

Response For:
270 Talbot Ave and Spencer Street
Dorchester, MA 02124

Submitted by:



**Codman Square Neighborhood
Development Corporation
587 Washington Street
Dorchester, MA 02124**



**K. Beth O'Donnell
Director of Real Estate
Codman Square NDC
617-825-4224 x123
beth@csndc.com**

**Travis Lee
Principal
TLee Development LLC
617-869-7092
travismlee@gmail.com**

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Cover Letter

Ms. Sheila Dillon

Director, City of Boston Dept. of Neighborhood Development
26 Court St., 11th Floor
Boston, MA 02108

RE: 270 Talbot Avenue, Dorchester, MA

Dear Ms. Dillon:

Codman Square Neighborhood Development Corporation (CSNDC) and TLee Development LLC (TLD) are pleased to be jointly responding to the Request for Proposals for the 270 Talbot Avenue and Spencer Street site in Codman Square. CSNDC has over 37 years of community development experience in South Dorchester. TLD is an entrepreneurial, Dorchester-based developer that specializes in delivering workforce housing units that meet Passive Housing standards. TLD is the perfect partner in CSNDC's mission to build strong communities by creating housing and commercial opportunities in the neighborhoods of Codman Square and South Dorchester in which people of all incomes and household types can live and thrive together.

This innovative partnership will allow the city to build workforce housing units more quickly and add sorely needed affordable housing units to the community. CSNDC brings a wealth of experience in the complex world of affordable housing development. This pairs well with TLD's experience in building deed-restricted workforce housing quickly. This experience combined with our joint ability to organize and create consensus among all stakeholders during the development process, makes our joint proposal the most advantageous choice to build on the 270 Talbot Avenue and Spencer Street sites.

As you will see in the attached Response, our proposal demonstrates the capacity, knowledge, and experience necessary to successfully complete this very important project for the City of Boston. Based on our combined 45 years of experience, CSNDC and TLD will draw on our collective skills and resources to deliver the project.

- **This is a proven development team with a track record** of completing complex, community-driven, highly sustainable projects that complement the character of existing established neighborhoods. In this capacity, we both have experience working with diverse communities to develop and implement plans that meet the needs of all community stakeholders – including residents, local elected officials, non-profits, volunteer organizations, and other local constituents.
- **We have the financial capacity, experience, and reputation** to raise public and private development funds. CSNDC has a proven track record of securing the funding necessary from state and local sources for the development of affordable rental housing units. TLD has successfully taken advantage of public

loan products specially designed for workforce housing, as well as traditional debt and equity sources.

- **We will provide economic development opportunities** for local businesses and entrepreneurs on the ground-floor commercial space at the corner of Talbot and Spencer.
- **We will ensure opportunities for local MBE/WBE businesses and employment** due to CSNDC's commitment to the hiring of disadvantaged businesses and striving for the highest levels of local, minority and women employment during our construction cycle and during property operations. TLD is excited to support us in this effort.
- **We plan to undertake robust community engagement efforts** with the surrounding residents and stakeholders. CSNDC has built long-standing relationships and led extensive planning efforts with local organizations, including the Codman Square Neighborhood Council, Talbot-Norfolk Triangle Neighbors United, Boston Project Ministries and West of Washington Coalition. TLD successfully engaged this exact neighborhood on a project now under construction at 246 Norwell St.
- **We have a joint commitment to green development**, as both CSNDC and TLD make green building a key component of our development programs. CSNDC is a NeighborWorks Certified Green Organization. With this certification, CSNDC has developed several LEED certified buildings – including the Levedo Building, the first LEED certified multi-family building in south Dorchester. TLD has worked with Placetaylor, a local architecture firm, to bring some of the first Passive House certified buildings to Dorchester. It is our goal to design a residential development that conforms to appropriate sustainable construction principles – promoting health, efficiency, and long-term affordability for the residents.

We are confident that our team possesses the skills, qualifications, and enthusiasm necessary to carry out the development of 270 Talbot Avenue. We specifically have envisioned this project as one that will bring badly needed workforce units online quickly using TLD's experience, while providing the deep affordability that only an organization like CSNDC can provide.

Sincerely,



Gail Latimore, Executive Director, CSNDC



Travis Lee, Owner, TLD

A. Introduction

Project Overview

The development at 270 Talbot Avenue and Spencer Street (the Project) will be transformative. For this proposal we will refer to the 270 Talbot Avenue site to be developed by TLD for 17 workforce housing units as Phase 1- Talbot Ave and the Spencer Street site to be developed by CSNDC for 19 affordable housing units (60% AMI and below) as Phase 2- Spencer St. Phase 2- Spencer St is intended to be developed concurrently with an additional 22 units a short walk away at 5-21 New England Ave (see Supplemental Addendum for more information).

The site is near the Talbot Avenue station along the Fairmount Indigo commuter rail line. This train station provides direct access to downtown Boston within 15 minutes. Equitable transit oriented development (e-TOD) is a key anti-displacement strategy for CSNDC. The team (CSNDC & TLD) will leverage this transit amenity and create a landmark destination that will provide affordability at many levels, further increase use of the station, and catalyze economic development opportunities in Codman Square.

The project's density will revitalize the immediate area, changing a blighted lot into two vibrant residential buildings, with amenities like retail, green design, and access to transit. In total, both phases of 270 Talbot Ave and Spencer St will bring forward 17 workforce housing rental units, 19 affordable housing rental units, and 2,500 square feet of commercial space, along with other benefits and amenities such as an enlivened streetscape, preservation of affordability, and sustainable design features. CSNDC's development at 5-21 New England, will bring an additional 22 affordable housing units online (see Supplemental Addendum for more information) for a grand total of 58 units..

The Project is located adjacent to the Talbot-Norfolk Triangle (TNT). This neighborhood also comprises the Eco-Innovation District (EID) developed by Codman Square in conjunction with the Natural Resources Defense Council among others. The EID is in the process of being awarded a designation as a LEED-Neighborhood Development (LEED-ND) site from the U.S. Green Building Council. The EID is a comprehensive effort of sustainability planning, focusing on benefitting TNT's 1,500 residents by connecting green transit-oriented development, local energy generation, green infrastructure, and insulation retrofits in a way that saves them money and improves their quality of life, while tracking greenhouse gas emissions on a neighborhood scale and providing a replicable model for neighborhoods in Boston and beyond.

The Project will be a positive contribution to Talbot Avenue, strengthening the commercial corridor and building upon CSNDC's and TLD's work in the area. Currently, there are very few businesses along the stretch of Talbot Avenue from Southern Avenue to Blue Hill Avenue. The redevelopment at Talbot Ave and Spencer St will add retail space, improve the appearance of the street wall, encourage foot traffic, and bolster pedestrian safety. 270 Talbot Ave is halfway between Codman Square and the train

station. Studies show amenities like retail and vibrant streetscapes help encourage people to walk further. This site will draw people towards the station. This Project builds on the legacy in the neighborhood that began with Levedo, a 24-unit residential building at 245-247 Talbot Avenue, completed in 2012, CSNDC's Talbot Station buildings to begin construction this summer, and 246 Norwell St a six-unit residential building, to be completed in 2018.

Economic Development

The Project will provide economic development opportunities to the community in several ways. Through extensive planning and communication with local stakeholders, including Talbot-Norfolk Triangle Neighbors United (TNTNU), CSNDC has identified jobs and job training as critical needs for the neighborhood and is focusing on this in the Project.

We anticipate prioritizing a local entrepreneur or business owner for the commercial space. CSNDC owns over 50,000 sf of commercial space; CSNDC also runs Small Business courses and provides technical assistance for would-be entrepreneurs. TLD currently owns and operates more than 40,000 sf of office, industrial and retail space in Dorchester, including a business incubator. Both organizations will leverage their community relationships and experience to identify the appropriate tenant(s) for the new retail space at 270 Talbot Ave.

The Project will focus on economic development in the following ways:

- **Employment opportunities** – The Project will create temporary construction jobs, as well as opportunities for those seeking permanent employment options within the commercial space.
- **Vibrant commercial space** – The creation of 2,500 square feet of ground-floor commercial space will welcome members of the community to create and patronize businesses.
- **Diversity of housing types** – The program includes affordable rental opportunities for households earning up to 80% of Area Median Income, as well as a range of bedroom sizes, from one-bedrooms to three-bedrooms, accommodating families of all sizes.
- **Affordability** – The affordability of housing will actively prevent displacement of existing residents in the neighborhood.

Fairmount CDC Collaborative

This Project supports the goals of the Fairmount CDC Collaborative (CSNDC, Dorchester Bay EDC, and Southwest Boston CDC), a consortium of community development corporations with the aim of revitalizing and redeveloping the station areas along the Fairmount commuter rail line. The Collaborative is a partnership of community organizations, residents, and elected officials that have worked together in a long campaign to bring back local train service to Roxbury, Dorchester, Mattapan, and Hyde Park along the MBTA Fairmount Line corridor. Fairmount Collaborative

fundere and supporters include The Boston Foundation, Hyams Foundation, Barr Foundation, Miller Foundation, Surdna Foundation, Garfield Foundation, Jessie B. Cox Foundation, Merck Foundation, U.S. Dept of Housing and Urban Development, U.S. Environmental Protection Agency, and the U.S. Dept of Transportation.

Fairmount Indigo Planning Initiative

The Project will also contribute to the goals of the corridor-wide Fairmount Indigo Planning Initiative. This planning study was completed in 2015 and was sponsored by the then Boston Redevelopment Authority. The planning initiative envisions the Talbot Ave Station as an anchor in an enhanced residential neighborhood with a vibrant commercial corridor. Following the actions stated to move the Talbot Station area forward in the Corridor Plan Executive Summary, this development will strengthen Talbot Avenue connections to the Station and Codman Square with the new housing supply of 36 units and enhanced commercial activity along Talbot Avenue.

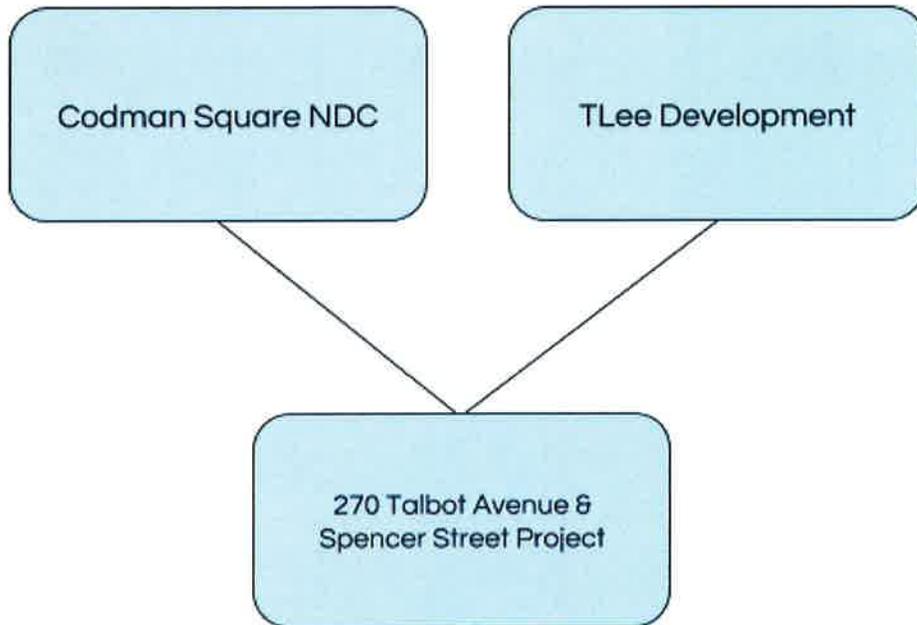
The development team's specific objectives working in tandem with planning initiatives at the Talbot Station area include the following:

- **Create catalyst investments** – The scale of this proposal will incentivize further development in the station area and on Talbot Avenue via the following initiatives:
 - o **Supporting small business** – The ground-floor corner space will provide 2,500 total square feet of space for an existing local business to move or expand, providing opportunities to serve the current community, create jobs, and keep local dollars local.
 - o **Reinforcing active storefronts and improving walkability** – Locating commercial/ retail uses on the ground floor will activate both the sidewalk and the building frontage, with the opportunity for sidewalk café seating areas.
 - o **Advancing streetscape improvements and building community and safety** – Pedestrian-oriented ground floor uses, in place of former inactive industrial uses, will enhance safety.
- **Create transit-oriented housing** – The 36 units of housing proposed for the Project are within a 5-minute walking distance of the Fairmount Indigo commuter rail station, and are consistent with the objectives established by the Fairmount Collaborative.
- **Prevent displacement** – The unique combination of very low-income, low-income and workforce housing units will enable current residents to stay in Codman Square and not be priced out of their neighborhood.

We welcome and encourage refinement of our development plan through an interactive community planning process that invites all residents, businesses, nonprofits, elected officials, and other local interest groups to participate.

Organizational Structure

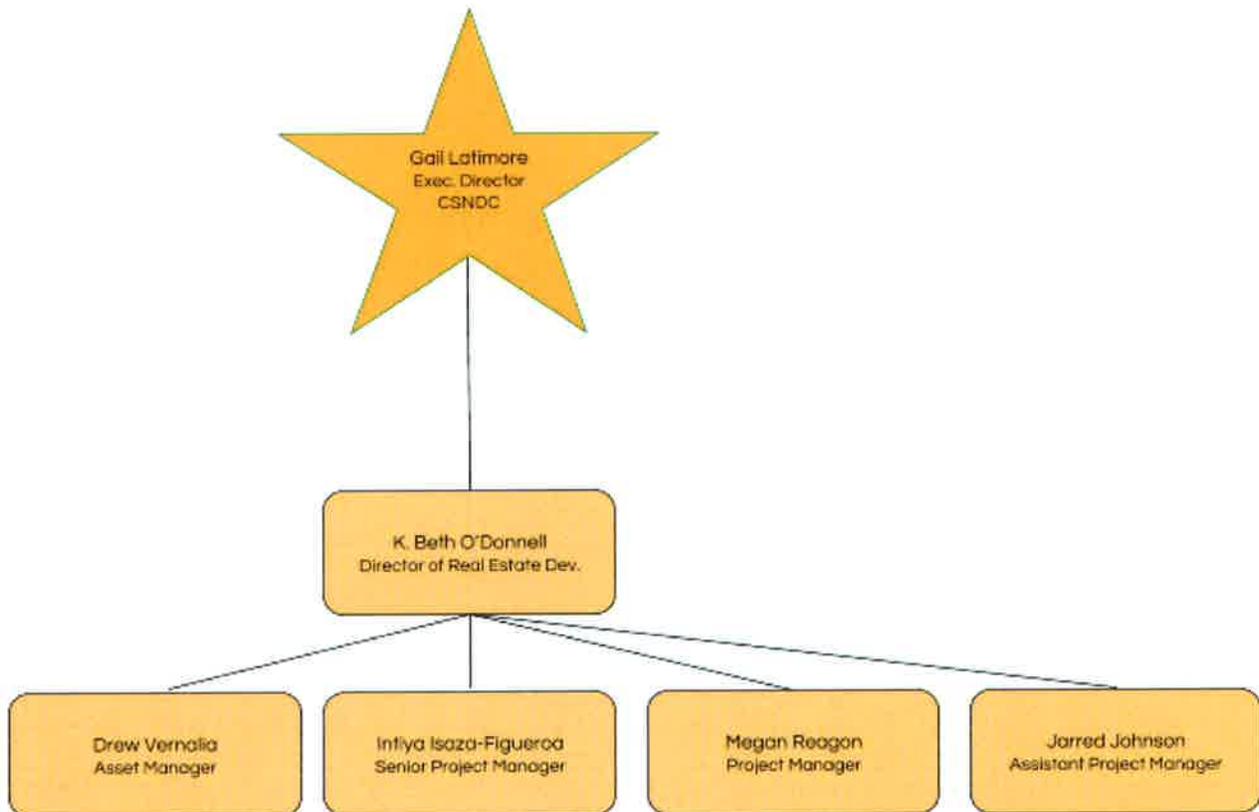
The Project is being jointly proposed by Codman Square Neighborhood Development Corporation and TLee Development. Each organization has its own structure and key personnel.



Codman Square Neighborhood Development Corporation

The project is being proposed and would be managed by CSNDC's Real Estate Department (RE). The RE team is lead by K. Beth O'Donnell, the Director of Real Estate. The team is comprised of Drew Vernalia, Asset Manager; Intiya Isaza-Figueroa, Senior Project Manager; Megan Reagon, Project Manager; and Jarred Johnson, Assistant Project Manager. The RE team is ultimately supervised by Gail Latimore, CSNDC's longstanding Executive Director. CSNDC is recognized as a minority business by the City of Boston and is seeking similar status at the state level.

CSNDC Organizational Structure:



TLee Development

The co-applicant for this Project is Travis Lee, the sole owner of TLee Development. While TLee Development is a one person shop (just Travis Lee), over the past five years TLD has partnered with various developers, investors and community organizations to plan and develop roughly 45,000 square feet of commercial space and about 10 units of affordable housing. TLD currently has a 10 unit, new construction building permitted and another 36 units in planning for the Dorchester neighborhood.

Resumes

Resumes or bios for the following key personnel are included:

- K. Beth O'Donnell (CSNDC)
- Gail Latimore (CSNDC)
- Travis Lee (TLD)

Resumes of all CSNDC RE staff are available upon request.

Lawsuit Narrative

CSNDC has two pending, routine liability cases with respect to Washington Columbia I and New Codman Square Apartments. There is also a discrimination case with respect to Talbot Bernard Homes that is without merit. The case is not expected to result in any finding of discrimination and will not require the owner to pay any damages. TLD has had no lawsuits brought against them in the last five years.

Gail Latimore

Executive Director



GAIL LATIMORE BIO

Gail Latimore is a veteran of nonprofit management and development, with over 25 years' experience working in the public or nonprofit sector. She has served as the Executive Director of Codman Square Neighborhood Development Corp (NDC) since 1998. In this role, she has overall responsibility for the management, growth and health of one of Boston's largest community development corporations. During Gail's tenure, the NDC has grown significantly, expanding its service base to meet the needs of the community. Additionally, during this time, the NDC has developed almost 500 units of affordable housing, both homeownership and rental.

