, maintenance, shipping/receiving areas plus various support functions. The renovated public areas include a stylish lobby and entry portico.

The Harvey, 480 Rutherford Hood Park, Boston, MA

New 6-story, 198,000 SF mixed-use building. Concrete podium construction for the first two floors with five floors of wood framed construction providing 177 residential apartments above. Amenity spaces including, café, roof deck, fitness center and two-level parking garage. Additional project highlights include campus utility infrastructure upgrades, customary landscaping and streetscape improvements around the perimeter of the project as well as interior fit-outs and finishes for the new units.

Winsor School, Center for Performing Arts and Wellness, Boston, MA

New six-story Performing Arts and Wellness Center. Performing Arts Center includes a 510-seat, two-level theater with state-of-the-art controls and rigging, a fly loft and full catwalk system; a costume shop; rehearsal space for music, theater and dance; and recording studio. Health and wellness wing features two gymnasiums with seating; a fitness area; two-story multi-purpose room; training rooms; five squash courts; roof deck; classroom and office space; and locker room facilities.



**MIKE DUPUIS,  
PE, LEED AP BD+C**  
Senior Project Manager

#### Professional Experience

28 Years of Industry Experience

#### Education

University of Massachusetts Amherst  
B.S. Civil Engineering

#### Certifications/Licenses

OSHA 10-Hour Certification  
OSHA 30-Hour Certification  
Massachusetts Construction  
Supervisor License  
LEED-AP BD+C  
Registered Professional Engineer (PE)

#### References

Ken Wertz  
Executive Director  
Mass Facilities  
(781) 775.6131  
exec@massfacilities.com

Robert MacLeod  
Associate Architect  
McKinnell, McKinnell & Taylor  
(781) 878.6223  
robert.macleod@neoscape.com

Joshua Sydney, LEED AP BD+C, MCPPO  
Sydney Project Management  
617-212-7431  
Js@sydneyopm.com

#### Winn Development, Boott Mill Apartments, Lowell, MA

Conversion of a historic cotton mill building into a modern apartment complex, included a full interior renovation, with selected preservation of historic millwork, masonry, and other period architectural elements. The historic exterior was repaired and restored.

#### Boott Cotton Mill, Waterfront Lofts, Lowell, MA

Adaptive reuse of a historic 19th century brick mill complex into 108 "true loft style" luxury condominiums with waterfront views, totaling over 125,000 SF. Amenities include a state-of-the-art fitness center and a spacious roof deck. Part of the complex was occupied by an industrial history museum during construction. This 4-story brick building is listed on the National Register of Historic Places.

#### Toll Brothers, The Kendrick 2nd Avenue Residences, Needham, MA

New construction of a 450,000 SF, wood-framed, 5-story, 390-unit apartment building and a 583-space precast concrete parking garage. Amenities include two courtyards, both a pool deck and outdoor entertaining space including a fire pit, a theater as well as a lawn. A 3-story fitness center and a spa studio was also included. The project was constructed with reinforced concrete foundations. Three phased construction over two years with an on-site staff of eight people. Included preconstruction services and estimating. \$80.8M

#### Quincy Mutual / Gate Residential, West of Chestnut Apartments, Quincy, MA

New, 6-story luxury apartment complex with 169 residential units and 15,000 SF of new retail space. The project consisted of constructing two new buildings within the same block. Both buildings are 6 total stories above grade (1 retail/parking podium and 5 stick-built residential levels). One building has an open parking structure at the ground level and 1-level of below-grade parking. \$55M

#### Boott Mill Apartments - Winn Development, Lowell, MA

Conversion of a historic cotton mill building into a modern apartment complex, included a full interior renovation, with selected preservation of historic millwork, masonry, and other period architectural elements. The historic exterior was repaired and restored.

#### Union Congressional Church Home, Union Towers Renovation, Weymouth, MA

135,000 SF phased renovation of 199-unit apartment building including upgrades to unit bathrooms and kitchens, MEPs, HVAC, ADA compliance conversions, and various interior finishes. Renovations to the building's lobby, common areas, multipurpose/exercise rooms, and retail areas were also included. Exterior work included complete facade renovation, window replacements, new entrance structures, and site work. All work occurred while building was occupied and operational. \$25M.

#### Pace University, Pleasantville, NY

Construction of two new residence halls and an addition to the Campus Student Center. This project included campus-wide utility replacement during the first summer. The two new residence halls were of a modular construction and were delivered to the site in blocks of nearly complete portions of the building.

#### Department of Youth Services, Juvenile Detention Facility Addition and Renovation, Dorchester, MA

Addition to an existing facility that included five pods with 20 rooms in each. The project also included construction of administration space and a renovation of the dining facilities.

#### Department of Youth Services, Juvenile Detention Facility Expansion, Worcester, MA

Design/build construction of a new 60-bed, 27,000 SF juvenile detention facility that was integrated into an existing, occupied facility.



