



MISSION HILL PATHWAY

PARKER + TERRACE STREET DEVELOPMENT

MISSION HILL, MA

11 | 07 | 22

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INTRODUCTION

STATEMENT OF INTEREST

Mission Hill is changing, and the demands of the future neighborhood must be met with a bold vision rooted in the Mission Hill community of today. Larger multi-family developments will emerge alongside the neighborhood's iconic brick row houses and triple-deckers. Within the next five years alone, more than 300 rental and homeownership units will come online, bringing hundreds of new workers, families, students, artists, and others to the neighborhood.

Mission Hill Pathway seeks to harness the growing energy, attention, and investment in Mission Hill to deliver a project that enables longtime residents to be part of a future that they have defined for themselves. That future is one where housing is affordable to people who want to live there, regardless of their income; where families can build wealth by owning a stake in their neighborhood; where small businesses led by women and people of color can grow, scale, and thrive; where residents can nourish themselves with produce grown on their street; where buildings enhance, rather than strain, energy and environmental resources; and where neighbors have spaces to be in community with one another.



The collaboration of Oxbow Urban, DVM Consulting, and JGE Development (OXBOW.DVM.JGE) is the right team to deliver this vision. Collectively, we are a diverse group of professionals with complementary talents and a broad range of lived and professional experience. We have a combined 85 years of experience designing and developing affordable, multi-family, mixed-use, transit-oriented, and sustainable projects.

We know that assembling teams and working with those organizations that share our vision is critical to a development that will stand the test of time. We are very excited that 'The Trustees' has decided to join OXBOW.DVM.JGE. The Trustee's understands community and the power of open space and has a long history working with the Mission Hill community.



Individually, we each believe in the transformative power of development, the life changing impact of homeownership, the importance of strengthening the neighborhoods where we live, and the power of hard work and focus. We also understand that success in our work is only possible with active, meaningful, and continuous collaboration with the Mission Hill community.

It is with these shared values that OXBOW.DVM.JGE submits this proposal for the redevelopment of the Parker and Terrace Street parcels in Mission Hill.

We have proposed a project with the future Mission Hill in mind, as defined by the community and the Mayor's Office of Housing (MOH): a neighborhood that sustains its character as it changes; promotes equity for moderate-income households and small businesses of color through homeownership and new economic opportunity; and contributes to a healthy and sustainable Mission Hill through community gardening, open space, and green building practices.

CONCEPT

MOH and the community can confidently expect to see the following outcomes when Mission Hill Pathway is complete:

1. 40 first time home owners will realize housing stability at an affordable monthly cost while taking the first step onto the wealth creation ladder.
2. Family childcare entrepreneurs will grow their capacity utilizing the resources and mentorship provided by the 5,000-square-foot Mission Care Incubator realized in collaboration with the City of Boston Office of Early Childhood;
3. Terrace Street will welcome a 45,000-square-foot all electric Zero Net Carbon mixed use building built to Passive House and LEED Gold standards.
4. The residential character of the community on Parker Street will be enhanced by the enlarged sidewalks between 778 and 796 Parker that prioritize the human over the automobile.
5. Urban heat island impacts will be reduced as all existing mature trees on Parker Street and will be maintained with additional species of trees being added as part of the Parker Street cultivation zone.
6. Garden beds, food production, and ecological awareness will be increased on 17,376 square feet of land at 778-788 Parker Street, stewarded by the Trustees in partnership with local community organizations, including Roxbury Community College and Nubian United Benevolent International Association (NUBIA).
7. Creativity, community, and wellness will be cultivated within the pocket park created on 15,007 square feet of land at 790-796 Parker Street with visibility, lighting, and careful selection of plantings and heights incorporated into the design to ensure neighborhood safety.
8. Stormwater will be retained on site via the implementation of Low Impact Site Design techniques while the cultivated zone will be irrigated utilizing rainwater harvested from the Terrace Street building.
9. A safe and accessible pedestrian connection will be created increasing the awareness and accessibility of the Parker Street cultivation zone to residents and workers on Terrace, Cedar and Heath Streets.



A Highly Advantageous Project for Mission Hill

The community and MOH have set rigorous standards to ensure delivery of a project that Mission Hill deserves. As the proposal will demonstrate, OXBOW.DVM.JGE meets and exceeds all criteria.

<p>DEVELOPMENT PLAN</p>	<ol style="list-style-type: none"> 1. Creation of 100% affordable ownership housing; 2. Focus on small business incubation in the form of child care collaborating with the City of Boston Economic Development team (Segun Idowa) as well as the City of Boston Department of Early Childhood (Kristin McSwain); 3. Expansion of Parker Street Community Garden working with the Trustees as co-development and long term open space asset manager; 4. Creation of pedestrian pathways that enhance connection between the existing Mission Hill neighborhood, Parker Street open space and the Terrace Street corridor; 5. Enhance the pedestrian experience by expanding separation and safety between open space and vehicular travel and street parking on Parker Street; 6. Maintain mature trees and supplementing with additional species while utilizing low impact site development strategies to reduce heat island effects while being sensitive to sustainable resources maximizing collection and reuse of stormwater.
<p>DESIGN CONCEPT</p>	<ol style="list-style-type: none"> 1. To create a unique and memorable path/ connection from Parker to Terrace Street. This idea is a direct reference to the existing “hidden” Mission Hill paths that are full of interest because they transverse through backyards, urban wilds, and other neighborhood elements that make them unique; 2. Organize the expanded open space and building along the new connection/ path; 3. Generate several epicenters of activity along the path. Starting with the plaza on Terrace Street and a variety of open-space activities on Parker Street; 4. To keep the entirety of Parker Street as a green space and to concentrate the residences on Terrace Street. The expanded green creates an invaluable amenity for both existing residents that have grown accustomed to this urban wild as well as new residents that would be able to take advantage of the gardens and areas ideal for children to play; 5. Architecturally the building will be contextual while providing a contemporary expression that represents the diversity of residents in Mission Hill and the city;

INTRODUCTION

<p>APPLICANT'S EXPERIENCE + CAPACITY</p>	<ol style="list-style-type: none"> 1. Partners with exceptional knowledge of development in Boston; 2. Experts in the design, construction management, marketing and sales of affordable ownership in the City of Boston and beyond; 3. Past experience with mixed use development including the development of the Harrison Urban Garden in coordination with the Trustees; 4. Have completed 20 affordable ownership units with MOH in the past 5 years, have 40 affordable ownership units with MOH in construction and 18 affordable ownership units in predevelopment with MOH. 5. Exceptional relationships with public/private affordable ownership lenders including end mortgage providers; 6. Demonstrated history in the City of Boston for high quality design/development on challenging sites in tight neighborhood conditions including coordination with MOH on the remediation of contaminated sites;; 7. Past experience with a diverse collection of development professionals/contractors. 8. Capacity to focus with 25 Fountain Street completion in Summer 2023; 9. We get it done.
<p>APPLICANT'S FINANCIAL CAPACITY</p>	<ol style="list-style-type: none"> 1. Available equity in excess of \$5M to advance the project from day 1; 2. Exceptional relationships with public/private affordable ownership lenders including end mortgage providers;
<p>DEVELOPMENT COST FEASIBILITY</p>	<ol style="list-style-type: none"> 1. Development costs that are informed by our active participation in the current design/construction/development marketplace; 2. Experience and understanding of the development/cost challenges when topography, ledge, remediation and tight urban conditions drive development costs; 3. The ability to reduce development costs through the efficient outreach/marketing/lottery/income certification and sell out of an all affordable ownership building; 4. Strong relationships with professionals on similar projects which leads to efficiency in process, services and soft costs.
<p>DIVERSITY + INCLUSION</p>	<p>Inclusion of minority and female participation at all levels of the development team:</p> <ul style="list-style-type: none"> • Development Partners; • Architect/Landscape/Civil-Survey/Interiors; • Interior construction fit out of retail; • Development Legal and Conveyancing; • Property Management; • Marketing; • Lottery/Income Certification
<p>HOUSING AFFORDABILITY</p>	<p>50% of ownership units affordable to families earning 62.5% of the Boston median income and 50% affordable to families earning 82% of the Boston median income.</p>

ORGANIZATIONAL STRUCTURE

Leadership Team

Howard Cohen, Jonathan Garland, Dariela Villon-Maga, and Kevin Maguire are the lead members of the limited liability development entity referred to as OXBOW.DVM.JGE. Our combined team will realize the vision for Parker Terrace homes in the Mission Hill neighborhood of Boston.

Division of Responsibilities

Howard Cohen: Strategic/Finance/Legal
 Jonathan Garland: Concept/Approvals/Design/Construction
 Dariela Villon-Maga: Concept/Approvals/Marketing/Sales
 Kevin Maguire: Legal/Finance/Design/Construction



Project Team

Our diverse and highly-qualified team has experience working in and with the City of Boston. The team’s combined talents and expertise will ensure a successful outcome for the Parker and Terrace Street Development.

NAME	ROLE	BOSTON BASED	MINORITY OWNED	WOMEN OWNED
Oxbow Urban	Developer	X		
DVM Consulting Corp	Developer	X	X	X
JGE Development, LLC	Developer	X		
The Trustees	Open Space Developer	X	X	
J. Garland Enterprises, LLC	Architect	X	X	
Ground, Inc	Landscape Architect			X
Sasha Thind Warm Minimalism	Interior Designer	X	X	X
Elyse Ayoung	Interior Designer	X	X	
Nitsch Engineering	Civil Engineer/Surveyor	X		X
CLEARResults	Building Performance Consultant	X		
McPhail Associates, LLC	Geotechnical + Environmental Engineering	X		
Dellbrook/JKS	General Contractor - Residential			
LJVDdevelopment	General Contractor - Daycare		X	X
McDermott, Quilty & Miller	Legal Counsel - Permitting	X		
Nolan, Sheehan, Patten	Legal Counsel - Development	X	X	X
UHM Management	Property Manager	X	X	
Waterville Consulting	Community Relations Consultant	X		
DVM Consulting Corp	Lottery + Income Certification	X	X	X
Our Village Initiative	Marketing Outreach		X	X
The Sofenomemal Agency Group	Community Outreach + Branding Consultant		X	X

INTRODUCTION



LEGAL PROCEEDINGS

No lawsuits have been brought against the Applicant or its Principals within the last five (5) years.

INTRODUCTION



DEVELOPMENT PLAN

MISSION HILL PATHWAY

Harnessing Community Vision to Guarantee a Healthy, Sustainable, and Equitable Future



Current development patterns do not center community assets

Within the last five years, new development in Mission Hill has accelerated with hundreds of new housing units coming online. On Terrace Street alone, seven projects have been approved since 2018 or are currently under review, adding an estimated 122 ownership and 240 rental units to the neighborhood.

This pace of development is necessary, in part, to meet the city's ambitious goal of adding 69,000 new units to the city's housing stock by 2030. Even so, these new projects will primarily offer market-rate housing, which means that many residents may not afford to live in these units. In fact, we are almost certain this will be the case: 94% of Mission Hill residents are renters and 51% of those renters are cost-burdened, spending more than 30% of their household income on rent.

In addition, although new projects incorporate green building elements that promote sustainability, only a handful actively contribute to neighborhood vibrancy. Of the three projects that include open space, these amenities are primarily closed to the public, and only two of those projects offer commercial spaces for future businesses.

DEVELOPMENT PLAN

TERRACE STREET DEVELOPMENT AT A GLANCE

Address	Total Units by Type	Affordable Units	Open Space	Retail/ Commercial	Parking Spaces	Approval Date
1-4 Terrace Place	47 Ownership	7	2,600 sf roof deck		15	June 2022
77-81 Terrace Street	60 Rental	10		5,690 sf	33	June 2018
80 Terrace Street	9 Ownership				10	Under Review
110-128R Terrace Street	79 Rental	12	6,084 sf roof deck/balcony/plaza	1,834 sf	32	Under Review
111 Terrace Street	39 Rental	5			22	October 2018
154 Terrace Street	66 Ownership	3	600 sf pocket park		24	October 2021
164-166 Terrace Street	62 Rental	3 Artist			48	Completed in 2011
Total	122 Ownership 240 Rental	>40	9,284 sf	7,524 sf	184	
Proposed Project: Mission Hill Pathway	40 Ownership	40	30,000 sf	4,623 sf	34	To be determined

DEVELOPMENT PLAN - CONCEPT

Mission Hill Pathway will deliver assets the community wants

Mission Hill Pathway will distinguish itself from new development patterns by centering affordable homeownership, small business development, and community-first amenities. We will enhance neighborhood sustainability, vibrancy, and equity through three key programmatic components.

WHAT MISSION HILL PATHWAY WILL DELIVER

Affordable Homeownership

We will deliver 40 1-bedrooms, 2-bedrooms, and 3-bedrooms homes. Half of the units will be affordable to families earning between 63% - 80% of the Boston Area Median Income (AMI), while the other half will be affordable to families earning 83% - 100% of Boston AMI.

Mission Care Incubator

Expanding on a growing national trend, we will co-locate child care programs within our affordable residential project through 5000 SF of ground floor commercial space. This space will host the Mission Care Incubator, which will grow the capacity of family child care providers while filling an essential gap in the city's childcare network. We collaborate with the City of Boston Office of Early Childhood and leverage the knowledge being generated from similar pilot programs to bring this novel amenity to life.

Parker Street Open Space Corridor

We will enhance existing open space amenities to stimulate a new scale of agricultural and artistic activity in Mission Hill in three ways:

Mission Hill Community Garden Extension. Garden beds, food production and ecological awareness will be cultivated on 14,450 SF of land at 778-788 Parker Street. Stewarded by The Trustees, the garden will extend the Mission Hill Community Garden and provide more than 40 new plots for interested gardeners on the waiting list.

Parker St Pocket Park. Restoring an existing park, the 15,000 SF pocket park at 790-796 Parker Street will facilitate gathering and artistic performance spaces, and deploy urban design principles that optimize neighborhood safety.

Open Space Pathways. Prioritizing connectivity within and across the site, we will network all open spaces on the site, while creating pathways for neighbors to traverse the site between Parker and Terrace Streets. These pathways will ensure that local residents, homeowners, and children enrolled in the Mission Care Incubator can access the recreational, agricultural, and educational opportunities facilitated by our garden and pocket park.

Affordable Homeownership

Ensuring All Families Have a Place in the Future Mission Hill

Mission Hill needs affordable homeownership

Mission Hill has a high need for affordable homeownership units. A 2021 analysis of income-restricted housing assets by the Mayor’s Office of Housing reveals that over one-third of housing units in Mission Hill (37 percent; 2,654 units) are income-restricted—the third highest proportion compared to other neighborhoods in the city. However, the vast majority of these units (93 percent) are rental, while only 7 percent of income-restricted units are homeownership. This tracks onto the renter-dominant character of Mission Hill, where 89 percent of housing units are renter-occupied.



Demand for units offered at our proposed 80% and 100% Area Median Income (AMI) thresholds is particularly strong in Mission Hill. At least 80 percent of households have incomes below these income limits, and nearly one-third have incomes that could potentially afford our proposed sales prices (27 percent of households make between \$50,000 and \$100,000 per year). Mission Hill households have sizes that fit our unit mix, with nearly half (45 percent) of households with 2 people, one-third (33 percent) with 3 people, and 16 percent with 4 people.



DEVELOPMENT PLAN

Through our collective experience designing, developing, and recruiting homebuyers for income-restricted homes, our team has gained a clear understanding of the keys to successful affordable homeownership: (1) a focused team; (2) a high-quality design; and (3) robust buyer engagement, marketing, and recruitment efforts (see the ownership marketing outreach section in Supplemental Information for more details).

A Team Focused on the Experience of Homeowners. Affordable homeownership projects must be supported by teams who understand the intrinsic differences between these projects and income-restricted rental or market-rate projects. These projects have unique demands, from the quality of construction, to the education and engagement of potential homebuyers that require consistent time, attention, and focus. At a minimum, this team must include:

- Quality Control Consultants such as waterproofing consultants to maintain a high design and construction standard.
- Builders who can build to high-quality standards and achieve a focused punch list.
- Homebuyer educators who can provide individualized attention to prospective buyers to set them up for the successful purchase and stewardship of their first home.
- Developers who can commit to designing and working within a resident ownership structure, such as a condominium association, for at least two years after the association is formed and units are sold. Among many purposes, sustained developer participation is necessary to help new homeowners adjust to homeownership and condominium association membership.

All team members must be involved and engaged from the beginning of the design process and throughout the construction and marketing period to achieve our outcomes.

TERRACE STREET RESIDENTIAL SUMMARY

Lot Size	28,300 sf
Residential Gross Area	48,000 sf
Affordable Homeownership Units	40
Bike Storage	40 Vehicles
Parking	34 Dedicated Parking Spots 1 Shared Battery Charging Station 4 Shared Vehicle Spots



“We have clear understanding of the keys to successful affordable homeownership: a focused team, high-quality design, and robust homebuyer engagement”

DEVELOPMENT PLAN - CONCEPT

How Mission Hill Pathway will meet this need

At 77 Terrace Street, our goal is to offer first-time homebuyers with moderate-incomes an opportunity to build intergenerational wealth and benefit from ongoing investment in Mission Hill. We will achieve this goal with 40 affordable homeownership units, affordable to families earning between 63% - 80% AMI or 83% - 100% AMI.

AFFORDABLE HOMEOWNERSHIP SUMMARY

Unit Type	Total Number of Units	Tier 1 Affordable to families earning between 63%-80% AMI		Tier 2 Affordable to families earning between 83%-100% AMI	
		Number of Units	Monthly Cost to Buyers	Number of Units	Monthly Cost to Buyers
3 BR	8	4	\$2,401	4	\$2,892
2 BR	24	12	\$2,160	12	\$2,602
1 BR	8	4	\$1,921	4	\$2,313
Total	40	20		20	

Note: Monthly Cost to Buyers includes mortgage, real estate taxes, condo fee, and insurance. Assumes sales prices based on 2022 AMI price limits.



✓ **Sustainability.** In prioritizing affordable homeownership, we are filling a critical gap in Mission Hill’s housing inventory, while reinforcing its network of income-restricted housing assets. Our homes will be designed to the latest green building standards.

✓ **Equity and Inclusion.** Mission Hill Pathway will allow moderate-income families in the neighborhood and across the city to access homeownership where it otherwise may not be possible or affordable. Owning a stake in a highly sought-after neighborhood of Mission Hill will ensure that families who have historically been edged out of opportunities can build a foundation for intergenerational wealth creation.

✓ **Safety and Vibrancy.** In addition to building beautiful and welcoming spaces, we are cultivating future homeowners who are invested in maintaining, improving, and participating in public life in Mission Hill.

“We believe in the importance of home ownership and thrive on the challenge of setting buyers up for success, from design and construction, to marketing, education, and home sales.”

Design. Homeowners of affordable homes deserve to live in high-quality, long-lasting, and beautiful spaces. Design, therefore, is another critical component of a good affordable homeownership project. The homes in Mission Hill Pathway would, at a minimum, offer the following features and amenities:

- Interior and Exterior Amenities
- Heating/Cooling System/Utility Structuring
- Healthy indoor air quality by minimizing VOCs and use of MERV 13 filters
- Optimized unit design to accommodate diverse lifestyles
- Variety of Space within the units and amenities to foster privacy and respite
- Parking, bike storage proximity to public transit

Buyer Engagement, Marketing, and Recruitment.

As our experience tells us, the mantra of “Build it and they will come” does not apply to affordable homeownership. Informed by feedback from past owners, we have developed methods for buyer education and marketing and lottery to ensure we identify and prepare first-time homebuyers to purchase our units. These methods include (but are not limited to):

- An “interested buyer club” of over 350 individuals (as of 11/1/22) and families in Boston, many of whom are prospective first-time home buyers
- Working relationships with the City (Boston Home Center, Boston Fair Housing Commission, MOH Staff)
- Focused implementation of a marketing strategy that is coordinated with the construction company, public/private lenders, conveyancing attorneys, appraisers, and mortgage providers

Our team is poised to leverage our past and ongoing experiences delivering high-quality and sustainable homes to first-time homebuyers to deliver 40 homes through Mission Hill Pathway.

DEVELOPMENT PLAN - CONCEPT

MISSION HILL HOUSING AT A GLANCE

HOUSING UNITS BY TENURE AND INCOME RESTRICTIONS

	All	Rental	Owner
All Housing Units			
Housing Units by Tenure		89%	11%
Total Number of Housing Units	7,228	6,433	795
Income Restricted Housing Units			
Housing Units that are Income Restricted by Tenure	37%	93%	7%
Total Income-Restricted Rental Units	2,654	2,476	178

Source: Mayor's Office of Housing, "Income-Restricted Housing in Boston 2021"

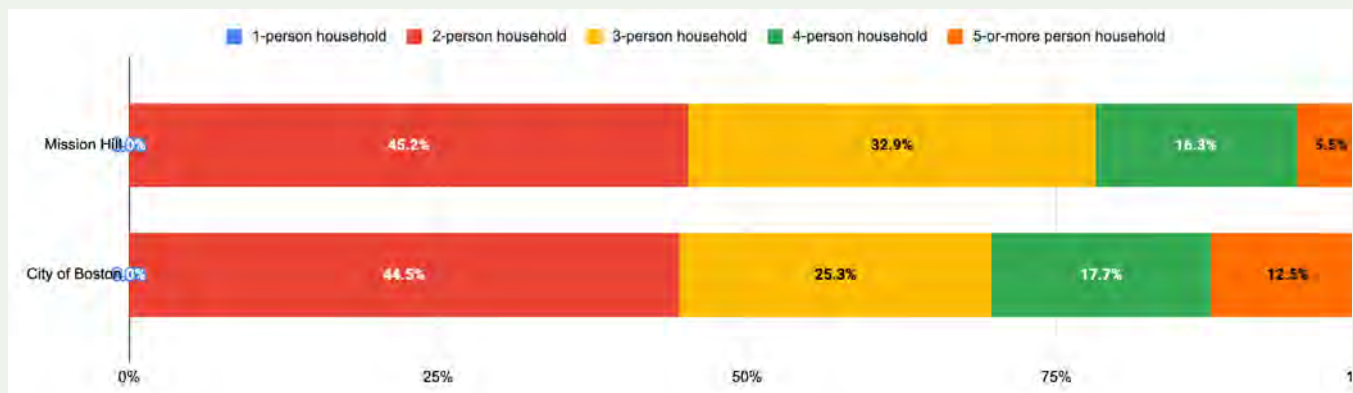
MEDIAN HOUSEHOLD INCOME

	Mission Hill	Boston
Median Household Income	\$45,392	\$76,298

HOUSEHOLD INCOME IN THE PAST 12 MONTHS



HOUSEHOLD SIZE



Source: Census Bureau, American Community Survey 5-Year Estimates, 2016-2020

Mission Care Incubator

Co-locating childcare with affordable housing to nurture our children and our most marginalized small businesses

In partnership with the City of Boston Office of Early Childhood, we are proposing a novel model for childcare service delivery that fulfills several urgent needs in Boston. Our Mission Care Incubator will provide a brand new space at a subsidized rate exclusively for multiple family child care providers to fulfill childcare services in the neighborhood. In addition to space, the Incubator will provide in-house small business development resources that many family child care providers struggle to access. Our goal in hosting the Mission Care Incubator is to help family providers scale their businesses while filling an essential need for childcare in Boston's strained system.



Why childcare, why family child care providers, and why now?

High-quality early care and education creates a foundation for our children to grow and thrive, sustains working families, and promotes economic mobility for providers. However, Boston has major gaps in early education and care that have become a “child care crisis” as a result of the pandemic.

Even before the pandemic, Boston had been losing licensed child care programs and seats over time: between December 2017 and September 2020, 35 percent of 0-to-5-year olds, and 72 percent of 0-to-2-year olds in Boston could not access early education and care seats. Not only is Massachusetts the second most expensive state in the country for early education, the childcare workforce—made up predominantly of women, people of color, and immigrants, earn an average of \$24,980 a year. Low wages threaten the sustainability of childcare providers, who are twice as likely to live in poverty compared to other workers, especially if they are Black. Working families must turn to childcare alternatives that are substandard in quality.

DEVELOPMENT PLAN - CONCEPT

These conditions are particularly challenging for family child care (FCC) providers and the families that rely on them.

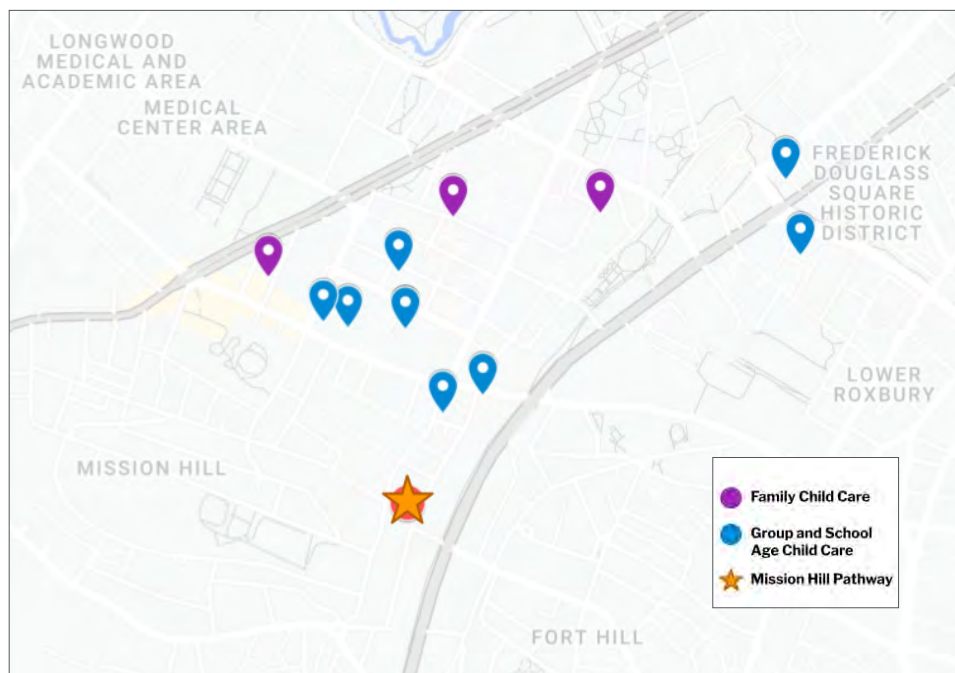
FCC providers—also known as home daycare, in-home preschool, or neighbor care—play an essential role within the child care landscape in Boston. In FCC programs, licensed providers care for small groups of children in their home, apartment, or condominium. FCC providers are attractive to working families because they tend to cost less than private programs and demand less commute times because they are located in the same neighborhoods. Due to the small size and intimacy of these environments, FCC programs can accommodate more 1:1 interactions between providers and children, mixed age groups, and longer continuity of care. They also tend to have lower staff turnover and facilitate strong relationships between parents and providers.

FCC providers face unique barriers to sustaining and scaling their businesses, compared to government-funded programs like Head Start or

private programs like Bright Horizons. Often, FCC providers lack basic business skills and lose out on opportunities like the Paycheck Protection Program because of a lack of a business bank account. FCC providers tend to be predominantly women and people of color and are therefore more likely to be declined for loans, receive smaller loans, and pay higher interest rates. Many providers also have limited English proficiency which makes it challenging to access training and coaching opportunities. Even the most financially stable FCC providers are limited in their growth due to spatial constraints of their homes and licensing requirements.

In Boston, these barriers have worn down the FCC provider network. Between 2010 and 2019, the city lost 55 percent of FCC programs between 2010 and 2019 despite the high demand for early child care seats. In the years leading up to the pandemic, areas near Mission Hill—including the South End and Roxbury, saw the largest loss of FCC seats across the city.

CHILDCARE OFFERINGS IN MISSION HILL



Why the city should support the Mission Care Incubator

As the pandemic has laid bare the dual crises of child care and affordable housing, there is a growing appetite across the country to maximize the benefits of public investment by co-locating these assets and addressing both challenges. In February 2021, the Local Initiatives Support Corporation (LISC) piloted a new Building Innovation for Equitable Child Care program, to fund predevelopment costs for community partners co-locating high-quality, affordable childcare facilities within development projects. Within the last two years, the Low-Income Investment Fund (LIIF) has invested in several technical resources for developers to build childcare facilities within larger affordable projects. From the many emerging and successful cases, LIIF is learning how co-location can support economic sufficiency and plays an increasingly important role in comprehensive community development.

States and municipalities around the country are also taking bold legislative action to support co-location investments: as recently as September 2022, the State of Oregon Emergency Board approved funding to provide co-located affordable housing and childcare to low-income families.

Childcare as a resource to new homeowners and the community at large is an investment in a robust intergenerational future for Mission Hill and the City of Boston.

A recent LIIF report specifically called out the high potential of co-location to empower FCC providers specifically:

“Affordable housing developments can also take multiple years to build. The long timeline can be helpful for FCC providers, as it gives them time to create a business plan and organize their finances to be able to take on debt to outfit the space. ...It is also important to consider equity within the type of child care businesses prioritized in a co-location development. If steps are not taken to proactively reach out to smaller, community-based providers, developers may end up working with larger companies only and exclude small business owners from the market.”

Individual and community wellness results when necessary amenities are accessible financially and physically. Childcare as a resource to new homeowners and the community at large is an investment in a robust intergenerational future for Mission Hill and the City of Boston.



DEVELOPMENT PLAN - CONCEPT

EXAMPLES OF SUCCESSFUL CASES FROM AROUND THE COUNTRY

Plaza Roberto Maestas²²



Location: North Beacon Hill - Seattle, Washington

Developer: El Centro de la Raza

Provider: Jose Marti Child Development Center

Classrooms: 7

Ages Served: 15 months to 5 years

ECE Slots: 128

Year Completed: 2016

Funding Sources: 9% LIHTC, Washington State Housing Trust Fund, City of Seattle Office of Housing and Human Services, construction loan, capital campaign, office condominium sale, and permanent bank debt

Details: El Centro is a nonprofit organization that runs over 40 community programs in the Seattle area. The organization manages a child care center and decided to build affordable housing on adjacent land that they owned to build in additional supports for the community. The site is also a transit-oriented development, located across the street from a light rail station. Enterprise Community Partners was a key contributor to the development, providing funding and technical assistance through their Home & Hope initiative.

North Beach Place²³



Location: San Francisco, California

Developer: BRIDGE Housing

Provider: Kai Ming Head Start

Classrooms: 2

Ages Served: 3-5 years

ECE Slots: 40

Year Completed: 2004

Funding Sources: HUD, San Francisco Housing Authority, City of San Francisco Mayor's Office of Housing, Citibank, Centerline Capital Group, Federal Home Loan Bank of San Francisco. LIIF provided a total of \$66,000 in grant funding to support start up, capital and quality costs at Kai Ming.

Details: This development is located in the North Beach neighborhood, which is home to many Chinese immigrants. The Head Start center is a dual language program. BRIDGE designed the development such that the center courtyard is also the outdoor space used by Kai Ming. This solved a common co-location problem of where to include the required ECE outdoor space and connected the center to other residents who call North Beach Place home.

DEVELOPMENT PLAN - CONCEPT

Trianon Lofts²⁴



Location: Woodlawn Park - Chicago, Illinois

Developer: Preservation of Affordable Housing (POAH)

Provider: Teeny Tiny University

Classrooms: 6

ECE Slots: 100

Ages Served: 6 weeks to 5 years

Year Completed: 2017

Funding Sources: New Markets Tax Credit, City of Chicago Neighborhood Stabilization Program, HUD Choice Grant, private construction loan

Details: The owner of Teeny Tiny University was previously operating out of her home and was looking to expand her business. Aspects that made the development successful were an SBA loan for the build out, an architect with deep experience in child care regulations and an adjacent playground to meet the outdoor space requirement. Woodlawn Park was selected as a HUD Choice Neighborhood grant recipient, and the Trianon Lofts building is one of multiple affordable housing developments constructed using the grant.²⁵

Parker Street Open Space Corridor

The parcels along 778 - 796 Parker Street provide a rare opportunity for Mission Hill to gain 30,000 square feet of diversely programmed open space. Given the scale of development taking place in the neighborhood, we believe that we can achieve our development goals while preserving as much open space as possible.

The neighborhood currently offers several essential open spaces, including the Mission Hill Community Garden; the linear SW Corridor Park, essential recreational and mobility infrastructure; the nearby McLaughlin Playground, a youth-focused recreational space; Kevin W. Fitzgerald Park, an all-age recreational and leisure amenity; and a lightly landscaped park on the Parker St parcels. Importantly, the existing topography and tree canopy will not be impacted while expansive views of Roxbury will be maintained.

The Parker Street Open Space Corridor is both distinct from and additive to these amenities. Our proposal will bolster the local open space network and build upon this latent community amenity in three key ways:

- 1. In partnership with the The Trustees, we will extend the reach of the nearby Mission Hill Community Garden and cultivate a wait list of eager new gardeners**
- 2. We will promote neighborhood safety and vibrancy and facilitate artistic activity through a new Parker Street Pocket Park**
- 3. The project will also expand access to these new amenities through a series of well-connected pathways**



OPEN SPACE OVERVIEW

Mission Hill Community Garden Extension 778-790 Parker Street	Parker Street Pocket Park 792-796 Parker Street	Open Space Pathways Full Site
<p>14,450 SF of open cultivation area maximizing local food production, managed by The Trustees</p> <p>Extends the existing Mission Hill Community Garden located one block north of the site, and engages active wait list of eager future gardeners</p> <p>Themed planting and landscaping: Foraging Garden, Apothecary Garden, Scent Garden, Kitchen Garden</p> <p>Partnerships with local groups to enhance programming including Nubia (Sudanese immigrant-led organization) and Roxbury Community College</p>	<p>15,000 SF pocket park</p> <p>Low-impact site development principles, e.g. rain gardens, bio retention basins, grass berms</p> <p>Gathering spaces at different scales, from benches to performance spaces</p> <p>Urban design principles that increase neighborhood safety and vibrancy</p>	<p>800 SF of pathways that bisect and traverse the site</p> <p>Stitches together multiple open space programs</p> <p>Facilitates new view and mobility corridors across Parker and Terrace Streets</p> <p>Expands broader neighborhood access to the site</p>



Mission Hill Community Garden Extension at 778 - 790 Parker St

The Trustees is the foremost authority on the conservation and preservation of natural places in Massachusetts, protecting over 12,000 acres of farmland and community gardens throughout the Commonwealth. The Trustees will shepherd the creation of a new 14,450 SF community garden, extending activities of the existing Mission Hill Community Garden, and offering space to an existing wait list of eager gardeners. The Trustees will also design garden and youth programming through existing partnerships with the Roxbury Community College and Nubian United Benevolent International Association (NUBIA), a Sudanese immigrant-led nonprofit focused on solving food insecurity through urban farming.



To support these activities, we will make landscaping and sidewalk improvements around the garden to enhance the residential character of the amenity. Our garden will also be subdivided into themed gardens focusing specific gardening practices as well as food and plant species, such as a “Kitchen Garden,” “Scent Garden,” “Foraging Garden,” and “Apothecary Garden.” Through this approach, we will help participants cultivate their gardening affinities while exposing visitors to a wider range of ecological activities. This new garden will also serve to enhance educational programming for children enrolled in the Mission Care incubator.

Parker Street Pocket Park at 792-796 Parker St

Our 15,000 SF Parker Street Pocket Park will restore and enhance the existing park on the site through low-impact site development principles. We will introduce landscaping elements that increase the resilience value of the site, including rain gardens, bio retention basins, and grass berms. The park will facilitate gathering spaces at different scales, from park benches for smaller groups to open areas for small performances. The site will also accommodate different forms of artistic expression, including sculpture, performance, and community arts events.

Our design will be guided by key urban design principles to promote safety and the vibrancy of the street:

- High connectivity to the street, the community garden, and the remainder of the site
- Wide sidewalks and pathways that can accommodate double pushchairs/strollers to ensure caregivers and families feel welcome
- Diverse route options and clear and legible circulation
- Clear and legible circulation
- Defensible spaces
- Mix of functions that occur across the full span of the day
- Plantings that do not obstruct major sightlines and do not create hidden spaces
- Well-considered lighting
- Clear directional signage
- High-quality maintenance to ensure spaces are well-cared for

Pathways across the Parker Street Open Space Corridor

We have designed 800 square feet of pathways that bisect and traverse the entire site. They connect residential units and the Mission Care Incubator to the open space corridor; they stitch together our community garden and pocket park; and they connect our open spaces to the broader Mission Hill and adjacent Boston neighborhoods from both Parker and Terrace Streets. This high level of connectivity will encourage more foot traffic across the site, cultivate more eyes on the street, and contribute to a safer, more vibrant Mission Hill.