Gail holds a Bachelor's degree in Architecture from Columbia University and has completed coursework towards a master's degree in Urban Affairs at Boston University. A founding Board member of the Dudley Street Neighborhood Initiative, Gail continues to serve on several state, regional and local boards dedicated to responsible community development, including the Massachusetts Association of Community Development Corporations and the Four Corners Action Coalition

email: gail@csndc.com | phone: 617.825.4224 ext 132

K. BETH O'DONNELL, LEED AP
(617) 276-6797 • kerynbeth@gmail.com

EXPERIENCE

- Present **Director of Real Estate**
Codman Square Neighborhood Development Corporation **Boston, MA**
- 2015-2016 **Acquisitions Manager**
Preservation of Affordable Housing, Inc. (POAH) **Boston, MA**
A national non-profit with 9,000 units of affordable family and senior housing.
- Managed financial and feasibility evaluation and reporting for an ambitious portfolio growth strategy.
 - Identified and pursued acquisition opportunities within POAH's geographic span with an emphasis on New England, Washington D.C., Chicago, Detroit and Florida.
 - Collaborated with POAH's acquisitions and development teams to generate creative financing approaches to support competitive acquisition bids.
 - Managed acquisitions prospect presentations to internal and external investment committees.
- 2012-2015 **Assistant Director of Real Estate, Project Director for Quincy Heights & Cottage Brook Apartments**
Dorchester Bay Economic Development Corporation **Boston, MA**
A mission-driven, neighborhood-based affordable housing and economic development organization.
- Managed pre-construction and June 2013 closing for the nation's first HUD Choice Neighborhoods project, a scattered-site, \$56 million affordable housing project in Boston's Grove Hall neighborhood.
 - Responsible for on-time and under-budget construction and delivery of 80 substantial rehab. units and 49 new construction units requiring temporary relocation of 129 low-income families.
 - Managed requisitions and cash flow to meet regulatory requirements and expedite construction.
 - Managed communication of project status with owners, lenders and stakeholders.
 - Led risk mitigation and proactive problem solving efforts.
 - Partnered with community organizations to lead the city in MBE/WBE and minority worker participation in construction with 50/50 union participation.
 - Led re-financing and significant rehabilitation of a 147-unit distressed housing portfolio spread across 51 addresses near Dudley Square.
- 2004 to 2011 **Avison Young** (formerly Essex River Ventures, Inc. acquired by AY in 2011) **Boston, MA**
A full-service commercial real estate company with 800 employees in the United States and Canada.
- Director, Client Services** 2008 to 2011
- Supervised all operations of multi-asset, \$80 million, 600,000 SF legacy real estate portfolio while successfully restructuring \$50 million in first mortgage loans and leasing nearly 300,000 SF.
 - Managed asset stabilization, financial reporting, leasing, and stakeholder communications.
 - Prepared and managed operating and capital expense budgets, receivables and payables.
 - Secured conditional use permits for 30,000 SF of laboratory incubator space in Charlestown.
 - Initiated and implemented portfolio-wide energy efficiency and recycling programs.
- Vice President, Acquisitions & Development** 2005 to 2008
- Implemented all aspects of permitting, design, finance and pre-construction activities for two brownfield projects with 310 residential units and a \$100M combined construction budget.
 - Successfully permitted complex projects with cities, environmental and coastal resource authorities.
 - Directed consultant teams including attorneys, architects, engineers, and environmental professionals.
 - Completed due diligence and on-time close of escrow for multiple commercial assets totaling \$135M.
- Associate** 2004
- Completed due diligence and on-time close of escrow for Lexington Corporate Center and two downtown-Boston office buildings with a total purchase price of \$55 million.
 - Performed feasibility study for the construction of a 40-unit riverfront apartment building in Providence, RI including the construction of an Excel model to analyze financial feasibility, comp analysis, zoning regulation review, parking, entitlement and community stakeholder analyses.
 - Led successful permit process for value-add office development opportunity with traffic issues.

- 2000 to 2003 **Conservation Project Manager**
Peninsula Open Space Trust **Menlo Park, CA**
 An award-winning group with a \$200M fund to purchase 20,000 acres on the San Francisco Peninsula.
- Managed the successful acquisition of five coastal ranches comprising 2,000 acres for \$43 million.
 - Effectively identified and solved multiple acquisition challenges including development feasibility, valuation, water rights, contamination, access easements, lease assignments and tenant relations.
 - Identified and assessed potential acquisition opportunities, prepared offer letters and negotiated with landowners. Supervised teams of consultants including legal and tax advisors, environmental specialists, landscape architects, surveyors and escrow agents to successfully close deals.
- 1999 to 2000 **Director, Operations**
New York City School Construction Authority **New York City**
 A 900-person construction agency with a \$5 billion dollar budget to build new schools and additions.
- Managed entitlement processes including all environmental reviews and community approvals.
 - Achieved approvals for over 22 new school facilities throughout New York City.
 - Supervised all work of three consulting firms with on-demand contracts totaling \$2.25 million.
 - Led due diligence including site inspections, hazardous material assessments, traffic studies, historic and archaeological investigations, wetland surveys, zoning analyses and stakeholder communication.
- 1997 to 1999 **Planning Associate**
Frederick P. Clark Associates, Inc. **Westchester County, NY**
 A consulting firm providing advisory services on planning, zoning and permitting for client communities.
- Reviewed development, subdivision and site plan applications for client communities. Conducted long-range development and fiscal impact analyses and environmental assessments for proposed residential and commercial development projects. Completed a 10,000-acre residential rezoning study.

EDUCATION

University of California at Berkeley, Walter A. Haas School of Business

- Master of Business Administration, May 2005; Vice President Berkeley Real Estate Club
- Awarded scholarships from ULI, California Association of Realtors and Women in Real Estate

University of Massachusetts at Amherst, Master of Regional Planning, August 1997

Brown University, AB in Environmental Studies, Varsity Ice Hockey, December 1993

Professional Credentials:

U.S. Green Building Council LEED Accredited Professional (LEED AP)
 Certified Low Impact Development Master Designer - Rhode Island Coastal Resources Management Council
 Professional Certificate in Real Estate (law, finance & marketing), New York University in May 2000

Professional Memberships:

Urban Land Institute (ULI),
 ULI-Boston Economic Development and Housing Council

Professional Conference Participation:

Speaker:

“Sustainability – Adding Value in Commercial Real Estate Transactions” Toronto 2011
 “The Marriage of Smart Growth and Historic Preservation: Phillipsdale Case Study” Providence 2007

Panel Participant:

ULI Technical Assistance Panel for Merrimack Street Corridor · Haverhill, MA · 2011
 ULI Technical Assistance Panel for the Church Street Lot · Salem, MA · 2008
 ULI Technical Assistance Panel for Bomes Theater · East Providence, RI · 2007

Board Member: Dorchester Bay Economic Development Corporation

Travis M. Lee

60 Ocean Street
Dorchester, MA 02124

Cell Phone: (617) 869-7092
Email: travismlee@gmail.com

PERSONAL OBJECTIVE

To serve in a capacity geared toward the comprehensive development of people by investing in the development of local commerce and housing within urban communities

EDUCATION

Furman University, Greenville, SC

September 1999 - June 2003

B.A., Business Administration major; Spanish minor

Foreign Study: Guadalajara, Mexico

PROFESSIONAL EXPERIENCE

T.Lee Development LLC, Boston, MA

October 2013 – Present

Founder and President

- Real estate development company whose objective is to marry underutilized urban properties with value-adding operators. Projects include:
 - o Purchase and lease-up of 18,000sf commercial building in Fields Corner, Dorchester - 2014
 - o Launch of Fields Corner Business Lab (first co-working space in Dorchester) – opened in 2014
 - o Principal, co-founder and lead project manager of Dorchester Brewing Company - opened in 2016
 - o Permitted, designed, financed and constructed a moderate-income, six family building - in process
 - o 10 unit, 18 unit and 24 unit buildings in planning with site control

Madison Park Development Corporation, Boston, MA

August 2007 – September 2013

Project Manager

- Managed all aspects of real estate development process including site selection, feasibility study, creation of budgets and proforma, financing commitments, project design, construction management and sales/leaseup

Deals

- Parcel 10 – New Construction of 44,000sf supermarket (Phase 1), 60,000sf retail/office building (Phase II) and renovation of historic warehouse into retail and 31 mixed-income apartments
- Dudley Greenville – New construction of 43 work-force housing units, Completed
- Schoolhouse 77 – Preservation/rehab of 128 low-income elderly/family rental units, Completed
- Orchard Homeownership Initiative – New construction of 20 affordable duplex town houses, Completed

Upper Manhattan Empowerment Zone, New York, NY

August 2006 - August 2007

Investment Analyst

- Managed all aspects of Upper Manhattan real estate and small business projects seeking loan and/or equity capital to finance the start-up or expansion of a business

Deals

- Alianza Dominicana – 38,000 SF social service/cultural use development, \$2,750,000 loan
- Columbia Park – 130,000 SF mixed-use hotel, retail and residential development, \$2,800,000 loan
- La Pregunta Arts Café – 1,300 SF community coffee shop, \$130,000 loan
- Mart 125 – Worked with public/private team to create/issue RFP that included art and culture space
- 125th Street Retail Initiative – Established \$750,000 forgivable loan fund to incent unique retailers to relocate or expand to 125th Street commercial corridor

Jamaica Plain Neighborhood Development Corporation, Boston, MA

Sept. 2005 - May 2006

Assistant Project Manager

- Assisted Project Manager in commercial project planning, design, financing, zoning/environmental approval, business and legal issue negotiation, construction, and marketing/lease up

RELEVANT SKILLS & LEADERSHIP

- Fluent Spanish Speaker

B. Development Plan

Development Overview

TLD and NDC are submitting a singular development proposal for the 270 Talbot Ave and Spencer St RFP with the intent of dividing the site into two newly formed and similarly sized tax parcels with a three-phased development plan. The Master Planning Phase will be a coordinated effort between TLD and CSNDC and will include the master planning, demolition, and site preparation necessary for the commencement of Phases 1 and 2 of the development proposal. Phase 1- Talbot Ave, owned and developed by TLD, will include 17 moderate-income units (affordable to families making at or below 80% AMI) in a 4-story building with 2,500 sf of ground floor retail space with approximately .5 off-street parking spaces per residential unit. Phase 2- Spencer St, owned and developed by CSNDC, will include 19 low-income units (affordable to families making at or below 60% AMI) in a 4 story building with approximately .7 off-street parking spaces per residential unit (the Master Planning Phase and Phases 1 and 2, are collectively called "the Project").

Upon receiving designation by DND, the team (CSNDC and TLD) intend to work together to perform all activities associated with the Master Planning Phase of the Project for the benefit of future Phases 1 and 2. We expect Phase 1 will overlap with and follow the Master Planning Phase and that Phase 2 will follow Phase 1. CSNDC and TLD intend to design and execute their respective phases in a synergistic and complimentary manner that leverages the adjoining nature of the development parcels to advance the shared vision of the project (i.e. shared pedestrian and car access, shared outdoor/open space, etc).

The following funding programs are proposed to support the development. These sources are also outlined in the pro forma under Sources and Uses.

Master Planning Phase

- i. It is anticipated that both parties will self-fund and equally split costs like architecture fees, demolition and any necessary grading/ site prep.
- ii. For environmental remediation we will seek \$100,000 in assessment funding from Mass Development.
- iii. Pending the results of that assessment we would seek remediation from Mass Development Brownfields Fund. It is assumed for this proposal that \$1,000,000 in remediation costs will be required and that \$1,050,000 in Mass Development Brownfields funding will be awarded. This funding is subject to Mass Developments Municipal Funding Repayment Policy.

Master Planning and Site Prep - Sources and Uses

Sources

NDC cash	95,000
TLD cash	95,000
Mass Development Brownfields Grant	1,050,000
Total Sources	1,240,000

Uses

Architect fees - master planning	25,000
Civil and survey	25,000
Geo-tech and env. consulting / investigation fees	100,000
Legal	15,000
Demolition	75,000
Environmental remediation	1,000,000
Total Uses	1,240,000

Phase I- 270 Talbot Ave

- i. TLD intends to use traditional construction and permanent debt (from a lender such as Eastern Bank or Boston Private Bank), equity from TLee Development and its partners and patient debt from MassHousing’s Workforce Housing Program to finance Phase 1 of the Project which will include 17 deed restricted residential rental units affordable to individuals and families making at or below 80% AMI. In the event that MassHousing does not renew its Workforce Housing loan fund, TLD intends to use DND’s NHT, HOME or IDP funding programs to fill the \$100,000 per unit gap (at which time TLD would increase the affordability level of the 17 units to 70% AMI).

Permanent Sources

Owner Equity	\$500,000	10%
Senior Bank Debt	\$2,691,320	55%
MassHousing Workforce Housing Loan	\$1,700,00	35%
Total	\$4,891,320	100%

Uses			\$/SF	\$/unit
Acquisition		0	0.00	\$0
Demo		\$37,500	\$2.15	
Construction		\$3,758,469	\$210.00	
Contingency	5%	\$187,923	\$10.75	
Total Hard Costs		\$3,983,892	\$227.90	\$234,347
A&E		\$185,000	\$10.58	
Survey, civil and permits		\$80,000	\$4.58	
Insurance		\$15,000	\$0.86	
Finance fees		\$75,169	\$4.30	
Legal fees		\$30,000	\$1.72	
Carrying costs		\$10,000	\$0.57	
Construction loan interest		\$61,667	\$3.53	
Utility backcharges		\$20,000	\$1.14	
Marketing/rentup		\$15,000	\$0.86	
Clerk of the Works		\$25,000	\$1.43	
DevFee and OH		\$100,000	\$5.72	
Bank inspection fees		\$15,000	\$0.86	
Lender reserves		\$150,000	\$8.58	
Contractor bond fees		\$96,000	\$5.49	
Contingency	7.5%	\$29,592	\$1.69	
Total Soft Costs		\$907,428	\$51.91	\$53,378
Total		\$4,891,320.83	\$279.80	287,725

Phase II- Spencer St

- i. CSNDC intends to access 9% Federal Low Income Housing Tax Credits issued by the Department of Housing and Community Development (DHCD) in the amount of \$414,675 in annual credit. With this, CSNDC projects a yield of approximately \$4,146,750 in equity available to support development of Phase II, representing \$.97 raise per dollar of federal 9% tax credit allocation awarded. The project site is in a QCT, therefore qualifying for a 30% basis boost.
- ii. Private sources for permanent senior debt, in the amount of \$1,350,000

- iii. Affordable Housing Trust Fund (AHTF): Administered by MassHousing in the amount of \$550,000. AHTF funds are used as a gap financing source to support private affordable housing initiative throughout the Commonwealth for households whose incomes are not more than 110% AMI.
- iv. HOME Funds: Administered by DHCD in the amount of \$500,000.
- v. NHT Funds: Administered by DND in the amount of \$500,000.
- vi. Department of Housing and Community Development (DCHD): sources such as HSF, CATNHP in the amount of \$550,000.
- vii. Mass Dev Funding: administered by DHCD in the amount of \$550,000.

Note: The funding sources and amounts are only for CSNDC's building at Spencer Street and not for the 5-21 New England Avenue building which would be pursued concurrently.

Permanent Sources

Tax Credit Equity	\$4,146,750	51%
Public Subordinate Debt	\$2,700,00	33%
Permanent Senior Debt	\$1,350,00	16%
Total	\$8,196,750	100%

Uses			\$/unit
Acquisition (both parcels)		\$200	
Environmental/ Demo		\$500,00	
Construction		\$4,762,672	
Contingency	5%	\$333,387	
Total Hard Costs		\$5,596,059	\$294,529
A&E		\$335,764	
Survey and permits		\$73,461	
Environmental Engineer		\$250,000	
Clerk of the Works		\$70,000	
Other/ Engineering Costs		\$50,000	
Insurance		\$50,000	
Accounting & Cost Cert		\$34,000	
Title and Recording		\$54,000	
Finance fees		\$105,961	
Legal fees		\$95,000	
Real Estate Taxes		\$18,050	
Construction loan interest		\$102,484	
Utility backcharges		\$20,000	
Marketing/rentup		\$39,000	
Development Consultant		\$31,500	
Overhead		\$495,250	
Developer Fee		\$495,250	
Lender fees & legal fees		\$80,250	
Predev Interest		\$30,000	
Security		\$3,200	
Capitalized reserves		\$137,494	
Inspecting engineer		\$12,000	
Contingency	2.6%	\$37,829	
Total Soft Costs & Reserves		\$2,600,491	\$136,868
Total		\$8,196,750	\$431,4084

Development Schedule

Master Planning Phase

The tentative overall schedule for the Project is as follows:

Task	Date	Duration
1. Predevelopment: RFP Submission		
RFP Submission	3/29/2018	
Public Meetings Start	4/26/2018	30 days
Tentative Designation Date	9/28/2018	180 days
2. Predevelopment: Permitting and Design		
Ask DND to begin HUD Environmental Review	9/28/2018	0 days
Team assembly (arch, surveyor, civil and env engineers)	11/1/2018	45 days
Follow-up to previous community process	1/15/2019	2 months
Funding application submitted to MassDevelopment for env. remediation	2/1/2019	3 months after designation
Conceptual design of master site plan	2/15/2019	1 month from community process
Pre-filing meetings with BPDA design staff	3/1/2019	45 days
Submit LOI to BPDA for Small Project Review	4/1/2019	2 weeks from pre-filing mtgs
Pre-scoping meeting with BPDA	4/1/2019	1 month from pre-filing meeting
Schematic design of master site plan	4/1/2019	3 months
File Project Notification Form with BPDA	4/15/2019	2 months from LOI submission to BPDA
Submit building permit applications for Phase 1 and Phase 2- Spencer St at ISD for rejection	5/1/2019	1 month from completion of schematic design
Funding allocation received from MassDevelopment	5/1/2019	3 months from application
File appeal with Zoning Board of Appeals	6/15/2019	45 days from bldg permit app submission to ISD
BPDA board vote	7/15/2019	4 months from submission of PNF to BPDA
ZBA hearing	9/15/2019	3 months from appeal submission
ZBA final decision	11/1/2019	45 days from ZBA hearing
Building Permits Secured for Phases 1 and 2	12/15/2019	45 days from ZBA hearing
3. Development: Construction		
Demolition of existing structures	6/1/2019	45 days
Remediation of soil contamination	10/1/2019	3 months

Phase 1- 270 Talbot Ave Timeline

Based on TLD's development pipeline, and a reasonable timeframe to design, permit and finance Phase 1 of the Project, TLD anticipates a Phase 1 construction start date of 12/15/2019.

The tentative Phase 1 - Talbot Ave schedule is as follows:

Task	Date	Duration
1. Financing		
Secure Mass Housing WFH loan commitment	8/1/2019	10 months from dev. designation
Secure Eastern Bank loan commitment	8/1/2019	10 months from dev. designation
Construction loan closing	12/15/2019	14.5 months from dev designation
2. Design and Permitting		
Schematic Design	4/1/2019	6 months from designation
DD drawing set	7/15/2019	3.5 months from schematic design
CD drawings (95%)	9/15/2019	2 months from Design Development plans
Secure building permit	12/1/2019	1 month from ZBA final decision
3. Development: Construction		
Phase 1 construction start	12/15/2019	15 months from designation
Phase 1 construction completion	10/15/2020	10 months from Phase 1 construction start
Phase 1 occupancy	1/15/2021	3 months from construction completion

Phase 2- Spencer St Timeline

Based on CSNDC's development pipeline, CSNDC expects to obtain City funding during the Fall 2018 round. Subsequently, we will seek funding with the Commonwealth in the winter of 2020. CSNDC projects an award from DHCD in the summer of 2020. Construction loan closing would take place in spring 2021, with construction starting immediately thereafter.