JOHN SAVAGE, LEED-GA  
Superintendent

Professional Experience

25 Years of Industry Experience

Education

Wentworth Institute of Technology  
Professional Growth Courses in  
Construction Management & Development

Certifications/Licenses

LEED Green Associate  
CPR & First Aid Certified  
OSHA 30-Hour Certification  
Construction Supervisors License  
(unrestricted)  
Hydraulics License  
RRP

References

Matthew Wasdyke, AIA, LEED AP  
Architect  
CambridgeSeven  
617.492.7000  
mwasdyke@c7a.com

Dean Mello  
President  
OnPoint Consulting  
(603) 498-5956  
dmello@onpointccg.com

Lt. Rafael Viana  
Salvation Army  
781.894.0413  
rafael.viana@us.salvationarmy.org

Parcel 6A, Taunton MA

Four (4) new 3-story wood-frame buildings created 62 units of affordable housing. The project required soil remediation, soil stabilization and extensive storm water recharge system as well as a playground, one (1) new public road and multiple parking lots. Energy-Star rated.

Old Colony, Phase 2C, South Boston, MA

Four (4) new 3-story, wood-frame buildings created 40 units of affordable housing mixed with market rate homes. The project required soil stabilization and a storm water recharge system, as well as high-efficiency mechanical systems. LEED certified.

Highland Court, Providence, RI

Renovation of former occupied apartments into a 52-unit assisted living community. Project included new sewer structures and storm water system. New MEP's, windows and EPDM roof.

Mattapan Heights, Phase III, Mattapan, MA

Two (2) new, 4-story wood-frame buildings and adaptive reuse of one (1) existing. Project required extensive underpinning and structural rehabilitation of existing buildings terra cotta structure.

Franklin Hill, Phase II, Boston, MA

14 new, 3-story, townhouse-style buildings to create multiple units of affordable housing. The project required demo of existing buildings, cut and caps of utilities and minor soil stabilization. In addition, the project included a park with playground equipment and small water park.

Appleton Mills, Phase I and II, Lowell, MA

Rehab of former mill building into a 130-unit complex. Project required the bracing of all existing exterior masonry walls (4 and 5-story walls) and demo of all interior beams, decks and columns. Underpinning of granite block foundation on existing canal and a full masonry restoration was required. Installed new glue lam beams and decking using the existing cast columns. A green roof garden was included in this project. The existing bridge spanning the canal was refurbished including new base supports at the canal wall.

Salvation Army, Corps & Community Center, 33 Myrtle Street, Waltham, MA

The 4,000 SF addition to the Salvation Army's Corporate & Community Center houses a multi-purpose room, commercial kitchen and a new 2-story entrance. 6,600 SF of renovations to the chapel, offices and pantry as well as three new activity rooms for after school and pre-kindergarten services.

The Whitney Hotel, Boston, MA

37,000 SF hotel renovation; 24,000 SF of renovating, 13,000 SF addition adding 20 hotel rooms and upgrading lobby and bar area. Tight urban site. 17-month construction schedule. \$19M 2019 Brick in Architecture - Silver Award recipient.

Central House, Cambridge, MA

Historical restoration and rehabilitation of the exterior masonry, windows and roof of the YMCA. Occupied rehab of 128 transitional sleeping units which included new flooring and paint.





## SEN BLANKINSHIP, WELL-AP, LEED-AP, PHIUS+ Project Manager

### Professional Experience

22 Years of Industry Experience

### Education

Babson College  
Masters in Business Administration  
University of Virginia  
B.S. Architecture

### Certifications/Licenses

OSHA 30-Hour Certification  
WELL Accredited Professional  
Legacy LEED® Accredited Professional  
Passive House Institute US (PHIUS+) Certification  
MCPPO Certificate for Construction Management at Risk Under M.G.L. c. 149A  
MCPPO Certificate for Public Contracting Overview

### References

Frank Killilea  
Stratton Development Management  
(978) 857-3763  
fkillilea@strattondm.com

Donald Woodring  
Boston College  
617-893-3013  
donald.woodring@bc.edu

Holly Sutherland  
CSL Consulting  
781-552-8466  
hsutherland@csl-consulting.com

### Nashua Housing Authority, Bathroom Modernization Project, Nashua, NH

Renovation of 53 residential bathrooms and 3 common bathrooms for the Nashua Housing Authority.

### Somersworth Housing Authority, Albert J. Nadeau Homes Insulation and Siding Renovation, Somersworth, NH

Insulation of existing exterior wall cavities with foamed-in-place insulation, and replacement of exterior siding for 17 buildings in the housing complex.

### Rogerson Communities, Council Tower Green Retrofit Project, Roxbury, MA

Green retrofit upgrades to 145 residential units in a 17-story residential tower.