Approach to Public Art

The Oxbow.DVM.JGE team recognizes the impact public art has on the revitalization of communities and dense urban areas. The artwork created for the Parker and Terrace Street development will add value to the cultural and aesthetic vitality of the area and give the Mission Hill neighborhood an identity while also fostering pride and enhancing the quality of life of its residents and visitors.

We have read the City of Boston's Department of Neighborhood Development (DND) Public Art Policy and fully understands and intends to follow the required guidelines. We will collaborate with artist(s), the City, the design team, and community members to develop an artistic concept that celebrates and responds to the neighborhood's history.

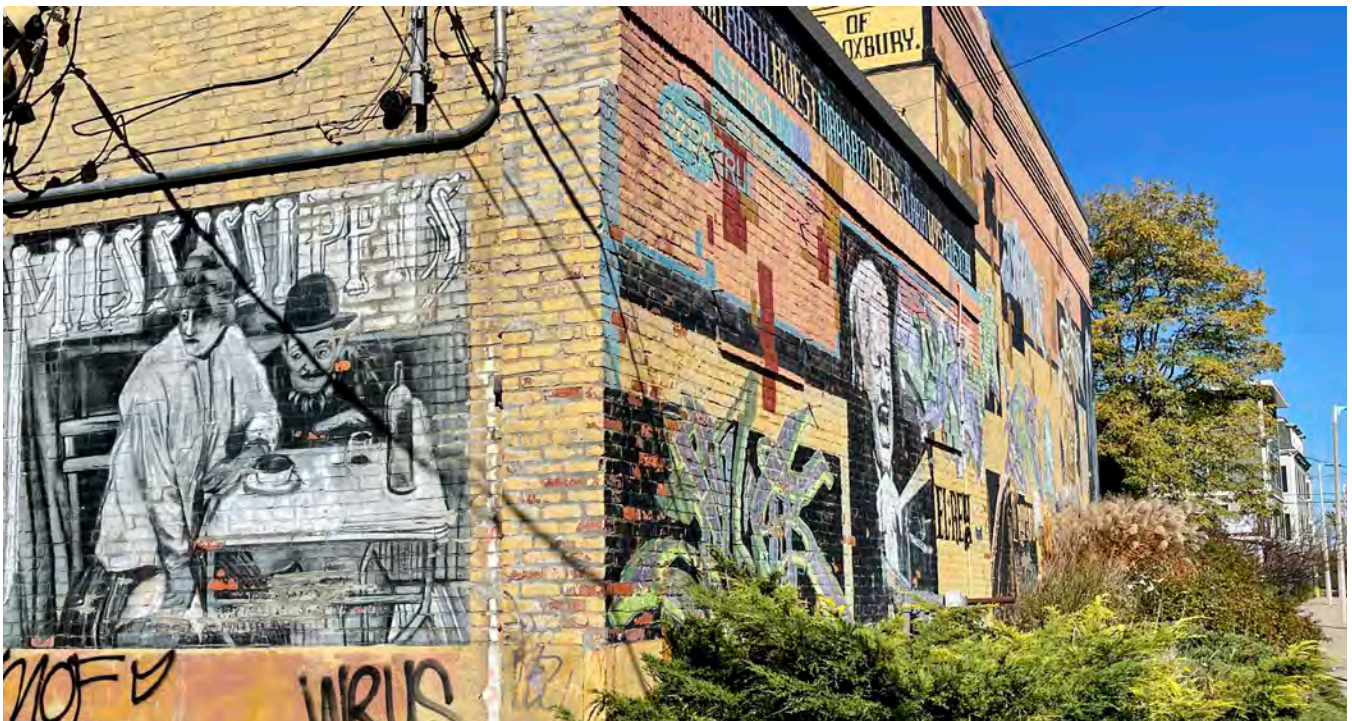


DEVELOPMENT PLAN - CONCEPT

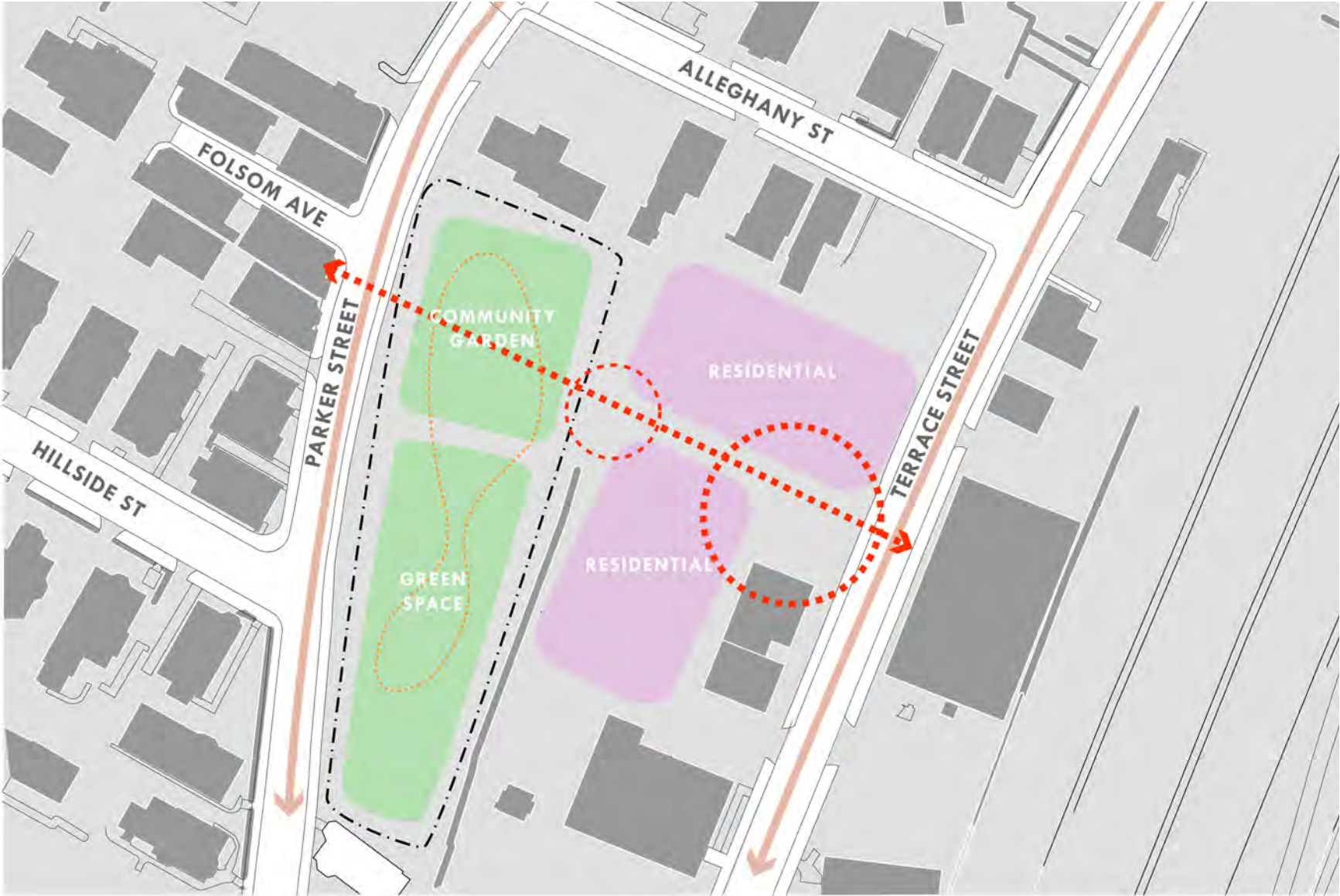


Our team anticipates incorporating artwork into the building's amenity spaces and wall murals on the building's exterior. Ground level artwork and sculptures, interactive art, and educational elements will all help to activate the site and interior spaces. In addition, the relocation of the existing Art Gazebo Park and incorporation of programmable outdoor spaces and infrastructure for art installations and performing arts will draw residents and visitors to the area.

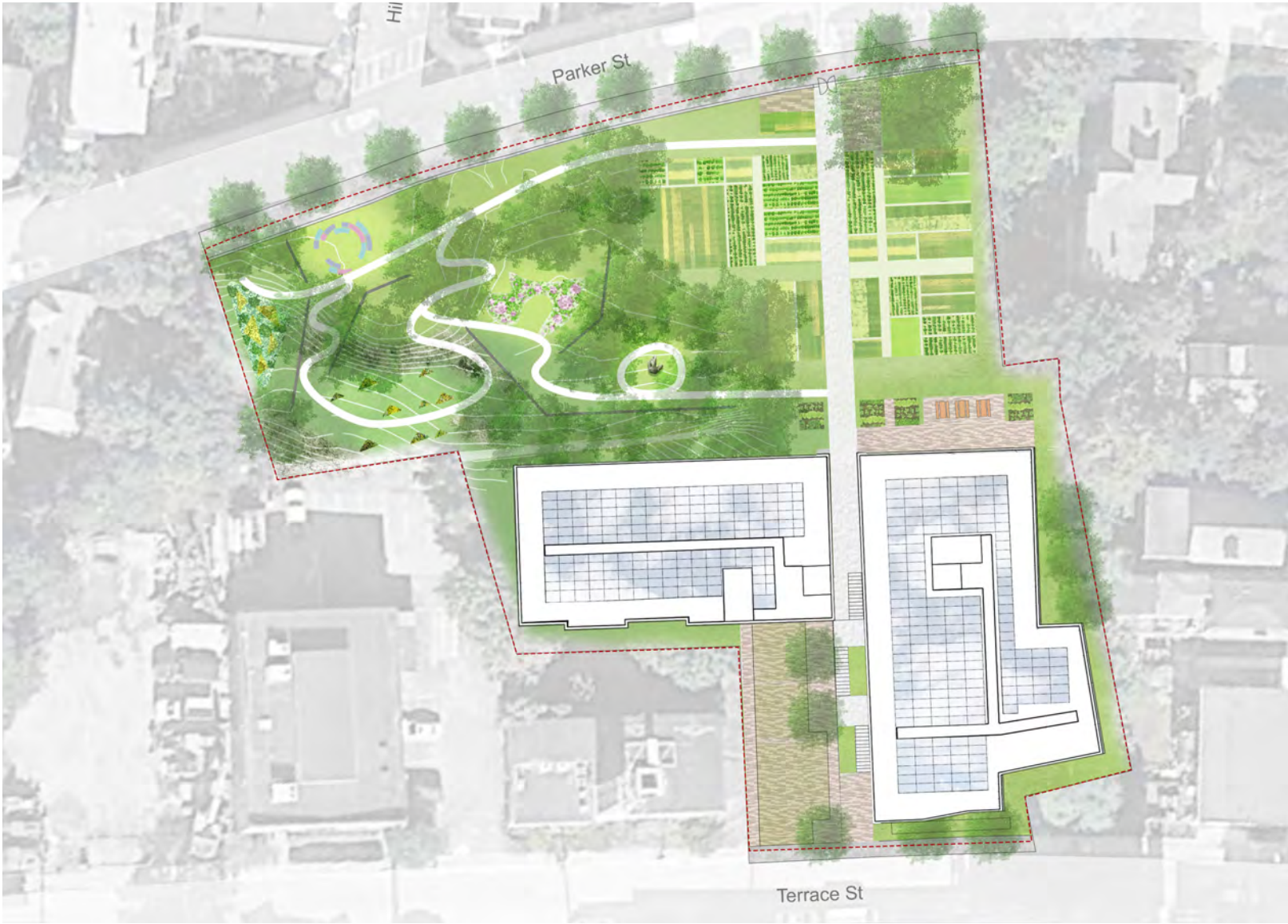
We will work with the Boston Art Commission (BAC) and the Department of Neighborhood Development (DND) to select the most suitable artist(s) for the Parker and Terrace Street development project. We are familiar with a number of local artists and organizations who we can recommend including the Mission Hill Art Collaborative, Rob Gibbs, Ekua Holmes, and Silvia Lopes Chavez.



URBAN DESIGN DIAGRAM-CONNECTIVITY



COMPREHENSIVE SITE PLAN



OPEN SPACE GARDEN TYPOLOGIES



VIEW ALONG TERRACE STREET



ORGANIZATIONAL FLOOR PLANS



Ground Level



Level 2

ORGANIZATIONAL FLOOR PLANS



Level 3



Level 4



Roof Plan

GARDEN ALONG PARKER STREET



VIEW FROM PARKER STREET



DEVELOPMENT PLAN - SUSTAINABILITY

Sustainability

The team's goals for Mission Hill Pathway are to achieve the highest levels of sustainability by significantly reducing embodied carbon, aiming for Zero Net Energy, and maximizing rainwater collection for urban gardening. The commitment to these goals begins by right sizing the program of the development and organizing the building elements for efficient use of resources. For instance, maximizing the area for urban gardening and not over building allows for rainwater collection to be effective. In addition, letting the design process be guided by the reduction of carbon from the start and not as a secondary feature, generates passive solutions that are highly efficient and effective in reducing or eliminating energy use.



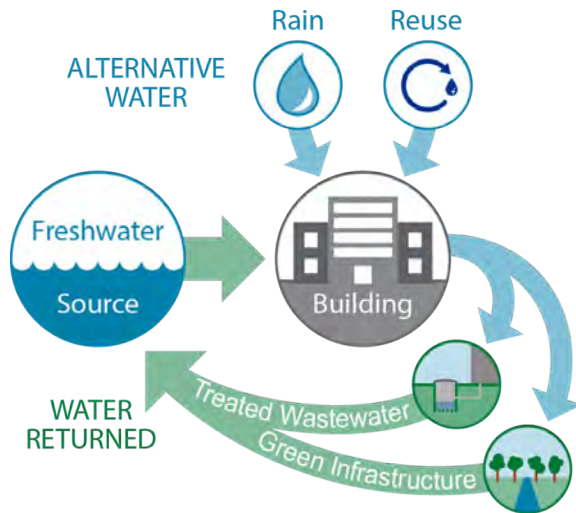
Reduce Embodied Carbon: The project aims to make decisions to lower embodied carbon by avoiding the use of fossil fuel material such spray foams for insulation and instead, opting for low global warming potential products. Low VOC emitting products will be used throughout, which will also achieve the EPA Indoor AirPlus program. Our team will look to reduce concrete and steel for structural purposes, and will aim to use more wood-framed construction. Additionally, we will look at concrete mixes and will use elements with less global warming potential.

Eliminate Fossil Fuel Use: The project will avoid the use of any fossil fuel burning systems and appliances, and will utilize high-efficiency all-electric systems for heating, cooling, hot water, and appliances. With the inclusion of renewable energy, the carbon emissions of the building as a whole will be significantly reduced and nearly eliminated.

Energy efficiency: The project will aim for Zero Net Energy by either following MOH's Zero Emission Building's (ZEB) guidelines or Passive House as well as maximizing the use of rooftop photovoltaic panels. The project will be solar ready and follow the strict envelope and systems efficiency requirements set by either ZEB's or Passive House.

- **Air Tightness:** The design will target a whole building infiltration of ≤ 0.06 CFM/ Ft² of Enclosure and a compartmentalization rate for each individual dwelling unit of 0.30 CFM/ Ft² of enclosure.
- **Windows Performance:** The design will target a window to wall ratio $< 15\%$. This target will improve the performance of each unit's thermal envelope and allow the team to select windows meeting Energy Star performance threshold with U-values and Solar Heat Gain Coefficients under 0.30.
- **Insulation:** The envelope will be highly insulated and at walls, roof and slab. It will also aim to be thermal bridge free.
- **On-Site PV:** The project will target compliance with the DOE Net Zero Energy Ready Programs. Part of compliance with this program includes adhering to the DOE Zero Energy Ready Home PV-Ready Checklist. This checklist is in line with the "ZEB Ready" provision set forth by the MOH Design Guidelines.

DEVELOPMENT PLAN



- Systems: High efficiency mechanical systems including energy recovery ventilation, efficient air source heat pump technology, heat-pump domestic hot water technology (COP's $\geq 2.$), MERV 13 filtration, LED lighting, and low flow plumbing fixtures.

Water: The project aims to make decisions to lower embodied carbon by avoiding the use of fossil fuel material such spray foams for insulation and, instead opting for low global warming potential products. Low VOC emitting products will be used throughout, which will also achieve the EPA Indoor AirPlus program. The team will look to reduce concrete and steel for structural purposes, and will instead aim to use more wood framed construction. Additionally, we will look at concrete mixes and aim to use elements with less global warming potential.

DEVELOPMENT PLAN - TIMELINE

TIMELINE

Proposal Submission	November 7, 2022
Notice of Tentative Designation	Winter 2022
Article 80 Approval	Spring 2023
Zoning Board of Appeal	Summer 2023
MOH Application for Funding	Fall 2023
MOH Award of Funding	Winter 2023/2024
Construction Bidding/Contractor Selection/Cost Finalization	8 Weeks after Notice of MOH Funding
Financing Secured (PFC)	3 Weeks after MOH Contractor Approval
Construction Loan Closing	10 Weeks after formal PFC Vote
AFHMP Approved	At Construction Loan Closing
Construction Begins (to be coordinated with Soil Remediation)	At Construction Loan Closing
Construction Complete	15 Months after Construction Loan Closing
Initial Home Sale	3 Months after Construction Completion
Final Development Sell Out	9 Months after Initial Home Sale

DEVELOPMENT PLAN - FINANCIALS

FINANCIALS

Pre-Development Budget

USES

Architecture/Engineering:	\$ 650,000
Sustainability Consultant:	\$ 60,000
Survey/Permits:	\$ 75,000
PreCon Servcies:	\$ 50,000
Environmental Engineering:	\$ 35,000
Legal:	\$ 75,000
PD Loan Interest:	\$ 125,000
Financing Fees:	\$ 35,000
Contingency:	\$ 35,000
TOTAL:	\$ 1,140,000

SOURCES

Developer Equity	\$ 140,000
PD Loan	\$ 1,000,000
TOTAL:	\$ 1,140,000

AVAILABILITY OF FUNDS:

Collectively, the Development Principals have cash and marketable securities in an amount over \$5M. Evidence of funds can be provided upon written request from the Mayor's Office of Housing.

The intent is to obtain a pre-development loan in the amount of \$1M from LIFE Initiatives and/or LISC.

The ability to commence work is not dependent on having access to funds from the pre-development loan.

OneStop Application Development Budget

OneStop Application Development Budget can be found in excel format as a separate document in our submission.

Letters from Financial Partners

Letters from financial partners can be found at the end of the section.

Audited Financial Statements

DEVELOPMENT PLAN - FINANCIALS

The OXBOW.DVM.JGE team will create a single purpose entity for the development of the Parker Terrace parcels upon tentative designation by the City of Boston. Specific financial information related to DVM Consulting Corp, JGE Development LLC, and Oxbow Urban LLC can be provided upon written request from the Mayor's Office of Housing as part of the Proposal review

MOH Development and Underwriting Policies

Project: Parker / Terrace
778-796 Parker Street
77 Terrace Street

Submitted By: Oxbow.DVM.JGE

Date: November 7, 2022

ACQUISITION: \$1,100

- The minimum allowed price (\$100 per parcel for 11 parcels) In order to provide the level of affordability and the program for which the community has advocated.

CONSTRUCTION:

- Direct Residential Construction – \$14,910,000
Based on conceptual design documents and provided by Genuine Construction and Consulting LLC. Please see Trade Item Breakdown in OneStop Section 3 for further details.
- Construction Residential Contingency – \$745,500
Hard cost contingency is capped at 5% of construction cost
- Direct Commercial Construction – \$580,000
Based on conceptual design documents and provided by Genuine Construction and Consulting LLC. Please see Trade Item Breakdown in OneStop Section 3 for further details.
- Construction Commercial Contingency – \$29,000
Hard cost contingency is capped at 5% of construction cost

SOFT COSTS:

- Architecture & Engineering – \$1,100,000
Architect fees are based on a proposal from J. Garland Enterprises and engineering fees are based on our team's past experience on similar projects (i.e. Saige on Fountain). Note that the total equates to 6.8% of total construction cost which is due to the complexity of the site engineering and integration of various program elements.
- Survey – \$75,000
Survey fees is based on a proposal from H.W. Moore Associates.
- Permits/Fees – \$193,625
Includes the cost of building permit fees and street permits needed during the construction period given the restrictions of

DEVELOPMENT PLAN - FINANCIALS

the construction location (Terrace Street)

- Environmental Engineer – \$75,000
This category covers 3rd party fees for environmental review (Phase 1 and Chemical testing of Soil Samples only) and geotechnical services provided by McPhail Associates.
- Sustainability Engineer – \$125,000
This category covers fees for Passive House, LEED Gold, HERS, and Building systems engineering and testing services based a proposal CleaResults (Energy Consultant)
- Legal – \$390,000
Includes all developer and lender (MOH, Pre-development Lender, and Construction Lender) legal fees as well as all the fees associated with the sale of the condominiums and commercial spaces.
- Title and Recording – \$50,000
Expenses and fees incurred as part of the construction loan closing as well as construction requisition process
- Accounting & Cost Certification – \$23,000
This category covers standard accounting reports associated with income-restricted housing and general accounting services.
- Affirmative Marketing and Income Certifications – \$250,000
There will be marketing work and collateral required for all income-restricted units being developed. Additionally, DVM Consulting Corp will lead all affirmative fair housing efforts and increase efforts (and staffing) to complete the lottery and income certifications associated with this project.
- Marketing (Retail) – \$50,000
Expenses associated with the marketing and lease up of the retail space including pre-construction market studies and design review in addition to the commissions and related expenses for finalizing an agreement with a neighborhood-based retail vendor.
- Real Estate Taxes – \$18,000
Anticipated taxes due during the construction and sell out period.
- Insurance – \$165,000
Anticipated insurance needs (liability and builders risk coverage) during the construction period.
- Appraisal and Market Study– \$20,000
This line includes the costs for appraisals required by MOH, lenders, and investors as well as the market study cost.
- FFE/Security– \$220,000
Includes costs for security/surveillance system, access controls, and FF&E expenses
- Pre-Development Loan Interest– \$67,500
Anticipated pre-development loan interest with an anticipated interest rate of 6.5%. We estimate an 18-month pre-development period post-designation.
- Construction Loan Interest– \$770,000
Anticipated construction loan interest given the scale and duration of construction.

DEVELOPMENT PLAN - FINANCIALS

- Construction Bridge Loan Interest– \$64,000
Anticipated construction bridge loan interest anticipated at 5.75% to cover the 5% holdback on MOH/CWB funds as well as the cost of the retail design and construction. The duration of the loan includes the construction period, the sellout period and the final close out with MOH after which the holdback is released.
- Inspecting Engineer – \$45,000
Industry standard for inspection services given the scale and duration of construction
- Interim Operating Expenses– \$164,000
Payment of utilities and operating expenses during the construction and sell out period.
- Other Financing Fees– \$85,000
Estimated financing fees due for pre-development, construction, and permanent (MassHousing) loans.
- Pre-Construction Consulting– \$50,000
Costs associated with construction logistics including site work, remediation and a thoughtful construction management plan. Participation in design review sessions providing the latest market and subcontractor input on systems, materials and pricing.
- Utility Back charges– \$50,000
Cost to bring electrical service to the site.
- Soft Cost Contingency– \$110,000
Soft cost contingency capped at 2.5% of soft costs.

CAPITALIZED RESERVES: \$65,000

Condominium association start up fund and open space reserves

DEVELOPER OVERHEAD & FEE: - \$2,200,000

Calculated based on direct development costs as allowed within MOH development guidelines.

LETTERS FROM FINANCIAL PARTNERS



Local Initiatives Support Corporation
75 Kneeland Street, Suite 1102
Boston, MA 02111

November 1, 2022

Mrs. Dariela Villón-Maga
DVM Consulting Corp
35 Batchelder Street
Boston, MA 02119

Mr. Kevin Maguire
Oxbow Urban LLC
867 Boylston Street, 5th FL
Boston, MA 02116

Mr. Jonathan Garland
J. Garland Development
One Marina Park Drive, 14th FL
Boston, MA 02210

Re: Parker Street and Terrace Street
City of Boston RFP

Dear Mrs. Villon-Maga, Mr. Maguire, and Mr. Garland:

The Boston office of the Local Initiatives Support Corporation (“LISC”) is pleased to provide this letter of interest regarding predevelopment and construction financing as may be approved by LISC to DVM Consulting Corp for the project located at 778-796 Parker Street and 77 Terrace Street, in the Mission Hill neighborhood of Boston. The project proposes to develop 40 units of affordable homeownership and ground floor commercial space.

LISC recently closed a \$750,000 predevelopment loan with DVM Consulting Corp to support the development of affordable housing on five city-owned parcels along Blue Hill Avenue in the Mattapan neighborhood of Boston. The financing will advance architectural drawings, pay consultants and cover other typical predevelopment expenses for the construction of three buildings consisting of 30 units of affordable homes and commercial space.

Please understand that this letter is only an indication of interest in providing financing in support of the project and is not a commitment or an offer to provide financing. The financing described in this letter of interest will be subject to, among other things, satisfaction of LISC’s standards and underwriting guidelines, satisfactory completion by LISC of an analysis of the project, and approval of the financing by LISC, including final approval by LISC’s Chief Credit Officer and National Credit Committee, if required. All terms and conditions of the financing, including any collateral securing the financing and the priority of LISC's lien on any such collateral, will need to be acceptable to LISC, in its sole discretion. If approved, the closing and disbursement of the financing will be subject to satisfaction of LISC’s standard closing and disbursement conditions for this type of financing and any special conditions that may be required as part of LISC's final approval.

If you should have any questions or need any additional information, please feel free to contact Margaret Keaveny at (617) 548-0494 or mkeaveny@lisc.org. We hope to partner with you on this project to support the new construction of affordable homeownership units and commercial space in Boston.

Warmly,

A handwritten signature in blue ink, appearing to read "Karen Kelleher". The signature is fluid and cursive, with the first name "Karen" being more prominent than the last name "Kelleher".

Karen Kelleher
Executive Director

Cc: Margaret Keaveny, Senior Program Officer

Explanatory Footnotes to Letter of Interest Pre-Intake Form Review

Important Notes:

- A.** The foregoing form of letter of interest is designed to be sent by a local or national LISC program **before** an intake form has been submitted and reviewed by LISC's Lending Department. [The procedures for the submission of intake forms can be found on LISC's Intranet, under Lending.]
- B.** The letter of interest does not need to be reviewed or approved by the Lending Department or the Legal Department so long as the form of the letter of interest is not added to or altered in any way. **Any additions to or alterations in the form of the letter of interest must be reviewed and approved by the Lending Department or the Legal Department.** Please contact the Credit Officer in the Lending Department or an attorney in the Legal Department with any questions about the completion of this form.
- C.** If a letter of interest is sent, a copy of the letter of interest should be submitted with the intake form for the proposed financing, when the intake form is submitted for review.

November 1, 2022

Mrs. Dariela Villón-Maga
DVM Consulting Corp
35 Batchelder Street
FL
Boston, MA 02119

Mr. Kevin Maguire
Oxbow Urban LLC
867 Boylston Street, 5th FL
Boston, MA 02116

Mr. Jonathan Garland
J. Garland Development
One Marina Park Drive, 14th
Boston, MA 02210

Re: Parker Street and Terrace Street
City of Boston RFP

Dear Mrs. Villon-Maga, Mr. Maguire, and Mr. Garland:

Thank you for your interest in having Cambridge Trust Company provide financing for the redevelopment of the sites referenced above into the new construction of forty one-, two- and three-bedroom ownership units and ground floor commercial space at Parker Street and Terrace Street site in Mission Hill.

Cambridge Trust welcomes the opportunity to work with you on this mixed-use development. It is our understanding from the information you have provided to us that the redevelopment of these sites will revitalize underutilized City-owned parcels. The proposed development will create 40 homeownership condos (in two buildings) restricted to families earning 100% or less of Area Median Income (AMI), with approximately 5,000 square feet of commercial space on the ground floor. The proposed developments will provide much needed affordability priced homeownership housing.

Based on the information we received, we understand that:

The total development costs of this site is approximately \$22.9 million. You expect to have residential sales proceeds of \$12,847,404. You will be applying for \$9,318,321 of MassHousing's CommonWealth Builder Funds and the City of Boston IDP/Linkage/CPA funds and you also expect \$500,000 from the sale of the commercial condominium.

This letter is an indication of interest to provide the above detailed development, construction loans as we are very interested in supporting your redevelopment of these key Mission Hill parcels and feel strongly that it will improve the quality of life for residents of the neighborhood.

Please note that this is not a commitment to extend credit but shall instead serve as a basis for future discussion. Based on your team's demonstrated ability to successfully develop projects such as this (and the 40 unit Saige on Fountain project in Nubian Square

financed by Cambridge Trust) and our preliminary review of the information you provided to the Bank, the project appears to be feasible as presented but the Bank's ultimate decision will be based on the completion of due diligence and underwriting and will require additional information which will be requested at a later date. However, we would like to reiterate our interest in this project and are confident that your development team will be successful in negotiating a financial structure that meets our mutual needs. Please keep us informed as the project moves ahead. We welcome the opportunity to work with you on this exciting and worthwhile project.

We wish you the best of luck with this development.

Sincerely,

Martin A. Fenton
Vice President



The Massachusetts Life Insurance Community Investment Initiative

October 31, 2022

Mrs. Dariela Villón-Maga
DVM Consulting Corp.
35 Batchelder Street
Boston, MA 02119

Mr. Kevin Maguire
Oxbow Urban LLC
867 Boylston Street, 5th FL
Boston, MA 02116

Mr. Jonathan Garland
J. Garland Development
One Marina Park Drive, 14th FL
Boston, MA 02210

RE: Letter of Support – Mayor’s Office of Housing, Parker and Terrace Street Development RFP

Sent via email

Dear Ms. Villón-Maga, Mr. Maguire, and Mr. Garland:

The Life Insurance Community Investment Initiative (TLI) is pleased to provide this letter of support for the redevelopment of eleven, City-owned parcels on Parker and Terrace Streets in the Mission Hill district, Boston, as proposed by DVM Consulting, Oxbow Urban, and J. Garland Development. This team has the experience, financial capacity, and community vision to successfully complete this exciting project and have demonstrated the capacity to secure financing and to develop and manage complex transactions.

We are excited to support your team in furthering the Mission Hill community goals through this RFP proposal which includes the development of affordable homeownership units. There is no better team to successfully bring affordable, sensitively designed, homeownership housing to this neighborhood and to help remove the obstacles to homeownership and wealth generation for the community.

TLI would be interested in providing predevelopment financing of approximately \$1,000,000 for predevelopment expenses that this project may require at a 6% interest rate, for a term of 3 years. We would also be interested in providing you with construction bridge financing of up to \$11,600,000 that may be necessary and will determine the interest rate and terms for that loan when needed. This letter of interest is not a commitment to extend credit and I look forward to working with you to further define the terms and conditions of the loans as the project moves forward.

Your team has the proven ability to collaboratively work with local leadership, navigate the required permitting processes and more importantly, respectfully engage the community and your local connections throughout this entire process. Because of these strengths, you are the ideal developer to realize the City of Boston’s vision for the development of the Parker and Terrace Street parcels in Mission Hill.

Please do not hesitate to reach out to me directly at mlockwood@masscapital.com or at 617-536-3905 if I can answer any other questions for you regarding my support of your team for this project.

Sincerely,

A handwritten signature in blue ink that reads "Mollye Lockwood".

Mollye Lockwood
Senior Vice President



21 Custom House Street
Boston, MA 02110
Tel: (617) 850-1000
Fax: (617) 850-1100

Guilliaem Aertsen
Chairman

Moddie Turay
President and CEO

November 2, 2022

Ms. Dariela Villón-Maga
President & Owner
DVM Consulting LLC
Boston, MA
Via: E-mail

Re: Parker Terrace, Boston, MA

Dear Ms. Villón-Maga:

Thank you for your interest in having MHIC provide financing for the development of the site referenced above into 40 units of affordable homeownership housing and a ground floor retail space. MHIC welcomes the opportunity to work with you on this mixed-use development. It is our understanding from the information you have provided to us that the redevelopment of these sites will revitalize underutilized City-owned parcels as follows:

- The proposed development will create 40 homeownership condos restricted to families earning 100% or less of Area Median Income (AMI), with a commercial space on the ground floor. You intend to structure the transaction so that the ground floor commercial space could be sold to a local business owner.

The proposed development will provide much needed moderately priced homeownership housing and the potential for property ownership by a local business.

Based on the information we received, we understand that:

- The total development cost is approximately \$22.8 million. You expect to have residential sales proceeds of \$12,847,404 and \$500,000 in retail sales proceeds. You will be applying for a combined total of \$9,318,321 from MassHousing's Commonwealth Builder Fund and the City of Boston.

MHIC is keenly interested in providing loan financing for predevelopment expenses, as well as a construction loan for the above homeownership housing.

This letter is an indication of interest to provide the above detailed predevelopment and construction loans, subject to availability of funding, completion of normal and customary due diligence and approval of our Board of Directors.

We are very interested in supporting your proposed development. We wish you the best of luck with this proposal.

Sincerely,

A handwritten signature in blue ink, appearing to read "Carrie Knudson", with a long horizontal flourish extending to the right.

Carrie Knudson
Investment Officer



Massachusetts Housing Finance Agency
One Beacon Street Boston, MA 02108

Tel: 617-854-1000
Fax: 617-854-1091

Relay 711
www.masshousing.com

November 2, 2022

Mrs. Dariela Villón-Maga
DVM Consulting Corp
35 Batchelder Street
Boston, MA 02119

Mr. Kevin Maguire
Oxbow Urban LLC
867 Boylston Street, 5th FL
Boston, MA 02116

Mr. Jonathan Garland
J. Garland Development
One Marina Park Drive, 14th FL
Boston, MA 02210

Re: Parker and Terrace Street, RFP Response

Dear Mrs. Villon-Maga, Mr. Maguire, and Mr. Garland:

I am writing to confirm MassHousing's strong interest in working with the DVM Consulting team to finance the proposed construction of a 40-unit mixed-income housing project in Boston, Massachusetts. We understand that all 40 units of the proposed development would be Commonwealth Builder homeownership units, with 20 of such units reserved for households earning at or below 80% of the area median income (AMI), and 20 of such units reserved for households earning at or below 100% AMI.

MassHousing's Commonwealth Builder (CWB) Program was created to support the Commonwealth's efforts to produce new homeownership opportunities for moderate-income households in Boston, Gateway Cities, and Disproportionately Impacted Communities (DICs) throughout Massachusetts. Based on the material you have provided and our preliminary review, the proposed development would be an appropriate project for funding under this program.

Accordingly, MassHousing is prepared to consider providing funding for this development to the extent of available program funds and subject to our due diligence review to confirm the development's compliance with the program guidelines and our closing standards. The amount will be determined in coordination with the Mayor's Office of Housing (MOH). These funds would provide a subsidy to support the sale of the restricted units to eligible homebuyers at the below-market sale price for the applicable AMI affordability tier.

While this letter does not constitute, and should not be construed as, a formal commitment by MassHousing to provide funding for the development, we would welcome the opportunity to work with you and your other funding partners to structure a financing package that best meets the needs of the development once you have obtained all applicable funding awards and approvals.

We wish you success in securing the financing commitments and hope to partner with you on this project to increase the moderate-income homeownership units in Boston. Please keep us informed of your progress.

Sincerely,

DocuSigned by:

Cynthia Lacasse

51ACA6BFD46A4A7...

Cynthia Lacasse

Director of Rental Business Development

cc: Kathleen Evans, Product and Lending Analytics Manager
Sebastian Zapata, Senior Origination Analyst

OPERATIONAL PLAN

OPERATIONAL PLAN

Thriving in Year 20: Structure | Partners | Plan

Physical development is an exciting and frustrating period of change normally defined by the completion of construction. We measure our success by the physical quality and community vitality 20 years after the construction has stopped. The long term success of 700 Harrison/Harrison Urban Garden, Residences at 89Oxbow and The Treehouse Foundation at Easthampton Meadow stem from: 1) Strong partnerships between Owner, Property Manager and Community Partners, 2) Master Condominium legal structures set up so that issues between adjacent uses are thoughtfully addressed and resolved, and 3) Management Plans and Budgets that are adequate for a successful launch and anticipate capital needs over the life of a development.