The tentative schedule is as follows:

Task	Date	Duration
1. Predevelopment: Funding		
Initial DND Submission	9/28/2018	0 days from designation
DND Funding Commitment	12/15/2018	90 days
DHCD Pre-Application	11/15/2019	2 weeks from completion of zoning
DHCD OneStop Application	2/14/2020	90 days
DHCD Funding Commitment	8/28/2020	180 days
2. Predevelopment: Design and Financing		
Final Schematic Design	9/28/2020	30 days
DD drawing set	11/28/2020	30 days
CD drawings (95%)	1/28/2021	60 days
Loan Closing	3/10/2021	6.5 months from DHCD award
3. Development: Construction		
Phase 2- Spencer St construction start	3/15/2021	3.5 years from designation
Phase 2- Spencer St construction completion	3/15/2022	12 months from Phase 2- Spencer St construction start
Phase 2- Spencer St occupancy	3/16/2022	Immediately upon construction completion

Design Drawings

Printed renderings and plans are included in the binder, please see the full drawings on the included flash drive.

C. Operational Plan

Operating Budget Summaries

270 Talbot Ave - Phase 1 (TLD)

Est. Annual Operating Expenses:

Management fee	\$16,000
Maintenance/Operations	\$18,250
Security	\$2,250
Utilities	\$3,000
Replacement Reserve	\$8,500
Operating Reserve	\$8,500
Real Estate Taxes	\$55,000
Insurance	\$11,000
Total Annual Operating Expenses:	\$122,500
Per unit per year:	\$7,206

Spencer St - Phase 2(CSNDC)

Est. Annual Operating Expenses:

Management fee	\$5,130
Administration	\$40,819
Maintenance/Operations	\$44,327
Resident Services	\$20,000
Security	\$551
Utilities	\$40,850
Replacement Reserve	\$9,500
Operating Reserve	\$0
Real Estate Taxes	\$18,050
Insurance	\$11,400
Total Annual Operating Expenses:	\$190,627
Per unit per year:	\$10,033



Detailed Budget

The following is included for Phase I- 270 Talbot Ave and Phase 2- Spencer St:

- Year 1 Operating Budget



Operating Income

Utility Allowances (Source: BH/HUD schedule 10/02/17)

	Studio	1BR	2BR	3BR	4BR
Lights & Appliances	\$43	\$55	\$73	\$91	\$112

Sec. 8 30% AMI	# of units	Contract Rent	Utility Allowance	Gross Rent	Rental Income
Studio					
1 Bedroom	2	\$1,936	\$55	\$1,991	\$3,872
2 Bedrooms	1	\$2,202	\$73	\$2,275	\$2,202
3 Bedrooms	1	\$2,469	\$91	\$2,560	\$2,469
4 Bedrooms					
Totals	<u>4</u>				<u>\$8,543</u>

MRVP 30% AMI	# of units	Contract Rent	Utility Allowance	Gross Rent	Rental Income
Studio					
1 Bedroom	1	\$1,086	\$0	\$1,086	\$1,086
2 Bedrooms*	1	\$1,241	\$0	\$1,241	\$1,241
3 Bedrooms	1	\$1,396	\$0	\$1,396	\$1,396
4 Bedrooms					
Totals	<u>3</u>				<u>3,723</u>

LIHTC 60% AMI	# of units	Contract Rent	Utility Allowance	Gross Rent	Rental Income
Studio					
1 Bedroom	4	\$977	\$55	\$1,032	\$3,907
2 Bedrooms*	6	\$1,106	\$73	\$1,179	\$6,636
3 Bedrooms	2	\$1,235	\$91	\$1,326	\$2,470
4 Bedrooms					
Totals - LIHTC 60% AMI	<u>12</u>				<u>13,013</u>

Total # of 1BR units	7
Total # of 2BR units	8
Total # of 3BR units	4
Total # of Units	19

Total Residential Contract Rent - Sec. 8 (Set-Aside)	\$8,543
Vacancy @ 5% for MRVP (assisted)	(\$427)
Total Residential Contract Rent - MRVP (Set-Aside)	\$3,723

Total Residential Contract Rent - LIHTC 60% AMI	\$13,013
Vacancy @ 5% for LIHTC units (non assisted)	(\$651)
Net Residential Rent Income (monthly)	\$24,201

Total Operating Income	\$290,413
-------------------------------	------------------

Operating Expenses

		Total	Per Unit
Management Fee @	1.8%	\$5,130	\$270.00
Payroll, Administrative		\$16,625	\$875.00
Payroll Taxes & Benefits, Administrative		\$4,988	\$262.51
Legal		\$2,090	\$110.00
Audit		\$4,636	\$244.00
Marketing		\$2,850	\$150.00
Telephone		\$1,917	\$100.92
Office Supplies & Services		\$2,159	\$113.64
Accounting		\$665	\$35.00
Investor Servicing		\$2,159	\$113.64
DHCD Monitoring Fee		\$570	\$30.00
Asset Management Fee		\$2,159	\$113.64
Subtotal: Administrative		\$45,949	\$2,418
Payroll, Maintenance		\$9,378	\$494
Payroll Taxes & Benefits, Maintenance		\$3,772	\$199
Janitorial Materials		\$16,167	\$851
Landscaping		\$2,280	\$120
Decorating (interior)		\$3,040	\$160
Repairs		\$2,945	\$155
Elevator Maintenance		\$0	\$0
Trash & Recycling		\$1,995	\$105
Snow Removal		\$2,090	\$110
Extermination		\$1,900	\$100
Fire Protection / Miscellaneous		\$760	\$40
Subtotal: Maintenance		\$44,327	\$2,333
Resident Services		\$20,000	\$1,053
Security		\$551	\$29
Replacement Reserve		\$9,500	\$500
Electricity		\$7,600	\$400
Gas		\$17,100	\$900
Water & Sewer		\$16,150	\$850
Subtotal: Utilities		\$70,901	\$3,732
Real Estate Taxes		\$18,050	\$950
Insurance		\$11,400	\$600
Subtotal: Taxes & Insurance		\$29,450	\$1,550
Total Operating Expenses		\$190,627	\$10,033
Net Operating Income		\$99,786	\$5,252
Desired Debt Service Coverage Ratio (Year One):		1.15	
Available for Debt Service		\$86,771	
Permanent Loan Interest Rate:and amortization		4.0%	30 years
Maximum Permanent Loan Amount		\$1,519,644	

Application for MassHousing Workforce Housing Funds Operating Pro forma

Applicant may use this form or attach Operating Pro Forma

Rent Schedule:

	<i>Rent</i>	<i>No. of Units</i>	<i>Annualized Rental Income</i>
Market Rate (unrestricted occupancy):			
0 bedroom		0	\$0
1 bedroom		0	\$0
2 bedroom		0	\$0
3 bedroom		0	\$0
4 bedroom		0	\$0
		Total:	\$0

Workforce Housing

80% AMI

0 bedroom		0	\$0
1 bedroom	\$1,420	3	\$51,120
2 bedroom	\$1,620	9	\$174,960
3 bedroom	\$1,820	2	\$43,680
4 bedroom		0	\$0
		Total:	\$269,760

Other

70% AMI

0 bedroom		0	\$0
1 bedroom	\$1,235	1	\$14,820
2 bedroom	\$1,420	1	\$17,040
3 bedroom	\$1,600	1	\$19,200
4 bedroom		0	\$0
		Total:	\$51,060

Gross Potential Residential Income: \$320,820

Commercial Income:

Square Feet: @ /sq. ft., annualized=

Parking Income:

Spaces for rent: @ /space, annualized=

Gross Potential Rental Income: \$345,820

Vacancies:

Residential:

Market	<input type="text"/>	Less Vacancy	<input type="text" value="\$0"/>
Workforce Housing	5.0%	Less Vacancy	<input type="text" value="-\$13,488"/>
Other	5.0%	Less Vacancy	<input type="text" value="-\$2,553"/>

Commercial and parking:

Less vacancy

Effective Rental Income: \$323,529

**Application for MassHousing Workforce Housing Funds
Operating Pro forma**

Other Income:

Total Effective Income: \$323,529

Operating Expenses:

Management fee	5%
Administration	
Maintenance/Operations	
Resident Services	
Security	
Utilities	
Replacement Reserve	
Operating Reserve	
Real Estate Taxes	
Insurance	

\$16,176
\$18,250
\$2,500
\$3,000
\$5,000
\$65,000
\$12,500

Total Operating Expenses: \$122,426 *per unit*
\$7,202

Net Operating Income: \$201,103

Debt Service: \$168,265

Debt Service Coverage: 1.1952

D. Housing Affordability Plan

Housing Program

Both CSNDC and TLD have a great deal of experience in building community consensus toward project designs that balance the site context with high-quality design and financial feasibility. As such, we are confident that we will develop a plan that will receive community acceptance very early on in the development process.

The program for 270 Talbot will include:

- 36 total housing units
 - o Phase 1- 17 workforce housing rental units (all for households earning no more than 80% AMI) at 270 Talbot Ave.
 - o Phase 2- 19 affordable housing rental units (all for households earning no more than 60% AMI) at Spencer St
- Approximately 2,500 square feet of ground-floor commercial space
- Minimal parking spaces, at or below 0.7 spaces per residential unit

The buildings will be designed to reflect the local character of the Talbot-Norfolk Triangle neighborhood, appropriate e-TOD density in proximity to the Talbot Ave commuter rail station, and to provide attractive and contemporary new buildings in this neighborhood. The site plan for 270 Talbot Ave and Spencer St will have building frontage oriented on Talbot Avenue and Spencer Street, along with parking cantilevered under the rear of both buildings. The commercial space will accommodate a smaller neighborhood scale retailer, perfect for a local entrepreneur. The residential units – a range of 1, 2, and 3-bedrooms – will incorporate Universal Design techniques with flexibility and adaptability for all residents.

Within the buildings, the design accommodates open modern unit floor plans with ventilation, materials and finishes that promote a healthy indoor environment, pursuant to LEED for Homes standards. Rooms will be furnished with adequate closet storage. Systems and fixtures will be selected to achieve the maximum feasible efficiencies and durability.

The average sizes of units in the proposed development are as follows:

One (1) Bedrooms:	600 square feet
Two (2) Bedrooms:	750 square feet
Three (3) Bedrooms:	1,000 square feet

The development will include parking for 22 vehicles – 9 at Phase I and 13 at Phase 2.

	Residential (units)				Commercial (SF)	Parking (spaces)
	1-BR	2-BR	3-BR	Total		
Phase I	4	10	3	17	2,500	
Phase II	7	8	4	19	N/A	
TOTALS	11	18	7	36	2,500	

The Project will accommodate residents with a mix of incomes ranging from homeless set-aside units for households at 30% AMI or lower, affordable housing units for households at 60% AMI or lower, and workforce housing units for households at 80% AMI or lower. The proposed affordability mix is broken down by phase and unit size below:

Phase I- 270 Talbot Ave

Size	70% AMI	80% AMI	# Units
1-BR	1	3	4
2-BR	1	9	10
3-BR	1	2	3
Total	3	14	17

Phase 2- Spencer St

Size	30% AMI	30% AMI	30 % AMI
	Sec 8	MRVP	Total
1-BR	2	1	3
2-BR	1	1	2
3-BR	1	1	2
Total	4	3	7

Size	Sec. 8/MRVP	60% AMI	# Units
1-BR	1	4	5
2-BR	3	6	9
3-BR	3	2	5
Total	7	12	19

The proposed affordability mix includes DND Homeless set-aside units and HUD HOME units.

Income Tiers/Eligibility

30% Income Eligibility Requirements

One-person household	\$21,700	Five-person household	\$33,500
Two-person household	\$24,800	Six-person household	\$36,000
Three-person household	\$27,900	Seven-person household	\$38,450
Four-person household	\$31,000	Eight-person household	\$41,320

50% Income Eligibility Requirements

One-person household	\$36,200	Five-person household	\$55,850
Two-person household	\$41,400	Six-person household	\$60,000
Three-person household	\$46,550	Seven-person household	\$64,150
Four-person household	\$51,700	Eight-person household	\$68,250

60% Income Eligibility Requirements

One-person household	\$43,440	Five-person household	\$67,020
Two-person household	\$49,680	Six-person household	\$72,000
Three-person household	\$55,860	Seven-person household	\$76,980
Four-person household	\$62,040	Eight-person household	\$81,900

These income limits are based on HUD Income Limits effective for calendar year 2017.

Our plan for 270 Talbot and Spencer St advances many of the goals stated in the City of Boston’s report: Housing a Changing City: Boston 2030.

- **Goal: Increasing housing for low-income, non-elderly households:** The project fosters the City’s goal of producing both low-income, non-elderly housing, and extremely low-income units by bringing 19 units online, 7 of which will be available to voucher holders, many of whom are households at 30% AMI or lower. The project will create **accessible units for non-elderly persons with disabilities**. The project will include fully accessible units and will also incorporate Universal Design features into each unit.
- **Goal: Meet the needs of Boston’s current and future middle class:** The project will bring 17 units of workforce housing online in a relatively short amount of time without depending on oversubscribed city and state funding sources.
- **Goal: Build “Strong Healthy Neighborhoods”:** The project furthers this goal in a variety of ways. The project is part of CSNDC’s **anti-gentrification** and

anti-displacement strategy. The project will add badly needed affordable and workforce housing units to a neighborhood facing gentrification pressures. The Project redevelops a **problem property**. The buildings will activate a long dormant site and signal that the city is committed to transforming blighted properties. The project features housing for extremely low-income, low-income and middle class households making this a truly mixed-income project. The project will add **diverse housing choices** to accommodate a wide range of people. Finally, CSNDC has an evolving relationship with the Codman Square Health Center and Boston Medical Center. We intend to integrate our findings from a pilot program at our Waldeck Street property to create **healthy homes**.

- **Goal: Create green and sustainable housing:** Both CSNDC and TLD are committed to creating sustainable housing. CSNDC is a leader in LEED building within affordable housing. Most of the housing units CSNDC has built since 2011 have been LEED Silver certifiable or better, with Whittier Place and 472 Washington achieving LEED Gold this year. TLD and their partners at Placetaylor have led the way in bringing Passive Housing design standards to middle income housing in the City of Boston. On average, projects designed by Placetaylor use 85% less energy than similar buildings in the city of Boston.

E. Diversity and Inclusion Plan

Both CSNDC and TLD envision the Project as an opportunity to further equity, diversity and inclusion during development, construction and operations.

Development

The team is committed to securing M/WBE firms for pre-development work. During the Master Planning Phase there will be numerous opportunities for M/WBE firms. The site will require environmental remediation, demolition and site prep. We will prioritize employing M/WBE firms to bid for these services.

Construction

CSNDC has developed its own Responsible Employer Standards for construction projects and also follows the City's Residents Jobs Policy. CSNDC recently had two projects participate in a pilot program through MACDC and the Massachusetts Minority Contractor Association (MMCA) to track M/WBE participation during construction. We anticipate that Phase 2- Spencer St (along with the New England Avenue site) will be a part of the second pilot. TLD has a strong track record of hiring minority and woman-owned subcontractors from Roxbury and Dorchester. TLD is experienced in and enthusiastic about meeting the City of Boston's Residents Jobs Policy.

There is no general contractor selected at this time. The development team plans to invite at least three contractors to bid on each phase of the project, we will actively seek and encourage M/WBE firms to bid. CSNDC and TLD will require all contractors to implement a hiring outreach plan. We will require that the GC have strong participation from minority subcontractors.

Operations

CSNDC and TLD are both excited about the opportunity to seek a minority or woman owned business for the 2,500 sf commercial space included in Phase I. As mentioned in the introduction, both organizations have deep connections to the Dorchester entrepreneurial community, and intend to use those connections for outreach. Both proposed property managers, Bridgestone Properties and Winn Management, will seek high levels of M/WBE utilization during operations and maintenance.

CSNDC and TLD will work with the Office of Fair Housing and Equity to ensure that the marketing and lease-up processes are are fair and equitable.

Certifications

CSNDC is certified as a MWBE contractor with the City of Boston. CSNDC is undergoing certification as a Minority Woman Controlled Non-Profit through the Mass SDO. The following is included

- City of Boston certification as a MWBE
- CSNDC Responsible Employer Policy



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Company	Contact Info
<p>Codman Square Neighborhood Development Co</p> <p>Category: Real Estate (Development, management, Sales and Appraisals) Residential Services Real Estate (Development, management, Sales and Appraisals)</p> <p>Status: MBE SLBE</p> <p>Scope of Services: Real estate: housing development and re-hab loan services; community development; organizing and outreach; and economic development Development.</p>	<p>587 Washington Street Dorchester, MA, 02124</p> <p>Phone: (617) 825-4224</p> <p>Fax: (617) 825-0893</p>

Company	Contact Info
<p>Slayton & Weaver Painting</p> <p>Category: Painting & Papering Contractors Plastering, Drywall Contractors Painting & Papering Contractors</p> <p>Status: MBE SLBE</p> <p>Scope of Services: Painting; plastering; sheet rock; property management</p>	<p>78 Codman Hill Avenue Dorchester, MA, 02124-</p> <p>Phone: 6174596080</p>

Codman Square Neighborhood Development Corporation

Responsible Employer Policy

CSNDC requires that all Contractors and all Sub-Contractors on the aforementioned project comply with the following provisions:

1. Comply fully with the applicable governmental labor force requirements regarding location, race, gender, and income level, for the particular project. These are: Boston Resident Jobs Policy (location, race, gender); and possibly HUD Section 3 Requirements (location, income level).
2. Make a good faith effort to hire workers that reside within the CSNDC service area. Make a good faith effort to contract with local companies, and to hire local workers, from referral lists provided by third party community organizations and agencies to CSNDC. Third party organizations providing referrals include (but not limited to): Roxbury Builders Guild, Boston Workers Alliance, and Boston STRIVE.
3. Properly classify employees as employees rather than independent contractors and treat them accordingly for purposes of workers' compensation insurance coverage, unemployment taxes, social security taxes and income tax withholding.
4. Comply fully with all job classification restrictions for licensed trades, as defined and enforced by the State Office of Public Safety.
5. Provide medical insurance, workers compensation insurance, and disability insurance for all employees. Employees share of medical insurance premiums to be consistent with current standards.

This policy will be made contractual to the extent allowed by law.

F. Developer Qualifications, Experience and Reference

Codman Square Neighborhood Development Corporation Profile

Codman Square Neighborhood Development Corporation (CSNDC) is a neighborhood-based community development corporation founded in 1981. It has an experienced, capable, and multi-racial staff and board that has taken a leadership role in the Codman Square area of Dorchester, MA. Since its founding, the NDC has worked in partnership with residents and neighborhood institutions to rebuild a community that had been devastated by recurring cycles of speculation, arson, divestment, and abandonment and now displacement and gentrification.

The impetus for CSNDC's founding was a rash of arson fires in the 1970s that ravaged the community's commercial district and housing stock -- opening floodgates of increased crime and deterioration that would further erode the neighborhood over time. During this time arson fires led to the demolition of more than 20 commercial and 100 residential buildings. Disinvestment, tax delinquency, and housing abandonment were widespread. Living conditions for the large number of poor residents were rapidly falling below basic levels of safety and decency.