### National Park Service, Frederick Law Olmsted National Historical Site Rehabilitation, Brookline, MA

Major infrastructure upgrades to the fire protection, fire alarm, and security systems, new electrical service for the site, new lighting, HVAC upgrades, major site drainage improvements, and repair and rehabilitating of the historic barn for public and education program use.

### Town of Littleton, Reuben Hoar Public Library, Littleton, MA

New, 22,280 SF steel-framed building, with a slab-on-grade lower floor, on the site of Littleton's existing Town Office property. Site work includes connections to and extensions of utilities in both the street and on-site, newly paved parking lot and connections to an existing lot, and associated site work. Chapter 149A. Pursuing LEED Certification. The project is currently in-progress.

### Boston College, McElroy Commons Roof Replacement, Chestnut Hill, MA

Removal of existing roofing at high roofs (dining hall and mechanical room roofs) and replaced with new EPDM roofing and new exterior roof parapet light fixtures. The team also removed and reinstalled coping stones and lightning protection in conjunction with roof work.

### The Street - Chestnut Hill Redemise and Facade Renovation (WS Development), 43-47 Boylston Street, Chestnut Hill, MA

43-47 Boylston Street included facade demolition and reconstruction for 4 core/shell tenant spaces, including foundation work to expand the rear footprint. 43 Boylston St. was a complete interior demolition and redemise of the existing tenant space. Work also included building a new electrical room and transferring old systems to new, relocating the gas manifold, relocating the fire alarm panels, installing new sprinkler systems and disconnecting old system from an underground sprinkler pit, relocating the Comcast and Verizon services, replacing the HVAC rooftop units, and a complete roof replacement.

### UMBA, University of Massachusetts Boston, University Hall, Boston, MA

New 192,000 SF academic building includes a café, general classrooms, one floor of chemistry teaching labs, Art Department and Performing Arts Department, including specialized spaces such as a new gallery, theater, and recital hall. DCAMM Chapter 149A. LEED Gold certified.

### BlueCross BlueShield, Office Remodel and Addition, Quincy, MA

This 345,000 SF renovation of an 80's-era office building included demolition of existing office building, installation of new MEP systems, construction of new office spaces, a cafeteria, and conferences rooms, demolition of an existing cast-in-place concrete garage and installation of a new 4-story pre-cast garage. LEED certified.



DANIEL KIHARA  
Assistant Project Manager

Professional Experience

1 Year of Industry Experience

Education

University of Massachusetts, Lowell  
B.S. Civil & Environmental Engineering

Certifications/Licenses

OSHA 30-Hour Certification

References

James Wilson  
Senior Project Manager  
R2Architects, LLC  
(508) 746-4646  
jim@r2arch.com

Dominick Maiellaro  
Architect  
Elkus Manfredi  
(617) 426-1300  
dmaiellaro@elkus-manfredi.com

Chris Sherman  
Operations Manager  
Faneuil Hall Marketplace  
(617) 523-1300 Ext. 7015  
chris.sherman@am.jll.com

Boston Sword & Tuna, 22 Drydock Avenue, Boston, MA

50,000 SF new, 2-story headquarters and food processing facility. The building is divided into two main areas – refrigerated seafood processing areas and office space.

Ashkenazy Acquisition, Faneuil Hall Marketplace, South Market Bay 42-46, Boston, MA

Core and shell work at Faneuil Hall Marketplace to prepare for a future tenant. The project scope includes selective demolition, interior masonry walls and replacing some of the historic windows on the exterior facade. The site is designated as a *National Historic Landmark* and is listed on the *National Register of Historic Places*.

Ashkenazy Acquisition, Faneuil Hall Marketplace - East Rotunda, Boston, MA

Renovations include major mechanical upgrades to the East end of the Quincy Market with new 100-ton AHU, new duct work, new granite stairs and ADA ramp, new bathrooms and new storefronts.

Long Wharf Custom House, Burning Glass, Boston, MA

20,000 SF fit-out of a single-story office space in recently completed core and shell renovation. Historic elements were incorporated into the design of this new space that consists of offices, bathrooms, café, elevator lobby and conference rooms. The building is listed on the *U.S. National Register of Historic Places*.

Klaviyo, 125 Summer Street, Floors 5-7, Boston, MA

80,000 SF phased, multi-floor tenant interior fit-out. Phase 1 encompassed 23,300 SF of fit out space on the 7th floor; Phase 2 involves 32,000 SF on the 5th floor and 23,200 SF on the 6th. Scope includes constructing individual offices, workstations, conference rooms, full kitchen, amenity spaces, a large central interconnecting staircase with a 3-story atrium, and comfortable collaboration spaces.

Klaviyo, 225 Franklin Street, 18th Floor, Boston, MA

10,000 SF office renovation. Work includes new partitions, ceiling, finishes, MEPs and HVAC. Coordinated all work with building owner as to not disrupt tenants in adjacent spaces.