700 Harrison/Harrison Urban Garden



The Residences at Oxbow



East Hampton Meadow/Treehouse Foundation

TEAM

Boston-based UHM Properties is our team’s preferred management company for the Mission Pathway development. They will function as the residential property manager and the Trustees will act as owner and asset manager of the Parker Street Open Spaces and representation from Oxbow.DVM.JGE, 77 Terrace Condominium Association and Mission Park Community Gardeners.



MASTER CONDOMINIUM STRUCTURE

(Reference Supplemental Information for the full Condominium Structuring Outline)

In acquiring the Parker Street Parcel (“Site 1”) and the Terrace Street Parcel (“ Site 2”), the Developer intends to construct two developments which will provide affordable homeownership opportunities, community gardening, green space, and commercial space (collectively, the “Development”). The Development will also include a pathway accessible to the public pursuant to a public access easement that will be recorded with the Suffolk County Registry of Deeds, which will connect Site 1 and Site 2, and allow pedestrian access from Parker Street to Terrace Street (the “Pathway”).

Site 1 will include (i) an approximately 17,000-square-foot community garden/cultivation zone (the “Garden”) and (ii) an approximately 12,000-square-foot pocket park adjacent to the Garden (the “Green Space”). Site 1 will also include the portion of the Pathway providing a pedestrian connection from Parker Street to Terrace Street (the “Parker Street Pathway”). The Developer intends to convey the Garden and the Green Space to the Trustees. The Trustees’ ownership shall ensure long-term public access and use and maintenance of the Garden and Green Space, as it does for other comparable properties in the City of Boston owned and stewarded by the Trustees.



OPERATIONAL PLAN

Site 2 will function as a residential/commercial condominium (the “Terrace Street Condominium”) and include the portion of the Pathway located on Site 2 (the “Terrace Street Pathway”). The Terrace Street Condominium will consist of a four-story building containing 40 affordable homeownership units (the “Residential Units”) and one (1) commercial unit on the ground floor (the “Commercial Unit”). Following construction completion, the Developer will sell the Residential Units, subject to typical affordable housing restrictions required by the City of Boston. The Developer intends to retain ownership of the Commercial Unit and lease the space to a long-term community partner at below market rates.

The Terrace Street Condominium and the Garden/Green Space shall share the responsibility to maintain the Parker Street Pathway and the Terrace Street Pathway, respectively, and will enter into a reciprocal use and maintenance agreement to be recorded with the Suffolk County Registry of Deeds, setting forth such responsibilities. The Terrace Street Condominium will finance the maintenance of the Pathway through a reserve, established in the condominium documents. Each respective reserve which will be funded as follows:

- i. a fee charged to each owner of a Residential Unit at the time of purchase;
- ii. an annual common expense contribution provided for in the condominium documents of each Condominium, limited to an amount that will maintain the affordability of the costs associated with each Residential Unit; and
- iii. a one-time contribution made by the Developer at the time of the formation of the Condominiums.

(Reference Supplemental Information for the full plan)

MANAGEMENT PLAN

UHM Properties LLC (UHM) (Agent) has demonstrated a consistently sound approach to management policies and procedures, which result in the effective and efficient management of real estate. Its long-term commitment to property investments is evidenced by the superior level of property management throughout its portfolio and by an unblemished record of dealings with its bankers, lenders, and Federal and State Housing agencies. The following sections describe the way UHM Properties generally provides Management services to condominium developments; while

this is a general description of procedures, the company will work with the Parker Street and Terrace Street Condominium Trust (Owner) to review the same and modify the plan where appropriate.

A. Management Procedures

All administrative policies and systems have been developed, implemented, and adjusted to accommodate the needs of the Trustees and unit owners. In addition, UHM will be responsible for certain aspects of the operation at Parker Street and Terrace Street (Property), comprised of Forty (40) Condominium units. All maintenance operations and unit owner contract will be conducted from UHM’s main office at 530 Warren Street, Boston, MA. A 24-hour, 365-day answering services will be maintained to respond to emergency services after normal business hours.

UHM’s responsibilities include the following:

1. Condo fee collection and bill payment
2. Supervise Common area repairs, contractors, and preventive maintenance, as necessary
3. Monthly accounting reporting and annual budget
4. Attend (virtually or physically) monthly Trustee meetings and one annual ownership meeting
5. Conduct monthly and annual property inspections



OPERATIONAL PLAN

BUDGET

Residential Condominium Budget

(Reference Supplemental Information for the full budget)

UHM Properties Parker Street and Terrace Street	
Description	11-2-2022 40 Units Proposed Annualized Budget
Fire Prevention Contract	\$ 960
Decorating Supplies	\$ 500
Decorating Contract	\$ 600
Misc. Operating and Maintenance Expenses	\$ 2,400
Total Operating and Maintenance Expenses	\$ 51,640
Taxes and Insurance	
Real Estate Taxes	-
Property and Liability Insurance	\$ 32,004
Total Taxes and Insurance	\$ 32,004
Total Cost of Operations	\$ 154,828
Cash Flow Reconciliation	
Residents Incentive Fund	
Reserve Replacement Release	
Capital Improvements	
Replacement Reserve Deposit	\$ 15,483
Depreciation/Amortization Expense	-
Annual Operating Reserve Deposit	\$ 9,677
Total Financial Expenses	\$ 25,160
Cash Flow	\$ 12
Total Revenue	\$ 180,000
Total Costs	\$ 179,988
Excess	\$ 12

OPERATIONAL PLAN

Community Garden Operating Budget (As prepared by The Trustees)

Sources	
Fees fir Gardener's (\$30/plot/year)	\$ 1,200
Gap Funding from The Trustees	\$ 21,500
Total Sources	\$ 22,700
Uses:	
Tools/Supplies	\$ 5,000
Utilities	\$ 1,200
Staff	\$ 15,000
Repair Reserve	\$ 1,500
Total Uses	\$ 22,700

Pathways Operating Budgetw

Sources	
Residential Contribution	\$ 5,000
City of Boston CPA	\$ 20,000
Annual Crowdfunding	\$ 10,000
Foundation/Grant/The Trustees	\$ 10,000
Total Sources	\$ 45,000
Uses	
Maintenance	\$ 25,000
Utilities	\$ 2,500
Staff	\$ 15,000
Repair Reserve	\$ 2,500
Total Uses	\$ 45,000

QUALIFICATIONS

DEVELOPMENT TEAM

Oxbow Urban - Development

Oxbow Urban LLC is a Massachusetts real estate development company whose mission is to contribute to the diversity and strength of urban neighborhoods. They accomplish this by harnessing and coordinating the ambition, creativity and energy of those who live and thrive in urban neighborhoods.

Oxbow Urban sees value in underserved neighborhoods where there is little stock of newly constructed housing. Via strategic land acquisition, targeted pre-construction marketing and exception development implementation skills, Oxbow is able to profitably develop workforce ownership housing and community scaled mixed-use ventures in those locations overlooked by the market.

Oxbow's competitive advantage is the ability to leverage big project experience and network of experienced professionals in combination with the flexibility of a small company and our strong ethos of partnership. This versatility allows us to secure and invest capital while attracting diverse entrepreneurial talents devoted to pushing the envelope of small-scale urban development.

DVM Consulting - Development (M/WBE)

DVM Consulting provides "soup to nuts" real estate development services with a focus on affordable housing. DVM prides themselves in ensuring the projects they are involved in are accessible to those native to the neighborhoods where projects are located as well as the larger Boston community. DVM has a unique perspective in the field given their knowledge of different aspects of the real estate industry including multi-family real estate development, property management, community engagement and resident services programming.

JGE Development - Development (MBE)

JGE Development LLC is a commercial real estate development practice focused on transforming underperforming assets and underutilized parcels into stabilized income-restricted, and market-rate multi-family housing. Their aim is to partner with communities to activate and improve historically disinvested neighborhoods throughout Boston's inner city and urban core—many of which need significant public infrastructure upgrades, affordable housing, and access to open space. JGE's experience includes the repositioning of assets, adaptive reuse of structures, and construction of new buildings on vacant sites. They develop

accessible, sustainable, and livable units for residents of all ages and income levels.

JGE's work extends to and through the community engagement process as well. They have worked with residents, faith-based organizations; community and volunteer groups; and racial, ethnic, and cultural groups. JGE identifies with stakeholders early in the process to determine the most appropriate means of communication with specific techniques to combat language access, scheduling conflicts, and technological barriers which continues to yield great success with our level of transparent and intentional community-based development.

The Trustees - Open Space Developer

The Trustees of Reservations (The Trustees) is the nation's first and Massachusetts' largest conservation and preservation nonprofit. The organization was founded in 1891 by esteemed landscape architect and open space visionary Charles Eliot to benefit the public health of Boston residents in the face of rapid urbanization. For 130 years the organization has worked to conserve the natural, cultural, and historic character that makes Massachusetts' landscapes and communities unique, guided by its mission to hold these properties for public use and enjoyment for all in perpetuity.

ADDITIONAL CONSULTANTS

Architecture - J. Garland Enterprises (MBE)

Landscape Architecture - Ground, Inc. (WBE)

Interior Design

Sasha Thind Warm Minimalism (M/WBE)

Elyse Ayoung

Civil Engineering - Nitsch Engineering (WBE)

Building Performance Consulting - CLEARResult

Geotechnical + Environmental Engineering - McPhail Associates, LLC

General Contracting

Dellbrook/JKS - Residential

LJV - General - Daycare (M/W/VBE)

Legal Counsel

McDermott Quilty & Miller - Permitting

Nollan | Sheehan | Patten - Finance (M/WBE)

Property Management - UHM Properties (MBE)

Community Relations Consulting - Waterville Consulting

Lottery + Income Certification - DVM Consulting (M/WBE)

Marketing Outreach - Our Village Initiative (M/WBE)

Community Outreach | Branding - Sofenomenal Agency Group (M/WBE)

Additional firm information, experience, and resumes is found on the following pages.

QUALIFICATIONS

REFERENCES

Oxbow Urban

Sheila Dillon, Chief of Housing

City of Boston Mayor's Office of Housing
12 Channel Street, 9th Floor
Boston, MA 02210
Sheila.dillon@boston.gov/617-635-3880

Chrystal Kornegay, Executive Director

MassHousing
One Beacon Street
Boston, MA 02108
ckornegay@masshousing.com/617-854-1000

Catherine Racer, Associate Director

Massachusetts Department of Housing and Community
Development
100 Cambridge Street
Boston, MA 02114
Catherine.Racer@state.ma.us/617-573-1100

DVM Consulting

Anthony Richards, Vice President of Equitable Business

Development
MassHousing
One Beacon Street
Boston, MA 02108
arichards@masshousing.com/617-319-3404

Karen Kelleher, Executive Director

LISC Boston | Local Initiatives Support Corporation
75 Kneeland Street, Suite 1102
Boston, MA 02111
kkelleher@lisc.org/617-308-8768

Michelle Meiser, Vice President, Senior Community

Partnerships and Development Specialist
78 Blanchard Road, 5th Floor
Burlington, MA 01803
michelle.meiser@cambridgetrust.com/781-491-3988

JGE DEVELOPMENT

William Grogan, President

Planning Office for Urban Affairs, Archdiocese of Boston
84 State Street, Suite 600
Boston, MA 02109
whg@poua.org/617-350-8889

Dennis Kanin, Principal

New Boston Ventures
540 Tremont Street
Boston, MA 02116
dkanin@newbostonventures.com/617-542-3500

Teronda Ellis, CEO

Jamaica Plain Neighborhood Development
31 Germania Street
Jamaica Plain, MA 02130
tellis@jpndc.org/617-522-2424 x247

QUALIFICATIONS

CURRENT BUSINESS PERMITS AND LICENSES FOR DEVELOPMENT PROJECT IN PLANNING

Saige on Fountain - Nubian Square, Roxbury

Building Permit
ISD
In Construction

Blue Hill Avenue B1 Parcels, Mattapan

Pending Zoning Approvals
Tentative Designation Expiration Date: 12/15/22

Drexel Village (Crescent Parcel) - Nubian Square, Roxbury

Tentative Designation Expiration Date: 12/31/22





FOUNTAIN HILL MIXED INCOME



LOCATION

Dudley Square-Roxbury

DEVELOPER

Oxbow Urban

PROJECT INFO

- 51 Units
- Vacant Urban Renewal Land
- 2 Building Types
- 3 Income Tiers
 - Workforce (120%AMI)
 - Affordable (100%AMI)
 - Affordable (80% AMI)

SOURCE OF FUNDS

- Sales Proceeds (private)
- Workforce Housing Initiative (state)
- City of Boston IDP Funds (city)
- City of Boston NHT Funds (city)
- Community Preservation Funds (city)





19 COURT STREET-HISTORIC REHAB IN VILLAGE CENTER

The Norfolk house was originally built in the early 1800s as a stopover on the trip between Boston and New York. It was later a Girls School and then converted to a single family home in the early 20th century. By 2000, the building stood vacant in the center of Dedham Square.

In 2016,Oxbow Partners completed a historic gut rehabilitation creating six well appointed rental flats.

LOCATION

Dedham, MA

DEVELOPER

Oxbow Urban

PROJECT INFO

6 Units
Appointed Flats for Empty Nesters looking for a Village Lifestyle

SOURCE OF FUNDS

Construction Loan (private)
Historic Tax Credits (state)
Historic Tax Credits (federal)





NEIGHBORHOOD HOUSING INITIATIVE-WORKFORCE OWNERSHIP



LOCATION
Uphams Corner
Codman Square
West of Washington

DEVELOPER
Oxbow Urban

PROJECT INFO
Deed Restricted Ownership for families earning 80% AMI, 100% AMI, and Unrestricted Ownership for families earning over 110% AMI

SOURCE OF FUNDS
Sales Proceeds (private)
City of Boston (public)

Trull/Ware Occupied Spring 2017





SACHEMS PATH-WORKFORCE OWNERSHIP



LOCATION

Nantucket, MA

DEVELOPER

Oxbow Urban

PROJECT INFO

37 Single Family Homes
Mixed-Income Ownership
Deed Restricted Ownership for:

80% AMI

120% AMI

150% AMI

Range of Sales Prices:

\$300,000- \$650,000

SOURCE OF FUNDS

Construction Loan (private)
Sales Proceeds (private)
Affordable Housing Trust (state)
Housing Stabilization Fund (state)
Nantucket CPA (town)





THE RESIDENCES AT 89 OXBOW



Oxbow Partners LLC

LOCATION

Wayland, MA

DEVELOPER

Oxbow Urban
Developer (at risk)

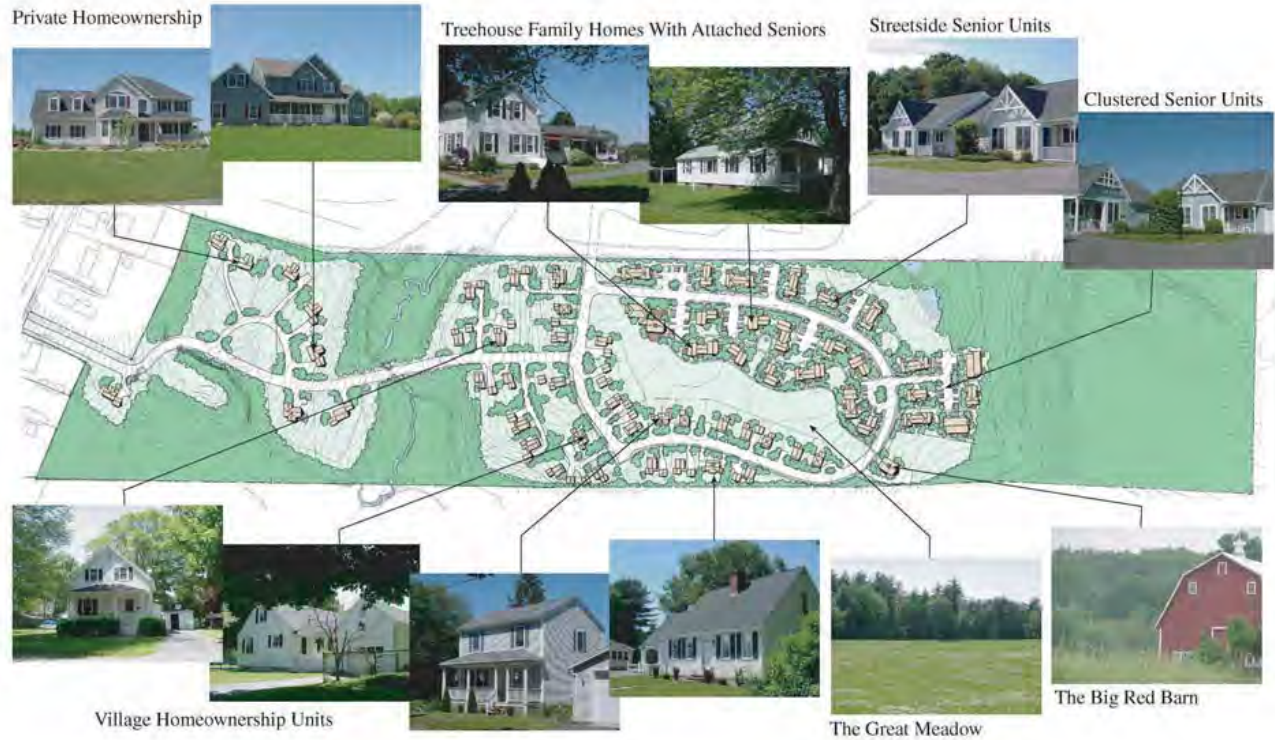
PROJECT INFO

Former Nike Missile Site
10.25 Acres for Recreation
2.75 Acres for Housing
16 Ownership Units
 11 Units @ 80% of AMI
 5 Units @ 100% of AMI
Total Development Cost:
 \$ 5.3 million

SOURCE OF FUNDS

State Affordable Housing Trust
State Housing Stabilization Funds
Town of Wayland CPA Funds
Mass Technology Collaborative
Private Construction Loan
Private Equity

EXPERIENCE



TREEHOUSE AT EASTHAMPTON MEADOW



Beacon Communities LLC

LOCATION

Easthampton, MA

DEVELOPER

Building Initiatives LLC/Oxbow Urban

PROJECT INFO

Intergenerational Community designed to facilitate the adoption of children from the public foster care system.

Mixed-Income/Mixed-Tenure

110 Units on 40 Acres

50 Ownership Units

60 Rental Units

Permitted Under Chapter 40B

SOURCE OF FUNDS

9% LIHTC

State Tax Credits

Affordable Housing Trust Fund

Housing Innovation Funds

State HOME

Private Mortgage Financing



OAK HILL - PHASE 1A, 1B, 1C



The Beacon Communities and Corcoran Jennison Companies

LOCATION

Pittsburgh, PA

DEVELOPER

Building Initiatives LLC/Oxbow Urban

PROJECT INFO

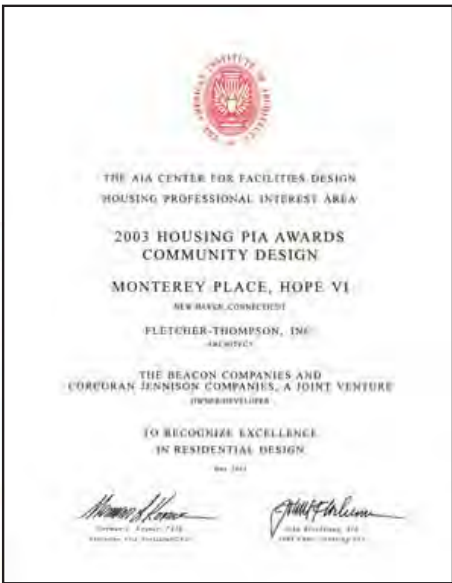
Federal Hope VI Program
Mixed-Finance/Income/Tenure
546 Units on 90 Acres
Total Development Cost - \$100 million

SOURCE OF FUNDS

HUD Hope VI Funds
9% LIHTC
4% LIHTC
City of Pittsburgh Capital Funds
Housing Authority Program Funds
Private Mortgage Financing



MONTEREY PLACE HOPE VI



LOCATION

New Haven, CT

DEVELOPER

Building Initiatives LLC/Oxbow Urban

PROJECT INFO

Federal Hope VI Program
Mixed Finance/Income/Tenure
250 Units on 40 Acres
\$5M Community/Social Services Program
National AIA Housing Award 2003
Total Development Cost - \$80 million

SOURCE OF FUNDS

HUD Hope VI Funds
9% LIHTC
4% LIHTC
City of New Haven Capital Funds
Housing Authority Program Funds
Private Mortgage Financing

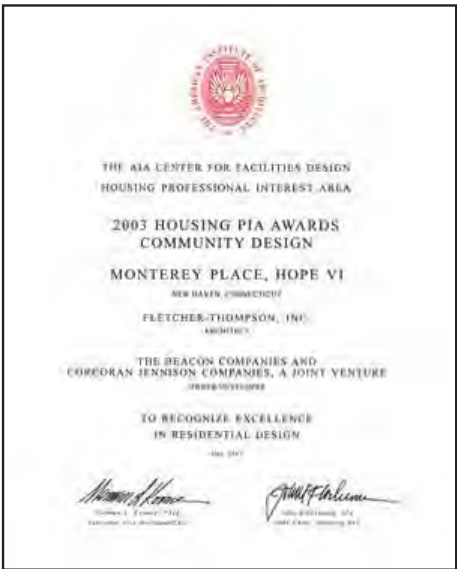
The Beacon Communities and Corcoran Jennison Companies



MONTEREY PLACE PHASE 1A + 1D



The Beacon Communities and Corcoran Jennison Companies



LOCATION

New Haven, CT

DEVELOPER

Building Initiatives LLC/Oxbow Urban

PROJECT INFO

25 Affordable Ownership units
Integration into Existing
Condominium Association
Sales/Marketing coordinated with
Housing Authority

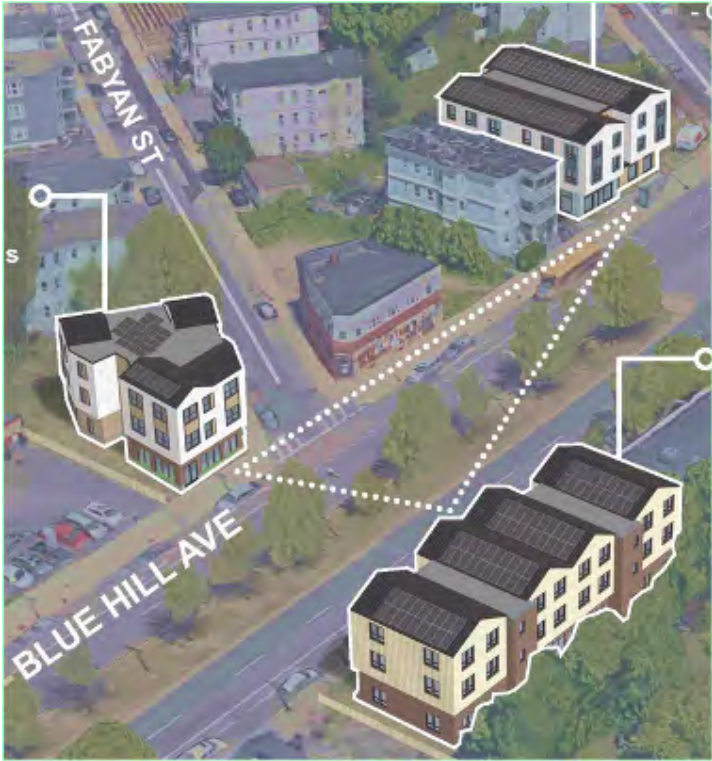
SOURCE OF FUNDS

HUD Hope VI Funds
City of New Haven Capital Funds
Housing Authority Program Funds
FHLB
Private Construction Mortgage

EXPERIENCE



BLUE HILL AVENUE - B1 PARCELS



LOCATION

Mattapan

DEVELOPER

DVM Consulting

DEVELOPER

18 affordable homeownership units
12 income-restricted rentals
3,000 sf of commercial space

YEAR

2021-present

SOURCE OF FUNDING

City of Boston MOH/NHT/CPA
MHIC/HNEF
MassHousing Commonwealth Builder Fund



EXPERIENCE



DOT CROSSING APARTMENTS

LOCATION

Field's Corner, Dorchester

DVM'S ROLE

Development Consultant
Affirmative Fair Housing Market Agent

DEVELOPER + ARCHITECT

TLee Development LLC +
J. Garland Enterprises

PROJECT INFO

29 Workforce Housing Units
1,300 sf Commercial Space

YEAR

2021-present

SOURCE OF FUNDING

MassHousing Workforce Housing Fund
MHIC/HNEF



191 TALBOT AVE. APARTMENTS

LOCATION

Dorchester

DVM'S ROLE

Commercial Development Consultant
Affirmative Fair Housing Marketing Agent

DEVELOPER + ARCHITECT

TLee Development + Place Tailor

PROJECT INFO

14 Workforce Housing Units
1,800sf of Commercial Space

YEAR

2020

SOURCE OF FUNDING

MassHousing Workforce Housing Fund
MHIC/HNEF





SAIGE ON FOUNTAIN

LOCATION

Nubian Square, Roxbury

DVM'S ROLE

Development Consultant
Affirmative Fair Housing
Marketing Agent

DEVELOPER + ARCHITECT

Oxbow Urban +
Prellwitz Chilinski Associates

PROJECT INFO

40 Affordable Ownership Units
1,300sf of Commercial Space

YEAR

2020-present

SOURCE OF FUNDING

DND
MassHousing
Cambridge Trust



FLAT 9 AT WHITTIER

LOCATION

Roxbury

DVM'S ROLE

Project Manager

DEVELOPER + ARCHITECT

Preservation of Affordable
Housing +
The Architectural Team

PROJECT INFO

52 Mixed-Income Units

YEAR

2019

SOURCE OF FUNDING

HUD
DND
DHCD
Citizens Bank
Mass Housing

EXPERIENCE



ALLBRIGHT HOMEOWNERSHIP

LOCATION

North Brighton/Lower Allston

DVM'S ROLE

Project Manager

DEVELOPER + ARCHITECT

Allston Brighton Community
Development Corp +
Geoffrey G. Pingree

PROJECT INFO

13 Units Acquired
16 Units Developed

YEAR

2015-2018

SOURCE OF FUNDING

Harvard University Community
Benefits
BCLF

CAROL AVE APARTMENTS

LOCATION

Brighton

DVM'S ROLE

Project Manager

DEVELOPER + ARCHITECT

Allston Brighton Community
Development Corp +
Davis Square Architects

PROJECT INFO

33 Mixed-Income Units

YEAR

2018

SOURCE OF FUNDING

DND
CEDAC
Brookline Bank





DREXEL VILLAGE (CRESCENT PARCEL) | Roxbury



CLIENT
BPDA + MassDOT

DEVELOPER
JGE Development

PROJECT INFO
217 units
11 Affordable Homeownership units

FUNDING SOURCES
Neighborhood Housing Trust
Dept. of Housing and Community Development
Affordable Housing Trust Fund + Housing Stabliations Fund
Mass Housing Commonwealth Builder Program
Mayer's Office of Housing (pending)

DEVELOPMENT

OXBOW URBAN
DVM CONSULTING (M/WBE)
JGE DEVELOPMENT (MBE)

OXBOW URBAN

Kevin Maguire is an urban entrepreneur with more than 25 years of experience in the building, design and development fields including experience as a construction laborer, electrician's assistant, environmental engineer, construction project manager, real estate consultant and workforce housing developer. This breadth of experience, in addition to academic degrees in civil/environmental engineering and urban planning/development, gives Kevin unique exposure and insight into the personalities, perspectives and motivations of the various participants involved in the process of urban redevelopment. Kevin's passion, and ultimate motivation, is to contribute to the solution of contemporary urban issues. Kevin has reached the realization that the transformation of the built environment, often considered a means to the end, in reality often serves as the catalyst - attracting, focusing and ultimately uniting those individuals with the talent, tolerance and passion to endure the process of change. Finding, aligning and incentivizing those individuals committed to revitalizing urban systems - whether physical, social or political - is the true challenge. Collaboration, Commitment, Results.

EDUCATION

Harvard University

Graduate School of Design, Master in Urban Planning

Cornell University

Civil and Environmental Engineering, Bachelor of Science

PROFESSIONAL EXPERIENCE

Oxbow Partners LLC

Co-Founder
Boston, Massachusetts
2006 - 2015

Responsibilities:

Co-Managing Member responsible for all aspects of starting and growing a private development services company. Oxbow Partners was founded in 2007 with the mission of contributing to the creation of sustainable communities of lasting value. This mission is realized via *Oxbow Advisory and Oxbow Investments*. *Oxbow Advisory* provides development expertise to support public and private organizations needing to implement complex physical initiatives in order to address important community priorities. Characterized by over-committed staff and volunteer committees, these organizations are in need of high-level development skills grounded in a spirit of partnership with the ability to implement. *Oxbow Investments* is focused on the revitalization of undervalued properties adjacent to active Town Centers in addition to the creation of mixed income communities of 50 units or less where our experience with public subsidies, complex sites and multiple stakeholders can be applied to community supported initiatives.

Mitchell Properties LLC

Partner
Boston, Massachusetts
2004-2006

Responsibilities: Partner in charge of Development Operations for all new development ventures that totaled over \$100 million. Projects included: 700 Harrison - an 84 unit six-story steel framed condominium building located in Boston's South End including ground-floor neighborhood retail, two levels of below grade parking and a community garden for use by the Harrison Urban Gardner's. Financing sources included State and Federal HOME funds, State Affordable Housing Trust Funds, State Brownfield's Funds, City CDBG as well as private debt and equity; 19 Father Gilday Street (the Marais)- 8 unit luxury rehabilitation of historically significant building in Boston's South End; Atlas Lofts - 54 unit loft conversion in Chelsea, Massachusetts; Coolidge School - a 34 unit conversion of a historic school in Watertown in to rental units for individuals and couples over the age of 55.

PROFESSIONAL EXPERIENCE

The Beacon Companies / Beacon Corcoran Jennison LLC

Development Director
Boston, Massachusetts
1998-2004

Responsibilities:

Development director for mixed income residential developments. Principle project was the HOPE VI revitalization of the Elm Haven public housing development in New Haven, Connecticut. Managed all issues relating to architecture, engineering, financing, local/state/ federal approvals, relocation, marketing, resident services and community hiring program. Served as primary interface with the Housing Authority of the City of New Haven, the City of New Haven, the Elm Haven Residents Council, neighborhood community groups and project stakeholders. Built adjacent to Yale University, Monterey Place involved the phased demolition of 428 housing units on 35 acres of land. This \$80 million redevelopment created rental apartments for three income tiers, for-sale housing units, and the creation of a neighborhood community center in conjunction with the renovation/expansion of an adjacent public school, the development of a linear park and the expansion of an existing neighborhood park. Project financing included Federal grant/loan funds, UDAG and capital funds from the City of New Haven, syndication of Federal 9% and 4% Low Income Housing Tax Credits, Federal Home Loan Bank Funds and private debt. Project was awarded the Professional Interest Area Award from the American Institute of Architects for Community Design in 2003. In addition to HOPE VI experience in New Haven and Pittsburgh, PA, Kevin managed the concept, design, financing and permitting of a 45-acre master planned community in Easthampton, MA, the central objective of which was to create a diverse intergenerational community with associated social service programming to facilitate the adoption of children from the state foster care system.

Project Management Advisors, Inc.

Real Estate Development Consulting
Chicago, Illinois

Responsibilities:

Accountable for the implementation of real estate services for public and private sector clients. Specific tasks included facility programming, real estate market analysis, financial modeling, construction administration, client relations and new business marketing. Project Manager for the privatization of student housing at California State University, Fresno. Program included capital needs study, competitive market analysis, legal steps to establish student housing as a private entity, issuance of bond funds and the implementation of a phased \$7 million capital program. Occupancy rose from 62% to 100% in the course of one calendar year.

LaSalle Partners / LaSalle Construction Ltd.

Construction Management
Chicago, Illinois

Responsibilities:

Accountable for completion of commercial construction projects within schedule and budget. Specific tasks included cost estimating, purchasing, contract administration and on-site supervision. Principle project was the full gut renovation of 231 S. LaSalle Street, the headquarters for Continental Bank of Illinois, which included completed mechanical, electrical, structural and architectural overhaul of a historically significant structure while maintaining full operations of the bank's headquarters.

Shell Oil Company / Royal Dutch Shell

Environmental Engineer
Washington D.C. and Long Island, New York

Responsibilities:

Technical support to the Gasoline Sales District within the Marketing Divisions of the Company. Specific tasks included developing and implementing physical maintenance program for retail service stations with Sales District, budgeting and implementing capital improvement projects and all related planning and interface with local government to implement underground storage tank (UST) replacement program as mandated by Federal and State EPA.

ACTIVITIES

Mel King Institute, Mentor, Community Development Integration Initiative 2015 to 2016

Mass Bay Community College, Mass Bay Foundation, Board of Directors, 2014 to 2017

Community Regional Housing Advisory Committee, Metropolitan Area Planning Commission, 2012 - present

Local Barriers to Opportunity Based Development, Working Group, The Ford Foundation, 2012

ACTIVITIES

Institute for International Urban Development/International Center for Local/Regional Development, Ireland
Advisor, 2009-2013

Sudbury Assabet Concord (SuAsCo) River Watershed Community Council,
Steering Committee, 2009 - 2012

495/MetroWest Partnership,
Investor/Member of Water Resources Committee, 2008-2012

Citizens Housing and Planning Association (C.H.A.P.A),
Member, 2007 - Current

The Treehouse Foundation,
Board of Directors, 2004-2005

Boston Partners for Education,
Middle School Mentor, 2002-2004

PANELS, PUBLICATIONS and SPEECHES

11th Annual Massachusetts Housing Institute June 2018, Featured Speaker and Development Resource

10th Annual Massachusetts Housing Institute June 2018, Featured Speaker and Development Resource

9th Annual Massachusetts Housing Institute June 2016, Featured Speaker and Development Resource

8th Annual Massachusetts Housing Institute June 2014, Featured Speaker and Development Resource

Think Regionally, Act Locally: Addressing Housing Needs in Western Mass Communities, April 2014

Early Morning at the Amusement Park: Thoughts, Vision, Verse; 2014 Those Who Know Productions

7th Annual Massachusetts Housing Institute June 2013, Featured Speaker and Development Resource

12th Annual Citizen Planner Training Collaborative, Panelist, Realizing Local Goals via Community Preservation Act

6th Annual Massachusetts Housing Institute June 2012, Featured Speaker and Development Resource

5th Annual Massachusetts Housing Institute June 2011, Featured Speaker and Development Resource

National Institute for Regional and Spatial Analysis, National University of Ireland, Maynooth,

April 2011 Local Communities Taking Control of Underutilized Public Land - Redevelopment in Coordination
w Community Needs

American Planning Association, 2011 National Conference, April 2011 Community Engagement in the Creation of
Community Housing

Massachusetts Community Preservation Coalition, April 2011, Community Housing: Strategies for Effective
Development

Mass APA/MHP/CHAPA/DHCD September 2010, Fostering Local Support for Affordable Housing

4th Annual Massachusetts Housing Institute, June 2010
Working with the Community to Shape the Development of Housing

Massachusetts Association of Planning Directors (MAPD), June 2010
Creating the Box - Demonstration Projects and their Impact on Public Policy

3rd Annual Massachusetts Housing Institute, May 2009 A Case Study on Community Initiative - the Residences at 89
Oxbow

SuAsCo River Visions, December 2008, Low Impact Development and the Creation of Suburban Housing

Mass APA Annual Meeting, May 2004
Affordable Housing - Using Design, Innovation and Process to Get Along with Developers

HONORS

ULI Jack Kemp Award for Workforce Housing, 33 Comm, Newton Massachusetts 2010

AIA PIA Award for Community Design, Monterey Place, New Haven Connecticut, 2003

Pumpkin Carving Champion, Harvard Graduate School of Design, 1997

Laurel Society Citation Award, Shell Oil Company, 1991



Howard Earl Cohen

Howard has nearly 50 years of experience in all aspects of multifamily development. Howard started his career as a staff attorney at the Massachusetts Law Reform Institute. He then served as general counsel to the Cambridge Housing Authority and the Massachusetts Housing Finance Agency. In 1980 he joined Mintz, Levin where his first assignment was revamping the legal and planning departments at the Boston Housing Authority which was then under court ordered receivership. At Mintz, he provided legal counsel to real estate developers and public agencies with a particular focus on developing affordable housing in suburban communities. In 1996, Howard joined The Beacon Companies to assume responsibility for its residential portfolio. In 2004 he formed Beacon Communities.