In August of 1993, the agency changed its name from the Codman Square Housing Development Corporation to the Codman Square Neighborhood Development Corporation (CSNDC) to better reflect its mission. This change was made in recognition that community development goes beyond "bricks and mortar" and includes development of human and economic capital. Along with that change the NDC expanded its service area from proximity to Codman Square to include the "four corners" area and westward to Columbia Road where there had been no community development organization presence.

CSNDC has been instrumental in the rebuilding of the neighborhood's physical infrastructure, supporting local community groups and redeveloping a blighted landmark commercial building in the central business district (the Lithgow Building / 22,000 sf). At the same time, the NDC has built a portfolio of 961 units of rental housing and simultaneously helped 550 families retain their homes from foreclosure.

CSNDC has been a leader in transit oriented development- first as a part of the coalition that won a commitment from the state to build new stations and increase service on the

Fairmount Indigo Line and most recently by the development of the Levado building and the planned TOD village known as Talbot Commons. CSNDC has also been a leader in sustainability working with the Talbot-Norfolk Triangle Neighbors United to create the Eco-Innovation district. This initiative has been recognized nationwide and will be one of the 1st LEED-ND designated neighborhoods in the country. All CSNDC developments in the EID have been LEED Silver certifiable or better, with Whittier Place achieving LEED Gold later this year.

CSNDC Real Estate Work Mission

The primary mission is to enhance the quality of life for all residents of the greater Codman Square area and to foster the stabilization of the community through the rehabilitation and construction of housing, open space, commercial real estate development, and the provision of supportive residents' services for renters and homeowners.

Vision

1. We have strong community leaders. Strong community leaders strive to realize full potential, see the broad picture, are vested in outcomes, and have a strong sense of enlightened self-interest that is tied up in the well-being of the community as a whole, not just themselves.
2. The community shapes what development needs are and what projects we do.
3. We create neighborhood revitalization, one house at a time, and through volume to accomplish greater transformation.
4. Success in a changing environment leads to more resident involvement and participation in their neighborhood and in social change at the local, state, and national levels.
5. Residents are empowered to accomplish physical change as development shares information openly. We build resident capacity to make good decisions and responses and provide valuable input to CSNDC.
6. Development projects strive to address the holistic needs of residents.
7. Development projects and programs identify and draw on skills in the neighborhood. For example, through local and minority vendor involvement and building the economic capacity of the neighborhood by developing local and minority vendor capacity. We reinvest in the community and leverage resources through our development projects and programs.
8. Every person has an affordable, quality place to call home.

K. Beth O'Donnell is CSNDC's Director of Real Estate Development, and plays a

supervisory role in all phases of development projects. CSNDC has extensive experience in all phases of real estate development including feasibility and acquisition, public relations, permitting, financing, construction management, and marketing. Resumes of our development staff are available upon request.

Experience

Relevant work includes Whittier-Lyndhurst-Washington (a mixed-use project with 44 units) in the Talbot Norfolk Triangle, Levado (a mixed-use project with 24 units) and Talbot Bernard Homes (a senior housing project with 24 units) both on Talbot Ave. , three of CSNDC's most recent successful affordable rental development projects.

PROJECT NAME & COMMUNITY/	HOUSING TYPE	DEV. TYPE	# OF UNITS	MONTH / YEAR COMPLETED	CONSTRUCTION LENDER	PERMANENT LENDER & OTHER SOURCES OF FUNDING
Whittier Lyndhurst Washington	R	NC & S	44	February 2017	Bank of America	MHP, AHT, DHCD, DND, CEDAC, LIHTC
New Codman Square Apartments	R	S	80	December 2013	Boston Private Bank & Trust Co.	MassHousing, AHT, DHCD, DND, LIHTC
157 Washington (A&B Building)	R & L	NC & AD	24	March 2011	Bank of America	MHP, AHT, DHCD, DND, LIHTC
Olmstead Green II	R	NC	50	January 2011	Bank of America	MHP, AHT, DHCD, DND, CEDAC, LIHTC
The Levedo Building	R	NC	24	January 2010	Bank of America	MHP, DHCD, DND, CEDAC, LIHTC

KEY:

Hsg. Type – R=Rental, L=Limited Equity Coop. S=SRO, AL=Assisted Living, SN=Special Needs (other than assisted living), E=Elderly Housing (conventional)

Dev. Type – NC=New construction, S=substantial Rehab, M=Moderate Rehab, MI=Minimal Rehab, AD=Adaptive Re-use, AC=Acquisition FD=Financially Distressed, PR=Preservation (Note: A project may be more than one development type.)

References

Codman Square Neighborhood Development Corporation

PROJECT	CONTACT NAME	ORGANIZATION & ADDRESS	PHONE #	EMAIL
Olmstead Green II	Elizabeth Gruber	Bank of America 225 Franklin Street Boston, MA 02110	(617) 346-1060	elizabeth.gruber@baml.com
Whittier-Lyndhurst-Washington	Tom Maxwell	RBC 155 Federal Street Boston, MA 02110	(617) 725-2000	thomas.maxwell@rbccm.com.
157 Washington	Amanda Roe	MHP 160 Federal Street Boston, MA 02110	(857) 317-8559	aroe@mhp.net

TLee Development Profile

The project is being proposed by Travis Lee, the sole owner of TLee Development. Over the past 15 years Travis has served as project manager at various real estate and community development organizations on the East Coast (Madison Park Development Corp., Jamaica Plain Neighborhood Development Corp., Upper Manhattan Empowerment Zone, ACCION USA) with the goal of creating economic development opportunities and affordable housing for underserved neighborhoods. He has facilitated over \$70 million of commercial and housing developments in New York City and Boston and has strong lending relationships with local and regional banks. As an entrepreneur Travis continues to look for creative ways to improve the quality of life for people living in his neighborhood – Dorchester.

While TLee Development is a one person shop (just Travis Lee), over the past five years TLD has partnered with various developers, investors and community organizations to plan and develop roughly 45,000 square feet of commercial space and about 10 units of affordable housing. TLD’s current pipeline includes a 10 unit, workforce housing project near the Ashmont train station in Dorchester, a 12 unit affordable homeownership project in the West of Washington area of Dorchester and a 24 unit mixed-use,

mixed-income project in the Talbot Norfolk Triangle area of Dorchester. Mr. Lee has had the privilege of developing meaningful and trusting relationships with residents from the WOW (West of Washington) civic group and the TNT (Talbot Norfolk Triangle) civic group.

TLD Experience

Project Name	Type	Size	Year Complete	Funders
Fields Corner Business Lab	Small business	5,000sf	2014	Owners equity
Lenane Building	Retail + Office	18,000sf	2013	Eastern Bank
Dorchester Brewing Company	Small Business	25,000sf	2016	Wells Fargo, Northeast Bank, DND, BLDC
246 Norwell Street	MF Residential	5,800sf / 6 units	under construction	Owner equity, MassHousing and Eastern Bank
1847 Dot Ave	MF Residential	8,000sf / 10 units	in permitting	TBD

References

Lender	Project	Contact Name	Contact Phone	Contact Email Address
Eastern Bank	246 Norwell	Johanna Stone	617-897-1085	j.stone@easternbank.com
Wells Fargo	Dorchester Brewing	Beth Chea	603-969-8144	Beth.Chea@wellsfargo.com
DND	Dorchester Brewing	Steve Rumpler	617-635-0462	Steve.rumpler@boston.gov
Granite State CDC	Dorchester Brewing	Matt Collins	508-294-6822	MCollins@granitestatedev.com
Northeast Bank	Dorchester Brewing	Eric Bankcroft	508-202-3125	ebancroft@northeastbank.com
MassHousing	246 Norwell	Deborah Morse	617-854-1133	DMorse@masshousing.com
Eastern Bank	Lenane Building	Abby Nguyen	617-872-7744	a.nguyenburke@easternbank.com

G. Permits/ Licenses

- N/A

H. Subcontractors or Partnerships

Partnerships

Placetailor
100A Warren Street
Boston, MA 02119

Miriam Gee, AIA LEED AP BC+D
617-639-0633
anderson@placetailor.com

Green Community Engagement
Eco Innovation District Department
CSNDC
587 Washington Street
Dorchester, MA 02124

Dave Queeley, Director
617-825-4224 x131
david@csndc.com

Community & Resident Engagement
Community Organizing Resident Resources Department
CSNDC
587 Washington Street
Dorchester, MA 02124

Jason Boyd, Director
617-825-4224 x140
jason@csndc.com

Profiles & Resumes

The following is included:

- Placetailor profile

Resumes for the following people are included:

- Miriam Gee
- David Queeley
- Jason Boyd

Powahouse



Client: **Placetaylor**

2 Linwood St.
Roxbury
Designer + Builder + Developer
Built: 2012

FIRST PASSIVE HOUSE/ENERGY POSITIVE BUILDING IN BOSTON

We took a risk in a slow housing market, to see if speculative units built to a passive house standard would sell. They did! One unit was sold before construction began, and the other two sold quickly once put on the market.

Because the units were all pre-sold, before or during the construction process, we were able to customize each of the units for the individual clients, from furniture to life to fixtures.

226-232 Highland Street: E+



Client: **Urbanica**

226-232 Highland St.
Roxbury
Consulting & Construction Management
Built: 2013-2014

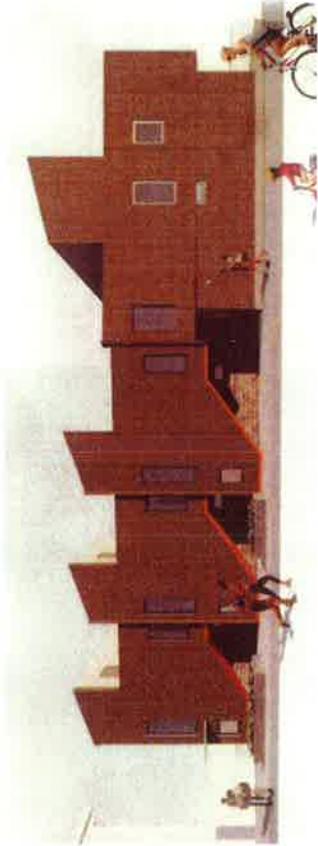
FIRST ENERGY POSITIVE BUILDING AS PART OF BOSTON'S E+ PROGRAM

Urbanica (developer), and Interface Studio Architects (Designer), worked together to win the RFP to Develop the first of three Energy Positive Development projects. The intent of the program initiated by Mayor Menino was to demonstrate that energy positive green homes and buildings can be constructed sustainably and cost-effectively, while enhancing the livability and vitality of Boston's neighborhoods now and into the future.

Placetaylor was hired to do energy consulting, review of constructability, and ultimately to be the Construction Project Manager.



Cliff House



Client: **CCG, LLC**

120 Centre Street
Roxbury, Architect, Developer, Builder,
Phase: Under Construction, 2018

Cliffhouse is a 5 unit development and collaborative effort between Placetailor and architectural designers Colin Booth and Grant Scott. Three townhomes sit atop a steep retaining wall anchored by two Philly-split style flats at the masonry. This project will be and contributes to the growing number of high-performance Placetailor projects in Highland Park



69 N. Montello St.



Client: **BRG Group, Inc.**

69 Montello St.
Brookton, MA
Designer + Builder + Developer
In Development

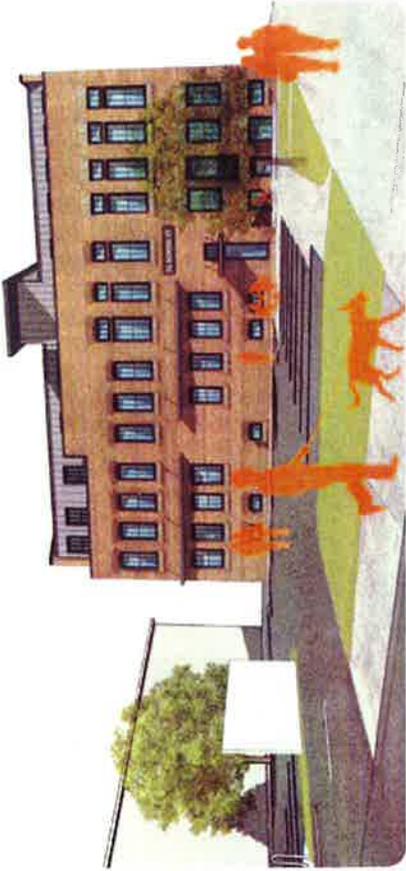
The historic Grassman's Supply Building is being transformed into a lively, modern industrial, transit-oriented development for 35 apartments in downtown Brookton, MA.

A 40,000 SF rental apartment building - one part historic renovation, one part new construction, all parts Deep Energy Retrofit. These 35 units are made up of micro/efficient and compact unit plans for studios, one, two, and three bedroom units. 20% are affordable housing.

A high performance passive house certifiable building envelope, efficient HVAC systems, triple glazed thermally broken tilt/turn windows, and roof top solar array will offset costs for residents



26 School St.



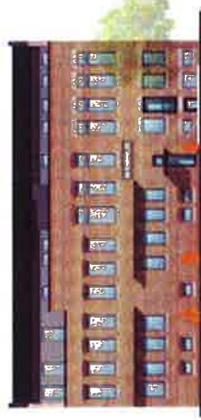
Client: **BRG Group, Inc.**

26 School St.
Brockton, MA

Architect

Phase: Schematic Design

A 24,000SF Mixed Use historic renovation. 20 Units of housing in the gateway city of Brockton, MA. Affordable and ADA accessible rentals. A 5000 SF French Cafe is owner-operated and caters to City of Brockton employees at the ground level. A variety of studios, one bedroom, and two bedroom apartments include a high performance envelope, high windows, double height and lofted ceiling space, and an attractive brick facade - originally a 1800s Telephone Office Building.



FIRM EXPERIENCE Placetailor on the Boards

Morelandtailor LLC, 63 Moreland Street, Roxbury. 2017. 8 high-performance residential condominiums. Developer and Architect.

Ben Reahy Group, 69 N Mansfield Street, Brockton. 2017. 39,000 SF (34 unit) historic residential; 20% affordable, Deep Energy Retrofit. Architect & Integrated Construction Administration.

Ben Reahy Group, 26 School Street, Brockton. 2017. 24,000 SF mixed use with 20 units, 20% affordable housing, and ground level cafe in historic building. Deep Energy Retrofit. Architect & Integrated Construction Administration.

Travis Lee Development, 1837 Dorchester Avenue, Dorchester. 2017. 9 affordable residential units built to Passive House standard. Architect.

Beantown Builders, TACK & Champion Co-Working Space, 155 Crescent St, Brockton. 2017. 9,000 SF Commercial Deep Energy Retrofit and Adaptive Reuse. Low Impact Stormwater Management and T.O.D. Architect & Integrated Construction Administration.

Andrew Mulligan, 587 Albany St, Boston. 2015. 10 residential unit Passive House mid rise. Design Proposal.

Codman Square NDC, Church Lois, Dorchester. 2014. 24 residential units designed for net zero performance. Design Proposal, Energy and MEP Consulting.

Nuestra Comunidad Development Corporation, Perrin Street, Roxbury. 2014. 5 high-performance residential units. Design, Development Consulting.

Cooper Center, 34 Linwood Street, Roxbury. 2012. Strategic Revisioning of Cooper Center programming and space use.

Placetailor Under Construction

Travis Lee Development, 246-248 Norwell Street, Dorchester. 2017. 6 workforce housing units built to Passive House standard, community amenities. Architect & General Contractor.

Nuestra Comunidad, Howard and Harlow, Dorchester. 4 high-performance residential units. Architect, Design, Development Consulting.

CCG LLC, Cliff House, 120 Centre St, Roxbury, 5 Passive House Townhouses. Co-developer, Co-Designer, General Contractor. 63 Copeland LLC, 10 Copeland Park, Roxbury, 4 high-performance condos. Co-developer, Architect, General Contractor.

Fort Hill Construction, 4 Fort Ave Terrace, Roxbury, 2 net-zero residential units. Architect, General Contractor

Zero Home Designs, 43 Hawthorne Street, Roxbury, 3 high-performance condos. Architect.

Placetailor Built Projects

E+ Solutions LLC, 152 Highland Street, Roxbury. 2017. 4 Et+ condos for City of Boston DND program. General Contractor.

Thomontailor LLC, 126 Thornton Street, Roxbury. 2017. 2 net-zero possible condos. Developer, Architect, General Contractor.

Dandelion Montessori Day Care, 38 Bow Street, Somerville. 2017. Tenant Improvement. Architect, General Contractor.

Bruno Lachogue, 393 Marlborough Street, Boston. 2016. Luxury Passive House condo retrofit. Architect and General Contractor.

Hawthorne Youth & Community Center, 9 Fulda Street, Roxbury. 2015. Deep Energy Retrofit and Addition. Co-Designer, General Contractor, Volunteer Coordinator.

Benjamin Uyyeda, Iamartine Lofts, 21 Lamarine St, Jamaica Plain. 2015. 3 Transit oriented Net Zero possible residential units. General Contractor.

Jim Labeck, dba Tend Development, Supply House, 67 Beech Glen, Roxbury. 2014. 2 Passive House condos. Developer, Designer, General Contractor.

Rocksberry, 55 Marcella Street, Roxbury. 2013. Single Family Passive House. Developer, Designer, General Contractor.

Fred Fairfield, dba Canton Corp, Fort Ave/Highland Park Ave, Roxbury. 2013. 6 residential townhouses. Construction Management and Build Services.

Urbanico, Et+ 226-232 Highland Street, Roxbury. 2013. 4 Et+ residential townhouses for City of Boston DND program. Project and Construction Management, MEP and Energy Consulting.

Ellen's House Child Care, 12 Worthington Street, Roxbury. 2013. Energy Retrofit and play space update for home based child care center. Designer, General Contractor.

Powahouse, 2 Linwood Street, Roxbury. 2012. First Certified Multifamily Passive House in Massachusetts. Developer, Designer, General Contractor.

Vlad Pezel, 15 Park Place, Somerville. 2012. Single Family Passive House. Designer, General Contractor.

Bing Broderick, 93 Pleasant Street, Dorchester. 2011. Partial Deep Energy Retrofit of Existing Townhouse. Designer, General Contractor.

JP Green House, 133 Catherine Street, Jamaica Plain. 2010. Deep Energy Retrofit. Designer, General Contractor.

Pratt House, 67 Dudley Street, Roxbury. 2008. Single Family Passive House. Developer, Designer, General Contractor.

TRAVIS ANDERSON, CPHC

EDUCATION, SKILLS, LICENSES & AFFILIATIONS

University of Washington, Seattle, WA
 • 2010: Master of Architecture

CPHC, Certified Passive House Consultant #2344

Yestermorrow, Warren, VT
 • 2005: Community Design Build Certificate

Alfred University, Alfred, NY
 • 1999: Bachelor of Fine Arts

• 2008 Alpha rho chi bronze medal (Excellence in Leadership and Service) UW Dept. of Arch
 • 2008 Mingan Fellowship (Awarded for strong commitment to design/build practice) UW Dept. of Arch
 • 2007 Design Build Challenge, New Orleans LA (Winning Team) DBC07 Jury

EXPERIENCE

DESIGN DIRECTOR | CO-OWNER

• 2012-present
 Lead designer on single family, multi-family and commercial projects. Lead design teams from conceptual design to project certificate of occupancy. Work is performed directly with clients to develop concept, project scope and budget. Tasks include, work directly with Project Architect (as needed), Energy Modeling, Drawing set creation (Permit + Construction docs), Project Feasibility Studies, Project Proposals, Specification Review, and Client Relationships.