Beacon Communities is an owner, developer, and manager of multifamily rental housing with an emphasis on governmentally aided affordable housing. It operates in twelve states and has a portfolio in excess of 18,000 apartments.

Currently Howard serves as Board Chair of Beacon Communities and is active in real estate investment and philanthropy.

Howard serves on the boards of the Massachusetts Housing Investment Corporation, Massachusetts Housing Finance Agency Advisory Committee, and the Department of Housing and Community Development Housing Preservation Advisory Committee. He was co-chair of and continues to chair the real estate committee at Hebrew Senior Life, a not-for-profit housing and health care provider and research center that is the Harvard Medical School affiliate for gerontology.

Howard co-founded and until recently served as chair of the board of New Lease for Homeless Families, an industry supported non-profit charged with moving families in shelters directly into permanent affordable housing. Howard co-founded and serves as the chair of Council of Larger Affordable Housing Companies, a national "best practices" organization.

Howard holds a B.A. summa cum laude in economics from Washington University of St. Louis (1968) and a J.D. cum laude from Harvard Law School (1971). In 1978 he was a Loeb Fellow at the Harvard University Graduate School of Design.



Why We Build Homes

Strengthening Boston Communities

oxbowURBAN 



Making Ownership a Reality in Dorchester and Mattapan

Mixed Income Ownership Development Experience
October 2, 2017

Project Name/ Location/ Developer/Year Completed	# of Units	Development Summary	Role in Project	Development Budget
City of Boston, Middle Income Housing Initiative Boston, MA Developer: Oxbow Urban LLC	15	New Construction of single family and two family homes on vacant City of Boston parcels for sale to families at 3 income tiers: 80%, 100% and Market Rate.	Kevin Maguire as Managing Partner of Oxbow Urban LLC	\$6.5M
Sachems Path Nantucket, MA Developer: Sachems Path Nantucket LLC	40	New Construction of 40 single family fee simple homes for sale to families at 3 income tiers: 80%, 100% and 150% of Nantucket Area Median Income.	Kevin Maguire as Development Consultant	\$20.5M
The Residences at 89 Oxbow Wayland, MA Developer: Oxbow Partners	16	New Construction of 16 affordable ownership condominiums completed in close collaboration with the Town of Wayland.	Kevin Maguire and Peter Smith as General Partners	\$5.5M
428 Main Street Medfield, MA Developer: Oxbow Partners	3	Purchase of Historic Building in Medfield Center and Repositioning of Asset for Future Development Opportunities	Kevin Maguire and Peter Smith as General Partners	\$0.7M
33 Comm Newton, MA Developer: B'nai B'rith Housing New England	57	Purchase and redevelopment of 13 existing units plus the construction of a 44 unit building all sold as market rate and affordable condominiums.	Kevin Maguire, Development Consultant	\$ 22.0M
700 Harrison Ave Boston, MA Developer: Mitchell Properties	84	New Construction of 84 condominium units, ground floor retail space and 80 underground parking spaces in Boston's South End.	Kevin Maguire, Development Director	\$ 45.0M
Monterey Place HOPE VI New Haven, Connecticut Developer: Beacon Corcoran Jennison	455	Redevelopment of existing Public Housing Development in New Haven, Ct. Phased demolition and mixed income financing led to the creation of over 450 units of market rate and affordable housing units.	Kevin Maguire Development Director	\$ 70.0M
Treehouse at White Brook Meadow Easthampton, Massachusetts Developer: Beacon Communities LLC	110	Acquisition of undeveloped parcel of land for development of 60 mixed income rental units, 40 cottage style ownership units and 10 lots sold to homebuilders.	Kevin Maguire, Development Director	\$39.7 M
Oak Hill (Phase 1A, 1B, 1C) Pittsburgh, Pennsylvania Developer: Beacon Corcoran Jennison Partners	546	Redevelopment of existing Public Housing Development in Pittsburgh, PA. Phased demolition and mixed income financing led to the creation of over 500 units of market rate and affordable housing units.	Kevin Maguire, Owners Representative (Phase 1A, Phase 1B, Phase 1C)	\$90.0 M

DVM CONSULTING (M/WBE)

Dariela Villón-Maga
DVM Consulting
35 Batchelder Street
Roxbury, MA 02119
p. 857-333-8180 f. 857-800-8261
www.dvmconsult.com



Professional Experience

President & Owner
DVM Consulting, Boston, MA

August 2020 - Present

DVM Consulting provides “soup to nuts” real estate development services with a focus on ensuring housing opportunities are accessible to those native to the neighborhoods where projects are located. The company has a unique perspective of the field given its knowledge in different aspects of the real estate industry, which include multi-family real estate development, property management, community engagement, and resident services programming.

Current Clients:

Oxbow Urban LLC
TLee Development LLC

Accomplishments:

Raised \$142,500 from 81 individuals via the first real estate crowdfund in Boston for the Dot Crossing Apartments. Visit www.smallchange.co/projects/1463_Dot_Ave for more information.

Lead the development of Saige on Fountain, one of the largest affordable ownership developments in Boston. Visit www.saigeonfountain.com to learn more.

Senior Project Manager

Maloney Properties, Inc., New England Region

March 2019 - February 2021

- Created management documents and operating budgets for tax credit funding applications in the states of MA, RI, NH, and CT.
- Developed construction budgets for several renovation projects totaling over \$3mil and oversaw the implementation
- Led the coordination for major capital improvement projects at different sites on a regional level
 - Negotiate and manage contracts of vendors and consultants in several trades/expertise
- Served as a liaison between property owners, developers, management staff, and relocation staff on occupied rehab and new construction projects
- Created and implemented the relocation plan and budget for a 146-unit renovation project involving Historical and Low-Income Housing tax credits
- Managed a team that consists of project managers, access coordinators, and maintenance technicians

Accomplishments:

Completed the National Affordable Housing Management Association Certified Professional of Occupancy certification (2019)

Development Project Manager

Preservation of Affordable Housing, Inc. (POAH), Boston, MA

July 2018 – March 2019

- Managed the acquisition, construction, and/or renovation of development projects
 - Responsible for Low Income Housing, Historical, and New Market Tax Credit underwriting and budget tracking
- Prepared funding applications to secure project financing from private, quasi-public, and public funding sources
- Communicated with project lenders, funders, and contractors and prepared reports as required
- Negotiated and managed contracts of applicable consultants (architects, engineers, general contractors, etc.)
- Assisted development team in closings of real estate transactions

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-
- Coordinated relocation planning as required

Accomplishments:

Completed the National Development Council's Rental Housing Development Finance Professional certification (2018)
Secured \$3mil in development funding from the City of Boston for the Whittier Phase 2 project, a HUD Choice Neighborhood Initiative recipient

Housing Project Manager

Allston Brighton Community Development Corporation (ABCDC), Allston, MA June 2015- July 2018

- Managed all functions of the All Bright Homeownership Program, an acquisition program that leverages Harvard University community benefit funds to promote neighborhood stabilization in Lower Allston by acquiring and selling properties under owner-occupant restrictions
- Developed and supervised the All Bright Community Center and the Resident Service program which provides case management services to ABCDC's affordable housing residents
 - Implemented a tracking tool via Salesforce to measure the impact of the program and the community center
- Identified sites in Allston/ Brighton for potential development of affordable housing, duties included:
 - Selecting and contracting architects, attorneys, engineers, and general contractors and a variety of other professionals
 - Collaborating with community members to assess housing needs and develop support for ABCDC real estate projects
- Assisting in the preparation of presentation of projects to committees, Board of Directors, and outside agencies and organizations
- Worked with property management company (Maloney Properties) to ensure compliance with all local, state, and federal requirements and ensure that quality services were being provided to the 506 families who live in ABCDC's affordable housing portfolio

Accomplishments:

Massachusetts Association of Community Development Corporations' Rising Star Award Recipient (2015)
Acquired 13 properties and created 16 owner-occupied units via the All Bright Homeownership program
Lead the acquisition of a 33-unit cooperative in Brighton, MA to maintain long-term affordability

Regional Relocation Coordinator

Housing Opportunities Unlimited (HOU), New England Region June 2011- June 2015

- Provided oversight, plan implementation, and direct services to eight projects (over 1,200 households) throughout New England including: organization of household information (i.e., family members, compilation and maintenance of residents' housing needs and preferences, relocation benefits due and received), establishment of filing systems, and identification of Sec. 8 regulations in relation to the project
 - Assisted families with special needs and circumstances (i.e., immigration issues, large families, elderly and disabled families, households with credit issues)
 - Communicated and coordinated with moving companies, utility companies, property management, and other local agencies to ensure tenants had a smooth transition to new apartments/developments
- Developed and implemented relocation, community development, and case management plans for projects under my supervision
- Constant and effective collaboration with appropriate government officials, housing authorities, developers, and social service agencies
- Communication with affordable housing residents in the form of community meetings, relocation informational sessions, home visits, office visits and flyers

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- Developed and distributed bi-lingual housing relocation-related information
 - Implemented a system for tracking all relocations for the Boston Housing Authority
 - Supervised and trained outreach workers, full-time/part-time mover assistants, and relocation specialists
 - Prepared proposals and budgets for potential clients and facilitated interviews for new business opportunities

Accomplishments:
2013 Employee of the Year Award Recipient

Assistant Property Manager

C.C. Real Investments, Inc., Chelsea, MA July 2009- July 2011

- Worked with staff to establish annual operating budgets of mixed income developments consisting of 185 units
- Prepared leases for current/prospective tenants and compiled documents for legal proceedings
- Managed and assisted maintenance staff with timely completion of repairs and preventive maintenance
- Proficiently processed rent payments and deposits in a timely manner
- Oversaw Section 8 tenants and provided necessary paperwork for tenancy in accordance with directives and local/state policy
- Advertised and promoted apartment vacancies on various websites and newspapers on a weekly basis

Professional Affiliations

Board of Directors, <i>Hildebrand Self-Help Center, Inc.</i>	<i>April 2021- Present</i>
Core Fellow, <i>Builders of Color Coalition</i>	<i>January 2022- June 2022</i>
Core Leadership Development Certificate Program <i>Institute of Nonprofit Practice</i>	<i>June 2021</i>
Certified Professional of Occupancy (CPO) The National Affordable Housing Management Association	<i>June 2019</i>
Rental Housing Development Finance Professional Certification <i>National Development Council</i>	<i>June 2018</i>

Development Experience & Pipeline
October 31, 2022



Project Name / Location / Developer	# of units	Development Summary	Role in Project	Development Budget	Project Timeline
City of Boston, Blue Hill Ave B1 Parcels Dorchester, MA Developer: DVM Consulting Corp	28 (18 ownership; 10 rental)	New Construction of three mixed-use buildings on vacant City of Boston parcels affordable at 80% and 100% AMI with 2400sf of commercial spaces	Dariela Villon-Maga as Lead Developer under DVM Consulting Corp	\$14.7M	Pre-Development Planning; Estimated Construction Completion April 2024
Saige on Fountain Roxbury, MA Developer: Oxbow Urban LLC	40	New Construction of 40 affordable ownership condominiums; affordable at 80% and 100% AMI	Dariela Villon-Maga as Development Consultant	\$22.1M	In Construction; Estimated Completion Dec. 2022
1463 Dot Ave Apartments Dorchester, MA Developer: TLee Development LLC	29	New Construction of a transit-oriented, mixed-use building, affordable at 70%, 80% and 90% AMI with 1200sf of commercial space	Dariela Villon-Maga as Development Consultant	\$9.6M	In Construction; Estimated Completion March 2023
Past Projects					
191 Talbot Ave Apartments Dorchester, MA Developer: TLee Development LLC	14	New Construction of a transit-oriented, mixed-use building, affordable at 80% and 90% AMI with 1800sf of commercial space	Dariela Villon-Maga as Development Consultant	\$5.9M	Completed in April 2021
56-58 Bowdoin Ave Apartments Dorchester, MA Developer: TLee Development LLC	31	Acquisition of two connected 4-story buildings as part of the City of Boston's Acquisition Opportunity Program; affordable at 60% and 80% AMI	Dariela Villon-Maga as Development Consultant	\$7.1M	Acquired December 2020
West Newton Rutland Apartments South End, MA Developer: Inquilinos en Accion (IBA)	146	Rehabilitation of a disposed Boston Housing Authority developemnt involving Historical and Low-Income Housing tax credits	Dariela Villon-Maga as Senior Proj. Manager for Maloney Properties	\$47.5M	Completed 2020
Flat 9 at Whittier Roxbury, MA Developer: Preservation of Affordable Housing (POAH)	52	New Construction of mixed-income rental units as part of a HUD Choice Neighborhood award to the Boston Housing Authority	Dariela Villon-Maga as Development Manager for POAH	\$27.8M	Completed 2019
All Bright Homeownership Program Allston Brighton, MA Developer: Allston Brighton Comm. Dev. Corp (ABCDC)	16	Purchase and rehabilitation of 13 existing homes plus the creation of 3 additional homes; all sold at market rate under owner-occupant restrictions	Dariela Villon-Maga as Real Estate Proj. Manager for ABCDC	\$5.0M (revolving line of credit)	2015-2018
Carol Ave Cooperative Allston Brighton, MA Developer: Allston Brighton Comm. Dev. Corp (ABCDC)	33	Acquisition of a failing mixed-income cooperative housing development; maintained affordability without displacement	Dariela Villon-Maga as Real Estate Proj. Manager for ABCDC	\$5.7M	2018

JGE DEVELOPMENT (MBE)



OVERVIEW

JGE Development LLC is a commercial real estate development practice focused on transforming underperforming assets and underutilized parcels into stabilized income-restricted, and market-rate multi-family housing. We aim to partner with communities to activate and improve historically disinvested neighborhoods throughout Boston's inner city and urban core—many of which need significant public infrastructure upgrades, affordable housing, and access to open space. Our experience includes the repositioning of assets, adaptive reuse of structures, and construction of new buildings on vacant sites. We develop accessible, sustainable, and livable units for residents of all ages and income levels.

In addition to providing housing, JGE Development offers real estate advisory services to established development partners, throughout Boston, Greater Boston, and New England. Our team has over 25 years of experience working with and for the City of Boston (BPDA, Boston Planning and Development Agency and the Mayors Office of Housing) and during that time, we have forged strong relationships with City and Community Partners. This experience provides JGE with a unique set of skills to understand and successfully navigate our developer clients through the permitting and regulatory approval process.

Our work extends to and through the community engagement process as well. We have worked with residents, faith-based organizations; community and volunteer groups; and racial, ethnic, and cultural groups. We identify with stakeholders early in the process to determine the most appropriate means of communication with specific techniques to combat language access, scheduling conflicts, and technological barriers which continues to yield great success with our level of transparent and intentional community-based development.

JONATHAN C. GARLAND

PRESIDENT AND FOUNDER

Jonathan Garland has over 20 years of professional experience in the architectural design and development industries. He is the President and Founder of Boston-based JGE Development, a real estate development and advisory practice as well as J. Garland Enterprises, an architectural planning and design firm with a broad portfolio of multi-family and mixed-use housing projects. Throughout his career, Jonathan has cultivated a seasoned approach to transforming buildings, urban infill sites, and neighborhoods through high-quality collaborative design and development strategies. He listens to community members' thoughts, concerns, aspirations, and ideas and then translates their input into executable outcomes. He is currently involved with the redevelopment of Crescent Parcel in Roxbury which is transforming the vacant parcel into a mixed-use complex offering affordable and mixed-income housing units, community spaces, and open green space for passive recreation.

Jonathan is a Board Trustee for the Boston Architectural College and the Brooke Charter School. He served as Co-Chair for the Boston Chapter of the National Organization of Minority Architects (NOMA) and is involved with numerous professional organizations including the US Green Building Council (USGBC) the Minority Developers Association (MDA), and the Builders of Color Coalition (BCC).



Education

Boston Architectural College
Bachelor of Architecture, 2009

Registrations

LEED Accredited Professional

Professional Affiliations

American Institute of Architects (AIA)
Boston Society of Architects (BSA)
Nominating Committee
Center for Artistry and Scholarship (CAS)
Minority Developers Association (MDA)
Secretary
Builders of Color Coalition (BCC)
National Organization of
Minority Architects (NOMA)
BosNOMA
Stoughton Planning Board
Board Member
US Green Building Council (USGBC)
African American Real Estate
Professionals (AAREP)

Professional Background

J. Garland Enterprises (2018-present)
D/R/E/A/M Collaborative (2017-2018)
Arrowstreet (2012-2017)
Ennead Architects (previously *Polsheck
Partnership*) (2010-2012)
ICON Architecture (2009-2010)
Sterling Associates (2001-2008)

LANCE CAMPBELL

DEVELOPMENT PRINCIPAL + SENIOR ADVISOR

Lance Campbell has over 25 years of professional experience working as a Senior Planner and Senior Project Manager for the City of Boston. Throughout his career, he has successfully managed a wide array of complex mixed-use development projects by securing zoning, real estate entitlements, and board approvals for development entities. His experience has allowed him to cultivate relationships with elected officials, permitting agencies, neighborhood associations, community development corporations, and the development community. Lance is well-versed in the community engagement process and works collaboratively with and through local groups, decision makers, and community members so they are able to meaningfully contribute to project outcomes. He does this through engagement, building trust, listening, and communicating throughout all phases of a project.

Lance's experience includes over 300 mid- to large-scale projects including residential mixed-use developments such as the Blessed Sacrament Campus in Jamaica Plain, St. Kevin's Redevelopment in Uphams Corner, Indigo Block in Dorchester, Cote Village in Mattapan, and 41 Lagrange Street in Chinatown.



Education

University of Massachusetts, Amherst
Master of Regional Planning, 1997

Westfield State University,
Bachelor of Arts, Communication, 1991

Professional Affiliations

Pioneer Planning Commission
Research Assistant

South Holyoke Neighborhood Revitalization
Charrette Team Member

Legislative Aide to the Speaker of the
Massachusetts House of Representatives

Charles River Watershed Association
Vice President Board of Directors

Professional Background

J. Garland Enterprises (2022-present)

Boston Planning & Development Agency
(1997-2022)

OPEN SPACE DEVELOPER

THE TRUSTEES

the trustees

WHO WE ARE

The Trustees of Reservations (The Trustees) is the nation's first and Massachusetts' largest conservation and preservation nonprofit. The organization was founded in 1891 by esteemed landscape architect and open space visionary Charles Eliot to benefit the public health of Boston residents in the face of rapid urbanization. For 130 years the organization has worked to conserve the natural, cultural, and historic character that makes Massachusetts' landscapes and communities unique, guided by its mission to hold these properties for public use and enjoyment for all in perpetuity.



While an organization with a statewide reach, The Trustees' Boston presence has expanded in the last decade, marked by a 2014 merger with the Boston Natural Areas Network (BNAN). The combination of The Trustees' experience, resources, and credibility with BNAN's history of community building, community garden and greenway development has been integral to driving green space solutions in Boston neighborhoods. The Trustees remains a vital part of the Boston community today as the largest owner of community gardens in the city managing 56 gardens. In the coming years, we aspire to grow the Boston Community Gardens as part of a new Urban Outdoors initiative that will establish The Trustees as the leading urban land conservation organization in the Commonwealth and will build the next generation of stewards for the care of these green urban landscapes.

WHAT WE DO

Through our gardens, we seek to support a community diverse in culture, income, and age, and to reflect the ongoing evolution of Boston's neighborhoods. Community gardens are a core tenet of our work, and our goal is to strengthen our gardens' role in the city's permanent open space and local food production infrastructure.

Grow Food

The Trustees cares for 56 gardens over 16 acres in eight Boston neighborhoods: Dorchester, East Boston, the Fenway, Jamaica Plain, Mattapan, Mission Hill, Roxbury, and the South End. These gardens host 1,600 garden plots, serving nearly 10,000 residents. A Dartmouth College study of our community gardens in 2021 estimated that more than \$2 million worth of food is being grown to supplement family food budgets. This food is fresh, organic, culturally diverse, and consumed both by the gardeners, their families, and clients at the local food pantries where some of the produce is donated.

Build Healthy, Cohesive Communities

Our gardens are vital community resources, contributing significantly to the quality of life for area residents. There are 125,000 residents living within a quarter mile of our gardens that we seek to invite in, to connect with the outdoors, and find respite within their neighborhood. Gardening offers participants many benefits that support healthy lifestyles, including physical activity, improved nutrition and food access, reduced stress and improved mental health, increased social contact, and culturally valued activities.

Importantly, the benefits of community gardens extend beyond those afforded to the gardeners themselves to the surrounding residents. Urban green spaces like our community gardens can have a positive impact on residents' physical, mental, and social wellbeing. Some studies suggest that proximity to and use of urban green space is associated with physical activity levels and cardiovascular health, among other positive health indicators. Access to natural environments can also improve overall mental health, including reduced stress

levels, improved general mood, reduced depressive symptoms, and improved mindfulness and creativity. Additionally, by providing a space for community activities and social gathering as our gardens do, they encourage positive social interactions and improve social cohesion, which in turn enhances health and wellbeing. Notably, our gardens are frequently one of the few places within the neighborhood that bring together people of all ages, financial means, cultures, and immigration status. These gardens are the cultural centers for the neighborhoods they are located in, representing the true diversity and spirit of generosity of the people that work the soil here.

MITIGATE IMPACTS OF CLIMATE CHANGE

Our gardens are effective in mitigating a range of environmental impacts including increased temperatures, pollution, and flooding. Parks and open greenspace can yield important cooling benefits to local urban environments, remove air pollution and improve air quality, and by decreasing impervious surface area, community gardens help capture stormwater runoff. They also provide pathways for native pollinators in the city's ecosystem, creating green islands and corridors that run across our neighborhoods.

LEARN TOGETHER

In addition to the access provided to grow food and strengthen community connections, we offer informational, technical, and educational support to people of all ages and experience that reaches nearly 17,000 people annually. Through a wide range of courses, workshops, and formal training—both in person and online—we provide opportunities for gardeners to gather and exchange information. Topics covered include garden planning, soil building, attracting beneficial insects, using culinary and medicinal herbs, and preserving the harvest, as well as more basic skills like weeding, fertilizing, harvesting techniques, and succession planting. Our gardens also offer opportunities for less formal learning to occur as grandparents and grandchild garden together, passing on traditions and skills that have supported their families for generations. And we offer social activities meant to engage multigenerational groups, like BBQs, concerts, and exhibitions with local artists, as well as garden socials with senior centers and afterschool programs. Approximately one-third of our gardens host after-school programs as we work to cultivate the next generation of community gardeners.

HOW WE DO IT

Volunteer community residents and local grassroots leaders are at the heart of The Trustees' community gardens. In concert with Trustees staff, the individual gardens are managed by a self-selected (sometimes elected) group of volunteers that contribute more than 25,000 hours annually to help with stewardship and operations. The Trustees supports this leadership team to effectively manage the day-to-day gardening activities and plot upkeep, as well as community relations and emergency response. Trustees staff and volunteers manage the landscape plantings, water services, and permanent garden infrastructure, as well as the programmatic area of the garden with support and consultation from the gardeners. With this model, The Trustees can gather direct and indirect feedback from residents that are highly involved with each garden—helping us make our gardens more accessible, welcoming, and desirable for all. Capital projects and annual maintenance and repairs are carried out by our trained staff who bring agricultural, horticultural, and community engagement skills to support the network of community gardens.

ARCHITECTURE

J. GARLAND ENTERPRISES (MBE)



OVERVIEW

J. Garland Enterprises (JGE) is a Boston-based 100% minority-owned architecture and design firm with a comprehensive portfolio comprised of multi-family housing, mixed-use development, academic, life sciences, commercial, and university projects. Every project presents a uniquely different client team, programmatic goal, budgetary constraint, and regulatory approval process. JGE appreciates the profound impact design has on our communities, so we work collaboratively with our clients, design teams, and stakeholders to develop innovative solutions to complex challenges. We deliver buildings that capture the spirit of their surroundings while also emphasizing their own unique identities.

LEADERSHIP

JGE's design practice is led by three talented and forward-looking architects with over 40 years of combined professional experience. The knowledge and expertise of President and Founder, Jonathan Garland; Design Principal, Andres Bernal, and Director of Architecture Marija Ilić come together to make a difference for our communities and the clients we work with. Jonathan, Andres, and Marija are joined by a diverse team of experienced registered architects, design professionals, and support staff.

FIRM CULTURE

In addition to keeping our clients happy and providing beautiful designs, the success and satisfaction of our employees is a priority at JGE. Our positive culture of leadership and mentoring allows new designers to feel comfortable collaborating with people at all levels. Staff members are given multiple opportunities to interact directly with clients, providing them with the confidence to explore new ideas and solutions. We have built a culture of people who are hungry for knowledge and passionate about designing for our clients and communities. Their enthusiasm is reflected in JGE's work.

ANDRES BERNAL AIA, LEED AP BD+C

DESIGN PRINCIPAL

With more than two decades of experience as an architect and urban designer, Andres has worked on a variety of project types including urban housing, commercial, institutional, and industrial development. His master planning efforts in diverse urban communities has included a complex overlay of constituents which has informed his nuanced and collaborative approach critical to advancing projects. Through this work, he has gained a robust understanding of Boston's community, zoning, and permitting processes.



MULTI-FAMILY HOUSING

3 Schuyler St - Boston (Roxbury), MA
6 income-restricted apartments, zero emission building
Jamaica Plain Neighborhood Housing Corp.

7-11 Curtis St - East Boston, MA
34 income-restricted apartments
RISE Together

10 Stonley Rd - Boston, MA
45 income-restricted condominiums, passive house
Jamaica Plain Neighborhood Housing Corp. | Traggorth Companies

14 West Broadway - South Boston, MA *

49 luxury condominiums
Citypoint Development

20-28 Cheney St - Boston (Roxbury), MA
6 income-restricted apartments, zero emission building
Jamaica Plain Neighborhood Housing Corp.

21 -23 Greenville St - Boston (Roxbury), MA
9 income-restricted apartments, zero emission building
Jamaica Plain Neighborhood Housing Corp.

31 Tufts St - Somerville, MA *

14 workforce apartments, passive house, ILIF affordable housing pilot program
E3 Development

40 Soldiers Field Place - Boston (Brighton), MA
61 market rate condominiums, LEED certified
40 Soldiers Field LLC

84 Warren St - Boston (Roxbury), MA
43 market rate apartments, 22 condominiums, ground floor commercial
Madison Park Development Corporation | Urban League

Education

Massachusetts Institute of Technology
Master of Science in Architecture and
Urbanism, 2013

Boston Architectural College
Bachelor of Architecture, 2007

Registrations

Registered Architect (MA)

LEED Accredited Professional

Professional Affiliations

American Institute of Architects

USGBC (U.S. Green Building Council)

Boston Society of Architects (BSA)

Urban Land Institute (ULI)

NAIOP

Professional Background

J. Garland Enterprises (2021-present)

Placetaylor (2018-2021)

RODE Architects (2013-2018)

CBT Architects (2001-2011)

* Completed prior to JGE

132-134 Arlington St - Boston (Bay Village), MA
12 luxury townhouse condominiums
New Boston Ventures

191 Talbot Ave - Boston (Dorchester), MA *

14 income-restricted apartments, passive house standards
TLee Development

632 Blue Hill Ave - Boston (Dorchester), MA
87 income-restricted apartments, multi-phased
The Community Builders

1201 River St - Boston (Hyde Park), MA
63 income-restricted senior housing apartments, passive house, LEED certified
B'nai B'rith Housing LLC

1463 Dorchester Ave - Boston (Dorchester), MA
29 workforce compact living apartments, passive house
TLee Development

1590 Blue Hill Ave - Boston (Mattapan), MA
165 market rate apartments, ground floor commercial
NLG Partnership | RISE Together

3200 Washington St - Boston (Jamaica Plain), MA *

76 market rate apartments, ground floor commercial
Berkeley Investments

Charlesview- Boston (Brighton), MA *

320 mixed-income apartments and townhomes
The Community Builders

Faneuil Gardens - Boston (Brighton), MA
450 income-restricted apartments, multi-phased
The Community Builders | JGE in Association w Moody Nolan

Mildred Haily Apartments - Boston (Jamaica Plain), MA
60 income-restricted apartments, passive house
Urban Edge | JGE in Association w PCA

Nevins Hill - Boston (Brighton), MA
56 luxury condominiums
New Boston Ventures

Residences at 566 - Boston (South End), MA
66 market rate condominiums, ground floor commercial
New Boston Ventures





10 STONLEY | Boston, MA (Jamaica Plain)



CLIENT
JPNDC | Traggorth Companies

PROJECT INFO
45 Units
New Construction
Income-Restricted Homeownership
LEED
Passive House



84 WARREN ST | Boston, MA (Roxbury)



CLIENT

Madison Park Development Corporation (MPDC)

PROJECT INFO

83,000 SF
65 Units | 6 Stories
Income-Restricted Apartments
Ground Floor Office Space



WARREN STREET ELEVATION



WARREN PLACE ELEVATION



1201 RIVER ST | Boston, MA (Hyde Park)



CLIENT
B'nai B'rith Housing LLC

PROJECT INFO
63 Units
Income-Restricted Apartments
Senior Housing
Passive House
LEED Gold





150 RIVER ST VILLAGE | Boston, MA (Mattapan)



CLIENT

Planning Office for Urban Affairs | Caribbean Integration Community Development

PROJECT INFO

38,000 SF
30 Units | 3 Stories
New Construction
Income-Restricted Housing
Senior Housing



7-11 CURTIS ST | East Boston, MA



CLIENT
RISE Together

PROJECT INFO
48,000 SF
29 Units
4 Stories | 2 Buildings
New Construction
Income-Restricted Housing
Below-Grade Parking
Wood Frame



EXPERIENCE



632 BLUE HILL AVE | Boston, MA (Dorchester)



CLIENT
The Community Builders

PROJECT INFO
87 Units | 2 Buildings
Income-Restricted Housing
Health Center
Multi-Phase Project



566 COLUMBUS AVE | Boston, MA (South End)



CLIENT
New Boston Ventures

PROJECT INFO
135,000 SF
66 Units | 6 Stories
Luxury Condominiums
Community Space
Art Gallery
Café
Below-Grade Parking



LANDSCAPE ARCHITECTURE

GROUND (WBE)



Ground Inc. is an award-winning landscape architecture practice with a depth of experience in multi-family residential and permitting process within the City of Boston. Our practice is committed to the creation of exceptional, artful and sustainable landscapes. The firm was established with the specific pursuit of creating landscapes that unite aesthetics, ecology and practicality, conceived and executed at the highest technical level.

Every project we undertake is unique, and to each we bring the same intense focus on the quality of execution and innovation in design. No matter what the scale or budget of the project, our goal is to create an extraordinary and enduring design that is the best “fit” to the parameters of the project, the contexts and the clients.

Ground’s project experience is wide-based, ranging from affordable housing, multi-family residential, mixed use, active streetscapes, civic buildings, to public parks. Past clients of our team of landscape professionals include cities, public institutions, architects, private developers and individuals. Whether across time zones or across the table, we believe the keys to success in any collaboration are mutual respect and clarity of communication.

Amidst a growing awareness of our world’s limited resources, design is an optimistic profession. We understand a truly sustainable approach to be multi-tiered and thus strive to create landscapes that add ecological, social, financial and aesthetic value to the projects we undertake.

The principal, Shauna Gillies-Smith, has led the design and construction of numerous critically acclaimed projects across the USA, Europe, and the globe. She has over twenty years of design experience in landscape practice and holds professional degrees from the Harvard Graduate School of Design and the University of British Columbia. Ms. Gillies-Smith has been honored with numerous awards and has taught and lectured widely. Trained first as an architect and urban designer, her shift to landscape architecture was motivated by a desire to shape exceptional moments of the public realm.

Ground is certified as a Women Business Enterprise.





Shauna Gillies Smith

FASLA, LEED AP
Principal Ground Inc.

Harvard University Graduate
School of Design
Master of Urban Design

University of British
Columbia, Vancouver
Bachelor of Architecture

Queen's University
Bachelor of Arts in Economics

American Society of Landscape
Architects

LEED AP

Licensure: MA, NH, CT, MI, ME

Boston Architectural College
Trustee

Boston Society of Architects
Board of Directors

Architecture Boston Magazine
Contributing Editor, 2007-2013

Urban Design Committee
Co-Chair, 2011-2013

Selected Teaching Experiences:

Harvard Graduate School of
Design,
2015-2012, 2009-2007

Rhode Island School of Design,
2011/2010/2000

Ground is certified as a WBE in MA



Selected Projects

Drexel Village
w/ J. Garland Enterprises
Boston, MA

Nubian Square Ascends
Boston, MA

A.O. Flats
Boston, MA

275 Albany - TROY
Multi-Family Residential
Boston, MA

115 Winthrop Square
Plaza and Residential
Boston, MA

Packard Crossing
Boston, MA

Parcel 12
Boston, MA

Tilia - Parcel U
Boston, MA

Waterside Place Mixed Use
Development
Boston, MA

5 Washington Street
Brighton, MA

Tufts University
Innovation Centre
Medford, MA

Washington Place
Newton, MA

5 Washington Street
Brighton, MA

Mildred C. Hailey Apartments
Boston, MA

One Charlestown
Park and Multi-Family Residential
Boston, MA

Downer Avenue
Public Park
Boston, MA

Massachusetts College of Art
Tree-House Residence
MSCBA, Boston, MA

The Quinn - 380 Harrison Avenue
Boston, MA

The Harlo - 380 Harrison Ave
Boston, MA

45 Townsend
Boston, MA

Second & Vine
Everett, MA

Lafayette City Center Green Roof
Boston, MA

Coleman Park
Field of Stories
City of West Palm Beach, Florida

Austin Street
Newton, MA

Union Square Parcel 2.2 and 2.3
Somerville, MA

Tontine Crescent Plaza
Boston, MA

Selected Awards

2020	Jumping Fish Ecological Power Plant Park - BSA Honor Award
2019	Collaborative Learning and Innovation- BSLA Award of Merit
2019	Tontine Crescent Tactical Plaza- BSLA Award of Merit
2018	Central Park - BSLA Award of Merit
2017	WRAP Taunton- Paul & Niki Tsongas Award
2017	Keene State College-AIA NH Honor Award
2016	Center for Design and Media-BSA Award Education Facilities Design
2016	MassArt Tree House Residence- New England AIA Design Award
2015	MassArt Tree House Residence - ASLA Award of Merit
2013	Peter Bulkeley Terrace - AIA NE Award
2012	Tapestry Garden - BSLA Award of Merit
2012	Parc Nouvelle - BSLA Award of Merit
2012	LandWave - BSLA Award of Merit

ARTICLE 80 EXPERIENCE

Drexel Village, Boston, MA

Client- POUA and J. Garland Enterprises

Mildred C. Hailey, Boston, MA

Client- TCB, Urban Edge and JPND

Nubian Square Development, Boston, MA

Client- Nubian Ascend Partners

Packard Crossing, Boston, MA

Client- The Hamilton Company Inc.

The Harlo, Boston, MA

Client- Skanska

A.O. Flats, Boston, MA

Client- The Community Builders

The Quinn, Boston, MA

Client- Related Beal

5 Washington Street, Brighton, MA

Client- KIG Real Estate

Tilia (Parcel U), Boston, MA

Client- Urbanica

The Troy, Boston, MA

Client- Gerding Edlen

Parcel 12, Boston, MA

Client- Corcoran Jenison and Millennium Partners Boston

Bunker Hill Housing Redevelopment, Boston, MA

Client- Leggat McCall, Suncal, Boston Housing Authority

Waterside Place, Boston, MA

Client- The Drew Company and HYM

45 Townsend, Boston, MA

Client- Kensington Investment Company

OTHER MULTI-FAMILY RESIDENTIAL PROJECTS

Laneway, Boston, MA

Client- Tremont & Burney LLC

Union Square Parcel D2.2, Somerville, MA

Client- US2

Trio Newton, Newton, MA

Client- Mark Investments

Austin Street, Newton, MA

Client- Austin Street Partners

Father Bill's Housing, Quincy, MA

Client- Father's Bill & Mainspring

Second & Vine, Everett, MA

Client- Block Properties

Agawam Village Ipswich, MA

Client- Ipswich Housing Authority

Brockton Trinity Brockton, MA

Client- Trinity Brockton Limited Partnership

37 Wales Street, Boston, MA

Client- Heading Home

808-812 Memorial Drive, Cambridge, MA

Client- Homeowners Rehab



Waterside Place



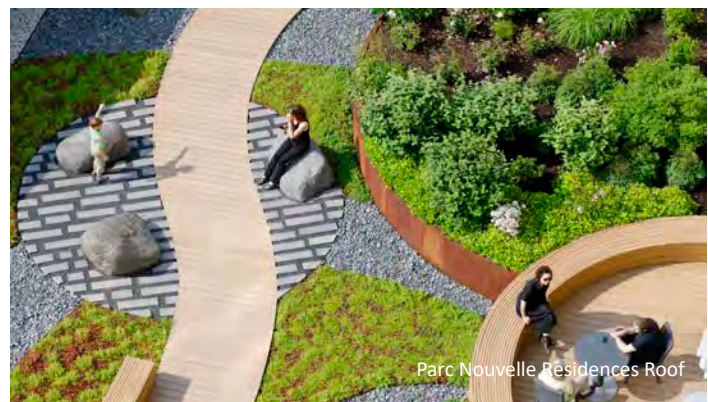
Mildred C. Hailey



Union Square, Parcel D2.2/3



The Troy



Parc Nouvelle Residences Roof

ground

INTERIOR DESIGN

SASHA THIND WARM MINIMALISM (M/WBE)

ELYSE AYOUNG

PROJECTS
SERVICES (/SERVICES)
ABOUT (/ABOUT-
MODERN-INTERIOR-
DESIGNER-BOSTON)
CONTACT (/CONTACT-
INTERIOR-DESIGN-FIRM-
BOSTON)

SASHYA THIND
WARM MINIMALISM

PRESS (/BEST-DESIGN-
FIRMS-BOSTON)
COLLECTIBLE (/SHOP-1)
JOURNAL (/SASHYA-
THIND-JOURNAL)

(/)

Sashya Thind Fernandes LEED AP

(Leadership in Energy and Environmental Design- Accredited Professional)

Principal Designer + Founder



I look forward to learning more about you! In the meanwhile, a little about me and my background....

Having grown up around strong female role models (mother and grandmother) that are both practicing Architects and Designers even today, has been an important part of this journey. I spent many years after school accompanying my mother on her job sites and studio. In hindsight, my father's work (pilot) took us all over the world as a child (which I grumbled about at the time), allowed me to recognize and adapt to different perspectives and cultures as needed and often. This often meant a new language or way of life. With all this travel, my Indian-ness is still deeply rooted in my being. Unconsciously or consciously, it has provided a foundation for my values, design thinking and aesthetic (love of natural materials). Through these early experiences and exposure, I have developed a strong intuitive sense which informs the design direction for my clients and their strong cultural backgrounds.

Working on cross-collaborative teams on large scale projects.

During my Architecture program, I interned in Dubai for a boutique, luxury residential firm. The experience highlighted the nuances of working within a different culture and climatic conditions.

Upon completing my undergraduate degree in Architecture in Mumbai, I had the opportunity to work in Mumbai for a large Architecture firm, Kapadia & Associates. The projects included large, commercial multiplexes and malls which involved collaborating with an international team of designers and multiple consultants at a time. It was an enriching experience designing cafes and other public areas within these buildings under the leadership of experienced Senior Designers and Architects.

Moving from Asia to Europe

A few years later, my husband and I, moved to England where I worked for an Urban Planner on housing projects in the Yorkshire region of England and a redevelopment in the Scottish highlands. Infill housing was a key component of our work which was designed to address the housing shortage.

On a personal level, England provided the best travel experiences, as we explored England, Wales, Scotland, and spent a considerable amount of time in London where we explored iconic historic architectural sights and museums. On long weekends, we indulged in short trips to France, Portugal, Italy and the Netherlands, all fascinating destinations for Art and Design both of contemporary and historic significance.

Launched the studio

In 2007, we were given the opportunity to move to Boston, where I joined a small boutique firm that specialized in both residential and commercial projects. The small size of the firm, allowed me to work closely with the Principal Architect and colleagues, on fun and challenging projects ranging from Hotels, Cruise ship Interiors, Custom homes, Restaurants, Gyms, Institutional spaces and Corporate fit-outs. Her design aesthetic was rooted in Experiential design and Peter Zumthor's Atmospheres was required reading upon joining the firm. It set the baseline for the kind of approach we were encouraged to take on all our projects and I lean on this design philosophy even today!

In addition, I define this approach within my framework of life and experience as Warm Minimalism.

After gaining several years of gaining hands on experience at the firm, it provided the impetus to launch Sashya Thind (formerly named ID8 Design Studio) in 2012, which had been a life long goal. Through the diverse project types I had been exposed to in the past, I knew my interest lay in Interior Design where the intimate size of the projects allowed me to dive into the details. My educational background and early training at Architectural firms, has given me the grounding to provide solutions that often require structural changes to the layout, which can solve the underlying issues within a space. ID8 Design Studio was formed to enable that life long journey of learning, forming connections with interesting people, and experimenting with ways to design spaces that will ultimately nurture the soul.

Interior Design - a way of life

My favorite types of projects are ones that involve both renovations and furnishings to realize the full potential of a space and complete the artistic vision. My favorite part of the process is observing how our clients finally experience the spaces we design.

A long time ago, I realized this wasn't a career, but a way of life for me! It keeps me passionate, vulnerable, emotional, practical and reminds me everyday, how I rely on those myriad of emotions to connect with people, place and purpose. We are closely knit to our environments and they can either inspire us and instil joy or not.

While our family, consisting of my 2 sons, my husband and our dog, have made Boston home for the foreseeable future, I look forward to working with patrons who continue to entrust me with amazing opportunities to create spaces that bring them joy.

Sashya Thind Fernandes

Principal + Founder



ELYSE AYOUNG

interior designer

Versatile and creative designer with a passion for creating spaces that speak to the human experience. Design should tell a story that moves you; each project should be approached as a story untold. Quality experience in all phases of design, construction and administration for projects of varying sizes, types and scales.

education.

BFA, Architecture

Mass. College of Art + Design,
2006 - 2010
Excellence in Design Award,
May 2010
Foundation Auction Award,
May 2009

skills.

Revit
Enscape
AutoCAD
Adobe Photoshop
Adobe InDesign
Adobe Illustrator
Microsoft Office
Sketch-Up
Good Ole' Hand Sketching

professional experience.

Gensler | Associate, Designer

Boston, January 2017 - Present

Interior design on all phases of projects starting at programming through construction administration. Development of concept designs, finish palettes, furniture selections and materials. Design presentations and concept boards that further the design thinking. Coordination with client, consultants and internal architectural teams.

Projects Include: Confidential Consumer Goods Client - Tokyo, Singapore, Lisbon, Seoul & Boston Campus, Nixon Peabody Offices, JLL Boston HQ, Confidential Tech Client, MC Partners

ID8 Design Studio | Design Consultant

Boston, 2013 - 2019

Freelance interior design consultant on residential, workplace and hospitality projects. Design work in concept phase, schematics and design development including mood boards, planning, renderings, graphic design presentations and minimal documentation. Consulting also included the pulling of finishes and material palettes.

Projects Include: Various Residential Clients, Notch Brewery, Elephant VC, IAC, Maloney Properties

Boston Architectural College | Adjunct Faculty

Boston, Fall Semester 2017

Introduction to Revit course for students of all levels. Covered basic modeling, graphics, view templates, sheet sequence and layout capabilities as well as cloud renderings and use of materials. Final assignment included digital boards with project concept, graphic plans, axons, elevations and revit renderings alongside use of additional programs such as photoshop and lumion for renders to help students compile a full presentation.

Nelson Worldwide Boston | Designer

Boston, January 2016 - January 2017

Planning, concept design and design development for Tech interiors. Graphic presentations, renderings, and finish selections. Compilation of full furniture packages including selections, specifications and finishes. Revit documentation and millwork detailing. Coordination and meetings with clients, engineers and all other consultants on project teams.

Projects Include: Cisco Systems, San Jose CA - Buildings 1, 2 & 19, Beacon Capital-160 Federal

cont'd.

References available upon request

professional experience.

NBBJ | Designer

Boston, December 2012-December 2015

Interior concepts, space planning layouts, graphic presentations and digital and physical finish palettes for projects in concept and design phases. Collaboration with architectural and urban planning teams. Experience in furniture process including selections, specifications, bidding and administration. Full furniture package finishes and presentations with direct client.

Revit production from SD to CDs and construction administration including interface with client, contractor and sub-consultants. Cross-office teaming with project teams in Columbus, New York and Seattle offices.

Some projects include: Suffolk University 20 Somerset, Suffolk University Sawyer Business School, Bloomberg Boston, 177 Huntington Ave Lobby, Brigham & Women Building for the Future, Kuwait Cancer Center

THEREdesign | Designer

Boston, September 2011 - November 2012

Concept development by use of hand sketching, 3D modeling and rendering. SD/DD material finish palette research and selections. Revit and AutoCad documentation in SD, DD and CD phases.

Marketing tasks including research and coordination of RFPs, literature and graphics.

Some Projects Include: Various residential clients, Buckminster Hotel-Fenway, Fenmore Bar & Grill

Hill Int'l (formerly Collaborative Partners) | Assistant Project Manager

Boston, 2009 - August 2011

Construction Project Management - Office liaison for project team, architects, consultants, general contractors and site personnel; ensuring smooth communication between all parties. Attended project and site meetings with production of meeting minutes. Maintenance of project records and compilation of monthly project status reports.

Some projects include: Revere Elementary, Revere High School, Bridgewater State College

professional organizations.

the MiD Collective | Co-Founder

Boston, 2018

Formed to be the link missing in the New England area.

Our mission:

The MiD Collective exists to amplify, celebrate and nurture the creative voices of BIPOC Interior Designers in Boston and beyond. Alongside our allied professionals, we provide the space to connect, unlock opportunities for our peers, and empower the creative potential of our youth. We firmly believe that a just and accessible industry leads to the design of human experiences for the benefit of all humanity.

BosNOMA | Parliamentarian + Outreach Chair

Boston, Member Since 2019

As outreach chair, strengthen and build upon engagement with local youth organizations to inspire the next gen and uplift communities through Architecture and Design.

Participation in mentor program, guiding mentees early in their professional career.

CIVIL ENGINEERING | SURVEY

NITSCH ENGINEERING (WBE)

Building better communities with you



*Washington Beech Housing
Boston, MA*

Nitsch Engineering is a multi-disciplined engineering and surveying firm offering an integrated suite of services to efficiently serve the needs of our building/site development and infrastructure clients. Our civil, transportation, and structural engineers; land surveyors; planners; and GIS specialists work collaboratively to deliver client-focused, creative, cost-effective, and sustainable project solutions. We have earned the confidence of our clients, as illustrated by the fact that 97% of our work comes from repeat clients.

For 30 years we have worked on major private development and public infrastructure projects in Massachusetts and throughout the northeast. Nitsch Engineering is the largest women-owned business enterprise (WBE) civil engineering firm in Massachusetts, and is also WBE-certified in Virginia.



*Scituate Public Safety
Scituate, MA*

Civil Engineering

Nitsch Engineering's professional engineers coordinate their efforts with architects, landscape architects, and owners to provide comprehensive solutions to site-development issues. Our proactive approach to addressing stormwater management, grading, site utility, and permitting issues allows us to identify and resolve potential problems before they become critical issues.

Transportation Engineering

Nitsch Engineering recognizes that the transportation elements of a project – including vehicle, bicycle, and pedestrian traffic – often set the tone for how a project is balanced in the surrounding environment. We perform traffic studies, prepare transportation master plans, and provide roadway design and permitting.



Quincy Adams Station, Quincy, MA

Structural Engineering

Bridges are an essential element of our nation's infrastructure, and Nitsch Engineering's structural engineers devise innovative, cost-effective, and sustainable solutions that keep our communities safe. Our staff are experienced in designing new bridges, rehabilitating older bridges, providing NBIS bridge inspection, and assessing bridge load rating.

Land Surveying

Nitsch Engineering works with each client to determine the appropriate scope of services and level of accuracy to meet the client's objectives, whether for a property line, topographic, title insurance, construction layout, laser scanning, or building survey.

Green Infrastructure

Using principles of biomimicry, ecohydrology, and ecological restoration, and often incorporating rainwater harvesting, Nitsch Engineering's integrated approach results in sites that more closely reflect natural ecological patterns than traditional engineering techniques, while accomplishing the program objectives.



*White Street Fire Station
Springfield, MA*

Planning

Nitsch Engineering works with our clients to prepare feasibility studies and master plan documents that evaluate alternatives with the goal of providing the "best use" plan for the site and environmentally sound solutions. We identify potential impacts, obtain project approvals, manage public participation, and follow through with the permitting process.

GIS Services

Nitsch Engineering meets our clients' planning, engineering, and land surveying needs with Geographic Information Systems (GIS) technology. By overlaying many different site factors, GIS analysis can help simplify the planning process when complex site or land issues are involved.



Years of Experience

- 20 in industry
- 17 at Nitsch Engineering

Registration

- *Massachusetts: Professional Engineer (Civil) #47098, 2007*
- *LEED Accredited Professional, Building Design + Construction, 2008*
- *Certified Professional in Erosion and Sediment Control, 2011*
- *OSHA (10-hour) Certification, 2010*

Education

- *B.S., Civil Engineering, University of Massachusetts, Amherst, 2002*

Professional Affiliations

- *American Society of Engineering Companies, Engineering Excellence Awards Committee, Co-Chair*
- *NAIOP Massachusetts, Member*
- *USGBC Massachusetts Member*

Awards

- *Boston Society for Civil Engineers Section 2010 Younger Member of the Year*

Deb has 20 years of experience in the civil engineering field, with an emphasis on designing urban sites, coordinating projects, integrating sustainable site practices, and resolving permitting issues in the City of Boston. Her project experience includes mixed-use and commercial developments, transportation-related projects, academic facilities, and providing review services in Massachusetts. She is very experienced in managing multiple projects to provide innovative civil engineering design services and is able to combine her technical and communication skills to successfully serve a number of clients.

Representative Projects

Orient Heights, East Boston, MA: Project Manager for civil engineering services for the redevelopment of a Boston Housing Authority multi-family housing development consisting of 331 units. The development will contain new public space, a community center, and management office. Conducted feasibility studies and analysis of the existing site. Performing site design services (grading, utilities, and layout design). Providing permitting services permitting with the Boston Planning and Development Agency (BPDA), Boston Water and Sewer Commission (BWSC), Public Improvement Commission (PIC), and Boston Transportation Department.

Jackson Square, Boston, MA: Project Engineer for civil engineering services for the redevelopment project that turned the 11-acre entry area to Jamaica Plain and the Fort Hill section of Roxbury into a mixed-use, transit-oriented community. Using Low Impact Development principles to develop the roadway improvements and private sites; the development will include green roofs and utilize other green design techniques for stormwater management. The project includes designing roadway infrastructure improvements for five streets in the area: Columbus Avenue, Centre Street, Amory Street, the Jackson Square MBTA busway, and Ritchie Street. Most of the public roadway site improvements were above the underground MBTA Orange Line train tracks. Provided technical support for the BPDA permitting, was responsible for providing utility design, stormwater management design, site layout and grading, and construction administration; as well as permitting with the BWSC, Massachusetts Department of Environmental Protection (MassDEP), PIC, and MBTA.

Washington-Beech Housing, Phase I, Boston, MA: Project Engineer for civil engineering services for the redevelopment of the Washington-Beech low and moderate-income housing development. The first phase added 100 new units to the property (in four townhouses and a midrise building) and created three new streets. Designed the site utilities, grading, and layout for Phase I, as well as two new public streets and one private way. Permitted the improvements and additions with the Boston Public Works Department (BPWD), BTB, BWSC, Boston Street Lighting Division, Boston Parks and Recreation Department, and private utility companies. Developed the specifications and cost estimates for the project. Worked closely with the project team to address AUL concerns during the design and permitting process.



Years of Experience

- 12 in industry
- 5 at Nitsch Engineering

Registration

- Massachusetts: Professional Engineer (Civil) #52304, 2015
- OSHA 10-hour Certified
- OSHA 40-hour Certified

Education

- B.S., Civil Engineering, University of Massachusetts, Amherst, 2010

Professional Affiliations

- American Society of Civil Engineers, Rhode Island Chapter
- Solid Waste Association of North America

Jon is a civil engineer with over 12 years of experience in engineering design and construction management projects (i.e. industrial site planning, underground utilities, stormwater management). His background of experience includes working for both public and private sector clients. As project manager, Jon is responsible for overseeing the civil engineering scope of services and monitoring the project process closely to make sure that Nitsch Engineering provides adequate and timely attention to the project.

Jon strives for a more efficient and client-focused design approach, and focuses on maintaining utilization while staying within project scope and budget to meet the client's needs.

Representative Projects

Orient Heights, East Boston, MA: Senior Project Engineer for civil engineering services for the redevelopment of a Boston Housing Authority multi-family housing development consisting of 331 units. The development will contain new public space, a community center, and management office.

The Homes at Old Colony, South Boston, MA: Senior Project Engineer for civil engineering services for the redevelopment of a LEED ND public housing project near Andrews Square. The two-phased project included 116 new units and a 10,000-square-foot community center during Phase 1, and 169 new units and five new public streets during Phase 2.

Whittier Place, Roxbury, MA: Project Manager for civil engineering services for the redevelopment of Whittier Street Apartments, a Boston Housing Authority multi-family housing development in Roxbury. Worked directly for the private developer leasing the Boston Housing Authority land, Preservation of Affordable Housing (POAH), to redevelop the 3.8-acre site in three phases. Providing services for design and permitting with the Boston Planning and Development Agency (BPDA), Boston Water and Sewer Commission (BWSC), Public Improvement Commission (PIC), and the Boston Transportation Department (BTD); and provided construction administration services.

730 – 750 Main Street, Cambridge, MA: Senior Project Engineer for a site redevelopment for MITMCO. Project includes two buildings with an associated parking garage with site and utility improvements. Stormwater improvements were designed based on Cambridge Stormwater regulations.

Tufts University, Cummings Building, Medford, MA: Senior Project Engineer responsible for the planning, site design, and permitting coordination services for the Cummings Building Project. Site design services include a two-phase construction approach which started with a site utility enabling package and ended with proposed utility improvements for the proposed 150,000-square-foot facility. Prepared plans and specifications and provided review and comment on cost estimates.



Years of Experience

- 12 in industry
- 7 at Nitsch Engineering

Registration

- Massachusetts: Professional Land Surveyor #53407, 2017
- OSHA (10-hour) Certified

Education

- B.S., Surveying and Mapping, Southern Polytechnic, 2010

Jeff has more than 12 years of experience in land surveying, including conducting property line, topographic, geodetic, ALTA/NSPS Land Title Surveys, construction surveys, preparing property descriptions, and performing survey control network adjustments that combine both conventional and Global Positioning System (GPS) data. He also has a strong background in using AutoCAD, Leica GPS equipment and software, and robotic total stations. He is dedicated to using his technical skills and the latest technologies to effectively and efficiently accomplish a project's goal.

Representative Projects

Wareham Street Apartment Building, Boston, MA: Project Surveyor for the construction phase land surveying services for a project to construct a mixed-use building including 18 residential units and two floors of office space. Performed building grid layout at ground level and on building floors, column plate as-built surveys, and establishing vertical control.

City of Boston Street Curb Layout, Centre Street, Boston, MA: Project Manager for street curb layout for a 1,000-foot section of roadway. Oversaw the field work and multiple levels of quality control checks to ensure that work being performed could be relied upon. The project involved layout for curb that was being realigned and regraded to allow for a more pedestrian friendly roadway layout.

L Street, Boston, MA: Project Manager for land surveying services for a ½-mile section of L Street between East Broadway and William J Day Boulevard. Performed a topographic, utility, and street line survey for the assessment for traffic calming and potential safety enhancements to the street.

Tremont Street, Boston, MA: Project Manager for land surveying services for a 1.5-mile section of Tremont Street from Melnea Cass Boulevard to the Massachusetts Turnpike. The purpose of the survey was base mapping for bus stop and crosswalk design.

Faneuil Branch Library, Boston, MA: Project Manager for land surveying services for the Faneuil Branch Library of the Boston Public Library. The purpose of the survey was preparing an existing conditions plan for use by the design team for the renovation of the library.

Josiah Quincy Upper School, Boston, MA: Project Manager responsible for providing land surveying services to support the design of a new middle and high school building in Boston's Chinatown neighborhood. Led development of an existing conditions survey, including a topographic, utility, property, and 3D laser scan of the building facades. Worked closely with the real estate title attorney and the Boston Planning & Development Agency (BPDA) to research the complex property record history. Developed plans to support discontinuing a remainder easement from the Metropolitan Transit Authority, consolidating the various lots that made up the site into a single lot of ownership by the BPDA, and transferring that ownership to the City of Boston Public Schools.

Relevant Projects



Orient Heights, East Boston, MA

Nitsch Engineering is providing land surveying, civil engineering, transportation engineering, and structural engineering services for the redevelopment of Orient Heights, a Boston Housing Authority multi-family housing development consisting of 331 units in East Boston. Nitsch Engineering's services include performing existing conditions surveys; preparing ALTA plans and subdivisions plans; conducting feasibility studies and analysis of the existing site; performing site design services (grading, utilities, and layout design) and structural design of retaining walls; and performing traffic data collection and roadway geometry studies.

125 Amory Street Master Plan, Boston, MA

Nitsch Engineering provided civil engineering services for the redevelopment of approximately six acres into an integrated mixed-use neighborhood in Jackson Square of Boston, Massachusetts. Services provided consisted of the preparation of a Master Plan and the needed assistance for permitting with the Boston Planning and Development Agency. Nitsch Engineering worked closely with the Project Team in developing a Conceptual Site Plan to select strategies that aligned with the highest and best use for the proposed project.



Woodrow Wilson Court, Cambridge, MA

Nitsch Engineering provided civil engineering services for the renovation of Woodrow Wilson Court. Woodrow Wilson Court consists of 68 units on a 0.86-acre site. We evaluated existing conditions, provided recommendations to the Owner on required upgrades of the complex site's utilities (sewer, water, and drainage) and overall site conditions, produced construction drawings and specifications, and provided Construction Administration services and permitting coordination with the City of Cambridge Department of Public Works, Cambridge Water Department, and Massachusetts Water Resources Authority.

Washington Elms, Cambridge, MA

Nitsch Engineering provided civil engineering services for the renovation of Washington Elms, consisting of 15, three-story walk-up buildings containing 175 apartments. We evaluated existing conditions, provided recommendations to the Owner on required upgrades of the complex site's utilities (sewer, water, and drainage) and overall site conditions, produced construction drawings and specifications, and provided Construction Administration services and permitting coordination with the City of Cambridge Department of Public Works and Cambridge Water Department.



Washington-Beech Housing, Phases I and II, Boston, MA

Nitsch Engineering provided land surveying, civil engineering, and transportation engineering services for the redevelopment of this low- and moderate-income housing development that was originally built in 1952. The property was redeveloped in two phases: the first phase added 100 new units to the property and created three new streets, while the second phase added another 105 units and four streets. Nitsch Engineering designed the site utilities, grading, and layout for the improvements, including four townhouses, a midrise building, two new public streets, and one private way.

BUILDING PERFORMANCE CONSULTING

CLEAResult

CLEAResult

BUILDING
PERFORMANCE
CONSULTING



Translating carefully developed plans into real life results

CLEAResult's Building Performance Consulting and certification teams provide consultation and project management to advance high-performance buildings.

We help ensure the highest level of design and construction team performance to maximize building performance; health, durability and energy efficiency for a range of commercial and residential building types.

Our dedicated staff includes building scientists, professional engineers, Certified Energy Manager, existing/building commissioning professionals, BPI Multifamily and HVAC specialists, Passive House Consultants and Verifiers, LEED AP, LEED Green Raters and HERS certifications. Our experts work with owners, architects and builders to support design work by providing building consultation, certification and training services and ensure quality is delivered in the field through construction quality control.

❖ Our building consulting services include:

- Enclosure and mechanical systems
- Commercial building energy audits
- Design support and consultation
- Plans review
- Energy modeling
- Renewable energy system guidance
- Field quality control inspections
- Diagnostic analysis
- Third party verification and certifications
- Technical training for builders and contractors

❖ Enclosure and HVAC systems commissioning

- HVAC commissioning and retrocommissioning (RCx)
- Energy use analysis
- Benchmarking
- Design, construction and post-construction (RCx) services
- Ongoing monitoring and commissioning
- Energy auditing
- Operations and maintenance consultancy
- Facility condition assessments

❖ Building performance diagnostic testing services

Our trained technicians can meet your building performance diagnostic testing needs by quickly and skillfully performing these technical tasks required for code compliance in high performance buildings:

- Air leakage testing
- Duct leakage testing
- Ventilation flow measurement
- Pressure differential testing
- Infrared camera scans
- Data logging
- Combustion safety testing

❖ Third-party verification and certifications provided

Third-party verification and certifications paths we help simplify include:

- Home Energy Rating System (HERS Ratings)
- ENERGY STAR® Certified Homes
- ENERGY STAR Qualified Multifamily High Rise Buildings
- LEED Homes/Midrise
- LEED BD+C
- National Green Building Standard (NAHB Green)
- Enterprise Green Communities
- Passive House
- Net-zero energy ready

GEOTECHNICAL + ENVIRONMENTAL ENGINEERING

MCPHAIL ASSOCIATES



Statement of Qualifications

Firm Profile

Since 1976 McPhail Associates, LLC has been providing geotechnical engineering services to architects, owners, contractors, institutions, and developers. Over the years our services have expanded to include geoenvironmental, geothermal energy and below-grade waterproofing consultation. In addition, we offer a wide variety of contractor support services including design of temporary and permanent excavation support systems, pile and specialty foundations, and construction dewatering systems. We remain true to the vision of our founder, Robert E. McPhail, and continue to be creative, practical, respected problem solvers, always keeping our clients' best interest and vision in mind.

Our leadership team is comprised of four managing principals, Amy D. Apfelbaum, Peter J. DeChaves, Thomas J. Fennick, and Jonathan W. Patch, who oversee our business operations and provide executive-level project management alongside principals Ambrose J. Donovan and Chris M. Erikson. Our professional staff consists of approximately sixty (60) individuals with backgrounds in Civil Engineering, Geotechnical Engineering, Environmental Engineering and Geology. The senior engineering staff has advanced degrees in the geotechnical or geoenvironmental engineering discipline. Our key engineers have had extensive experience in subsurface explorations, geotechnical analysis and design, geoenvironmental site evaluation and remediation, design assistance to structural engineers and architects, and construction monitoring for more than 6,000 building, environmental, waterfront, and heavy construction projects.

We understand the role of the geotechnical engineer in performing the subsurface design of construction projects in terms of both the geotechnical and geoenvironmental considerations. We are oriented towards providing timely design assistance to the design team which assists in the proper implementation of the geotechnical design recommendations and geoenvironmental requirements into the Contract Documents.

Diversity, Equity & Inclusion

Our people come from a wide variety of backgrounds whether it be race, color, age, sex, national origin, or basis of disability. The diverse background of our people makes McPhail stronger and this diversity benefits both McPhail and our clients by fostering a close-knit community that encourages new thoughts and perspectives on old problems, leading to new and innovative solutions.

GENERAL CONTRACTING

DELLBROOK/JKS - RESIDENTIAL
LJV DEVELOPMENT - DAYCARE (M/W/VBE)

DELLBROOK/JKS

Corporate Profile and History

Contacts

Michael Fish
President & CEO
781.380.1675
mfish@dellbrookjks.com

Dellbrook|JKS Awards

**#5 Largest MA
General Contractor**
Boston Business Journal

22' Corporate Citizenship Award
#56 Top Charitable Contributor
#2 within Construction Firms
Boston Business Journal

**#232 Top 400
National Contractors**
Engineering News-Record

#95 Top 100 CM-at-Risk Firm
Engineering News-Record

AGC MA Merit Safety Award
AGC MA

Dellbrook|JKS provides a full range of construction services throughout the New England region. Our firm has over three decades of experience and a team of more than 250 exceptionally talented professionals with expertise to provide services across a variety of market sectors, building types and construction methods. Our portfolio of projects include many affordable housing projects, mixed use and multifamily residential construction, senior housing, healthcare facilities, educational institutions and commercial projects serving the needs of our clients.

One of Dellbrook|JKS' strengths is our history of successful affordable housing projects and our history of working with community development corporations on projects funded with low income housing tax credits. Our singular focus is always to be a true partner that assists our clients in all aspects of the decision making process in order to deliver facilities that promote their mission and enhance the communities in which they serve.

Falmouth is Dellbrook|JKS' community. We are fortunate to have completed many projects here that positively impact our friends, neighbors and our families. From school projects at Falmouth Academy and Morse Pond, to the Falmouth Public Library, Falmouth Hospital and affordable housing

developments like Veterans Park we want the buildings we construct here to enhance our hometown and to effectively deliver a quality project on time and on budget. Our projects maintain a very cooperative and team driven spirit fueled by our firm's philosophy and management style.

With a local office in Technology Park, our expertise and collaborative style will provide Falmouth Housing Corp and Affirmative Investments high-quality, responsive service backed by significant financial strength and bonding capacity.

100% Client Centered

Embodying the spirit of our core values and having a true commitment toward excellence is key, however it isn't just quality construction and exceptional service that helps to set us apart. Our mission is to always strive to be 100% client centered in all that we do. Our business model is firmly grounded in tried and tested construction methods and organizational processes, yet we continue to seek new and innovative ways to deliver quality, savings and scheduling efficiencies to our clients. It is our best practices and inclusive approach that makes our firm stand out. The fact that we understand the priceless value of relationships has resulted in long term repeat clients.



Affordable Housing

PROJECT	LOCATION	UNITS	SF	COSTS
108 Newbury Street	Lawrence	18	26716	\$4,171,510
2Life Shillman House	Framingham	150	150565	\$26,210,998
2Life 132 Chestnut Street, Weinberg House	Brighton	61	58026	\$16,995,337
2Life Brown Family House, 370 Harvard	Brookline	62	62118	\$19,318,889
2Life JJ Carroll	Brighton	142	180000	\$62,500,000
21 Soldiers Field Place	Boston	38	71984	\$10,610,749
Fountain Hill Condominiums	Roxbury	40	47750	\$14,583,931
Elizabeth Stone House	Roxbury	32	56560	\$16,217,055
Madison Park Haynes House	Roxbury	131	136020	\$21,476,128
Madison Park IV	Roxbury	143	42582	\$9,757,453
Madison Park Melnea Cass Blvd	Roxbury	136	89000	\$28,764,656
The Laurent 55 Wheeler	Cambridge	525 (100 affordable)	698000	\$171,300,000
POAH Mattapan	Mattapan	135	11800	\$51,500,000
Rindge Commons	Cambridge	24	72881	\$12,039,471
Sophia Snow	West Roxbury	66	38000	\$14,259,118
St. Polycarp II	Somerville	29	36800	\$5,645,001
St. Polycarp III	Somerville	31	46217	\$6,424,697
Viet Aid	Dorchester	41	51906	\$13,417,030



Elizabeth Stone House

ROXBURY, MA

Elizabeth Stone House is a new multifamily-mixed use, supportive home for young families in Roxbury, MA. The five story podium building is 56,560 SF with an exterior facade of rain screen of brick, FC Autoclaved panels and corrugated aluminum panels.

The lower 2 floors contain public meeting space, classrooms, offices, conference areas, and childcare facilities. The upper 3 floors contain 32 affordable apartments. Construction included steel framing for the lower levels and wood framing for the upper levels. The project is LEED Silver Certifiable.



ARCHITECT

Narrow Gate
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OWNER

Elizabeth Stone House
Nancy Owens Hess
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COST

\$19.5M

START / END

August 2018 / March 2021

TYPE

New Construction
Podium (3/2) - Steel
Affordable Housing
LEED Silver Certifiable



VietAid

DORCHESTER, MA

The VietAid project consisted of redeveloping two vacant lots in Dorchester for the construction of a new 51,906 GSF, four story, wood framed, mixed use building with 41 residential apartments.

This mixed-use project houses affordable units for households with incomes at or below 60% of Area Median Income (AMI), with eleven units affordable to households at or below 30% of AMI. The 6,000 square feet of ground floor retail space is being leased to the

Dorchester Community Food Coop—a grassroots initiative to build a community and worker-owned grocery store that makes healthy food accessible and advances economic opportunity through neighborhood engagement.

Construction also included basement level parking for 22 spaces. The complicated urban site required the removal of 700 yards of “pudding stone” ledge. Additionally, the structure is Enterprise Green Communities Certified.



ARCHITECT

Utile Architecture & Planning
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OWNER

Vietnamese-American Initiative
for Development, Inc.
Eric Fellingner
617.882.3717
eric@vietaid.org

COST

\$14M

START / END

October 2020 / Aug 2022

TYPE

New Construction
Podium (4/1) - Steel
Affordable Housing
Enterprise Green Communities



Madison Park Village - Melnea Cass Apartments

ROXBURY, MA

New, wood framed affordable housing development on Melnea Cass Boulevard in Roxbury. The project consists of two multifamily buildings on adjacent sites. The development includes the demolition of a 1 story building and the new construction of 76 units. Building 2A is a 4 story, slab on grade, wood framed building and sits on just over 18,000 SF and included 16 stacked town houses. Building 2B is a five story, slab on grade wood framed building and sits on just under 71,000 SF and included 60 units.

With very tight site conditions, we created a separate access road for vehicles to enter and exit the site, and then close an existing road afterwards. The Melnea Cass buildings have a combination of corrugated metal, Atas and Hardie Panel siding.

Dellbrook | JKS also completed renovations to the neighboring Smith House property at Madison Park Developments as well as the MPDC Village IV renovations for the non profit in 2011.



ARCHITECT

Elton & Hampton Architects
Nick Elton
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OWNER

Madison Park Development Corp.
Leslie Reid
617.849.6240
lreid@madison-park.org

COST

\$28.7M

START / END

November 2017 / June 2019

TYPE

New Construction
Affordable Housing
LEED Silver Certifiable



Fountain Hill Condominiums

UNDER CONSTRUCTION | ROXBURY, MA

Our Fountain Hill Condominiums project includes constructing a 48,750 SF building for 40 affordable condo units on an extremely tight site at 25 Fountain Street, Roxbury. The project will require soil remediation and ledge removal.

The building will have a steel podium with underground parking and 4 levels of wood framed construction above. Construction includes (16) Studio units, (16) 1 bedroom,

(6) 2 bedroom and (2) 3 bedroom units. The exterior of the building will be a combination of brick, ground face block, James Hardie fiber cement siding and storefront. The project was designed and will be constructed to meet LEED Gold under the LEED BD+C v4: Homes and Multifamily Low-Rise rating system, as well as achieve ENERGY STAR Multifamily New Construction certification.

ARCHITECT

Prellewitz Chilinski Associates
Daniel Molenkamp
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OWNER

Owner's Rep
Waypoint KLA
Parke Sickler
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COST

\$14.3M

START / END

Oct 2021 / Feb 2023

TYPE

New Construction
Affordable Housing
Steel / Concrete Podium (4/1)
Wood Frame
DND Funded
Tight Site
LEED Gold
Energy Star Certification





21 Soldiers Field Place Condominiums

BOSTON, MA

21 Soldiers Field Place is a 34,740 SF, five story, podium building containing 38 affordable condominiums. The condominiums consist of 11 studios, 16 one bedroom, and 11 two-bedroom units.

A total of 175 parking spaces were constructed on site as well as a 9,300 SF parking garage underneath the apartment building containing 148 spaces and a screened ground-floor

garage within the condominium building containing 27 spaces and outdoor courtyards.

The development replaced a two-story, 44,800 SF office building with surface parking, and is located minutes from the Massachusetts Turnpike by car. The 15.2-acre Boston Landing development and its new MBTA commuter rail station are both located a short walk away.