FOUNDER | DESIGNER | FABRICATOR

• 2010-2012
 Design: Work closely with clients to develop a concept, design vision, project scope, and budget. Encourage energy savings and reduction of environmental impact through home energy analysis and material use/re-use. Production of as-built drawings, construction documents, models and perspectives. Build: Fabrication and construction of design, coordination of sub contractors.

GATEWAY PRACTICE FACULTY

• 2010-2014
 Develop curriculum and student assessment for community driven design projects with pedagogical emphasis placed on experiential learning. Students gain hands-on experience through direct client collaboration and community charrettes from schematic design to final construction.

DESIGN INTERN

• 2009
 Architectural model fabricator

Lead Carpenter

• 2008
 Jobsite lead for Brightwater Community Pavilion

SHED architects
 Seattle WA

Jersey Devil
 Design Build
 Seattle WA

BOSTON ARCHITECTURAL
 COLLEGE
 Community Design/Build Course
 Boston, MA

SWIFT WORKSHOP
 Residential design/build
 company established in
 2010

PLACETAILOR INC
 Architecture, Construction
 and Development Co-op
 Boston, MA



MIRIAM GEE, AIA, LEED AP BD+C

EDUCATION, SKILLS, LICENSES & AFFILIATIONS

California Polytechnic State University, San Luis Obispo, CA
 • 2006: Bachelor of Architecture, French minor, graduated Cum Laude
 • Coursework included environmental design, inter-disciplinary collaboration, and atelier at Ecole d'Architecture, Paris Val de Seine in Paris, France.

Design/Build Instruction, Green Building Consulting, Workshop Facilitation, Rough Framing, Basic Carpentry, Construction Admin, Project Management, Permit Routing, Architectural Design, Hand Sketching & Rendering, AutoCAD, Revit, Adobe CS, MS Office, Fluent in English, French, Basic Spanish.

Massachusetts - Architect, AR#32411 since 2015
 Washington - Architect, #1001, since 2010.
 Hawaii - Architect, #AR 14335, since 2010.
 LEED Accredited Professional - BD+C since 2007.

EXPERIENCE

ARCHITECT, DESIGNER, CO-OWNER

• 2016 - present: project architect, designer, design/build, co-owner
 • Projects: Roxbury Co-Housing Design Charrette, the TACK & Champion Co-Working high performance adaptive reuse, Roxbury Outside-In House, Fort Ave Terrace NetZero Duplex, Dandelion Montessori Day Care II, Montello St 38 rental units high performance historic housing.
 • Project Architect, project lead, interior design, charrette facilitation, consultant coordination, specifications, QC and CPHC training, green building strategies, contract negotiating

OWNER, ARCHITECT, GREEN BUILDING CONSULTANT

• 2012-present: independent and collaborative work in Boston, Seattle, and Honolulu
 • Projects: Willowford Farm Housing, VA; Hess Single Family Renovation, Cambridge; BasilTree Cafe II, Renovation, Cambridge; Beacon St. Condos, Boston; Walea Tower LEED Gold, HI; Bellevue Botanical Garden Visitor's Center LEED Gold, WA.
 • Architectural design, CD sets, drafting, as-builts, presentation boards, and project management for small-scale projects in the Boston area. Construction admin, LEED applications, workshop facilitation, and specification review. Past and current offices include: Next Phase Studios, Santos Prescott + Associates, and Fermata Consulting.

DESIGN/BUILD INSTRUCTOR:

• 2010-present: Co-founder and Instructor; Build Lightly Studio - buildlightly.com
 • Institutions include: MASSART, Univ. of WA, Yestermorrow School, Asheville Design Center
 • Projects: Tutu's Hale - Ho'oulu, Aiea, HI; El Colibri - Finca Antigua, Turrialba, Costa Rica; 13 Bones Bridge, City of Asheville, NC; The Beehive Pavilion, YWCA of Asheville, NC; Neighborhood Cookery, Interim CDA, Seattle, WA.
 • Collaboration between local professionals (including: USGBC, AIA), university students and non-profit clients. Organized the design, permitting, and construction of public-interest projects with local volunteers, industry mentors, and professionals. Instruct and lead students through a consensus-based design process, permit application, and construction.

PROJECT ARCHITECT:

• 2009 - 2012: Project Architect, LEED Project Administrator, uwarchitects.com
 • Projects: Sinclair Library Renovation, LEED Gold EBOM for SSFM Headquarters, UHCWH Kona Community College, AIA Honolulu Design Center Competition.
 • Responsibilities: Close collaboration and excellent rapport with client, users, and contractor from design concept through construction for projects ranging from 17,000 - 30,000 sq. ft. Preparing and conducting eco-charrettes with client, users, and consultant team to determine tangible goals during pre-design phase. Project architect, lead designer, point of contact, consultant coordinator, and construction administrator.

• 2006 - 2009: Junior Designer - lmmarchitects.com

• Projects: LEED Gold Showare Center, Columbus Convention Center Renovation

LMN ARCHITECTS

2016 AIA firm of the year
 Seattle, WA.

URBAN WORKS

a small, AIA award-winning
 design firm in Honolulu, HI.



Placetaylor designs, builds, and develops urban environments.

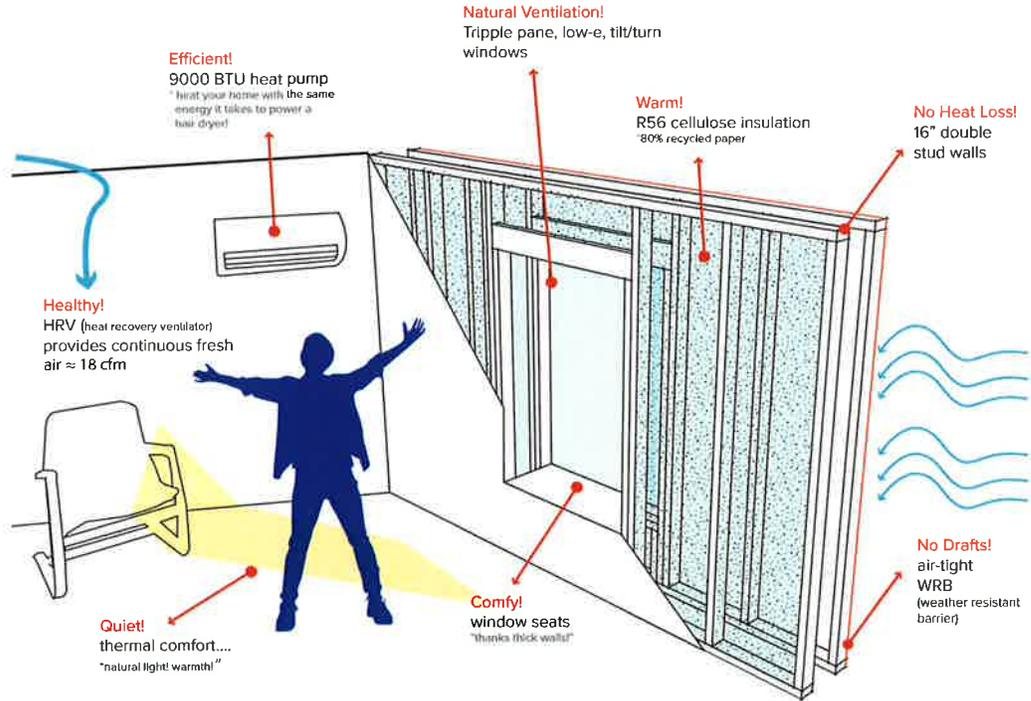
We are an employee-owned Architecture, Construction & Real Estate Development Company committed to creating balanced and beautiful urban environments. We go beyond "green", to make better buildings and communities that are comfortable, connected, healthy, and remarkable.

What does Passivhaus design feel like?

Smart,

Like a well-tailored suit.

here are some reasons why...



“We bake it in”

Too frequently sustainability is seen as the “icing on the cake,” something added after the cake is already done being baked. It might look good, it might even taste good, but it is always applied afterward, it isn’t integrated or integral. Sustainability is at the core of every single project our team has ever done and will ever do. Sustainability is one of the main ingredients to all of our designs; in other words “we bake it in.”

No Additional Cost

We are confident that we will be able to create a site Net Zero 50,000 SF development at no premium above standard construction. We are able to do this by carefully considering the energy, comfort, aesthetic, and cost implications of every decision. We are able to balance costs and do rapid estimating. When sustainability is frosting instead of being “baked in,” it becomes a superfluous added cost. There will be some first cost expenses that are higher, but also some that will be lower, and we are practiced at navigating these budgets to find the right balance. We strive for cost parity and operational savings from day one. We want it to be a “no brainer,” so we can focus on the bigger picture of how this project will benefit the community.

Non-Energy Benefits: Comfort & Health

When you eliminate drafts, provide fresh filtered air and exhaust stale air, keep consistent temperatures, get ride of VOCs and all fossil fuel combustion, plus allow for quality day lighting and beautiful space you end up with a home that is healthier and more comfortable than almost any other. Sure these things also help to reduce the energy loads of the home, but our team believes that we really ought to be considering health and quality of life at least as much as the cost savings from reducing energy.



Jason T. Boyd

Email: jason_t_boyd@hotmail.com
Tel: 617-309-7382

Professional Summary

Community and organizational leader experienced in stakeholder engagement, advocacy, and budget development. Committed to leading, enhancing and maintaining meaningful community partnerships. Proven history of creating and expanding community driven approaches to increase civic engagement. Advocate for policy to inform decisions at neighborhood, city, and regional level. Highly effective budget development and management for organizational growth, sustainability, and efficiency.

- Program Development & Leadership
 - Grant Management
 - Project & Staff Management
 - Program Evaluation
 - Community Organizing
 - Policy Advocacy
 - Budget Development
 - Stakeholder Engagement
-

Experience

Codman Square Neighborhood Development Corporation
Director of Community Organizing & Resident Resources

Dorchester, MA
May 2012 – Present

Senior management team member focused on community organizing, resident engagement, and equity. Currently championing efforts related to fair housing and workforce development. Integrates larger public health programming and advocacy through public transportation access and healthy food justice initiatives at the neighborhood, city, and regional level. Increases civic engagement through collaborative events and strategic staff management.

- Generate new program ideas and work with residents and stakeholders to carry out initiatives related to health, social well-being, education, employment, and community cohesion.
- Monitor and evaluate community organizing program, practices, and initiatives to ensure quality and effectiveness; make recommendations and implement improvements.
- Identify and develop a strong base of active and engaged residents equipped to organize, advocate, and leverage resources to advance an agenda for individual and family success that increase community self-reliance.
- Cultivate meaningful partnerships with community leaders, public health, private industry and community-based organizations.
- Collaborate with local coalitions, grassroots organizations, and non-profits to put policies in place that ensure long term equitable access to housing, livelihood, and resources for low and moderate income community members.
- Effectively align program staff support and operations with long-term agency goals and expectations.
- Facilitate youth organizing campaigns, including curriculum and program development.
- Hire and supervise staff, interns, and volunteers for all community organizing initiatives, including determining workload and delegating assignments, training, monitoring and evaluating performance, and initiating corrective or disciplinary actions.

Housing Opportunities Unlimited
Director of Resident Services

Dorchester, MA
Oct. 2009 – April 2012

- Conduct on going resource development activities toward expansion and improvement of services available to residents in large mixed income apartment community. Assist in strategic planning in the area of neighborhood advocacy, as well as maintain/establish contact with key players in agencies and organizations affecting residents and their quality of life. Facilitate community health awareness and continuing education initiatives in conjunction with community health centers and area institutes.

- Respond to and provide follow-up on management referrals within 48 hours regarding residents involved in lease violations, rent arrears, failed housekeeping inspections, social service needs and security-related matters.
- Provide oversight and coordination of the use of the on-site computer center and collaborate with Community Task Force members in responding to computer technology related needs of the Harbor Point Community. Establish staffing schedule to included HOU staff, volunteers, and representatives from other on-site service providers.
- Manage a staff of 3 in our role as tenant advocates in a large mixed income apartment community.

Housing Opportunities Unlimited

Dorchester, MA

Youth/Young Adult Outreach Coordinator

June 2006 – Oct. 2009

- Serve as a tenant advocate in a large mixed income apartment community in regards to quality of life issues (conflict resolution, lease issues, alcohol/substance abuse)
- Serve as a resource for residents' various employment and educational endeavors (job search, resume development, liaison for area college/university, trade union, GED and employment programs)
- Maintain a resource library and serve as a referral source for community parents and youth in regards to citywide recreation and education opportunities.

Massachusetts General Hospital Professional Billing Office

Charlestown, MA

Applications Analyst

Sept. 2004 – June 2009

- Responsibilities include management and quality assurance of the Billing flow for multiple medical practices associated with the Partners Healthcare Network.
- Responsible for editing Healthcare Provider Dictionaries as well as for the security of medical and financial confidential information
- Responsible for security and maintenance of the Patient Keeper Charge Capture system for multiple practices, billing managers, and doctors within the Partners Healthcare System.

Education

University of Pittsburgh
Cambridge Rindge and Latin

Pittsburgh, PA
Cambridge, MA

Notable Achievements

2016 NeighborWorks America Community Building & Engagement Staff Award for New England Region

NWA is a national trade organization that annually recognizes the top CB&E staffs operating in the four regions of focus (North East, Mid-West, Southern, and Western). My organizing team received this recognition for our outstanding work in regards to resident leadership development and policy advocacy.

Awarded Inaugural Collaborate Boston (Boston Foundation) Grant 2013

Served as organizational program design and lead facilitation for a collaborative program convened with Concerned Black Men of Massachusetts which focused on boys 10-15 developing conflict resolution, problem solving, and soft skills. Facilitated youth participants in creating video story telling capstone project.

Certification of Completion: Midwest Academy Training for Supervising Organizers 2012

Founded in 1973 Midwest academy is a national training institute committed to advancing the struggle for social, economic and racial justice.

DAVID T. QUEELEY

71 Weld Hill Street - #2
Jamaica Plain, MA 02130

617.894.4748
dqueeley@gmail.com

PROFILE

Urban/environmental planner with a focus on the nexus between community, and the environment. Interested in creating broad-based programs that promote cooperation and partnerships while keeping the environment as a priority. Work closely with non-profits, individuals, communities, foundations, government and municipal agencies to secure funding and to bridge policy and practice. Excellent communication and presentation skills.

WORK EXPERIENCE

CODMAN SQUARE NEIGHBORHOOD DEVELOPMENT CORPORATION, Dorchester, MA 2013-Present
Director of Eco-Innovation

- Manage, innovate, oversee, and implement Boston's first neighborhood scale sustainability project in an existing neighborhood; partner with local residents, city officials, and national organizations; do research, create and track measurement metrics regarding neighborhood improvements in health, clean energy use and related cost reductions, transit oriented development, and home retrofits.

THE APPALACHIAN MOUNTAIN CLUB, Boston, MA 2011-2013
Vice President, Outdoor Engagement

- Managed, oversaw all aspects of AMC's education programs, including a staff of 22, thought leadership, program design, and implementation, budget of over \$1.25 million, partnership and constituency outreach and formation.

THE FUNDERS NETWORK FOR SMART GROWTH AND LIVABLE COMMUNITIES 2011
Consultant

- Project Director for TFN's National Green and Healthy Homes Initiative, which connects foundations to US government efforts to reduce health and energy-related costs for low income homeowners across the US.

THE TRUST FOR PUBLIC LAND, Boston, MA 2004-2009
Director, Parks for People New England

Managed programmatic budget of \$1.8 million; provided strategic leadership, visioning, and direction for iconic, urban, multi-state program within TPL's portfolio of land protection services; coordinated programmatic activities with New England state directors, national transaction teams, and development staff; oversaw three staff and interns; managed Advisory Board and secured programmatic funding; partnered with state and city officials, local residents and NGOs to further their open space goals; provided innovative maintenance funding models. Selected accomplishments:

- Provided vision, coordination with local partners, and successfully solicited funding to enable the creation of playgrounds in Boston, MA
- Oversaw ongoing process to create more open space outcomes from and transparency for citizens regarding disposition of vacant land in Roxbury, Dorchester and Mattapan, MA
- Completed comprehensive park assessment report for City of Hartford, CT
- Permanently protected community garden threatened with development in Providence, RI
- Doubled size of board from six to 12 people and increased board giving to 100%

NEW ECOLOGY, INC., Cambridge, MA 2003-2004
Vice-President/Senior Planner

Responsible for project management, intern oversight and coordination, fundraising, and board engagement.

- Created mixed-use vision and process for eco-industrial development for the City of Springfield, MA
- Worked with NGOs and CDCs in state and region to create green development and waste reduction strategies
- Performed research on costs and benefits of green affordable housing
- Served on City of Boston's Green Building Task Force
- Helped to develop waste transfer station best practices
- Mentored MIT urban planning interns
- Secured funding from both public and private sources

PROSPECT PARK ALLIANCE, Brooklyn, NY 2000-2003
Vice-President for Community and Government Affairs

Managed departmental budget of \$740,000 and 23 staff. Led and coordinated activities for government fundraising, community outreach, education, and youth programs.

- Developed effective relationships with local, city and state government. Educated public officials on the importance of the Park to their constituents, ultimately resulting in additional funding sources, including first time contributions.
- Created strategic direction for youth programs, which doubled program participation and increased funding.
- Represented Alliance at meetings with elected officials, Community Boards, and community-based and citywide organizations to further promote Park advocacy.

BOSTON NATURE CENTER, Massachusetts Audubon Society, Boston, MA

1997-2000

Sanctuary Director

Led the start-up and creation of the Society's newest and most urban sanctuary. Managed budget and staff of 9. Oversaw education programs, outreach efforts, board creation, funder cultivation and site work.

- Developed and maintained constructive relationships with state and city agencies and with community-based organizations. Worked closely with churches, non-profits, a site-based community garden, neighbors, a site-based citizen Advisory Committee, and others.
- Assisted with fundraising for capital and operations, including individual and foundation donors. Ensured compliance with grant guidelines.

EXECUTIVE OFFICE OF ENVIRONMENTAL AFFAIRS, Boston, MA.

1988-1997

Senior Planner, Metropolitan District Commission

Managed budget of \$375,000 and oversaw consultants. Coordinated Commission's activities with federal, state, and local, Agencies and non-profit groups. Represented agency at Environmental Diversity Forum.

- Managed conversion of a 75-acre landfill and adjacent abandoned railway into public park land, bicycle path and open space in Dorchester Shores and Neponset River Reservations. Prioritized the use of a \$40 million bond allocation for Neponset River area.
- Ensured all relevant regulatory obligations were met. Reviewed state agency permits for environmental consistency and need for federal, state, and local permits. Completed agency environmental permit guide and environmental library.
- Wrote successful \$1.1 million ISTEA grant to fund initial bikeway work

MASSACHUSETTS DEPARTMENT OF YOUTH SERVICES, Brewster, MA

1985-1986

Instructor

Led activities for residential program based on Outward Bound for at-risk youth, ages 14 to 17.

CROSSROADS SCHOOL OF ARTS AND SCIENCES, Santa Monica, CA

1983-1984

Teacher

Prepared, organized and taught 7th grade Life Science and 9th grade Earth Science courses and experiential trips to Sierra Nevada, desert, and ocean environments.

SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS, Los Angeles, CA

1983-1984

Researcher

Co-researched and co-authored "Comments on Draft Environmental Impact Report for Lease Sale 80" on behalf of Coalition for Clean Air.

U.S. GEOLOGICAL SURVEY and WOODS HOLE OCEANOGRAPHIC INSTITUTE,

1981-1983

Woods Hole, MA

Research Assistant

- Prepared samples, conducted primary element analysis of sand deposits on the Continental Margin and Florida coast crustal concentrations of Manganese and Phosphate and performed primary element analyses of sediments from the Yangtze River, China.

AWARDS, AFFILIATIONS AND BOARD MEMBERSHIPS

Awarded John O'Connor Award for Grassroots Leadership, October 2015

City of Boston, GoBoston 2030 Advisory Board

City of Boston, Mayor's Climate Action Leadership Committee

Rose Kennedy Greenway Conservancy Leadership Council

Lecturer, Yale School of Forestry and Environmental Studies

EDUCATION

Wesleyan University, Middletown, CT
Bachelor of Arts, English, 1980

Cornell University, Ithaca, NY
Completed course work toward Master of Arts in Regional Planning,
1994-1996

Proposed Subcontractors

Development Consultant

Henry Joseph & Associates, Inc
103 Terrace Street
Roxbury, MA 02120

Henry Joseph
617-782-4520
henry@hjoseph.biz

Surveyor

R.E. Cameron & Associates, Inc
681 Washington Street
Norwood, MA 02062

Scott Cameron
781-769-1777 x13
scameron@recameron.com

Geotechnical / Environmental Engineer

McPhail Associates, LLC
2269 Massachusetts Avenue
Cambridge, MA 02140

Joseph G. Lombardo, Jr., L.S.P.
617-868-1420 x344
jlombardo@mcphailgeo.com

Green Design Consultant

CLEARResult
50 Washington Street, Suite 3000
Westborough, MA 01581

Michael Schofield, LEED Faculty,
Certified Building Commissioning
Professional
Senior Project Manager

Legal

Goulston & Storrs
400 Atlantic Avenue
Boston, MA 02110

Amy Moody McGrath, Supervising
Attorney
617-574-4198
amcgrath@goulstonstorrs.com

Construction Cost

Estimator/Contractor
TBD

I. Additional Data

A. Sustainable Design

The team will use LEED Silver for minimum sustainable design requirements. We will also incorporate Passive House design standards to make this one of the most efficient developments in South Dorchester. Our architect, Placetaylor is very familiar with both the LEED and Passive House programs. A short list of the design considerations include higher insulation levels for walls, roofs and windows, higher efficiency heating and ventilation systems, and increased indoor air quality. The team will also continue to explore the possibility of using renewable energy such as geothermal, photo-voltaics, or cogeneration to offset energy consumption and further reduce utility costs for both residents and the property management functions.

Please see the included sustainability narrative from Placetaylor.

B. Community Engagement

Upon submission we will begin to engage the community in a series of meetings and presentations.. Both parties have extensive experience with community engagement. In addition to Travis Lee and the CSNDC Real Estate Team, we plan to utilize the skill and expertise of the CSNDC Community Organizing and Resident Resources Department to receive community support.

If awarded, we will begin another round of robust community engagement ahead of Article 80 filing. We will continue to engage abutters, neighborhood residents, civic associations, business owners, area nonprofits, and other stakeholders through permitting and zoning, construction, lease-up, and retail tenant selection.

Residents of both phases will have access to CSNDC's programming, and the wealth of community events and programming organized by TNT-NU, the Codman Square Neighborhood Council, the Codman Square Health Center and others.

C. Property Management

Profiles

The following is included:

- Bridgestone Properties Profile (for Phase 1)
- Winn Management Company Profile (for Phase 2- Spencer St.)

WinnCompanies is an award-winning national multifamily development and management company dedicated to the highest standards of excellence. Through its affiliates, WinnDevelopment, WinnResidential and WinnResidential Military Housing Services, the company acquires, develops and manages affordable, senior, mixed-income, market rate, military and mixed use properties from coast to coast.

A private company founded in 1971 and now operating in 22 states and the District of Columbia, WinnCompanies is the fifth largest multi-family housing manager in the United States, the largest manager of affordable housing in the nation and the second largest manager of military housing.

Portfolio as of January 1, 2017

Total Properties Managed	586
Total Units Managed	100,669*
<i>Market Rate</i>	7,440
<i>LIHTC</i>	34,592
<i>Other Subsidized</i>	17,958
<i>Privatized Military</i>	40,779
Properties owned by WinnCompanies	109
Units owned by WinnCompanies	15,634

*all units, including Winn-owned

Headquartered in Boston’s historic Faneuil Hall Marketplace, WinnCompanies serves its clients through significant regional offices in Baltimore, MD; Fresno, CA; Honolulu, HI; Lowell, MA; Nashville, TN; New York, NY; and, Washington, DC.

WinnCompanies has demonstrated a consistently sound approach to real estate through its long-term commitment to property investments; its passion for excellence in property development, management and maintenance; and, its unblemished record of dealings with bankers, lenders, and public and private sector partners. WinnCompanies consistently provides a creative, award-winning and focused approach in the multifamily industry that is grounded in sound economic fundamentals.

- WinnCompanies is the largest privately held management company, owning and managing real estate holdings valued at approximately **\$14 Billion**.
- Winn has acquired and developed real estate holdings in excess of **\$2.5 Billion**;
- Employs more than **2,700** hard-working and capable team members, including **318 veterans** of the United States Military.
- Manages **121 Million** square feet, including housing, condos, commercial, retail, parking facilities;
- Provides homes to **300,000** residents;
- Has transformed 30 historic properties into **more than 3,200 units of mixed-income housing** in mixed-use communities **valued at \$500 million**;
- Has **never** missed a mortgage payment or defaulted on a loan in its **45-year history**.

VISION

WinnCompanies is the creator and champion of the best possible living communities for our residents and clients achieved through strong partnerships, a focus on sustainability, and the efforts of our outstanding team members who work with a passion for excellence and a commitment to exceed expectations.

VALUES

These guiding principles inspire the daily work of our executives and team members:

Passion for Excellence

Excellence is not accidental; it is the result of our dedicated effort, hands-on experience and the vision to see challenges as opportunities.

Clients and Residents are the Core of Our Business

Clients and residents are our focus; they are our priority as we nurture mutually beneficial relationships.

Deliver Service that Exceeds Expectations

Our service delivery impacts every aspect of our business and our reputation, so we strive to exceed expectations by listening, responding, caring and pursuing positive experiences for our partners and residents.

Integrity is Never Compromised

The way we conduct ourselves and our company will affect others. Our obligation is to act responsibly, with honesty, and to make positive contributions to the community and the industry in which we do business.

Our People are the Source of Our Success

Our people provide our vitality. We encourage teamwork, employee involvement, trust, and respect. We value effort, innovation and results.

Commitment to Sustainability

As we develop and operate properties to maximize their use and promote healthy communities, we also ensure the efficient use of natural resources. This goal is critical for the environment and for our business.

Team Leadership

Leadership is achieved by actions and results. Together, we can show the way.

A Culture of Safety

We pledge to create the safest possible environments for our employees and residents, achieved by fostering a culture focused on awareness, communication, safety education, and safe working methods.



WinnDevelopment has earned a national reputation for award-winning excellence in real estate development, acquiring and developing holdings with a value in excess of \$2.5 billion in 10 states. In addition, we have improved or converted more than 5 million square feet of property into prime space for a wide range of businesses and commercial properties.

The WinnDevelopment portfolio spans affordable housing, market-rate housing, mixed-use and mixed-income developments, urban and suburban garden-style and high-rise apartment communities, along with office buildings, hotels, retail, and medical offices and parking garage facilities.

Through innovative financing mechanism and an intense a focus on a property needs and improved management practices, we set a course for properties to enjoy long-term success. The recent work of WinnDevelopment has focused on large scale mixed-use and mixed-income developments; and, the acquisition, rehabilitation and repositioning of under-valued multifamily properties, working with private owners and/or public sector partners to strengthen communities and their quality of life.

In addition, WinnDevelopment is an award-winning national leader in the adaptive reuse of historic properties and landmark structures. During the past three decades in Mid-Atlantic and the Northeast, we have transformed 30 vacant historic properties into more than 3,200 units of mixed-income housing in mixed-use communities now valued at \$500 million. No other company in the US has won more awards for residential adaptive reuse development.

WinnDevelopment also is proud to be a national leader in green development and the use of renewable energy. Our innovative approaches to sustainability are recognized throughout the multi-family industry and our award-winning green projects demonstrate our commitment to excellence. Known as WinnGreen, our expertise includes Green Building Certification, Deep Energy Retrofits, the Better Buildings Challenge, Green Financing and Solar Power.

To complement our development and financial capabilities, our extensive operations capacity spans all types of onsite property management, full-charge accounting, financial reporting, negotiation and asset-management evaluation. Our diversified third-party management expertise adds value to properties in countless communities across the United States, including many of the country's hottest markets.

2017

AHTCC Charles L. Edson Tax Credit Excellence Award for HUD Preservation: Livingston School Apartments, Albany, NY

2015

Boston Rental Housing Association Industry Excellence Award: Larry Curtis, President & Managing Partner WinnDevelopment

NAHMA Vanguard Award: Voke Lofts, Worcester, MA, for Major Rehab of a NonHousing Structure

Multi-Housing News MHN Excellence Award: Voke Lofts, Gold Winner in Development & Design, Adaptive Reuse

NH&RA J. Timothy Anderson Award for Historic Rehab: Two finalists – Counting House Lofts, Lowell, MA, and Voke Lofts, Worcester, MA



A passion for excellence is what sets WinnResidential apart. The consistent growth of our portfolio is evidence of our ability to significantly raise the standards of residential property management, one interaction at a time.

Its mission is to provide the highest quality services to residents and the best returns for clients; preserve and enhance the physical asset; and, ensure compliance with all federal, state and local programs. Recognized among the nation's leaders in multifamily property management, WinnResidential offers decades of proven expertise in third party work across all property types in major and secondary metropolitan markets coast to coast.

With apartment communities ranging from 17 units to 6,000 units, the company's substantial management portfolio features successful:

- Market Rate Housing
- Affordable Housing
- Senior Affordable and Senior Living
- Undervalued and Distressed Assets
- High Rise and Mid-Rise Living
- Garden Style
- Military Housing
- Mixed-Use Properties

Armed with decades of problem-solving experience, WinnResidential is often called upon for property management consulting services designed to improve a property's financial performance by leveraging the company's wealth of operating and marketing resources, support services and technology infrastructure.

WinnResidential manages each asset with the long-term in mind, recognizing that each property is different and treating each one as if it owned it. As a result, leading institutional investors, real estate investment firms, corporations, and developers trust the passion for excellence that drives the WinnResidential reputation for third party management expertise. Its joint venture experience includes housing authorities, the U.S. Armed Forces, non-profit organizations and some of the country's most successful multi-family owners and financiers.

The company also offers clients national procurement buying power, extensive reporting and auditing capabilities, rigorous compliance protocols, and award-winning "green" operations expertise.

RECENT AWARDS

2017

Multifamily Executive Community Service Award: Squire Village, Manchester, CT

2016

NAHMA Vanguard Award, Major Rehab of Non-Housing Structure: 777 Main, Hartford, CT

NAA ROE "Energy Reduction Award": Heritage House, Newburyport, MA

1. *Appendices 2 thru 11*

2. Supplemental Addendum

5-21 NEW ENGLAND AVENUE

CSNDC proposes to concurrently pursue development of the Phase2- Spencer St building with 5-21 New England Ave as one 9% LIHTC project with 41 residential units total.

PROPOSED USE AND OVERVIEW

The CSNDC owned site at 5 -21 New England Avenue is comprised of an irregular shaped lot currently occupied by a one-story masonry and steel building, previously housing auto repair uses. The site is about a half-block from Talbot Avenue to the north, abuts the Fairmount MBTA corridor to the west, and fronts on New England Avenue to the east. To the north, a single story auto repair business occupies the corner of New England Avenue and Talbot Avenue. The site is within a three-minute walk from the Talbot Avenue commuter rail station and a fifteen minute walk from Codman Square to the east. Immediately across from 5-21 New England Avenue is the proposed "Talbot Commons Phase I" a 15-unit residential redevelopment that will commence construction in the summer of 2018. The CSNDC sites on New England Avenue contribute to substantial redevelopment next to the new commuter rail station. When viewed with the neighboring 270 Talbot Avenue and Spencer Street site, the developments become a well integrated catalyst for neighborhood residential and commercial rejuvenation.

SITE LAYOUT

The proposed new building and open space requires the demolition of existing one-story concrete block structures. The new building will be a four-story wood-framed mixed-use building offering 990 SF of commercial/retail space for a small shop, approximately 25,000 SF of residential space comprising 22 apartments ranging in size from 1BR to 3BR units. Twelve parking spaces at the rear of the site are screened from the street, while common use open green space that incorporates a unique masonry façade of an existing building is located to the south of the building

Aspects of the Building

- 22 affordable residential units with 5x 1-bedrooms, 12x 2-bedrooms, and 5x 3-bedrooms.
- Inclusion of neighborhood retail space at the building corner (closest to Talbot Avenue), which is lacking in this immediate neighborhood, for convenience shopping i.e. a small coffee shop.
- Front entry stoops and doors fronting on New England Avenue which activates the primary streetwall, puts more eyes on the street thereby enhancing security and a

safer pedestrian experience.

- Front green space offers landscaped planters as an amenity not only to the development but to the neighborhood at large.
- Bays and frames around windows create visual interest, rhythm and reflects the predominant physical building typology of two- and three-family buildings.
- An assembly of a range of unit sizes from 1BR to 3BR units.
- Triple-glazing and augmented wall insulation on the rear facade to mitigate noise from nearby transportation corridor.
- Designed to buffer the noise from passing trains, the single-loaded corridor along the track side of the building reduces the impact on these dwelling units.
- Façade consisting of an insulated rainscreen system with auto-claved fiber-cement panels, providing a durable, attractive, low-maintenance systems to support the affordable housing mission of the Owner.

Open Space

- The plan retains existing architectural streetwall elements as a portico and gate to the park, as a reminder of the neighborhood's industrial past.
- Although the park is privately owned and managed by CSNDC, it is available for use by neighborhood residents.
- The community gardens and plaza with sitting area, rain garden and water feature offer opportunities for neighborhood engagement, water conservation, and healthy food production.

Sustainable Design Features

As a transit-oriented development, this project seeks to promote sustainability in all aspects of its design but especially in regard to promoting alternative transportation through pedestrian and bike-friendly pathways to the new Talbot Station. The project relies on its proximity to the Talbot Station and city bus lines to reduce the overall number of parking spaces needed to about 0.5 spaces per residential unit. To support bicycle use, bike storage facilities is provided in the building.

All buildings will be designed to meet or exceed LEED Silver standards, including high efficiency thermal envelope, water saving fixtures, solar panels, green roofs, solar shading, robust daylighting, green finishes and high efficiency HVAC and electrical systems.

5-21 New England Ave

Please find the following included in this addendum:

- Site Plan and Design Drawings

Profiles & Resumes

The following is included:

- The Narrow Gate profile

Resumes for the following people are included:

- Bob Wegener
-



MISSION STATEMENT



The Narrow Gate was formed in 1987 to build justice by creating pleasing environments for those historically underserved. Our name, **The Narrow Gate**, is based on a biblical image of hospitality and an alternative way of living.

We continue to build on many years of providing architectural services for community-based projects. Our clients are non-profit organizations and public agencies with whom we've developed longstanding partnerships in Greater Boston neighborhoods and surrounding communities. Though most of our clients have limited budgets, we strongly emphasize design and the use of materials resulting in beauty, durability and responsible stewardship of the environment. We believe the spaces and places we create with our clients and their communities have a vital impact on the quality of people's lives.



FIRM PROFILE and QUALIFICATIONS



PRINCIPALS

Kitty Ryan, RA
Founding Principal

Robert Wegener, LEED AP
Founding Principal

Neal Mongold, RA, LEED AP
Principal

STAFF

David Flaschenriem, RA, LEED AP
Senior Architect

Monica Sidor, RA
Senior Architect

Greg Zurlo
Senior Architect

Wendy Richter
Designer

Federico Soriano
Designer

Joe Lambert
Designer

Sara Briggs
Intern Architect

Moriah Gavrish
Intern Architect

The Narrow Gate has specialized in providing high-quality architectural services to non-profit organizations and government agencies in the greater Boston area and Massachusetts for over 30 years; it is our primary focus. Our project experience includes rehabilitating existing housing stock, new construction of multi-family and mixed-use projects, master planning, site capacity studies, supportive and special needs housing, capital needs projects, non-profit offices and community commercial spaces. We are able to quickly identify a range of solutions that respond to the Owner's needs, the program, the community and the site. We efficiently solve building science issues of energy performance, long-term durability and the comfort of residents while carefully designing to complement and revitalize existing neighborhood contexts, often to meet historic restoration requirements.

The firm is led by its three Principals, Kitty Ryan, Bob Wegener, and Neal Mongold. With six of our staff architects logging in over 20 years of experience, we have an unusual depth of expertise for the size of our firm. We are skilled at preparing detailed and thorough documents for new and renovation work. Most of our work includes elements of special needs and accessible design. Our team is very experienced with accessible design and in understanding the requirements of the many access regulations (ADA, 504/UFAS and MAAB) for designing accessible spaces and sites. Our design capacity can provide you with cost effective, durable and attractive solutions for the development of new accessible developments.

The Narrow Gate staff also includes three LEED accredited professionals. We advocate for energy saving and sustainability strategies in our projects as budgets allow and integrate sustainable design and materials with strong attention to these details from conception to completion.

Since 2009 we have been design reviewers and lender advisors for affordable housing projects for Massachusetts state agencies such as DHCD, Mass Housing Partnership, and CEDAC.