ARCHITECT

ICON Architecture
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OWNER

SMC Management Corp
Robert Simonds
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COST

\$10.7M

START / END

Mar 2021/ April 2022

TYPE

New Construction
Affordable Housing
Podium (4/1) - Steel

The Backstory

In 2018, Dellbrook|JKS formed an internal Diversity, Equity, and Inclusion (DEI) Committee comprised of several Executives and Sr. level managers. The committee in 2019 made the decision to formalize the position for DEI, and later that year hired Sheryce Hearn as Director of Diversity, Equity, and Inclusion. The formation of the DEI department allowed Dellbrook to have a full focus on creating a diverse and inclusive culture at the company internally as well as externally on all our job sites. Our Diversity department provides both our staff, M/WBE trade partners, and our local resident, people of color and women trade workers with support and valuable resources to grow and develop within the industry.

We strategically created goals for DEI at Dellbrook|JKS as it relates to internal and external company awareness, hiring, contracting, education, outreach and engagement of minority and women owned businesses and trade workers. We have created several initiatives, programs, and practices to ensure we get the best outcomes from those goals.

At Dellbrook|JKS we are committed to a Culture of Care in our offices and on our job sites. We are committed to building a culture that is safe, welcoming and includes everyone. We are committed to the Culture of Care principles which are:

>> Commit

to hire and pay based on skill and experience, regardless of ability, age, ethnicity, gender identity nationality, race religion, sex, or sexual orientation.

>> Attract

prospective employees, suppliers, and subcontractors by creating inclusive workplaces that are free from harassment, hazing and bullying.

>> Retain

high-performing employees by identifying and removing barriers to advancement.

>> Empower

every individual to promote a culture of diversity and inclusion

Dellbrook|JKS DEI Programs & Initiatives



One of our top priorities at Dellbrook|JKS is to continually increase diversity amongst our office and field staff. The construction industry does not currently have a surplus of diverse candidates as only 3% is made up of minorities. With the demographics in the industry being such a challenge our approach to increasing diversity is one of organic training, development, growth, and career advancement within the company. Like many companies, we looked at several strategies in the past to recruit a more diverse pool of candidates into our organization. We knew to be successful, we had to tie these initiatives to our core values. We believe that the best way to diversify the construction industries future

workforce will be achieved by recruiting and retaining young women and people of color to start their journey with us. The Construction Immersion Program (CIP) is a two-year rotational program that allows individuals who are new to, but passionate about, construction management to gain experience and a thorough understanding of what it takes to be successful in this industry. Through hands-on rotations in Estimating, Project Management, and Field Supervision, we can provide them with valuable experience in how to run a wide variety of projects. The Field Engineer Program is a one-year structured employee development program designed to promote and accelerate the development of field



engineers through a wide range of assignments across all phases of a projects field operations. Trainees will be exposed to a diverse training and onboarding process and be immersed in all aspects of construction. They will be evaluated throughout their assignments and be paired with a mentor. The successful candidate will be exposed to a tremendous amount of learning, hands-on experience and real-life construction management experience that will benefit them as they continue their work career with Dellbrook|JKS.

At Dellbrook|JKS, the population of women makes up 21% of the company with a mix of office and field staff. We started the Dellbrook Women's Collaborative (DWC) an employee resource group (ERG), which supports that population of women and some men who have also joined the group as allies. The Dellbrook Women's Collaborative (DWC) cultivates a supportive and inclusive environment that encourages women to develop their skills through engaging discussions, cross-industry partnerships, and exciting mentorships. The DWC host monthly meeting, provides educational resources, conference outings, events, and activities throughout the year. We host an annual awards celebration to honor the women/members who really stood



out over the year for their participation, volunteerism, outstanding personal and professional growth, and development. As part of the DWC membership, we offer everyone the opportunity to be a member the National Association of Women in Construction (NAWIC). NAWIC offers several resources, educational opportunities, networking events and more to its members which we see as an added benefit for the DWC members. Our community outreach and engagement with diverse trade partners and trade workers also remains a top

priority for Dellbrook JKS. We have created initiatives, programs, and events to engage the local, minority and women owned trade firms as well as local resident, people of color and women trade workers. At Dellbrook JKS we want to get to know our trade partners and develop lasting working relationships that allow us to provide obtainable and tangible contract opportunities. We are genuine in our approach to providing opportunities and expanding diversity within our subcontractor base.



Corporate Citizenship & Philanthropy



2022 Honoree, Mike Fish
The Children's Advocacy Center

PHILANTHROPY

At Dellbrook |JKS we are committed to leaving our mark where we work and where we live through meaningful contributions to the community and a personal commitment to corporate and personal social responsibility.

For many years we've been included among the Boston Business Journals **Largest Corporate Charitable Contributors**. The BBJ recognizes companies that have demonstrated innovation and developed best practices in specific partnerships with nonprofits at any level of engagement, including volunteer work, cash donations, in-kind donations and board participation.

In 2022 we were again selected to the Top Charitable Organizations and are ranked #2 within construction management firms in their top 60 charitable contributors. We are committed to being an involved and stable partner both on and off site. We routinely provide our time, skills and support to further our clients mission with the same passion and focus we bring to building our projects. That passion for giving back is exemplified by Dellbrook |JKS President and CEO, Michael Fish and his contributions to the strength, resiliency and health of the communities in which we build.

The Children's Advocacy Center

Most recently, Mike was named a 2022 Honoree of the Children's Advocacy Center of Suffolk County (CAC) at its Annual Step Up & Speak Out Benefit. This annual recognition goes to individuals who have demonstrated a unique level of support for the CAC's mission in responding to children and families who are victims of violence, exploitation, and abuse. In addition to Mike's dedication as a CAC Board Member and donor, Dellbrook |JKS' sponsorship of key CAC events has fostered a lasting partnership between the organization and our firm.

Mike has also been awarded the **You Matter Award** for his commitment to building the new Elizabeth Stone House in Roxbury, creating a haven for thousands of domestic violence survivors. The Elizabeth Stone House partners with adult and child survivors of domestic violence and related trauma - mental illness, housing instability and substance misuse to achieve safety, stability, and overall wellbeing.

NeighborWorks® also recognized the community contributions of Dellbrook |JKS and Mike specifically, when they honored him with the **Good Neighbor Award**. The Board of Directors chose Mike and Dellbrook |JKS as recipient because of our unwavering support of their mission to bring more affordable housing to our area and help families achieve the dream of homeownership.

In addition to our work with non profits to address and prevent housing instability, Dellbrook |JKS has been recognized as one of the top philanthropic companies in the region. In 2019 we were honored to receive the **Community Champion Award from Gosnold Cape Cod**. Gosnold, a leader in the prevention, treatment, and recovery of men and women affected by mental health and substance use disorders, presented Dellbrook |JKS with the Community Champion Award in recognition of our strong support for the Gosnold mission and support of the organization's valuable but unfunded initiatives.

CIVIC ENGAGEMENT

Whether it's using our craft and skills to build housing with Habitat for Humanity, endowing scholarships for local high school students, or volunteering for a community service project, we support our nonprofit partners in their tireless efforts to positively impact the health, safety and education of those in need.

COMMUNITY SUPPORT

Each year our employees dedicate their energies, skill and hundreds of hours to support local and statewide charitable organizations in their missions.

President and CEO Mike Fish is a firm believer that construction is the ultimate team sport. Each year Team Dellbrook |JKS competes in the Corporate Cup for **Boston Children's Hospital**, raising money (and our heart rates!) for their Every Child fund. We support the **Greater Boston YMCA** in their Huntington Games which raises funds for youths, teens and families in our community, as well as **Save the Harbor/ Save the Bay**, the region's leading voice for clean water and continued public investment in Boston Harbor.



Habitat for Humanity Build



Corporate Cup



Annual Softball Game

Construction Immersion Program (CIP)

Our Construction Immersion Program is a two-year rotational program for young people just beginning their journey and careers in Construction Management.

CIPs develop technical and leadership skills through a wide range of assignments across all phases of a project from preconstruction in estimating through construction in project management and field operations.

During the program, the CIPs rotate through hands-on assignments and have the ability to customize the program

with any additional areas they have an interest in (business development, mechanical coordination accounting, etc.). We understand that those just starting their journey should test out every role in construction to find their passion and in return, develop a well-rounded approach to construction where they can grow, become leaders and then serve as mentors to the next generation of CIPs at Dellbrook |JKS.



CATHOLIC MEMORIAL HIGH SCHOOL CORPORATE SCHOLARS

The Dellbrook |JKS Corporate Scholars Program is a partnership between Dellbrook |JKS and Catholic Memorial High School that provides not only financial support, but creates meaningful relationships and leadership development opportunities between students and Dellbrook |JKS employees.

The \$25,000 scholarship is awarded annually to two students who have demonstrated extraordinary leadership skills. In addition to the scholarship funds, the CM Corporate Scholars are connected to a Dellbrook |JKS mentor, where they receive hands on learning opportunities on how to develop strong leadership skills, and build strong relationships through various engagement opportunities such as:

- Welcome Reception at DBJKS Corporate Office, with students, mentors, parents, and Dellbrook |JKS leadership
- Monthly meetings/opportunities between Dellbrook Scholars and their mentor
- Scholars and mentors dinners
- Participating in volunteering events with Dellbrook |JKS staff
- Professional Development workshops
- Jobsite visits

In 2020, our CEO Mike Fish, and COO Ed Sople recieved the Silver Shield award in which honors a member of the Catholic Memorial community who exemplifies the seven knightly virtues of courage, justice, mercy, generosity, faith, nobility, and hope.

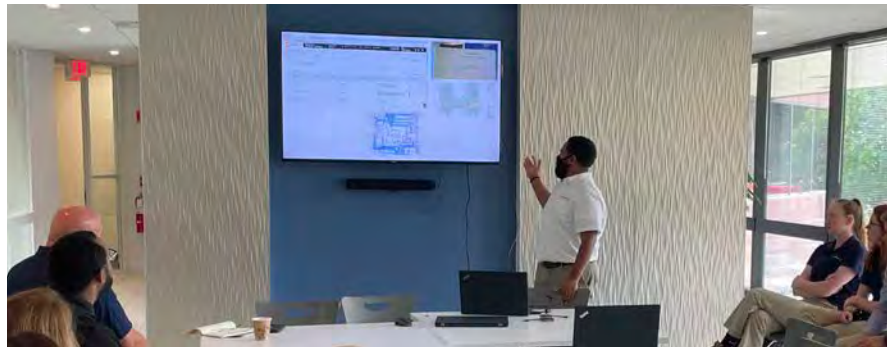


**BENJAMIN FRANKLIN
CUMMINGS INSTITUTE
OF TECHNOLOGY**

In 2020, Dellbrook|JKS established a partnership with the Benjamin Franklin Cummings Institute of Technology (BFCIT) to help the college as they build a talented, well-trained workforce well prepared for success as they complete their program and embark on their career. The partnership focuses on cooperative learning and provides internships for students in their Construction Management, HVAC and Electrical programs. Students enrolled in the City's non-profit technical college are given opportunities to grow their already strong technical foundation through practical on-the-job experience.

In addition to hands-on learning provided by Dellbrook|JKS staff and our trade partners, Dellbrook|JKS has agreed to provide annual scholarships and emergency fund grants to the college so they can continue to make a vital difference in the lives of urban youth in the greater Boston area. Dellbrook|JKS also works with BFCIT to present career success seminars; resumes and job application workshops; job site tours, mentoring opportunities and professional development classes throughout the year.

In 2022 Dellbrook|JKS and Onnew Way Development formed joint venture for BFCIT's new campus. This project will consist of 68,000 s/f, academic facility, including 23 labs, and other learning environments fit for electrical engineering, computer technology, machining, advanced manufacturing, construction management, practical electricity, and HVAC programs. Enrolled students will have access to an engineering technology robotics lab, optical shop, live automotive garage, outdoor learning lab, and more.



M/WBE and Workforce Outreach



Workforce Outreach And Coordination Program

Dellbrook|JKS's commitment to equity and diversity is rooted in more than compliance. Every project we consider, our M/WBE trade partners are included from the earliest stages. On projects with specific requirements, we approach those M/WBE, BRJP, Section 3 and CDC goals in a comprehensive and systematic manner. **Led by our Director of Diversity, Equity and Inclusion, Sheryce Hearn**, our goal and the goal of our trade partners is to make every effective effort to utilize certified, minority and women business enterprises and be held accountable for outcomes that will meet the objectives of the contracting plan.

We create a customized plan to meet the specific needs of the project as outlined in the corresponding RFQs or RFPs and related documents. Through a system of consistent communication, dedicated community outreach and our Partner Accelerator program, we

strive to have all goals be met and contractors stay in compliance for the duration of the project.

Dellbrook|JKS will conduct M/WBE Workforce Outreach on the project by:

- Developing, implementing, and monitoring a project and **neighborhood specific community engagement plan**
- **Conducting outreach at the subcontract level** and work with the Subcontractors to conduct outreach to lower-tier subcontractors
- Identification and **on-going solicitation** of minority and women owned business enterprises as bid packages are prepared
- **Removing barriers and providing equal opportunity to participate** in meaningful construction jobs with trade partners, community partners and other applicable entities
- Collaborating early with the project team to provide viable subcontracting opportunities that maximize M/WBE participation and help **get the community engaged with the project.**

- Holding educational workshops through our **Partner Accelerator Program** and other community engagement initiatives to let small and disadvantaged businesses know about new opportunities as a trade partner and support and grow those trade partners already involved
- Monitor the project during construction to **ensure goals are being met**

%

Minority and Women Owned Enterprise Engagement

In the past 5 Years
Dellbrook|JKS has awarded

\$87M

in 271 contracts and opportunities to our
Minority and Women owned
trade partners

Dellbrook | JKS Partner Accelerator Program



We're committed to building strong relationships with each of our trade partners and we understand the importance of engaging with Minority Business Enterprise (MBE), Women's Business Enterprise (WBE), Small Business (SB), Disadvantaged Business Enterprise (DBE) Veteran/Service Disabled Veteran Owned Small Business (SDVOSB) and lesbian, gay, bisexual and transgender (LGBT) on every project we build.

Our outreach programs continually work to educate, promote, track and follow up on subcontractor and workforce participation.

In 2018 we established our Partner Accelerator Program to mentor, support and strengthen our trade partners understanding and proficiency in Construction Safety Practices, Accounting and Finance procedures, and Project Management Technology programs.

Our Partner Accelerator Team holds monthly trainings on our job sites (either in person or virtually) focusing on the Procure, project accounting and Safety and Risk Management. Our team consists of Dellbrook | JKS Project Managers, Project Accountants, Construction Technology Specialists and our Safety Managers, the team provides hands on learning in:

PROCORE

- Plans & Specifications
- Submittals
- RFIs
- Workflow/Punchlist
- Project Documentation

PROJECT ACCOUNTING

- AIA G702 & 703
- Lien Waivers
- Change Orders

PROJECT SAFETY AND RISK MANAGEMENT

- OSHA Standards
- Safety Inspections
- Dellbrook | JKS Prequalification Process



Since 2018
The Dellbrook | JKS
Partner Accelerator
has provided nearly
**150 LEARNING
HOURS**
to our Minority and
Women Owned
trading partners and
their staff.



M/WBE Hiring

- We ask that prior to contract award, MBE, and WBE subcontractors submit a Letter of Intent, which includes a copy of their most recent certification letter to verify the MBE and WBE status of the firm.
- Dellbrook|JKS teams integrate their buyout reports by reflecting actual versus estimated participation goals. The total costs and percentages are calculated against the total contract amount, and as project buyout proceeds, the schedule of participation is updated so that the client and project team are up to date on the progress of the MBE and WBE participation.
- Our success in meeting and exceeding the MBE and WBE participation goals is attributed to our project managements' continued emphasis on reviewing the MBE and WBE participation goals throughout the project buyout phase.
- For certain projects we submit, we run a monthly utilization report that lists all MBE and WBE subcontractors. This allows us to track the participation percentages, as the prime contract and subcontract amounts change over the course of the project. This eliminates any surprises that can come up over the course of the job, and ensures that participation is maintained throughout the project.

M/WBE Tradepartners

The involvement of Minority and Women owned businesses on a project begins during the estimating phase. We are proactive in making sure to solicit as many qualified firms as possible.

Our current subcontractor database includes a list of subs who are approved as a Minority or Women owned business by the Commonwealth of Massachusetts and have completed our prequalification process. Based upon the scope of work for the project, Dellbrook|JKS develops a subcontractor list that includes Minority and Women owned subcontractors and supplier in conjunction with the directories of the state office of M/WBE's Business Assistance (SOMBWA) to seek qualified bidders for all contracts

Outreach efforts to solicit M/WBE and local firms will utilize local media, electronic and print, to market and promote contract business opportunities as well as traditional methods including telephone calls, We will identify centers of influence within the project area to ensure that subcontracting and supply opportunities are known to the business community.

This focus and priority of Minority and Women owned businesses continues when the project is turned over to the operations team. We include any project specific requirements within our Subcontractor Procurement log and track actual versus required Minority and Women owned businesses participation goals.

The total costs and percentages are calculated against the Guaranteed Maximum Price (GMP) or Stipulated Sum, and as project buyout proceeds, we update the schedule of participation so that the client and project team are up to date on the progress we are making towards the participation goals or requirements.



Elizabeth Stone House Groundbreaking

PROJECT NAME & LOCATION	MBE Contracting		WBE Contracting		People of Color Worker Hours		Women Worker Hours		Boston Residents Worker Hours		Section 3 Resident New Hires		Section 3	
	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL
2Life - Weinberg House Brighton MA	BFE	6%	BFE	0%	25%	60%	10%	5%	50%	28%	N/A	N/A	N/A	N/A
2Life - Brown Family House Brighton, MA	25%	12%	10%	7%	20%	51%	10%	4%	N/A	N/A	30%	0%	N/A	N/A
2Life - JJ Caroll Brighton, MA <i>Under Construction</i>	30%	48.25%	10%	2.42%	51%	32%	12%	10%	51%	19%	30%	---	10%	12.39%
2Life - Coleman House Newton, MA <i>Under Construction</i>	25%	TBD	10%	TBD	20%	TBD	10%	TBD	N/A	N/A	30%	61%	10%	TBD
Addison Street East Boston, MA	N/A	N/A	N/A	N/A	40%	49%	12%	2%	51%	11%	N/A	N/A	N/A	N/A
Alma del Mar II New Bedford, MA	10.4% Combined	3% Combined	10.4% Combined	3% Combined	15.3%	28.07%	6.9%	0.18%	N/A	N/A	30%	---	10%	---
5-15 Case Street Southbridge, MA <i>Under Construction</i>	BFE	9.06%	BFE	0%	30%	57%	30%	4%	N/A	N/A	25%	28.06%	BFE	---
Elizabeth Stone House Roxbury, MA	39%	34%	10%	<1%	40%	70%	12%	4%	51%	24%	25%	--	10%	<1%
Glenbrook Way Medford, MA	N/A	N/A	N/A	N/A	20%	41.%	20%	1%	N/A	N/A	30%	27.8%	10%	0%

PROJECT NAME & LOCATION	MBE Contracting		WBE Contracting		People of Color Worker Hours		Women Worker Hours		Boston Residents Worker Hours		Section 3 Resident New Hires		Section 3	
	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL
Madison Park Melnea Cass Apts. Roxbury, MA	22.5%	20%	9%	2%	51%	50%	15%	3%	51%	25%	N/A	N/A	N/A	N/A
Madison Park Smith House Roxbury, MA	30%	49%	10%	3%	40%	77%	10%	8%	51%	46%	N/A	N/A	N/A	37%
Madison Park Haynes House Roxbury, MA	35%	28%	10%	4%	51%	73%	12%	8%	51%	39%	N/A	N/A	N/A	N/A
Madison Park IV Roxbury, MA	N/A	N/A	N/A	N/A	25%	81%	10%	2%	50%	56%	N/A	N/A	N/A	N/A
POAH Mattapan Development Mattapan, MA	30%	38.6%	10%	5.8%	40%	60.9%	12%	6%	51%	37.9%	30%	TBD	10%	11.57%
Oak Bluffs Town Hall Oak Bluffs, MA	10% Combined with WBE	3%	10% Combined with MBE	4%	15.3%	25.35%	---	14.96%	N/A	N/A	N/A	N/A	N/A	N/A
Oak Row Apartments W. Roxbury, MA	25%	55.6%	10%	1.1%	N/A	N/A	N/A	N/A	50%	25.7%	N/A	N/A	N/A	N/A
Oxford School Residences Fairhaven, MA	Combined with WBE 20%	10.56%	Combined with MBE 20%	,004%	N/A	32.48%	N/A	1.90%	N/A	N/A	30%	2.21%	10%	0%
Mass Maritime Dormitories Bourne, MA <i>Under Construction</i>	10.4% Combined with WBE	12.6%	10.4% Combined with MBE	6.23%	15.3%	23.70%	6.9%	2.37%	N/A	N/A	N/A	N/A	N/A	N/A

PROJECT NAME & LOCATION	MBE Contracting		WBE Contracting		People of Color Worker Hours		Women Worker Hours		Boston Residents Worker Hours		Section 3 Resident New Hires		Section 3	
	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL
Taverner Place Acton, MA <i>Under Construction</i>	10%	8%	10%	0%	N/A	N/A	N/A	N/A	N/A	N/A	30%	---	10%	---
Terrapin Ridge Sandwich, MA	10.4% Combined with WBE	5.6% Combined	10.4% Combined with MBE	5.6% Combined	20%	31.3%	20%	N/A	N/A	N/A	30%	5.6%	10%	---
VietAid Dorchester, MA	40%	43.25%	15%	7.5%	40%	73.5%	12%	11.6%	51%	36.9%	30%	10%	10%	5%
191 & 201 Washington Street Brighton, MA <i>Under Construction</i>	N/A	N/A	N/A	N/A	40%	66%	12%	3%	51%	22%	N/A	N/A	N/A	N/A
1550 Soldier's Field Road Boston, MA <i>Under Construction</i>	N/A	43.25%	N/A	N/A	51%	60%	12%	7%	51%	17%	N/A	N/A	N/A	N/A
Oxbow / Fountain Hill Condominiums <i>Roxbury, MA</i>	30%	22.4%	10%	14%	40%	63.4%	12%	1.3%	51%	15.3%	N/A	N/A	N/A	N/A

LJV DEVELOPMENT



Liseth Velez
 Founder & CEO
 617.637.3939
liseth@ljvdevelopment.com

Gabriel Hierro
 Business Development Lead
 973.910.9796
gabriel@ljvdevelopment.com

Corporate Address
 1760 Revere Beach Pkwy
 Suite 438
 Everett, MA 02149

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LJV DEVELOPMENT

About Us

LJV Development is a Solution-Based Construction Management firm located in Everett, MA providing services from renovation to design-build by using tech-enabled processes that help increase creativity and precision building, our hands-on approach offers a collaborative environment where our trade contracts are set up for success from preconstruction to closeout. We bring a variety of different perspectives that promote higher innovation and provide support to our clients who are continuously faced with challenges from planning around funding, pivoting to meet industry standards, and juggling multiple projects at the same time.

Capabilities

- Preconstruction
- Planning
- Demolition & Disaster Pickup
- Building Renovation
- BIM Moduling
- Turnkey Design & Implementation
- Design-Build
- Value Engineering
- Quality Control

Differentiators

- Family Run
- Agile Management Practices
- Hyper Responsiveness
- Partner Trade Contractors
- Supply Chain Analysis
- Risk Management
- Culture of Safety
- Schedule & Logistical Planning

Tech Enabled

- Procore Certified
- AutoCAD
- Automation
- Drone Capture
- LiDAR
- Thermal Sensor
- VDC

Environment

- Asbestos Containing Material
- Disposal
- Environmental Remediation
- Flood Control
- Waste Materials
- Lead Abatement
- Environmental Protection
- Special Soil Conditions
- HAZMAT
- Emergency Planning

Business Type

Service-Disabled
 Veteran Owned
 Businesses Enterprise
 (SDVOBE)

Veteran Business
 Enterprise (VBE)

Minority and Woman
 Business Enterprise
 (MBE and WBE)

Professional Certifications

MA CSL 113934
 MA HIC 193801
 24 HR Fall Protection
 EM 385 1-1
 OSHA 10/30
 Project Management
 Professional (PMP)
 Procore Certified

Key Associations



Purpose
Priority
Productivity
People



WHAT WE'RE ALL ABOUT

Between rising material costs and labor shortages, forward thinking construction companies invest in technology that reduces "rework" and stress. At LJV, we do just that with Artificial and Virtual Intelligence. Every decision we make is geared towards optimizing efficiency, improving quality, and embracing safety. Upon successful deployment of these activities, LJV attracts America's most innovative minds to continue pushing the limits of building innovation.



H | B | S

Mellon Hall Lounge Renovation

Client: Harvard Business School

Completion: In Progress

Location: Boston, MA

Description: Update and preserve the building, while improving the quality of Lounge Space. Maintain and protect existing walls and millwork. Furnish and install new light fixtures. Furnish and install new flooring.



Lulu All Gender Bathroom Renovation

Client: Wellesley College

Completion: July 2022

Location: Wellesley, MA

Description: Demolition, repurposing, tiling, mechanical, plumbing, and HVAC. Other work performed included construction waste management & disposal, cleaned systems and components in compliance with NADCA standard 1992-01.



Tenant Space Sub-Division

Client: The Grossman Companies

Completion: May 2022

Location: Wellesley, MA

Description: Demolition, office subdivisions, flooring, door replacements and fireproofing. Installation of all new interior wall and ceiling finishes. Interior floor finishes, carpeting, and newly installed interior trim materials.

Design-Build

Client: CrackerJack Communications

Completion: June 2021

Location: Wellesley, MA

Description: A demolition project that converted two spaces into one space. LJV performed painting, mechanical, and electrical upgrades.

CRACKERJACK
COMMUNICATIONS

PAST
PERFORMANCE



LISETH J. VELEZ

FOUNDER & CEO, LJV DEVELOPMENT

From 2012 to 2018, she served in the Air National Guard. Liseth and her team provide Construction Management services to federal agencies and private institutions. She plays an active role in assisting with the coordination and execution of projects while fostering a collaborative environment with all vested stakeholders. Liseth is an advocate for US Veterans and students. As a BunkerLabs Ambassador, she supports military veterans and spouses in their pursuit of growing their businesses. As part of her service to students in their early career exploration, she Co-Founded the nonprofit organization, LIT Conversations. LIT helps inspire student success and career readiness by developing conversational skills.

EDUCATION

Webster University
B.A.A. Business Management
Community College of the Air Force A.A.
Mechanical and Electrical Technology
Northern Essex Community College
A.A. Liberal Arts

CERTIFICATIONS

MA Construction Supervisor License 113934
MA Home Improvement Contractor 193801
Section 608 Technician
Certification Universal
USACE CQM

AWARDS

Army Achievement Award
AF Outstanding Unit Award
USAF NCO PME Graduate
National
Defense Service Medal

ASSOCIATIONS

Women's Business Enterprise National
Council (WBENC)
Society of American Military Engineers
(SAME)
Association of General Contractors (AGC)
United States Women Chamber of
Commerce (USWCC)
Veterans Institute for Procurement (VIP)
Bunker Labs

PROJECTS

OTIS Air National Guard Base

Joint Base Cape Cod, MA
Renovation in existing Medical Building, Auditorium, and Training
Facility | Mechanical | HVAC | Finishes | Demolition | Flooring |
Electrical | Tile Installation

Federal Emergency Management Agency (FEMA)

Maynard, MA
Provided Level III Ballistic Glass | Installation of Glass at the Guard
Shack | Oversaw Compliance with COVID-19 and Background Checks

The Grossman Companies - Multiple Projects

Wellesley, MA
Design-Build | Demolition | MEP Upgrades | Finish upgrades |
Assembled a Team to Execute Items Under Agreed Upon SOW |
Oversaw and Monitored Project Budget and Milestones

Cilantro Latin Kitchen – 1415 Tremont St.

Boston, MA
2,000-SF Full-Service Kitchen Build-Out | Contract Negotiations and
Modifications | Demolition | Plumbing | HVAC | Electrical | Finishes |
Installation | Mechanical

Wellesley College Aquatics Renovation

Wellesley, MA
Renovation of their Keohane Sports Center | The Wing of the Building
Containing the Pool. | Contract Negotiations | Demolition | Plumbing
| HVAC | Electrical | Finishes | Sprinkler System | Tile Installation |
Window Replacement



JONATHAN VELEZ

PMP, PROJECT MANAGER

Jonathan brings over a decade of experience in coordinating federal and commercial projects. He is a flexible asset since he can oversee projects under contract on-site and keep track of budgets, estimates, and schedules. On site, he's a proven leader with an attention for detail. As a Safety Health Officer thanks to his U.S. Army Corp of Engineer's Safety & Health certification, Jonathan ensures all personnel are always prepped for success so that the project goal is always attained.

EDUCATION

Cambridge College
B.A.A. Business Management

CERTIFICATIONS

Project Management Professional
(PMP)

EM 385 1-1 USACE Safety & Health

OSHA 30-Hour Certification

Procore Certified

USACE CQM

ASSOCIATIONS

Association of General Contractors
(AGC)

PMI

Columbia Engineering

AFFILIATIONS

WBENC

SAME

AGC

Bunker Labs

PROJECTS

Wellesley College Aquatics Renovation

Wellesley, MA

Renovation of their Keohane Sports Center | The Wing of the Building
Containing the Pool | Coordinated Site Visits with Wellesley College | Safety
Coordination |

Cilantro Latin Kitchen – 1415 Tremont St.

Boston, MA

2,000-SF Full-Service Kitchen Build-Out | On-Site Management |
Scheduling | Estimating | Budgeting | Compliance | Safety Officer |
Installation | Team Lead

OTIS Air National Guard Base

Joint Base Cape Cod, MA

Renovation in existing Medical Building, Auditorium, and Training
Facility | Estimating | Safety | Supervision | Resource Planning |
Organization | Time Management | Scheduling

The Grossman Companies – 572 Washington St.

Wellesley, MA

Multiple Projects | Retail Fit-Out | Subdivisions | Exterior Renovations
| Mediate Water Damage | Coordination of Trade Partners | COVID-19
Compliance | Implemented Procore to Streamline Communication
with Stakeholders | Supervision | Planning and Budgeting | Estimating



ERIC KILLEBREW

ASSISTANT SUPERINTENDENT

Eric is a natural onsite leader who delivers projects with safety, high quality, and shorter schedules. He brings more than 11 years of experience in PowerPro with Generators. He is a combat veteran and is still active with 102 CE Sq. Cape Cod. Eric has experience overseeing field operations for multiple complex projects and is responsible for supervising subcontractors and enforcing safety and OSHA protocols. As Superintendent, Eric is responsible for overseeing staff, resource management, and ensuring successful project completion.

EDUCATION

Community College of the Air Force

Non-Commissioned Officer Academy

USAF Basic Training/Technical School

CERTIFICATIONS

EM 385 1-1 USACE Safety & Health

OSHA 10-Hour Certification

OSHA 30-Hour Construction Outreach

First Aid / First Responder

American Red Cross CPR Certification

ProCore Certified

PROJECTS

Wellesley College Aquatics Renovation

Wellesley, MA

Renovation of their Keohane Sports Center | The Wing of the Building Containing the Pool | On-Site Supervision | Safety Coordination | Submittal Manager | Sub-contractor Communication | Procurement of Materials

Veteran Affairs – Door Replacements

West Haven, CT

On-Site Supervision | Anti-Terrorist Compliance | Safety Coordination | Submittal Manager | Procurement of Materials

U. S. Corps of Engineers (USACE) - Knightville Dam

Huntington, MA

Contract Management | Safety Compliance | Quality Control Management | Implemented COVID-19 Compliance Safety Plan | Reviewed Contract to Execute Submittal and Procurement Process | Furnished Bonding and Insurance Requirements

U.S. Air Force - Prime BEEFs Civil Engineering Squadron

Staff Sergeant | Deployed to Camp Lemonnier in Djibouti Africa | Puerto Rico Disaster Relief | Mississippi Camp Kamassa Humanitarian Effort

USAF National Guard - 104th Alert Mission

Weekly and monthly maintenance and repair of 30kW to 500kW generators and Barrier Maintenance responsibilities



NATALIA PEREZ

OPERATIONS ANALYST

Natalia is the Operations Analyst at LJV Development. Joining the team in May of 2022, Natalia has been responsible for providing back office support for the company on all projects. She is our primary point of contact for contracting and clearance purposes specifically on federal projects. Natalia is passionate about using her analytical skills to identify and implement new processes to better equip our team members. She takes an active role in assisting team members in multiple divisions on completing their daily tasks.

EDUCATION

Emmanuel College
B.A.A Political Science
Minor Legal Studies

CERTIFICATIONS

Procore Administration Certification

Project Manager: Financial
Management

ASSOCIATIONS

Women's Business Enterprise National
Council (WBENC)

Society of American Military Engineers
(SAME)

Association of General Contractors
(AGC)

United States Women Chamber of
Commerce (USWCC)

Veterans Institute for Procurement (VIP)

Bunker Labs

PROJECTS

GSA – 202 Harlow St.

Bangor, ME

Contract execution | Maintaining certificate of insurance compliance |
Processing request | Invoicing

Cilantro Latin Kitchen – 1415 Tremont St.

Boston, MA

Permitting | Maintaining certificate of insurance compliance | Processing
request | Invoicing

The Grossman Companies – 572 Washington St.

Wellesley, MA

Permitting | Maintaining certificate of insurance compliance | Processing
request | Invoicing | Contract execution

OTIS ANGB – 158 Reilly St.

OTIS ANGB, MA

Permitting | Maintaining certificate of insurance compliance | Processing
request | Invoicing

Federal Emergency Management Agency – (FEMA)

Maynard, MA

Permitting | Maintaining certificate of insurance compliance | Processing
request | Invoicing | Contract execution



TIERNAN SAUL

ENGINEER IN TRAINING, BIM SPECIALIST

Tiernan is an Engineer in training with LJV Development. Majoring in Architectural Engineering at Ulster University Belfast, Ireland. Working with an Architecture and Building Energy Consultancy Firm in Ireland while completing his college studies, he has honed his best-in-class construction industry technical skills, along with proficiency with industry leading software's such ProCore, Action Plan and OpenSpace.

EDUCATION

Ulster University
Architectural Engineering
Bachelor of Engineering (Honors)

Abbey Christian Brothers' Grammar
School

CERTIFICATIONS

ProCore Certified

TIPS Certified (2024)

ASSOCIATIONS

Women's Business Enterprise National
Council (WBENC)

Society of American Military Engineers
(SAME)

Association of General Contractors
(AGC)

United States Women Chamber of
Commerce (USWCC)

Veterans Institute for Procurement (VIP)

Bunker Labs

PROJECTS

Wellesley College – 21 College Rd.

Wellesley, MA

Renovation in Lulu Chow Wang Campus Center | Conversion of ATM Vestibule into a Gender-Neutral Bathroom | Sub Coordination/Outreach | Document Review | Procore Action Plan | OpenSpace 3D Captures/Reviews | BIM Specialist

M.C. Smith Federal Building – 202 Harlow St.

Bangor, ME

Office Renovation in M.C. Smith Federal Building | Painting Surface Preparation and Finishing of Exposed Interior items and Surfaces | Sub Coordination/Outreach | Document Review | Procore Action Plan

Cilantro Kitchen – 1415 Tremont St

Roxbury, MA

Complete Kitchen & Restaurant Fit-Out | Sub Coordination/Outreach | Document Review | Procore Action Plan | OpenSpace 3D Captures/Reviews | BIM Specialist

OTIS Air National Guard Base Joint Base –

Bldg. 149, 165, 330

Cape Cod, MA

Renovation in existing Medical Building, Auditorium, and Training Facility | Sub Coordination/Outreach | Document Review | Procore Action Plan | OpenSpace 3D Captures/Reviews | BIM Specialist | Site Visit Coordination



CARL CHARLES

ENGINEER IN TRAINING, BIM SPECIALIST

Carl is of Haitian origin, being born and raised in Haiti before moving to the United States in 2016 to further his education. Having graduated from Wentworth Institute of Technology in Boston, MA, with a bachelor's degree in Mechanical Engineering and a double minor in Electrical Engineering and Physics in the Summer of 2022, he is entering the professional world in full force at LJV. There, he will fulfill the role of an engineer in training geared towards Building Information Modeling (BIM).

EDUCATION

Wentworth Institute of Technology
Mechanical Engineer Bachelor

CERTIFICATIONS

PROCORE CT Certification

PROCORE PM Certification

SolidWorks CSWA

SolidWorks CSWA-S

ASSOCIATIONS

IEEE

SOFTWARES

SolidWorks

AutoCAD

Microsoft Office Suite

PROCORE

PROJECTS

Cilantro Latin Kitchen – 1415 Tremont St.