AFFORDABLE MULTIFAMILY HOUSING



DUDLEY GREENVILLE HOUSING *Dudley Square, Roxbury, MA* *Madison Park Development Corp.*

- New Construction
- 43 units of affordable rental housing in two buildings
- 3,000 sf street level commercial and community space
- Transit Oriented Development (TOD)
- Steel & wood frame, masonry



DUDLEY VILLAGE *Roxbury, MA* *Dorchester Bay Economic Development Corp.*

- New construction
- 50 units of environmentally sustainable affordable rental housing
- 6,600 sf street level retail, commercial, and community space
- Masonry veneer
- John Clancy Award for Socially Responsible Housing 2011



COPPERSMITH VILLAGE *East Boston, MA* *Neighborhood of Affordable Housing*

- New Construction
- 71 units of rental & homeownership housing
- Street level commercial and community space
- Storm surge resilient
- Reviewed by Boston Civic Design Commission
- Steel & wood frame, masonry



24 CHERRY STREET
Danvers Housing Authority

Danvers, MA

- Complete renovation of historic two-family house
- 100% redesigned floorplan
- Accessibility improvements
- Envelope improvements
- Wood frame



95-97 PINE STREET
Home Owners Rehab

Cambridge, MA

- Renovation of 12 units of affordable rental housing
- LEED Platinum Certified
- Envelope improvements
- Go Green Award for Outstanding Preservation Project 2010
- Wood frame



PATRIOT HOMES
Neighborhood Development Corp. of South Boston

South Boston, MA

- New construction and renovation
- 24 units of affordable rental housing for veterans
- Community and veteran services administrative spaces
- Wood frame



RESIDENCES AT FAIRMONT STATION
Southwest Boston Community Development Corp.

Hyde Park, MA

- New Construction
- 50 units of affordable rental housing
- Exterior courtyard and play area
- Community room, management offices, structured parking
- Transit Oriented Development (TOD)

ICONIC in CONTEXT



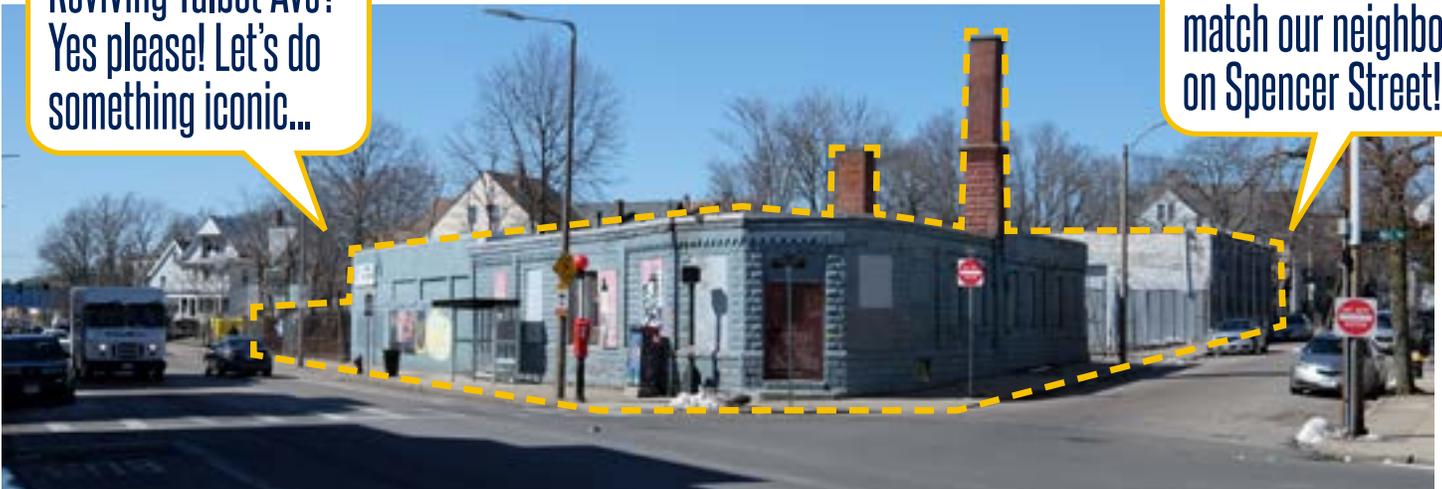
270 TALBOT

Reflecting the neighborhood's desire to keep a strong commercial presence on Talbot, while at the same time relating to the neighborhood scale on Spencer, we propose two buildings that share a parking drive aisle and a connected courtyard - an Iconic and Contextual community development.



Reviving Talbot Ave?
Yes please! Let's do something iconic...

...and contextual to match our neighbors on Spencer Street!



270 Talbot SITE PLAN



Site Design Features

- Shared Drive Aisle
- Shared Enclosed Bbq Courtyard
- 13 Parking Stalls For Spencer Building
- 7 Parking Stalls For Talbot Building
- Talbot Garden Court
- Green Space Buffer Behind Parking
- Native & Drought Tolerant Landscaping
- Ideal Orientation For Pv Array On Talbot Building
- Street Facing Entries At Ground Level On Spencer
- Retail Entries On Talbot

Building Design Features

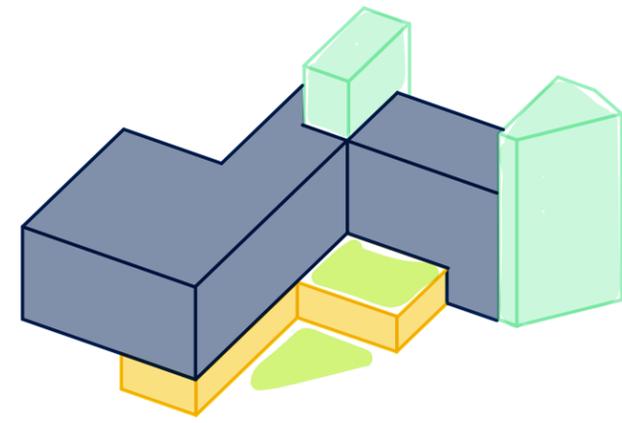
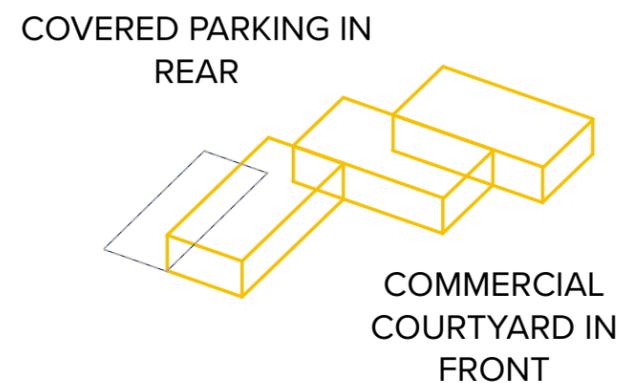
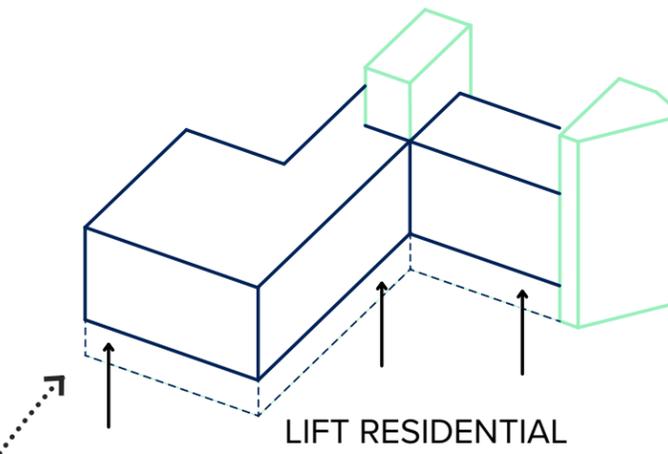
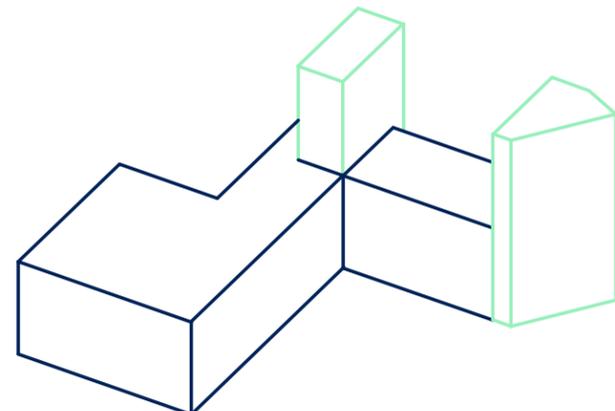
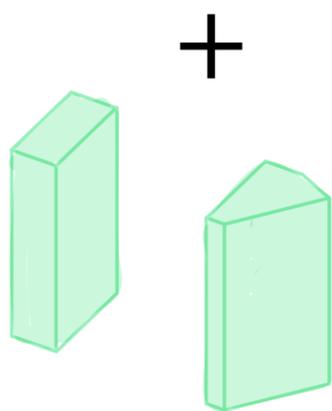
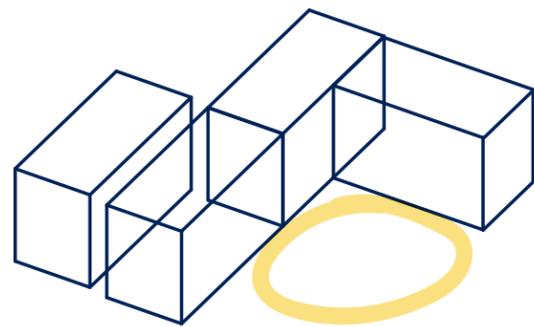
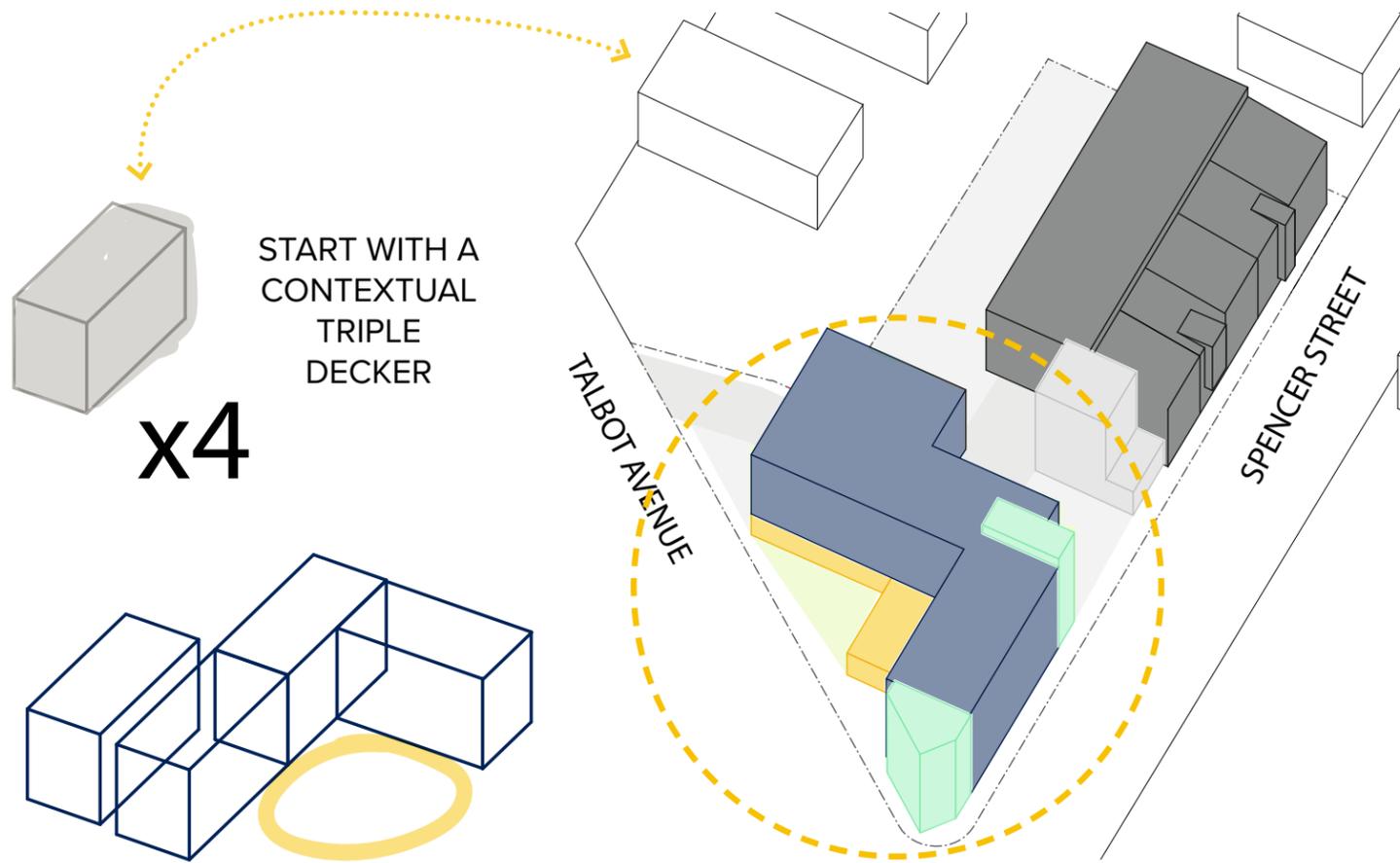
SPENCER BUILDING

- CSNDC Owned
- 19 Units for rent
- ADA Accessible Units at Ground Floor
- 3.5 Story Building

TALBOT BUILDING

- TLC Owned
- 17 Units for rent
- ADA Accessible and Retail at Ground Floor (plus elevator)
- 4 Story Building
- Roof Top Terrace above Retail
- South Facing Garden Court

TALBOT AVENUE

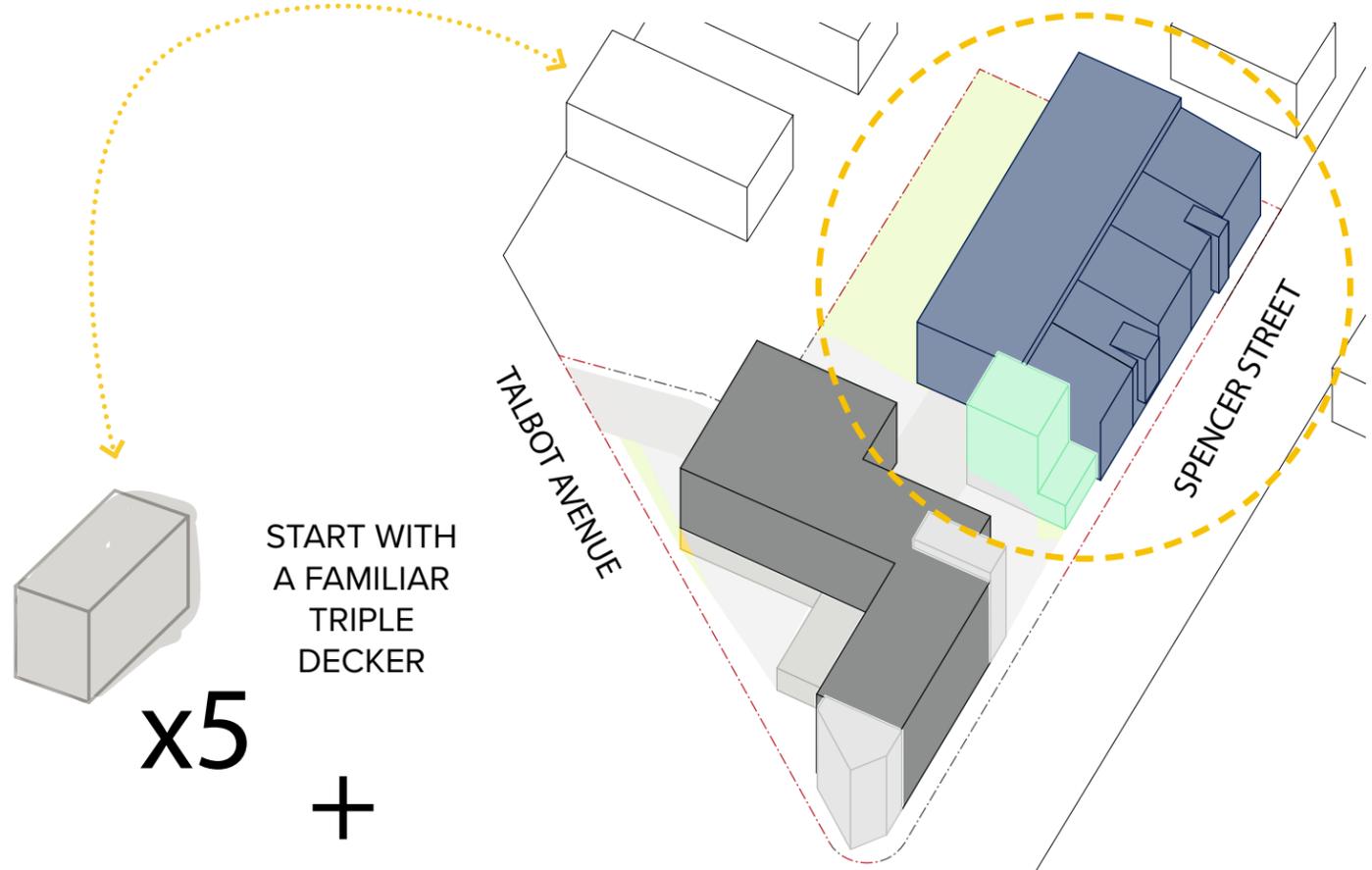


Building Design Features

- Efficient Layout allows for all all spaces to have exterior windows and views
- Take advantage of south-facing exposure for passive solar gains and daylighting in winter months
- Illuminated stair towers anchor the building and provide efficient vertical circulation
- Iconic stair corner captures the corner to provide a bold street presence for Dorchester
- Designed with the contextual modular floor plan of a triple decker
- Elevator centrally located off Spencer provides ADA accessible units
- Roof terrace above Commercial

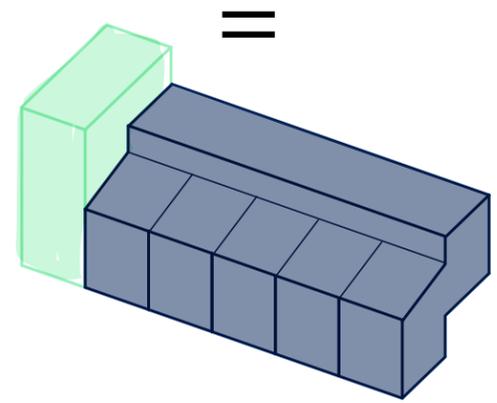
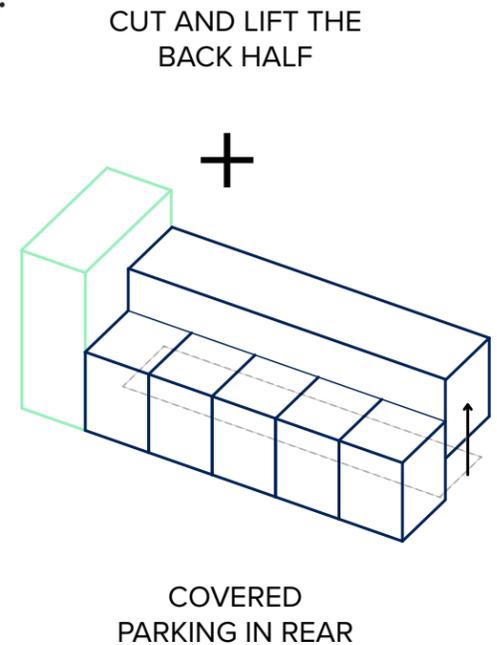
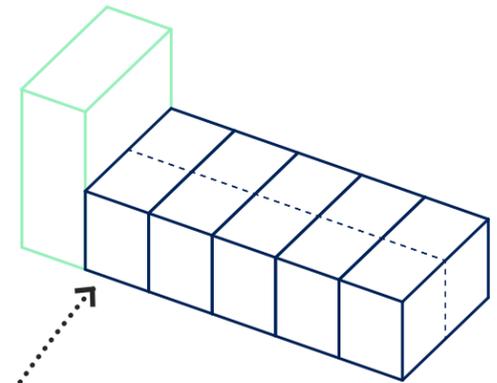
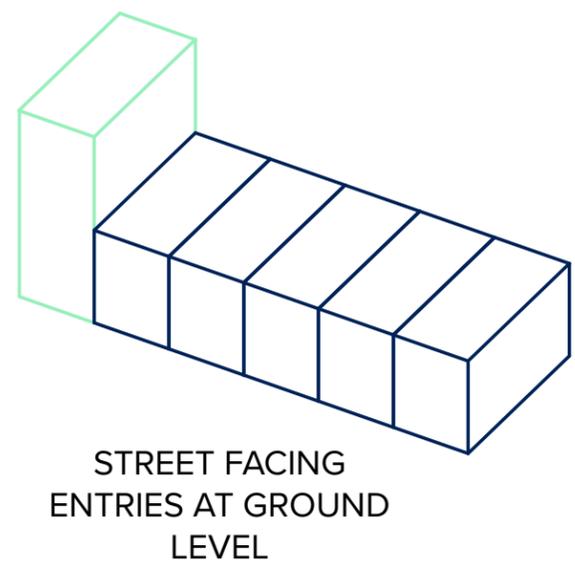


SPENCER STREET



START WITH A FAMILIAR TRIPLE DECKER
x5
+

MATCH THE ICONIC STAIR ON TALBOT, ADD COMMUNITY SPACE
=



Building Design Features

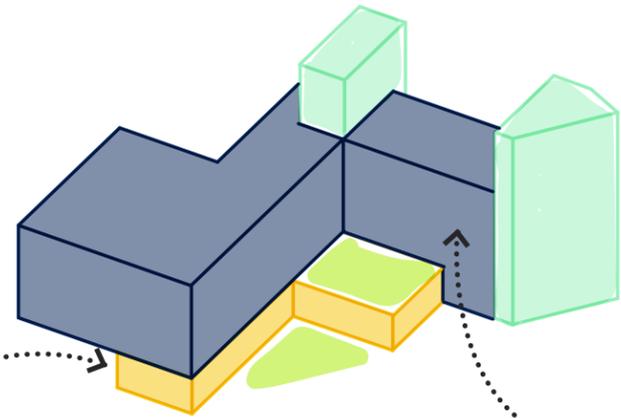
- Contextual Scale of the triple decker, familiar Spencer Street
- Iconic stairs carry the same language from Talbot street
- Varied facade treatments on Spencer with recessed entries and bay windows to mimic Row housing
- Laundry & Community spaces within the vertical core
- Elevator and ADA accessible ground floor units
- Simple, efficient building envelope is compact and cost-effective

ICONIC in CONTEXT



BIRD'S EYE VIEW - Iconic Talbot Avenue, within a contemporary context.

TALBOT AVENUE

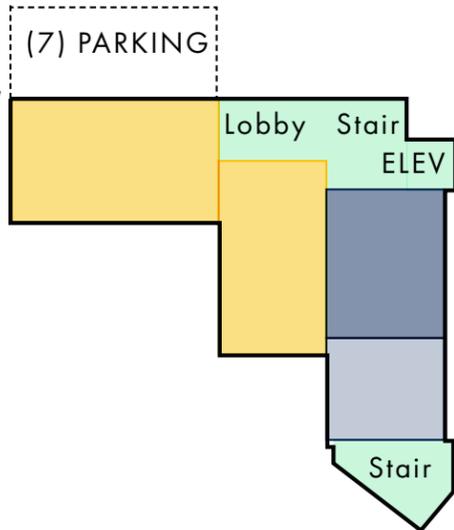


UNIT MIX

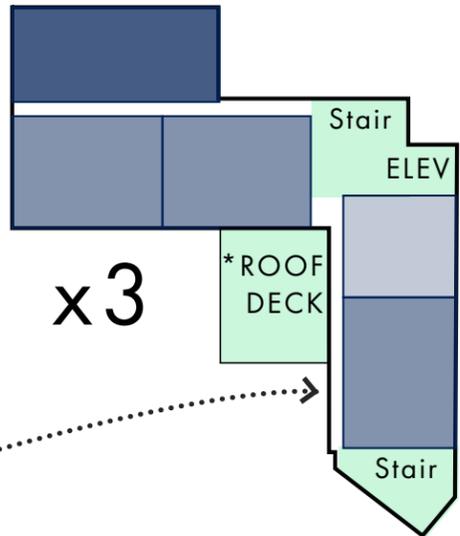
	(1 BED) 4	UNITS
	(2 BED) 10	UNITS
	(3 BED) 3	UNITS
		17 UNITS

	COMMERCIAL SPACE
	COMMON SPACE

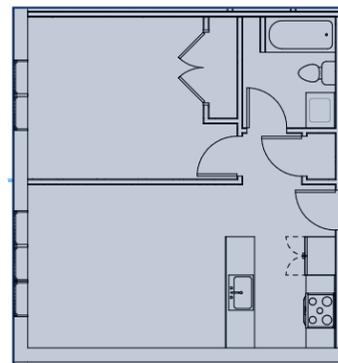
x1



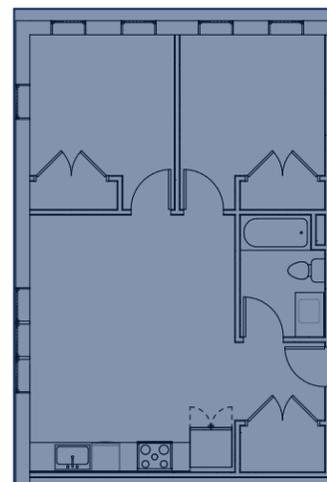
Level 1



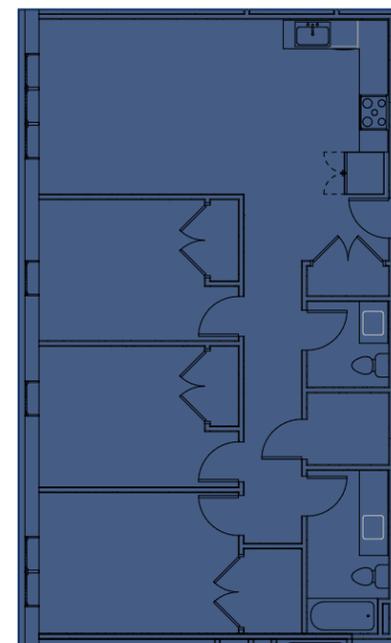
Levels 2,3,4



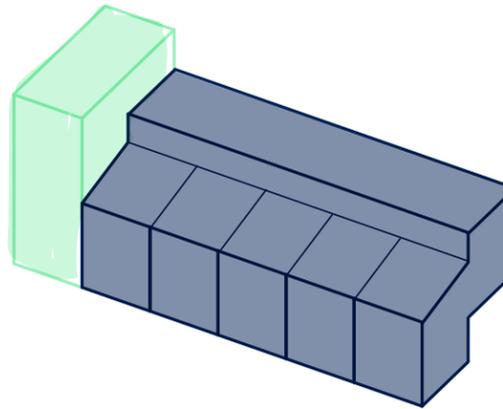
1 BED
600 SF typical



2 BED
750 SF typical



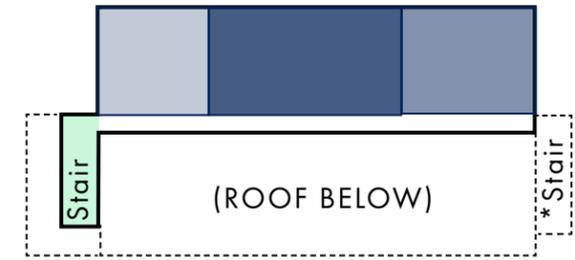
3 BED
1000 SF typical



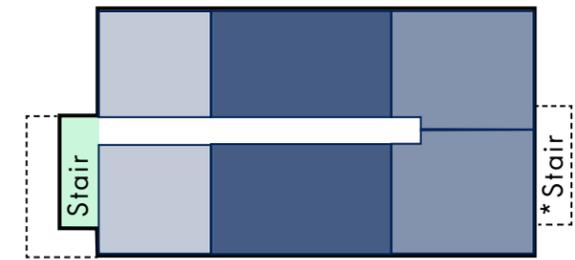
SPENCER STREET

UNIT MIX

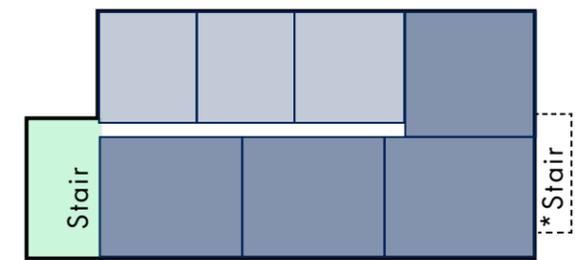
	(1 BED) 7	UNITS
	(2 BED) 8	UNITS
	(3 BED) 4	UNITS
		19 UNITS



Level 4
*Level 4 Egress



Level 3



Level 2



Level 1



SITE SECTION - STREET PERSPECTIVE



Talbot Building

Spencer Building





SUSTAINABLE DESIGN

270 TALBOT qualifies for the LEED NC BD+C Rating System, in lieu of LEED for Homes. The project is designed to be Passive House Plus Certifiable.

PLATINUM Passive House Plus

LEED NC BD+C v4 CHECKLIST (Platinum)

LEED v4 for BD+C: New Construction and Major Renovation Project Checklist

Project Name: 273 Highland - ROXCO
Date: 02/14/2018

Y	?	N	Credit	Integrative Process	1
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16	0	0	Location and Transportation	16
1	0	0	Credit LEED for Neighborhood Development Location	16
1	0	0	Credit Sensitive Land Protection	1
2	0	0	Credit High Priority Site	2
5	0	0	Credit Surrounding Density and Diverse Uses	5
5	0	0	Credit Access to Quality Transit	5
1	0	0	Credit Bicycle Facilities	1
1	0	0	Credit Reduced Parking Footprint	1
1	0	0	Credit Green Vehicles	1

4	0	6	Sustainable Sites	10
Y	0	0	Prereq Construction Activity Pollution Prevention	Required
1	0	0	Credit Site Assessment	1
2	0	0	Credit Site Development - Protect or Restore Habitat	2
1	0	0	Credit Open Space	1
3	0	0	Credit Rainwater Management	3
2	0	0	Credit Heat Island Reduction	2
1	0	0	Credit Light Pollution Reduction	1

9	0	2	Water Efficiency	11
Y	0	0	Prereq Outdoor Water Use Reduction	Required
Y	0	0	Prereq Indoor Water Use Reduction	Required
Y	0	0	Prereq Building-Level Water Metering	Required
2	0	0	Credit Outdoor Water Use Reduction	2
6	0	0	Credit Indoor Water Use Reduction	6
2	0	0	Credit Cooling Tower Water Use	2
1	0	0	Credit Water Metering	1

33	0	0	Energy and Atmosphere	33
Y	0	0	Prereq Fundamental Commissioning and Verification	Required
Y	0	0	Prereq Minimum Energy Performance	Required
Y	0	0	Prereq Building-Level Energy Metering	Required
Y	0	0	Prereq Fundamental Refrigerant Management	Required
6	0	0	Credit Enhanced Commissioning	6
18	0	0	Credit Optimize Energy Performance	18
1	0	0	Credit Advanced Energy Metering	1
2	0	0	Credit Demand Response	2
3	0	0	Credit Renewable Energy Production	3
1	0	0	Credit Enhanced Refrigerant Management	1
2	0	0	Credit Green Power and Carbon Offsets	2

13	0	0	Materials and Resources	13
Y	0	0	Prereq Storage and Collection of Recyclables	Required
Y	0	0	Prereq Construction and Demolition Waste Management Planning	Required
5	0	0	Credit Building Life-Cycle Impact Reduction	5
2	0	0	Credit Building Product Disclosure and Optimization - Environmental Product Declarations	2
2	0	0	Credit Building Product Disclosure and Optimization - Sourcing of Raw Materials	2
2	0	0	Credit Building Product Disclosure and Optimization - Material Ingredients	2
2	0	0	Credit Construction and Demolition Waste Management	2

16	0	0	Indoor Environmental Quality	16
Y	0	0	Prereq Minimum Indoor Air Quality Performance	Required
Y	0	0	Prereq Environmental Tobacco Smoke Control	Required
2	0	0	Credit Enhanced Indoor Air Quality Strategies	2
3	0	0	Credit Low-Emitting Materials	3
1	0	0	Credit Construction Indoor Air Quality Management Plan	1
2	0	0	Credit Indoor Air Quality Assessment	2
1	0	0	Credit Thermal Comfort	1
2	0	0	Credit Interior Lighting	2
3	0	0	Credit Daylight	3
1	0	0	Credit Quality Views	1
1	0	0	Credit Acoustic Performance	1

6	0	0	Innovation	6
5	0	0	Credit Innovation	5
1	0	0	Credit LEED Accredited Professional	1

4	0	0	Regional Priority	4
1	0	0	Credit Renewable Energy Production	1
1	0	0	Credit Optimize Energy Performance	1
1	0	0	Credit Surrounding Density and Diverse Uses	1
1	0	0	Credit Outdoor Water Use Reduction	1

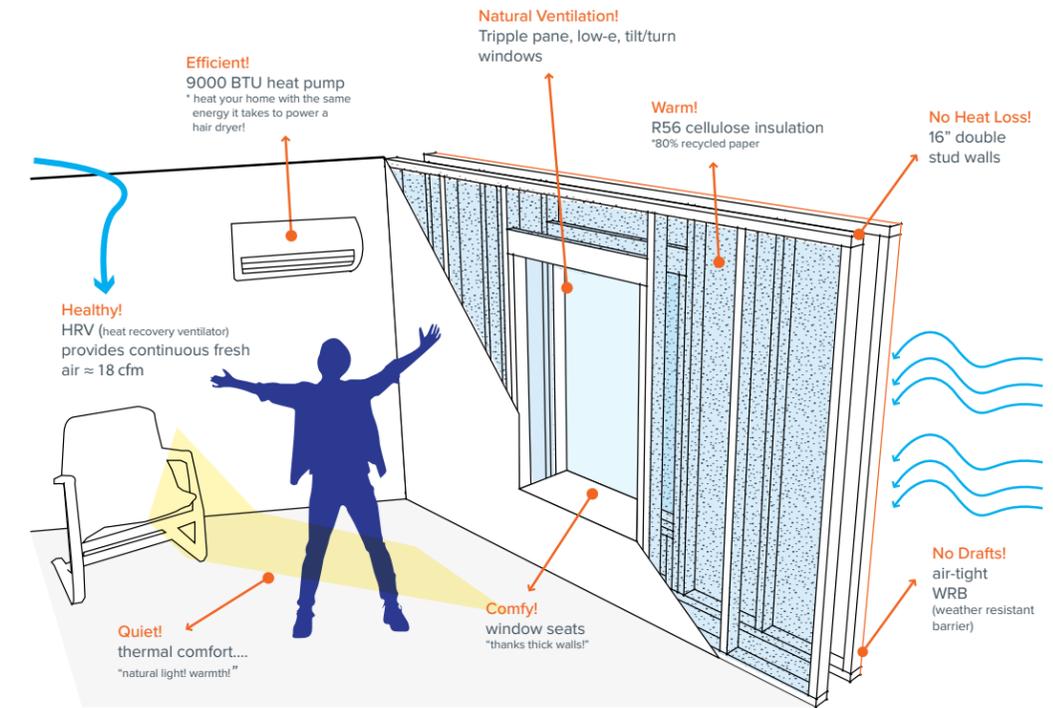
101	0	8	TOTALS	Possible Points: 110
Certified: 40 to 49 points, Silver: 50 to 59 points, Gold: 60 to 79 points, Platinum: 80 to 110				

What does Passivhaus design feel like?

Smart,

Like a well-tailored suit.

here are some reasons why...



"We bake it in"

Too frequently sustainability is seen as the "icing on the cake," something added after the cake is already done being baked. It might look good, it might even taste good, but it is always applied afterward, it isn't integrated or integral. Sustainability is at the core of every single project our team has ever done and will ever do. Sustainability is one of the main ingredients to all of our designs; in other words "we bake it in."

No Additional Cost

We are confident that we will be able to create an energy positive 30,000 SF development at no premium above standard construction. We are able to do this by carefully considering the energy, comfort, aesthetic, and cost implications of every decision. We are able to balance costs and do rapid estimating. When sustainability is frosting instead of being "baked in," it becomes a superfluous added cost. There will be some first cost expenses that are higher, but also some that will be lower, and we are practiced at navigating these budgets to find the right balance. We strive for cost parity and operational savings from day one. We want it to be a "no brainer," so we can focus on the bigger picture of how this project will benefit the community.

PASSIVE HOUSE DESIGN

Energy Efficiency Strategies

We are using a few strategies for 270 TALBOT to reduce energy bills for residents and tenants:

- 1) Passive Solar Orientation (Talbot only)
- 2) Highly Insulated/Airtight Envelope (both)
- 3) Efficient, Semi-Centralized HVAC and DHW (both)
- 4) Optional PV Array for Flat Roof (Talbot only)

Non-Energy Benefits: Comfort & Health

When you eliminate drafts, provide fresh filtered air and exhaust stale air, keep consistent temperatures, get ride of VOCs and all fossil fuel combustion, plus allow for quality day lighting and beautiful space you end up with a home that is healthier and more comfortable than almost any other. Sure these things also help to reduce the energy loads of the home, but our team believes that we really ought to be considering health and quality of life at least as much as the cost savings from reducing energy.



the ICONIC corner





TALBOT STATION PHASE II: 5-21 NEW ENGLAND AVE
CODMAN SQUARE NEIGHBORHOOD DEVELOPMENT CORPORATION



TALBOT STATION PHASE II: 5-21 NEW ENGLAND AVE
CODMAN SQUARE NEIGHBORHOOD DEVELOPMENT CORPORATION



FAIRMOUNT COMMUTER RAIL

GREEN ROOF

PATIO

RESTORED FACADE
SOLAR ARRAY

PARKING

NEW ENGLAND AVE

TALBOT AVE

TALBOT STATION
COMMUTER RAIL

TALBOT
STATION
PHASE I

MALLARD AVE

TALBOT STATION PHASE II: 5-21 NEW ENGLAND
CODMAN SQUARE NEIGHBORHOOD DEVELOPMENT CORPORATION



2 Floor 2 Plan (Floors 3, 4 Similar)
Scale: 1/16" = 1' - 0"



1 Floor 1 Plan
Scale: 1/16" = 1' - 0"