Boston, MA

2,000-SF Full-Service Restaurant Renovation

Used the Procore Project Management tools to analyze the project drawings and assure their accuracy | Planned and avoided rework by calculating and simulating the tolerance of the scope of work | Conducted work verification | Directed proper submittal management and approval workflow

Wellesley College - 106 Central St.

Wellesley, MA

Renovation in Lulu Chow Wang Campus Center

Analyzed the plans and made takeoffs for the estimating team |

Communicated with clients to further flesh out the desired scope of work

USACE – Franklin Dam Falls

Franklin, NH

Renovation - Demolition of The Gatehouse at the Dam

Analyzed, created, and submitted shop drawings | Assisted the PMO with the execution of the scope of work

GSA - Lubec

Lubec, ME

General space renovation

Managed subcontractor invites | Analyzed drawings and scope of work making sure there are no disparities | Furnished shop drawings 3D models of desired equipment

LEGAL COUNSEL

MCDERMOTT QUILTY & MILLER - PERMITTING
NOLLAN | SHEEHAN | PATTEN - FINANCE (M/WBE)

MCDERMOTT QUILTY & MILLER

JOSEPH P. HANLEY, ESQ. - PARTNER AND DIRECTOR



Joseph P. Hanley, Esq.

PARTNER AND DIRECTOR

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McDERMOTT
QUILTY &
MILLER LLP
28 State Street
Suite 802
Boston, MA 02109

Joe Hanley is a Partner and Director at the firm, specializing in land use, zoning, licensing and administrative law. His practice includes 25 years of experience in the State and Municipal regulatory process for large to mid-scale real estate development ventures in mixed-use, residential, commercial, hospitality, biotechnology/life sciences and institutional sectors, with specific expertise and extensive experience in the Boston Planning and Development Agency's Article 80 Large Project Review process, Planned Development Area adoptions by the Boston Zoning Commission and Board of Appeal cases for Special Permits and Variances under the Boston Zoning Code. Joe's land use practice also extends to client ventures in the cities of Somerville and Cambridge, where he has successfully entitled large-scale Master Plan Developments and secured Special Permits and Variances under their respective Zoning Ordinances and regulatory approvals process.

Joe is a member of the Board of Directors of the Boston Arts Academy Foundation, the former President and current Board member of Heading Home, Inc. and Vice Chairman of the Board of Directors of the Back Bay Association. As an original member of the New England Steering Committee for the 2008 Presidential Campaign of Barack Obama, he also served as an Obama Victory Trustee, National Finance Committee member and At-Large Delegate to the 2012 Democratic National Convention. Joe graduated Cum Laude with his J.D. from Suffolk University Law School in Boston, Massachusetts and received his B.A. from the University of Maine.

LAND USE, ZONING, PERMITTING AND LICENSING

Practice Concentration



MQM provides comprehensive representation of real estate development projects in residential, commercial,

institutional, hospitality, life sciences/biotechnology, telecommunications, transportation, alcoholic beverages sales and distribution and alternative energy sectors.

Working with the client to develop and implement success-based strategies and results, MQM secures entitlements for real estate development projects of all sizes before State and Local/Municipal planning, zoning, permitting and licensing authorities, public officials, quasi-governmental agencies and community interest groups. We also provide strategic advice and expert legal analysis in project due diligence, certification and review.

Client Industries

MQM's Land Use, Zoning, Permitting and Licensing practice area experience includes a variety of accomplishments on behalf of numerous local, national and international clients in the following areas:

- Residential, Mixed-Use and Commercial Real Estate.
- Hotel, Hospitality, Restaurant, Off-Premise Alcoholic Beverages Sales and Distribution, Sports and Entertainment Venues.
- Transit-Oriented Development and LEED-certified projects.
- Transportation, Wind and Alternative Energy.
- Trade Union, Education/Institutional and Non-Profit Facilities.
- Wireless Telecommunications carriers and site-managers.

Local-Practice/Statewide Reach

MQM has delivered successful client results on development projects in each and every Boston neighborhood, all Greater Boston cities and towns, and in nearly every community throughout Eastern Massachusetts, Cape Cod and the Islands.

NOLAN | SHEEHAN | PATTEN



NOLAN | SHEEHAN | PATTEN

FIRM DESCRIPTION

Nolan Sheehan Patten is a Boston-based real estate law firm concentrating on affordable housing and community development. We provide strategic, technical and transactional advice to a range of clients including equity investors, syndicators, lenders, developers, nonprofits, community development entities (CDEs), and government and quasi-governmental agencies.

Founded in early 2009, we are a young firm with decades of experience. Our lawyers practiced real estate and tax law in major law firms before coming together to form Nolan Sheehan Patten. We combine a depth of expertise in our areas of practice with accessibility, personal service and reasonable fees.

In our practice, we handle transactions involving complex financing structures utilizing state and federal New Markets Tax Credits, Low Income Housing Tax Credits, Historic Rehabilitation Tax Credits and related programs. We also devise and implement partnership and limited liability company structures for investment funds, CDEs and property owners. Our development practice spans customary real estate matters as well as permitting under the Massachusetts anti-snob zoning statute, Chapter 40B.

We represent governmental lenders in designing loan programs using a broad range of affordable housing financing sources and in closing loans under such programs.

Among the attributes that differentiate our firm from our competitors are our experience and ability to service clients on the *development*, *lending* and *investment* sides of the affordable housing and community development process. With this versatility, we can assist our clients with transactional and tax matters pertaining to multiple aspects of a transaction.

Our offices are located in the Boston financial district. Our clients are located nationwide, with a particular concentration in the Northeast.

Nolan | Sheehan | Patten

84 State St., Suite 940

Boston, MA 02110

617.451.1725

nolansheehanpatten.com

WHO WE ARE

Drawing on decades of professional experience in real estate law, we are a mission-driven firm with a deep commitment to affordable housing and community development. We have a well-established track record in devising innovative financing strategies using new state and federal programs. All our lawyers provide pro bono service to civic and charitable organizations. Biographies of individual attorneys are attached.

WHAT WE DO

Overview

Nolan Sheehan Patten provides focused legal services that support community development and affordable housing.

We handle complex transactions involving multiple financing sources and overlapping governmental programs. We are known for our ability to develop and implement innovative investment structures that take advantage of tax incentive programs.

We bring both real estate and tax expertise to bear in helping our clients solve the challenging legal and tax issues they face. Our goal is to do so in an efficient and creative manner, leading to a successful result for all stakeholders.

Our legal services cover all phases of real estate projects from initial structuring and tax planning, to permitting, to creation of business entities, drafting of legal documentation, ongoing representation and compliance and any necessary restructuring.

Some of the key issues and programs we assist clients with are described below.

Housing Tax Credits

Attorneys at Nolan Sheehan Patten have extensive experience in the federal Low Income Housing Tax Credit as well as in the Massachusetts Low Income Housing Tax Credit. The firm represents the Massachusetts Department of Housing and Community Development with respect to implementation of the federal and Massachusetts Low Income Housing Tax Credits and our lawyers were involved in the drafting of the regulations implementing the Massachusetts credit. We have represented a number of investors and syndicators of the federal Low Income Housing Tax Credit in the formation of blind pool and proprietary funds and we have closed numerous project investments, both for direct investors and for syndicators.

Our experience with the housing tax credits also extends to representation of for-profit and nonprofit developers using the credit to develop affordable housing. We have negotiated partnership and operating agreements with investors, dealt with tax structuring issues and rendered tax opinions on Low Income Housing Tax Credit projects.

Nolan | Sheehan | Patten

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Boston, MA 02110

617.451.1725

nolansheehanpatten.com

We are experienced in the many tax issues that arise in housing credit syndications, and we developed some of the early structures for maximizing the value of state housing tax credits using nonprofit entities as recipients and sellers of the credit.

The New Markets Tax Credit Program

Nolan Sheehan Patten attorneys have represented clients on New Markets Tax Credit ("NMTC") matters since inception of the federal program. We represent numerous allocatees. We have closed NMTC transactions for projects such as health care facilities, youth centers, performing arts venues, manufacturing plants, office buildings and mixed-use projects. Several of these projects have also included a housing component (both affordable and market rate).

Many of these NMTC transactions take advantage of other tax credits such as the Historic Tax Credit and state tax credits. These transactions involve a wide range of deal structures, often ones that are more challenging than the usual NMTC transactions because the projects have greater financial need or are trying to utilize non-traditional financial sources such as government grants or tax-exempt bonds.

In particular, Nolan Sheehan Patten helps clients with:

- Forming and qualifying Community Development Entities ("CDEs") and subsidiary CDEs;
- Assisting with preparation of NMTC applications;
- Finalization and amendment of allocation agreements and related opinions and documents;
- Creating financing structures and implementing NMTC transactions through to closing;
- Drafting and negotiating NMTC documents such as leverage loan documents, forbearance agreements, CDE operating agreements, QLICI loan documents, and put and call agreements;
- Preparing tax opinions in connection with NMTC transactions;
- Creation of blind investment pools and loan funds;
- Preparation of offering and investment instruments.

Historic Tax Credits

Nolan Sheehan Patten regularly advises real estate clients on utilization of federal and state historic credits as a resource that generates equity for their real estate development projects. We guide our clients through the real estate and tax issues involved in these transactions. For example, we often advise clients on structures that combine the federal Low Income Housing Tax Credit, federal Historic Tax Credit and state historic tax credits. These structures involve multiple investors and multiple investment vehicles. We have also advised on numerous transactions that combine the New Markets Tax Credit and the Historic Tax Credit.

Nolan | Sheehan | Patten

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Boston, MA 02110

617.451.1725

nolansheehanpatten.com

Business Entity Structuring

The partnership structure – utilizing either a limited partnership or limited liability company – is generally the most tax-advantaged structure for real estate investment. Partnerships are typically subject to only one level of federal and state income tax.

We advise investment funds, for-profit and nonprofit real estate developers and investors about these entities. Partnership structures allow for creation of varying equity interests within the same entity. These advantages bring complexity. Our goal is to create structures that address the business goals of our clients while satisfying the often-complex tax compliance requirements required to achieve those goals.

We regularly draft limited partnership and limited liability company documents for both single and multiple member entities. We also review such documents for clients, pointing out and correcting key business issues that are hidden in their provisions.

Real Estate Development/Chapter 40B

Nolan Sheehan Patten advises for-profit and nonprofit real estate developers on the full spectrum of real estate development from the early stages of site acquisition and land use planning through the ultimate financing and operation of the property. We are well versed on public and private financing resources available to developers, and we bring that knowledge to bear in assisting our clients in the planning and implementation of their project's financing structure. We also have extensive experience in developing difficult projects and are well equipped to help our clients navigate through the various layers of title, permitting and regulatory hurdles that often arise in developing affordable housing and community development projects. In addition, we have assisted clients in permitting and developing numerous projects under the Chapter 40B Comprehensive Permit program.

Public Housing Authorities

Nolan Sheehan Patten has represented three Massachusetts housing authorities, Cambridge Housing Authority, Boston Housing Authority and Brookline Housing Authority in the rehabilitation of portions of their federal public housing portfolios under HUD's RAD program and under Section 18 of the United States Housing Act of 1937. This work has involved numerous properties containing more than 1,000 units financed using 4% Low Income Housing Tax Credit and tax-exempt bonds. Nolan Sheehan Patten has negotiated operating agreements with LIHTC equity investors, negotiated loan and bond documents with the bond lenders, negotiated and drafted ground lease documents, prepared conveyancing documents, and negotiated and coordinated with HUD on the required RAD/Section 18 agreements and documentation. We have extensive experience coordinating RAD/Section 18 closings with HUD and the LIHTC/bond financing closings.

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Private Financing

Nolan Sheehan Patten represents both borrowers and lenders in commercial real estate financing transactions. Our experience ranges from traditional acquisition and refinancing loans to complex construction financing to less traditional types of lending such as mezzanine loans. We have closed loans involving collateral pools as well as other non-real estate collateral such as securities accounts, equipment, inventory, accounts receivable and deposit accounts. We have worked with both borrowers and lenders in structuring and closing lines of credit and refinancings. We also have considerable experience in workout situations, including both restructurings and foreclosures.

Public Financing

Nolan Sheehan Patten regularly advises governmental and quasi-governmental agencies and real estate clients on the implementation and utilization of the full range of public financing resources available for both rental and homeownership projects. We routinely represent clients in closing transactions involving multiple sources of funds from various governmental and quasi-governmental agencies. Our attorneys were instrumental in the design and implementation of the MassDocs program, which helps to streamline the closing of multi-layered governmental loans by utilizing a single set of financing documents.

In particular, Nolan Sheehan Patten has extensive experience with the following programs:

- Affordable Housing Trust Fund
- Commercial Area Transit Node Housing Program
- Community-Based Housing Program
- Community Development Block Grant
- Capital Improvement and Preservation Fund
- Facilities Consolidation Fund
- HOME Investment Partnerships Program
- Housing Innovations Fund
- Housing Stabilization Fund
- MHP Subsidy Program
- Transit-Oriented Development Infrastructure and Housing Support Program

OUR CLIENTS

As noted above, our clients include:

- Banks
- Community Development Entities
- Syndicators of Tax Credits
- Developers
- Governmental Agencies/Housing Authorities
- Quasi-Governmental Agencies
- Housing Advocacy Organizations
- Community Development Corporations
- Tax Credit Investors

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Some representative clients are listed below:

- Massachusetts Housing Investment Corporation
- Massachusetts Housing Equity Fund, Inc.
- Mission First Housing Development Corporation
- Planning Office for Urban Affairs, Inc.
- Massachusetts Department of Housing and Community Development
- Community Economic Development Assistance Corporation
- Massachusetts Development Finance Agency
- Massachusetts Affordable Housing Trust Fund
- The Community Builders, Inc.
- Cambridge Housing Authority
- Boston Private Bank and Trust Company
- Massachusetts Housing Partnership Fund
- BlueHub Capital
- Brookline Bank
- Rockland Trust Company
- Affirmative Investments, Inc.
- Homeowner's Rehab, Inc.
- Urban Edge Housing Corporation
- East Boston Community Development Corporation
- Massachusetts Housing Finance Agency
- Development Fund of the Western Reserve, Inc.
- Preservation of Affordable Housing, Inc.
- Reed Realty Group
- DVM Consulting, Inc.
- NewGate Housing, LLC
- Brookline Housing Authority
- Evernorth and Vermont Rural Ventures
- Wells Fargo Affordable Housing Community Development Corporation
- Boston Housing Authority
- Berkshire Housing Development Corporation
- Citizens Housing and Planning Association



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OUR ATTORNEYS

STEPHEN M. NOLAN

Partner

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Stephen Nolan's practice focuses on affordable housing and community development, especially involving the federal Low Income Housing Tax Credit, Historic Rehabilitation Tax Credit and New Markets Tax Credit. He is one of a small number of attorneys nationally who are recognized for their mastery of complex legal and financial structures using the New Markets Tax Credit program. Steve has represented numerous community development entities in closing more than sixty NMTC financings for a broad range of projects, including health care facilities, youth centers, commercial facilities, theaters and performing arts centers, manufacturing plants, office and retail buildings, community centers and mixed use projects.

Steve has handled numerous syndications of real estate limited partnerships and limited liability companies for both direct purchasers and syndicators of low-income housing and historic tax credits. He is experienced in representation of both borrowers and lenders in commercial and governmental mortgage loan transactions, including loan document drafting and negotiation, opinion writing, and title matters. Steve has represented a syndicator in forming more than a dozen blind pools for investment in low-income housing and historic tax credit projects.

Steve also guides developers of for-sale and rental housing as well as community development projects through all facets of the complex real estate development process, from entity formation to permitting strategy to financing structures.

Prior to founding Nolan Sheehan Patten, Steve was a Partner at DLA Piper LLP (US) in Boston and at Hill & Barlow, P.C. in Boston. He also clerked for Chief Judge Levin Campbell of the United States Court of Appeals for the First Circuit.

Education

- University of Michigan School of Law (J.D. magna cum laude 1983); Contributing Editor, University of Michigan Law Review
- Northwestern University (B.S. in Environmental Engineering with highest distinction 1980)

Admissions

- Massachusetts (1984)
- First Circuit Court of Appeals (1984)

Community Service and Professional Activities

- Board of Directors and Past President, Lawyers Clearinghouse on Affordable Housing and Homelessness
- Board of Directors, National Housing and Rehabilitation Association

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MIRIAM VOCK SHEEHAN

Partner

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Miriam Sheehan has a broad based federal income tax practice that focuses on partnership taxation and taxation of exempt organizations. Her practice has particular emphasis on the use of federal and state tax credits to promote development and financing of projects with significant community benefit. She regularly provides tax advice to syndicators, developers, equity investors, community development entities, governmental authorities and lenders in transactions that use the Low-Income Housing Tax Credit, the Historic Rehabilitation Tax Credit, and the New Markets Tax Credit.

Miriam was a partner in the tax group at DLA Piper LLP (US) from 2003 to 2009. Prior to that, she was a partner and chair of the tax department at the Boston law firm of Hill & Barlow where she practiced from 1980 until 2003.

Education

- University of California at Berkeley, Boalt Hall School of Law (J.D., Order of the Coif, 1980)
- Stanford University (A.B. 1977)

Admissions

- Massachusetts (1981)
- California (1982)
- First Circuit Court of Appeals (1982)
- Federal Tax Court (1984)

Civic, Charitable and Professional Activities

- New England Women in Real Estate.
- The Boston Tax Forum
- Pro Bono tax advice to numerous non-profit organizations

Recent Presentations

- Lawyers Clearinghouse for Affordable Housing
 - Historic Boardwalk Decision Update: the IRS Guidelines and What They Mean for Community Development in Massachusetts
- National Housing & Rehabilitation Association
 - New Markets Tax Credit Financing for Health Care Facilities and Nursing Homes
 - Combining New Markets Tax Credits with Tax Exempt Bonds
 - New Markets Tax Credits and Green Buildings
- The Boston Tax Forum
 - An Overview of Tax Penalties
 - The Partnership Merger Regulations
 - Investing in State Tax Credits

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BRIAN C. PATTEN

Partner

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Brian Patten focuses his practice on real estate transactions, specifically in the area of affordable housing and community development. He represents nonprofit and for-profit developers, equity investors, syndicators, community development entities, and public and private lenders in transactions involving an array of financing sources. He assists clients and provides advice pertaining to the use and implementation of all aspects of the Low-Income Housing Tax Credit, Historic Rehabilitation Tax Credit and New Markets Tax Credit programs both at the federal and state level. Brian also represents senior lenders in affordable housing projects and serves as MassDocs counsel for the state's Department of Housing and Community Development in connection with their various loan programs. Brian is also experienced in general commercial real estate financing, including loan document drafting and negotiation, as well as purchase and sale transactions, zoning and permitting matters, and conveyancing and title matters.

Along with Stephen Nolan and Miriam Sheehan, Brian is a founding member of Nolan Sheehan Patten. His prior experience includes practicing in the real estate group at DLA Piper LLP (US) in Boston, where he focused on affordable housing and community development, general real estate development, leasing, conveyancing, financing, and permitting; and working as a real estate Associate at Hill & Barlow, P.C. in Boston.

Education

- Northeastern University School of Law (J.D. 2000)
- University of Kentucky (B.A. summa cum laude 1997)

Admissions

- Massachusetts (2001)

Community Service and Professional Activities

- Member of National Housing and Rehabilitation Association Next Generation Leadership Initiative
- Active member of Real Estate Bar Association Affordable Housing Committee, and Affordable Housing Committee of the Boston Bar Association
- Ongoing pro bono representation of homeless individuals through the Lawyers Clearinghouse for Affordable Housing and Homelessness
- Pro bono representation of Lovelane Special Needs Horseback Riding Program, Inc., an organization that provides therapeutic horseback riding to children with special needs
- Pro bono participation with The Advocates for Human Rights for the Liberian Truth and Reconciliation Commission Diaspora Project

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HANNAH L. KILSON

Partner

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Hannah L. Kilson concentrates her practice on real estate transactions in the area of affordable housing and community development. She represents nonprofit and for-profit developers, borrowers and lenders in real estate transactions involving various financing sources. Hannah is experienced in structuring multi-family, mixed-income and mixed-use developments utilizing commercial financing coupled with federal and state low income housing tax credits, historic tax credits and state public financing through the Department of Housing and Community Development's Mass Docs financing programs. She is experienced in all stages of commercial real estate transactions, including land acquisition and disposition matters, leasing, and permitting. Over the last several years, Hannah and her colleagues at NSP, have represented several housing authorities located in the Greater Boston area in the redevelopment of their federal public housing stock through the creative use of HUD's rental assistance demonstration program and federal low income housing tax credits. She represented one of the first developers to receive financing under the Massachusetts Housing Finance Agency's Workforce Housing Program.

Prior to joining Nolan Sheehan Patten LLP, Hannah was the Deputy General Counsel of Massachusetts Development Finance Agency, the Commonwealth's largest economic development authority, where she was responsible for the day-to-day management of the Agency's Legal Department and handled legal matters associated with the Agency's redevelopment and financing efforts, including the redevelopment of the former Leverett Saltonstall State Office Building and the redevelopment of the former Northampton State Hospital site into a mixed use, planned village community. Prior to MassDevelopment, Hannah practiced in the real estate group at DLA Piper LLP (US) in Boston and at Hill & Barlow P.C. in Boston, and clerked for Judge William G. Young of the U.S. District Court of the District of Massachusetts.

Education

- Harvard University Law School (J.D., cum laude, 1997)
- Harvard University Graduate School of Education (M.Ed. 1993)
- Amherst College (B.A., cum laude, 1988)

Admissions

- Massachusetts (1997)

Civic, Charitable and Professional Activities

- Boston Bar Association, President-Elect (September 2022 – Present), Vice President (September 2021 – August 2022), Executive Committee, Member (September 2018 – present), Treasurer (September 2020 – August 2021), Secretary (September 2019 – August 2020) Council Member (September 2016 – August 2019)
- Boston Bar Foundation, Trustee (September 2022 – Present)
- BBO Bar Counsel Search Committee, Member (January 2019 – July 2019)

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- Boston Bar Association, 2018 Annual Meeting, Co-Chair
- Boston Bar Association, Immigration Working Group (Summer 2018)
- American Civil Liberties Union-Massachusetts, Board Member (June 2021 – Present)
- Horizons for Homeless Children, Advisory Board Member (September 2020 – Present)
- Massachusetts Interest on Lawyers Trust Accounts Committee, Chair (September 2013 – December 2021)
- Massachusetts Housing Finance Agency, Advisory Committee, Member (November 2016 – Present)
- Abstract Club (November 2016 – Present)
- Fontbonne Academy, Strategic Planning Committee (September 2017 – May 2018)
- Real Estate Section of the Boston Bar Association, Co-Chair (September 2014 – August 2016)
- City of Boston Centers for Youth & Families, Curtis Hall Basketball League, Youth Basketball Coach (November 2014 – April 2016)
- Affordable Housing Subcommittee of the Real Estate Section of the Boston Bar Association, Former Co-Chair (September 2011 – August 2013)
- The Advent School, Board of Trustees, Co-Chair of the Education Committee and the Diversity Committee (June 2007 - June 2010)

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BRET L. HENDRICKSON

Partner

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Bret Hendrickson concentrates in affordable housing and community development real estate transactions, particularly those involving the New Markets Tax Credit. Bret has represented community development entities, borrowers and investors in closing New Markets Tax Credit financings for a broad range of projects, including community centers, manufacturing plants, health centers, educational facilities, mixed-use office and retail buildings, supermarkets, forestland, a youth hostel and a museum. He also has experience with financing structures that combine the New Markets Tax Credit and the Historic Rehabilitation Tax Credit.

Bret is also experienced in general commercial real estate financing, acquisitions, dispositions, zoning, permitting, conveyancing, commercial leasing and title matters. He represents developers, borrowers, equity investors and lenders in transactions involving public and private financing sources.

Prior to joining Nolan Sheehan Patten, Bret practiced in the real estate group at DLA Piper LLP (US) in Boston where he focused on mortgage lending, mezzanine lending, commercial leasing and conveyancing.

Education

- Northeastern University School of Law (J.D. 2005)
- University of Notre Dame (B.B.A. 1999)

Admissions

- Massachusetts (2005)

Community Service and Professional Activities

- Member of American Bar Association Forum on Affordable Housing & Community Development Law, Co-Chair of the New Markets Tax Credit Committee (2012-2014)
- Member of the Affordable Housing Committee of the Boston Bar Association
- Pro bono representation of tenants in summary process proceedings through the Volunteer Lawyers Project of the Boston Bar Association
- Pro bono representation of families in connection with summary process proceedings through the Medical-Legal Partnership
- Pro bono representation of clients in connection with probate and housing matters through the Massachusetts Legal Clinic for the Homeless
- Pro bono representation of victims of Hurricane Katrina with FEMA appeals

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VANESSA L. CARNES

Partner

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Vanessa Carnes represents investors, syndicators and developers in connection with complex structuring, tax analysis, and written opinions for tax credit transactions, including projects financed by low-income housing tax credits, historic rehabilitation tax credits and new markets tax credits. Vanessa also provides tax advice and planning for exempt organizations and for-profit businesses and their owners in connection with a wide variety of business transactions, including formation, structuring and documentation of routine and complex partnership and corporate transactions. Vanessa has also represented corporations in connection with the tax aspects of mergers, acquisitions and reorganization transactions, and businesses on the design and implementation of equity incentive compensation plans for new and existing business ventures, including analysis of 409A issues, as well as general tax planning for executives in negotiating or upon receipt of equity incentive compensation.

Prior to joining Nolan Sheehan Patten, Vanessa was a member of the tax groups of Boston law firms Nutter McClennen & Fish LLP, Goulston & Storrs PC and Posternak Blankstein & Lund LLP. Vanessa began her career in Philadelphia where she was a member of the corporate tax department at KPMG Peat Marwick LLP and a tax associate at Stradley Ronan Stevens & Young LLP.

Education

- Villanova University School of Law (L.L.M. in Taxation 1996)
- Villanova University School of Law (J.D. 1994)
- Villanova University, Villanova School of Business (B.S. cum laude 1991)

Admissions

- Pennsylvania (1994)
- New Jersey (1994)
- Massachusetts (1995)
- Federal Tax Court (1996)

Community Service and Professional Activities

- Pro bono representation of clients of Lawyers Clearinghouse on Affordable Housing and Homelessness
- Pro bono representation of tax exempt organizations
- Member of the Tax Section and the Affordable Housing Section of the American Bar Association
- Member of the Tax Section, Tax Exempt Organizations Section and Real Estate Section of the Boston Bar Association

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KRISTOPHER GOSSELIN

Associate

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T: 617.419.3179

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Kris' practice focuses on affordable housing and community development real estate transactions, with an emphasis on those involving the federal New Markets Tax Credit. Kris has represented community development entities in closing New Markets Tax Credit financings for a broad range of projects, including community centers, health centers, public libraries, childcare and education facilities, community food cooperatives, and mixed-use residential and commercial facilities. He also has experience with financing structures that combine the federal New Markets Tax Credit with other federal and state tax credit programs.

Kris also has experience representing public and quasi-public agencies, developers and lenders in connection with real estate disposition and financing transactions, as well as investors in residential developments utilizing the federal Low-Income Housing Tax Credit.

Education

- Northeastern University School of Law (J.D. 2017)
- Northeastern University (B.S. 2010)

Admissions

- Massachusetts (2017)

Community Service and Professional Activities

- Pro bono representation of homeless individuals through the Lawyers Clearinghouse
- Member of the American Bar Association
- Member of the Boston Bar Association

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COLETTE IRVING

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Colette's practice focuses on affordable housing and community development real estate transactions.

Prior to joining Nolan Sheehan Patten, Colette worked as Research Analyst & Legal Counsel for the Massachusetts Joint Committee on Housing where she focused on legislation related to the Massachusetts low income housing tax credit, bond financing, public housing, rental vouchers and homelessness. Colette also received the 2014 BC Law Public Service Fellowship, allowing her to serve as a one year fellow for the Massachusetts Law Reform Institute.

Education

- Boston College Law School (J.D., 2014)
- Boston College (B.A., 2007)

Admissions

- Massachusetts (2014)

Community Service and Professional Activities

- Co-Chair, Public Policy Subcommittee of the Boston Bar Association Real Estate Section
- Member of the Boston Bar Association
- Member of the American Bar Association, Forum on Affordable Housing and Community Development Law
- Member of CHAPA Production and Housing Preservation Committee
- Pro bono representation of clients through the Lawyer's Clearinghouse

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JESSICA WELTER

Associate

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Jessica's practice focuses on affordable housing and community development real estate transactions. Jessica has experience representing nonprofit developers, public and private lenders, equity investors and syndicators in connection with complex real estate transactions involving various public and private funding sources.

Before joining Nolan Sheehan Patten, Jessica was a judicial clerk to the Honorable Michael D. Vhay, Associate Justice of the Massachusetts Land Court. During law school, Jessica participated in the Community Business Clinic where she provided legal services to entrepreneurs and small businesses.

Education

- Northeastern University School of Law (J.D. 2018)
- Tufts University (B.A. 2013)

Admissions

- Massachusetts (2018)

Community Service and Professional Activities

- Member of the American Bar Association
- Member of the Boston Bar Association
- Member of the Real Estate Bar Association
- Pro bono representation of homeless individuals through the Lawyers Clearinghouse

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COLLINS CANNON

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Collins Cannon's practice focuses on federal income tax law, with an emphasis on partnership taxation and taxation of exempt organizations. His primary focus is on real estate transactions involving the Low-Income Housing Tax Credit, the New Markets Tax Credit, and Opportunity Zones.

Before joining Nolan Sheehan Patten, Collins was an associate at PwC where his practice focused on partnership and corporate taxation of international mergers & acquisitions as well as fund formation.

Education

- Boston University School of Law (LL.M. 2014)
- Boston University School of Law (J.D. 2014)
- Brigham Young University (B.A. 2009)

Admissions

- Massachusetts (2014)

Community Service and Professional Activities

- Member of the American Bar Association
- Member of the Boston Bar Association



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PROPERTY MANAGEMENT

UHM PROPERTIES (MBE)

Brief History of UHM Properties

UHM Properties, LLC (UHM) is a professional property management and development company that has been in business for over 18 years. The founding members had worked together before UHM was established, as the company was started by the entire senior staff of the residential division of Long Bay Management Company. They have a 30-year history of working together in the affordable housing industry. UHM purchased the Long Bay residential portfolio of the retiring general partners in 2003 and began the new venture as United Housing Management LLC. As part of a strategic growth plan, the name was changed to UHM Properties LLC on January 1, 2019. UHM Properties is a Certified MBE with the City of Boston and the Supplier Diversity Office with the Commonwealth of Massachusetts.



UHM currently manages 24 residential properties consisting of over 1,630 units and approximately 360,000 square feet of commercial space in the greater Boston area. The residential properties include 14 that have 100% Section 8 contracts, and the remaining properties all have affordability components. UHM has the capacity and experience to manage affordable housing properties owned by local not-for-profits as well as for-profit owners. Not-for-profit customers include Dorchester Bay EDC, Madison Park DC, Habitat For Humanity, VBCDC, and also the Boston Housing Authority. For-profit, customers included nationally represented companies such as the NHP Foundation, PNC Bank, and Vitus Corporation of Seattle, WA. With all clients, there is professionalism and full-service management, but with Tenant Owned organizations, UHM can have a more substantial connection with the owner because of the greater commitment to the residents which is essential to our mission. We have also established a 501(c)(3) organization called the Neighborhood Network Center which provides support services to the greater community.

Please see the attached chart of the entire portfolio which lists the number of units, subsidy/ funding, and contact person if you need references.

UHM PROPERTIES LLC
LIST OF MANAGED PROPERTIES

Project	Address	Managed Since	# of units	Income Level %	Subsidy/ Regulatory Type	Property Owners	Contact for References
RESIDENTIAL							
BHA Highland Park	50-68 Highland	2003	26		BHA	George.Mcgrath@bostonhousing.org	Yes
BHA Condo	Scattered	2008	75		BHA	George.Mcgrath@bostonhousing.org	Yes
BHA 56 Condo	Scattered	2003	56		BHA	George.Mcgrath@bostonhousing.org	Yes
Blue Hill Place Condo	Blue Hill	2016	25	Deed restrictions	N/A	Habitat for Humanity jamekostaras@habitatboston.org	Yes
Blue Mountain Apartments	Scattered	2003	217	30,50	PBS8	The NHP Foundation	Yes
BNCLT	Scattered	2021	30	30,50	BHA ,Metro	Boston Neighborhood Community Land Trust Mlevy@bnclt.org	Yes
Boston Bay	Scattered	2003	88	30,50,60	LIHTC,PBS8	kbynoe@uhmgt.com	Yes
Dudley Terrace	Scattered	2013	56	50,60,80	LIHTC,PBS8	Dorchester Bay cmcvea@dbedc.org	Yes
Esperanza	Scattered	2019	42		PBS8	Vitus Scott.muoiio@vitus.com	Yes
Fort Hill	Scattered	2019	40		PBS8	Vitus Scott.muoiio@vitus.com	Yes
Fairmont Langston	Fairmont St	2021	4 res 5 comm	50	BHA	Nikia.londy@gmail.com	Yes
Geneva Apartments	Scattered	2013	47	30,50,60	LIHTC,PBS8	Dorchester Bay / Geneva Tenants Organization cmcvea@dbedc.org	Yes
Grove Hall Apartments	Scattered	2022	104	30,50	PBS8	haroldraym@aol.com	Yes
Heritage Corner Condominium	Elmore / Brinton	2019	26	10 Market 16 Affordable	N/A	Michelle Carroll, Trustee	Yes
Hope Bay	Scattered	2003	45	30,50,60	LIHTC,PBS8	kbynoe@uhmgt.com	Yes
Imani House	516 Warren St	2008	9	30	TBS8	The Canton Group ffairfield@cantoncorporation.com	Yes
New Port Antonio	Scattered	2003	227	30,50,60	LIHTC,PBS8	PNC Bank National Assoc. John.Wooldridge@pnc.com	Yes

Quincy Heights	Scattered	2003	129	30,50,60	LIHTC,PBS8	Dorchester Bay cmcvea@dbedc.org	Yes
RAP UP I	Scattered	2007	33	30,50	PBS8	Unicorn 2021 LLC Darryl Settles - dsettles@cvduboston.com	Yes
Rockville Park	Scattered	2018	10	50,60	TBS8 Market	Veterans' Benefits Clearinghouse DC VBCDC – haroldraym@aol.com	Yes
Sanoma, Maple, Schuyler LLC	Scattered	2022	100	30,50	PBS8	Sanoma Maple Schuyler LLC Haroldraym@aol.com	Yes
VBC Housing	495 Blue Hill Ave	2003	30	30,50,60	PBS8	Veterans' Benefits Clearinghouse DC VBCDC – haroldraym@aol.com	Yes
Washington Heights	Scattered	2004	175	30,50,60	PBS8	Washington Heights Tenant Association / VBCDC – haroldraym@aol.com	Yes
10 Taber Street Condominium	10 Taber Street	2021	45	37 Market 8 Affordable	N/A	10 Taber Street Condominium Trust klauskimel@gmail.com	Yes
COMMERCIAL							
Bruce Bolling Municipal Building	2300 Washington Street	2020	6 Tenants	240,000 SF	N/A	City of Boston Peter.osullivan@boston.gov	Yes
Rivermoor Archive Building	201 Rivermoor Street	2022	7 Tenants	120,000 SF	N/A	City of Boston Peter.osullivan@boston.gov	Yes

Minority Business Enterprise and our Commitment to Local Hiring

UHM is at the forefront of ensuring economic stability for minorities in the communities of Boston. Our commitment to supporting local minority-owned and women-owned businesses is paramount to the foundation of UHM. Every year since its inception, UHM has earned the Multi-Million MBE/WBE Achievement Award from MassHousing for high levels of spending with women and minority-owned businesses. The last year alone, over \$11,000,000 was spent on MBE/WBE businesses representing almost 65% of our discretionary spending. We believe that those dollars are well spent as those vendors tend to be located in inner-city communities of Boston that need economic support. Those vendors will make their money in the community and spend it in the community, thus creating an economic cycle that improves the community as a whole. The commitment to hiring local women and minority-owned businesses will continue if we are selected to manage the properties.

We practice inclusion in our workplace, with our staff of 86 employees being made up of multiple races and nationalities. A large portion of our staff boasts Caribbean heritage representing 10 different countries. Many of our staff are bi-lingual (a few tri-lingual) speaking Spanish, French, Portuguese, Cape Verdean Creole, Haitian Creole, and even sign language. No one is ever turned away because of language; we use a translation service to accommodate anyone that speaks another language when they come to our office.

Resident Services & the Neighborhood Network Center, Inc.



**ENHANCED SUPPORTIVE SERVICES
TO BETTER OUR RESIDENTS' LIVES**

At UHM Properties, safe, clean and affordable housing is our duty - enhancing the quality of our residents' lives is our mission. Through the Resident Services Department and the Neighborhood Network Center, Inc., we strive to support our residents in reaching the long-term stabilization necessary to achieve their goals.

Our Mission

The UHM Properties Resident Services Department works diligently to ensure all individuals and families living in our resident communities have the necessary support to build and maintain a standard of living that promotes long-term stabilization, wellness, and personal growth.

The Neighborhood Network Center Inc. works as an access point to create and promote a culture of wellness, vitality, and success for our residents and the surrounding community.

Our Vision

Since its inception, UHM Properties has championed the importance of supportive services coupled with affordable housing. Through the programs and services provided by the Resident Services Department, the Neighborhood Network Center, and key community partnerships, we envision our resident communities having access to the resources necessary to meet their immediate needs and build a better future for themselves and the community at large.

The Neighborhood Network Center envisions a robust and vibrant community created through the growth and development of families and individuals living in the residential communities and neighborhoods served by UHM Properties



UHM PROPERTIES' RESIDENT SERVICES APPROACH

CONSISTENT ~ AWARE ~ RESTORATIVE ~ EFFECTIVE

Through dialogue with our residents, noted best practices, and the skill set of a dedicated team of human service professionals, the UHM Properties Resident Services Department created its service delivery approach. The CARE approach ensures our department meets the needs of individuals and families in a way that recognizes and appreciates the residents' right to dignity even while in distress, crisis, or transition. Through this approach, we work to ensure the support services offered are:

- **Consistent** – From initial contact to the closing of the referral, our Resident Services team delivers in a manner that will reflect our intentions to assist the family or individual in reaching the best possible outcomes for their situation.
- **Aware** – Each client and family is served in a manner respectful of their particular need and situation and mindful of any cultural or personal traditions that are a part of their lived experience.

- **Restorative** – We meet clients within their comfort zone to address the immediate need with a demeanor of concern rather than condemnation. Whenever possible, we execute long-term stabilization plans to assist families/individuals in reaching positive life milestones after addressing their immediate concerns.
- **Effective** – We recognize the importance of follow-up and follow through and do our part to ensure that individuals/families get the services they need, both in-house and from partner agencies. We check in with the individual/family through each phase of the referral process to ensure the services offered versus those obtained genuinely meet the need.

What We Offer



Youth Development

Through a whole child approach, Resident Services has offerings designed to support the growth of resident youth at every stage. Our current program includes:

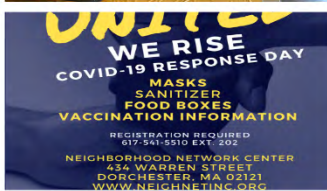
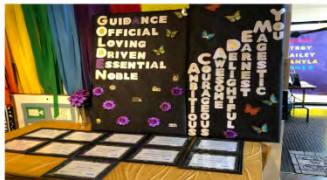
- NNC Children's Defense Fund Freedom Schools®
- College Internships (Partners: Harvard University/ Fitchburg State/ Roxbury Community College)
- Summer Youth Employment (Partners: ABCD/Private Industry Council)



Aging in Place

UHM Resident Services works diligently to make sure our senior population has both preventative and intervention programming and services in place to keep them safe and well cared for as they grow older. Senior population programs include:

- Golden Academy – An Aging In Place Program
- Wellness Checks
- Transition to Home Case Management



Stabilization and Self Sufficiency

Once an individual or family becomes a recipient of supportive services at UHM, our primary objective is to ensure they have all available resources to sustain their housing and move forward with personal goals. Our offerings include:

- Case Management & Referrals
 - Early Childhood Education Vouchers
 - Employment & Educational Services
 - Federal and State Public Assistance Programs
 - Financial Planning & Management
 - Healthcare & Homemaking Services
 - Mental Health Counseling
 - Substance Abuse Treatment Centers
 - Rent/Utility Arrearage Financial Assistance

- Resident Programs and Activities
 - Resident Appreciation Day
 - Thanksgiving Turkey Giveaway
 - Toys for Tots Holiday Christmas Store
 - Site-Specific Holiday Parties
 - Bi-Monthly Site Resident Meetings
 - Family Movie Nights

- Workshops & Training
 - Lease Education
 - Eviction Prevention
 - Financial Literacy and Stability
 - Workforce Readiness
 - Parenting Guidance and Support

Our CARE Approach

Drawing from our experience coupled with the input of you and residents, the UHM Resident Services will collaborate with you to build the supportive services program that meets the needs of your resident community. The transition plan will include our first hundred-day approach to lay the foundation for a stable and productive onsite resident services program. The three main objectives are:

- 1. Culture Assessment** – Every resident community is unique. To be proper support, we have to get a sense of the needs, concerns, and values of the residents in the community. We will begin to ascertain what will work best to assist the collective resident community with this information. Our resident services team will meet with the designated team, including maintenance and security, to assess existing supportive services and areas for improvement.
- 2. Critical Stabilization Support Plan** – Our resident services team will work with the resident community and property manager to identify and prioritize residents who need supportive services in place as soon as possible. The critical stabilization support plan includes residents with rental arrearages, open reasonable accommodation requests, aging in place needs of older adults. Once the resident gives consent for our assistance, we will make the necessary referrals to work towards the stabilization of the most vulnerable.
- 3. Community Building and Engagement** – An integral part of a vibrant resident community is creating opportunities to bring people together. We will engage residents in at least three different ways in the first hundred days. These will be customized touchpoints to enhance the shared experience of living and thriving for residents.

Neighborhood Network Center Inc. and Community Partnerships

An innovative approach to building vibrant communities is through the Neighborhood Network Center Inc. (NNC). As a registered 501c3 organization since 1998, NNC works with community partners to further carry out UHM Properties' mission to positively impact the lives of residents and our neighbors by using impact programming. The activities and programs offered at the Neighborhood Network Center serve the residents of UHM Properties and the community at large. NNC is under the direction of the UHM's Resident Services Department and is actively engaged in building partnerships and soliciting financial and in-kind contributions that round out the offerings to our residents and surrounding neighbors in need of support. Current partners include:

- City of Boston (Boston Resiliency Fund/Office of Intergovernmental Affairs)
- Boston Public Health Commission
- Children's Defense Fund
- Grow with Google Community Learning Program
- About Fresh (Fresh Truck)
- Toys for Tots
- Anton's Coats for Kids and Families
- Boch Center for the Performing Arts Week
- State Police Association of Massachusetts
- Good360
- Massachusetts Society for the Prevention of Cruelty to Animals (MSPCA)
- Stop & Shop
- Transitional Remedies Solutions

Resident Services Impact By Numbers

Through the CARE approach's successful execution, the Resident Services Department consistently meets the needs of the UHM Residents and community members who seek out the services at the Neighborhood Network Center, Inc. The following data articulates the positive impact from years 2015 - 2020:

- **Average Number of Closed Referrals By Property Managers Per Year: 172 (93%)**
- **Average Number of Closed Self Referrals Per Year: 114 (96%)**
- **Average Number of Activities/Programs Per Year: 36**
- **Average Individual Unduplicated Direct Engagement Through Programs and Activities: 1,073**
- **Rental Arrearage Recovered through RAFT per client: \$1,683.00**
- **Average Amount of Food Distributed Per Year: 18,000 lbs**
- **Overall In-kind Donation Value Directed to Clients Each Year: \$37,00**

Our Resident Services Team

The Resident Services Department is a team of four highly skilled and dedicated UHM staff members Ms. Patricia Farr, Mrs. Mayra Leith, and Mr. Dwayne Watts.

- ❖ **Ms. Patricia Farr**, is a founding partner of UHM Properties, and supervises resident services. Ms. Farr has over twenty-five years of professional service in affordable housing. As the Director of UHM's Human Resources Department and supervisor of the Resident Services Department, Ms. Farr ensures resident programs and services align with the company's vision and meets federally regulated guidelines and standards of service.
- ❖ **Mr. Dwayne Watts is the Executive Director of The Neighborhood Network Center, Inc.** For the past 27 years, Mr. Dwayne Watts has worked in numerous areas of the affordable housing, mortgage lending, and homebuyer development. His experience includes participating in the development and implementation of the Boston Home Center. For 3 years, Mr. Watts worked in all three program areas of the Boston Home Center: Education and Counseling, Affirmative Marketing Services, and Financial Assistance.
- ❖ **Mrs. Mayra Leith** has twenty-five years of direct experience in the human services field. Ms. Leith is directly responsible for developing programs and services for UHM seniors. Additionally, Ms. Leith serves as the department's Spanish translator and is in the Program Director's role for the Neighborhood Network Center Children's Defense Fund Freedom Schools® Summer Program.
- ❖ **Ms. Audreyana Washington** is an emerging leader in the resident services department. She is directly responsible for administrative and clerical support as well as data collection and office management.

The UHM Partners

J. KEVIN BYNOE CHIEF EXECUTIVE OFFICER

Mr. Kevin Bynoe is the Chief Executive Officer (CEO) of UHM Properties. As the CEO, Kevin is responsible for overseeing all aspects of the company including management decisions, implementing UHM's long and short-term goals, and acts as the primary spokesperson.

Kevin's career in affordable housing began while still in high school and continued as a construction laborer early in his career. In 1987, Kevin began his professional career in the housing industry as a Maintenance Supervisor; he then progressed through the ranks as an Assistant Property Manager, Property Manager, Senior Property Manager, and Regional Manager. Kevin attended Central State University where he majored in Management. He has received Boston University's Certificate in Real Estate Finance, the Registered Housing Manager (RHM) designation from the National Center for Housing Management, his Low Income Housing Tax Credit C¹²P certification from Spectrum Enterprises, and completed the Minority Property Management Executive Program at MIT.



PATRICIA A. FARR DIRECTOR OF HUMAN RESOURCES



Ms. Patricia A. Farr is our Director of Human Resources.

As the Director of Human Resources, Pat is responsible for coordinating all aspects of the business relationship between our company and each of our employees, providing information and training about our company policies, procedures, benefits, compensation, and insurance.

Pat was born and raised in Jamaica, West Indies. When Pat immigrated to the United States in 1977, she attended Roxbury Community College where she received a degree in business administration in 1979. She pursued her education by attending courses in real estate finance and management at Boston University, as well as completing the Minority Developer Executive Program at MIT, and attending various human resource management programs at Northeastern University.

SHEILA P. HARPER

DIRECTOR OF COMPLIANCE

Ms. Sheila P. Harper is our Director of Compliance.

Sheila grew up in Roxbury and graduated from Fisher Junior College in 1980. She began her career in housing management in 1984 as a Property Manager for Long Bay Management Company. In 1992 she was appointed as a Senior Property Manager, and again in 1995, she was promoted to Regional Manager. In 1996, she became the Director of Operations where she assumed responsibility for supervising all of the other property managers.

Sheila's most critically important job, however, is acting as our company's tax credit compliance monitor. This critical role began in 2000 when she assumed responsibility of ensuring that every property under management, to which federal low-income housing tax credit had been allocated, was in full compliance with state and federal regulations. She also assumed responsibility for training all of the staff about the appropriate procedures for maintaining compliance. Simply stated, Sheila reviews every resident file and she must give the final OK before any resident/applicant can sign a lease and move into a regulated property. Her depth of experience and education ensures that all of the government regulations have been followed. Sheila is certified as a Credit Compliance Professional by Spectrum Enterprises at level C¹⁵P and a Registered Cooperative Manager.



PROFILES OF KEY MEMBERS OF THE UHM LEADERSHIP TEAM

CHRISTOPHER A. SHEPHERD

Director of Business Development

Chris serves as Director of Business Development and is responsible for producing new business opportunities for UHM Properties. This work includes the review of opportunities for the acquisition of existing properties and portfolios, in addition to the review of new construction and renovation possibilities. Chris also manages energy efficiency and green programs, as well as serves as a liaison between UHM and the owners of the properties that UHM manages. Chris joined UHM in 2007 as Manager of Real Estate Development and then later became Director of Real Estate Development.

Chris graduated from Howard University, with a degree in Finance with a concentration in banking. Early career experience included progressing from commercial lending trainee to Vice President in commercial lending within various lending areas including construction lending and real estate loan workouts. Chris has also owned a construction company and has developed and managed commercial real estate.

JEFFREY CAPUTI, CPA

Chief Financial Officer

Jeff joined UHM in 2016 and serves as the Company's Chief Financial Officer. Jeff and his team provide financial and accounting support for all of the Company's activities. Jeff oversees UHM's financing and banking functions and is responsible for external audits, tax reporting, budgeting and provides strategic support in helping UHM achieve its goals and objectives.

Jeff comes to UHM with over 15 years of experience in public accounting specializing in the affordable housing industry. He graduated from the University of Massachusetts - Amherst and is a Certified Public Accountant and a member of the Massachusetts Society of CPAs.

WINNIE LAMOUR

Chief Operating Officer

Winnie has been with UHM since its inception in 2003, originally as Support Coordinator, and progressed to the position of Director of Administration where she was responsible for a variety of administrative duties including preparation of all HAP Contract Renewals and Rent Adjustments for the UHM portfolio, and the Waiting List Department where she maintained and revised policies and procedures that are consistent with HUD regulations for all properties. Winnie currently serves as the Company's Chief Operating Officer where she oversees the operations of the Company. With over 20 years of experience in the Housing Industry, she plays an active role in strengthening and assisting in the management, governance culture, and practices that reflect the Company's core values, discipline, and professionalism.

Before joining UHM, Winnie began her career in 1990 as a Paralegal for Long Bay Management Company where she worked closely with the Company's Legal Counsel, attending court on non-payment and violation cases for the entire portfolio. In 1997 she was appointed as a Property Manager where she was responsible for the management of 185 units.

Winnie Lamour holds a Bachelor of Science in Business Management with certifications as a Registered Cooperative Manager, Paralegal Studies, and Tax Credit Professional C3P. She is fluent in French, Haitian Creole, and conversational Spanish and Sign Language.

Genesa Mendes
Director of Property Management

Genesa has over 18 years of experience in the property management industry. As Director of Property Management at UHM, she is responsible for overseeing the management operations of our mixed-use properties. In her role, she is responsible for the overall operation of our community and administers all aspects of property management services including annual budgeting, cost control, financial planning, and recommendations for capital improvement. In addition, she ensures the completion and the processing of all reporting required by Federal, State, and Local Agencies as well as the implementation of corporate policies and procedures. Ms. Mendes also manages all on-site property personnel, is involved in all personnel decisions, and fosters employee relations, including annual and quarterly performance evaluations as well as the execution of an employee bonus structure. Ms. Mendes contributed to shaping corporate policies and initiatives

Genesa holds the designation of ARM from the Institute of Real Estate Management, C5P from The Spectrum Companies; and CPO, NAHP, SHCH, and CGPM from the National Affordable Housing Management Association.

Everton Blake
Director of Maintenance

Everton is responsible for the overall supervision and administration of maintenance programs for the properties in the UHM portfolio consistent with each property's budget. He makes recommendations to the CEO and Human Resources Department on all aspects of maintenance operations and personnel.

Everton joined UHM in 2003 after many years of work in supervisory positions in construction companies in the area of carpentry. Everton maintains a Massachusetts construction supervisor's license

Dwayne Watts
Executive Director of Neighborhood Network Center

For the past 27 years, Mr. Dwayne Watts has worked in numerous areas of affordable housing, mortgage lending, and homebuyer development. His experience includes participating in the development and implementation of the Boston Home Center. For 3 years, Mr. Watts worked in all three program areas of the Boston Home Center: Education and Counseling, Affirmative Marketing Services, and Financial Assistance.

While working in the Boston Home Center, Mr. Watts successfully closed approximately 800 financial assistance grants in one year, successfully marketed numerous affordable homeownership developments throughout Boston neighborhoods, provided timely education and counseling to thousands of first-time homebuyers, provided financial assistance to approximately 4,000 first time homebuyers within his tenure, and is a team recipient of HUD'S Gunther Best Practices Award.

RESUMES

CHRISTOPHER A. SHEPHERD

Director of Business Development

BACKGROUND SUMMARY

Real Estate Professional with over 30 years of experience in real estate development and project management, construction lending, and loan work-out.

EXPERIENCE

- 2008-Present UHM PROPERTIES, LLC, Boston, MA
- Director of Business Development
Responsible for cultivating new business opportunities including acquisition of existing properties and portfolios, as well as new construction and renovation prospects. Also serves as a liaison between UHM and its clients.
- 2002-2008 LONG BAY MANAGEMENT COMPANY, Boston, MA
- Development Manager
Was responsible for locating, analyzing, and recommending the acquisition of commercial properties for the Company. Review the operating statements of currently owned commercial properties. Assess the status of properties for deferred maintenance or needed tenant improvements and develop a funding plan. Reposition properties to increase asset value. Refinance properties to improve cash flow and property operation. Project Manager for the development of the new executive office of the Company and office / retail complex.
- 2000-2002 QUINCY-GENEVA HOUSING CORP. / NEW VISION CDC, Boston, MA
- Project Manager
Located prospective properties for development, created proformas, arranged financing, selected Architect, General Contractor, and monitored construction for this affordable housing developer. Managed the development of properties through the City of Boston 1-4 family property program for first-time homeowners.
- 1995-2000 SHEPHERD BUILDERS, INC., Boston, MA
- General Manager
Was responsible for the management and operation of the privately held, General Contracting firm. More specifically, responsibilities included project cost estimating, site inspections, scheduling, financial operations, and marketing.
- 1994- 1997 BOSTON BANK OF COMMERCE, Boston, MA
- Consultant
Vice President
Advised management and monitored a portfolio of approximately 60 performing and non-performing loans. Loan sizes averaged between three hundred thousand and one million dollars.
- 1992-1993 SOCIETY FOR SAVINGS, Hartford, CT
(Acquisition of BankBoston, CT- July 1993)
- Vice President
Administered a real estate portfolio consisting of 30 adversely rated accounts within the Special Assets Division.
- 1990-1992 FLEET FINANCIAL GROUP
- Recoll Management, Hartford, CT
Bank of New England, Springfield, MA
Assistant Vice President
Restructured or liquidated a real estate portfolio of adversely classified and non-performing loans.

1985-1989 SHAWMUT BANK, Boston, MA
Commercial Mortgage Officer
Developed and managed a real estate loan portfolio with an aggregate value of thirty million.
Commercial Lending Training Program

EDUCATION

1980-1985 HOWARD UNIVERSITY, Washington, D.C.
Bachelor of Business Administration – Finance

JEFFREY CAPUTI, CPA
Chief Financial Officer

BACKGROUND SUMMARY

Licensed Certified Public Accountant with over 18 years of experience in accounting in both public and private industry (14 years of public accounting experience), specializing in real estate with a focus in the low-income housing tax credit, affordable and subsidized housing industries as well as significant experience servicing higher education institutions, not-for-profit organizations and closely held businesses.

EXPERIENCE

2016-Present UHM Properties, LLC, Boston, MA

Chief Financial Officer

Responsible for the finances of UHM and its affiliates; including reporting to investors, lenders and government agencies, cash and investment management, budgeting and forecasting, managing the day to day operations of the accounting department and development and implementation of UHM's business plan with other senior staff.

2000-2015 COHNREZNICK LLP (formerly Ercolini & Company LLP), Boston, MA

Manager

Conduct audits, reviews, compilations and related accounting and consulting services for a diverse client group including subsidized real estate partnerships, commercial real estate entities, state universities, construction companies, other non-profit entities and various small entities. Responsible for running multiple engagements simultaneously, training and supervising staff and including creating and teaching internal training programs. Responsible for developing strong business relationships with clients and peers.

1998-2000 THE COMMUNITY BUILDERS, Boston MA

Development & Acquisitions Accountant/Property Management Accountant

Prepared monthly requisitions of funds from sources for projects in development. Tracked budgets, sources and uses and prepared payments. Maintained internal financial statements for project. Prepared monthly internal reporting packages for a portfolio of approximately 30 properties.

EDUCATION

1993-1997 UNIVERSITY OF MASSACHUSETTS AMHERST, Amherst, MA
Bachelor of Arts – Political Science

2001 NORTHEASTERN UNIVERSITY, Boston, MA

Advanced Accounting Certificate

WINNIE LAMOUR
Chief Operating Officer

BACKGROUND SUMMARY

Dynamic, detail oriented professional with more than twenty years of experience in affordable subsidized housing and the low income housing tax credit industry. Play an active role in strengthening and assisting in the management, governance culture and practices that reflect the Company's core values, confidence, discipline and professionalism. Encourage maximum performance and dedication while assisting staff to meet a wide variety of challenges. Efficiently and effectively establish priorities for a broad range of responsibilities to consistently exceed prescribed goals.

EXPERIENCE

2003-Present UHM PROPERTIES, LLC, Boston, MA

Chief Operating Officer

Perform a variety of administrative duties including preparation of the renewal of HAP contracts, rent increase requests from HUD and utility analysis for the United Housing Management portfolio. Oversee the waiting list department; modify tenant selection plans for all properties consistent with HUD regulations. Prepare emergency transfer plans for each property; maintain and revise policies and procedures for the overall operation of the waiting list and related activities. Assist in coordinating compliance activities as it relates to other departments and the waiting list; develop/implement corrective action plans for resolution of problematic issues, and provide general guidance to staff on how to avoid or deal with similar situations in the future. Assist in improving the processes and policies in support of the Company's mission – better management reporting, business practices and organizational planning.

1993-2003 LONG BAY MANAGEMENT COMPANY, Boston, MA

Property Manager

Prepared rental agreements for prospective residents, collected deposits and rents, enforced terms of rental agreements, resolved residents' complaints, oversaw eviction proceedings if necessary. Established and maintained resident account information using HUD Manager, computed, adjusted and monitored rent payments and effectively reduced delinquency; scheduled maintenance and repairs, negotiated contracts with vendors, regularly inspected property to ensure good working order, quickly resolved emergency maintenance issues. Maintained accurate records of all transactions and submitted reports and submitted reports on a timely basis (i.e. delinquency reports, move-in/move-outs, etc.). Generated necessary legal actions, documents and processed in accordance with State and Company guidelines. Submitted accounts payable invoices for processing. Prepared and/or implemented procedures and systems within Company guidelines to ensure orderly, efficient workflow. Completed recertification and corresponding paperwork. Ensured proper response and handling of all emergencies with residents, buildings, etc. within Company guidelines to minimize liabilities (i.e. criminal activity in community, employee/resident injuries, fires etc; dealt with resident concerns and requests on a timely basis to ensure resident satisfaction with management. Administered action plans consistently, and on a timely basis with performance problems.

Paralegal

Drafted legal documents including 14 day notices, summary process for non-payment cases for all properties and filed with the court. Gathered information pertinent to the cases and prepared case summaries for the attorney to review; discussed strategies to move forward with the attorney. Met with the Housing Specialist and resident in order to come to an agreement. Drafted court agreements for the attorney to review prior to execution. Prepared responses to interrogatories for attorneys to review for trial, gathered and obtained affidavits and other formal statements that may be used as evidence in court. Assisted with trial preparation and managed trial exhibits. Attended Housing Court on a weekly basis for violation cases for all properties. Prepared work orders and distributed to the maintenance department to complete repairs. Scheduled inspections with the maintenance department and Housing Inspector prior to going to court. Gathered evidence to show to the court that the work has been completed.

EDUCATION

- 2017 NATIONAL ASSOCIATION OF HOUSING COOPERATIVE
Registered Cooperative Manager
- 2015 UNIVERSITY OF MASSACHUSETTS, Boston, MA
Bachelor of Science – Business Management
- 2012 SPECTRUM ENTERPRISES, INC.
Certified Credit Compliance Professional – C3P
- 1998 UNIVERSITY OF MASSACHUSETTS, Boston, MA
Certification in Paralegal Studies
- 1997 National Center of Housing Management
Certificate of Occupancy Specialist (COS); Certificate of Property Management (CPM)

Languages: Fluent in French and Haitian Creole; knowledge of Spanish and Sign Language.

COMMUNITY RELATIONS CONSULTING

WATERVILLE CONSULTING

About Waterville

Waterville Consulting was founded in 2002 to serve the growth industries that underpin the economy of New England. Fueled by the success of Waterville's technology clients, the firm successfully expanded into the real estate and foreign direct investment industries. Widely recognized for their ability to reach decision makers and deliver solutions, Waterville Consulting should be part of your company's success plan.



Sean Curran is the Principal of Waterville Consulting. His background includes twenty-five years of public affairs and government relations work.

With You Every Step Of The Way

Waterville Consulting works with investors and developers throughout their project timeline, from the initial filing to ground-breaking. Our team focuses on cultivating and building on the important relationships your project will have with local organizations and businesses, abutters, and public officials.

Community Relations

On your behalf, Waterville Consulting will ensure the community relations of your project are handled thoughtfully and respectfully. We believe that to be truly successful, it is important to engage and listen to all opinions - positive and critical.

Among Our Clients

accenture

 freedom
MASSACHUSETTS

lyft

 RELATED
BEAL

 TCR

 ca
technologies

IBM

MorphoTrust USA
A Safran Company

scape

 Cape Air
We're your wings.

INCAPSULATE

 PUMA

swætgreen

 TRANSON

MARKETING OUTREACH

OUR VILLAGE INITIATIVE (M/WBE)

COMMUNITY OUTREACH | BRANDING

SOFENOMENAL AGENCY GROUP (M/WBE)

THE SOFENOMENAL AGENCY GROUP

"THE CULTURES BRANDING AGENCY"

31 SAINT JAMES AVENUE, BOSTON MA 02116

To Whom It May Concern,

My name is Fena Fenelon of Boston, Massachusetts, a Brooklyn-born Haitian- American who is heavily influenced by hip hop culture, the artwork of both Jean-Michel Basquiat & Andy Warhol, and her Haitian/African Diaspora [heritage]. I am the Founder and CEO of The Sofenomenal Agency Group, a digital branding agency that helps companies authentically engage with diverse cultures through compelling storytelling and data analysis allowing them to not only improve the engagement with their pre-existing audience but leave a lasting impression on a new, growing audience.

My skills range from graphic designing, web design, videography, photography, producing, creative direction, teaching, and public speaking. I have had my work featured in Essence Magazine and Fashion Bomb Daily and has worked with organizations such as The Pendergrass Foundation and influencers/artists such as Omarion, Amanda Seales, and Whitney White of Naptural85, and more.

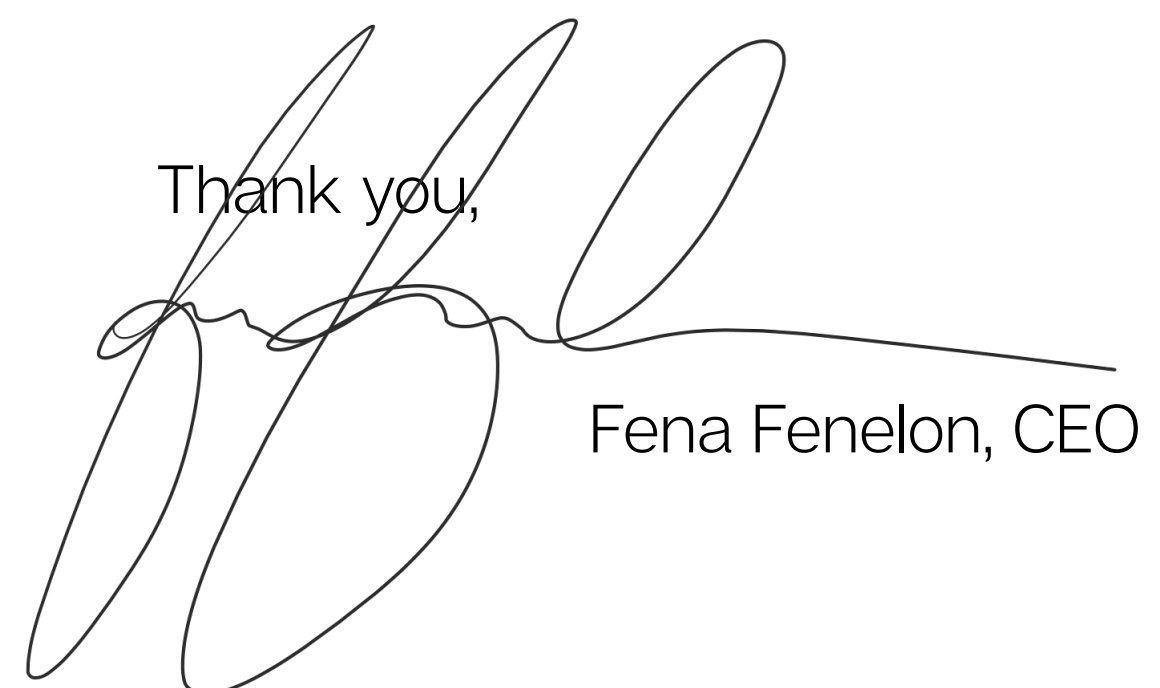
When discovering this new entrepreneurial venture, my doubts kept creeping up. I researched "graphic designers" and thought to myself, " There are enough graphic designers out there. There's no space for me" and the deeper I kept researching, the more I realized the majority of the designers didn't look like me. I was finding photos of white and Asian males and wondered about the representation and the lack thereof. After realizing the lack of representation, I literally had to look at myself in the mirror and I saw a Black women. A plus-sized black woman who loves nails, weaves and furs and then I thought about me growing up in a Haitian household where my options were limited to doctor, nurse, engineer or lawyer (which was my Major at Suffolk University, Boston) and how design was never an option. I also thought about how I had always been creative but suppressed my abilities because I "didn't pay the bills". Black women birth culture with our creativity and we must learn at a young age the importance of art and creativity and the impact it has. My "why" is the younger me and the other many young black girls who don't know that they bleed creativity and can make a living off go that. The "starving artist" should not exist. Art has been feeding culture for generations and I have made it my mission to have art or the curation of art to be the center of our culture push.

The purpose for me writing to you is to inform you on my interest in partnering with Oxbow Urban, and J. Garland Enterprises, and DVM Consulting with the The Pathways on Mission Hill project. Being that the project promotes Cultivation, Diversity, Growth, and Connection, it was an easy decision to want to join the team and partner once again with the Oxbow team with another first time home owning development. We've been able to see how we were able to impact the neighborhood of Roxbury through the Saige project and excited to see how we can replicate or even surpass the impact with Pathway.

As an entrepreneur, transitioning from graphic designer to now a branding strategist running the only black owned, women run branding agency in the northeast and as we build this agency, we aim for change and advancement and the ability to create affordable housing for artist and curating a space for community engagement is right up our ally and we plan on doing this while unapologetically being true to ourselves. Engaging the entrepreneurs in the area who like myself feel led to making a profession out of my/their artistry isn't a possibility.

Since the birth of Sofenomenal Agency Group, I have made it a point to offer my talents in attending high schools in and around Boston and offer creative workshops, and speaking to young black and brown boys and girls about the significance of creating and the importance of cultural representation.

Thank you,



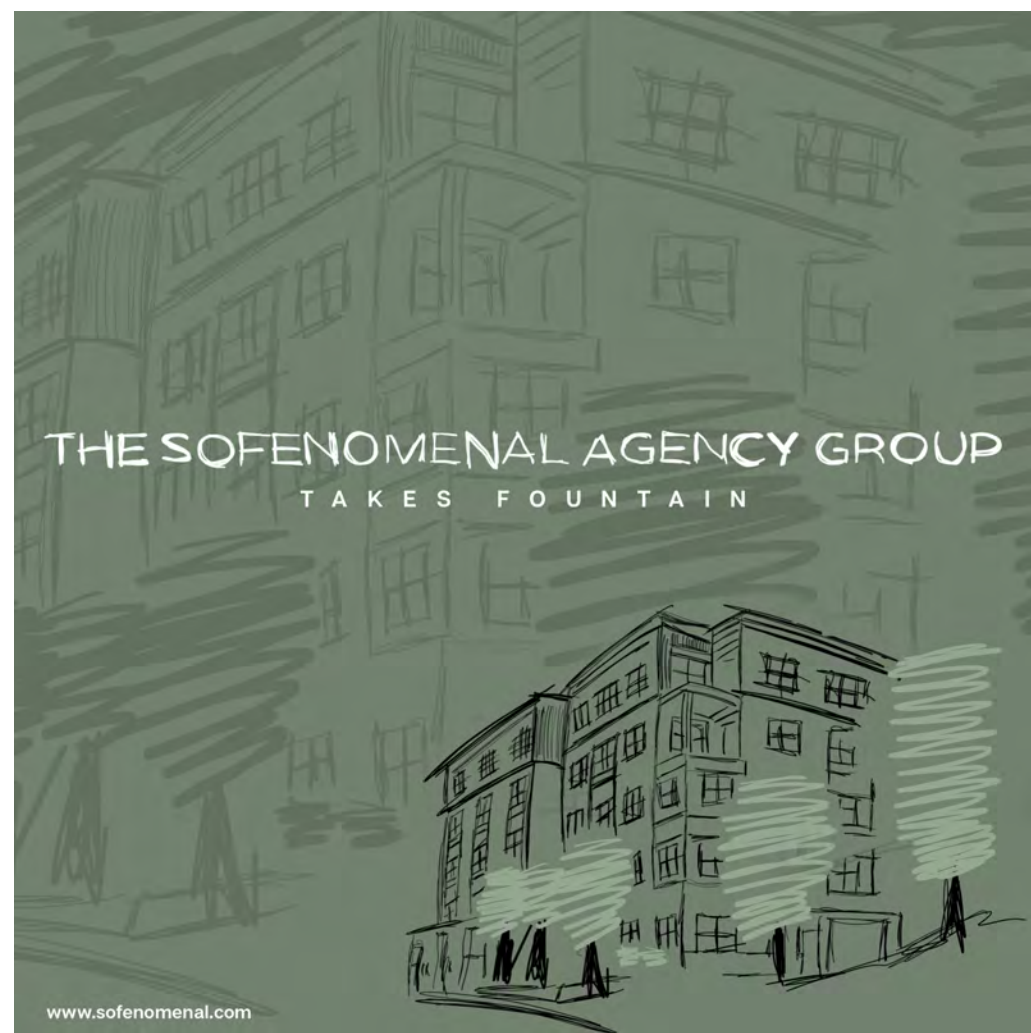
Fena Fenelon, CEO

THE SOFENOMENAL AGENCY GROUP
 "THE CULTURES BRANDING AGENCY"

OUR COLLABORATIONS AND FEATURES



OUR DEVELOPMENT EXPERIENCE



Earlier this year (roughly 6 months ago), @sofenomenalagencygroup joined the development world. We have partnered with development firm Oxbow Urban, Our Village Initiative and Thumbprint Reality to name, brand, market and establish an overall culture for a housing development coming to Fountain Street in the good old 02119.

In 2022, the agency joined with TLee Developments in brand partnership for their 1463 dot Ave location soon to be unveiled in spring/summer 2023

OUR SOCIAL IMPACT

PROTECTMA

Protect MA is an online marketplace that connects Massachusetts-based Black and Latinx designers, makers, and manufacturers of non-medical masks, cloth face covers, and other personal protective equipment (PPE) with potential buyers in the business and residential communities.

THE PARTNERSHIP

Protect MA is a collaborative effort to match Massachusetts-based designers, makers, and manufacturers that are producing non-medical masks and other personal protective equipment (PPE) with companies and individuals who want to purchase them. Our goal is to promote the purchase of local products by local companies from communities impacted hardest by COVID-19.

This is an initiative of the Black Economic Council of Massachusetts (BECMA) -- the Chamber of Commerce for Black businesses in the Commonwealth -- and is done so in collaboration with IncluDe Innovation and the Sofenomenal Agency Group.



The Sofenomenal Agency strongly believes that we obtain the ability to rebrand the world we want to see using design. With the world suffering from not only the Covid-19 pandemic but the what seems to be the never ending racial pandemic. This year we mourned the loss of Ahmaud Arbery, Breonna Taylor, George Floyd and sadly, many more

BOTH SUPPORT AND PROTESTING HAVE MANY FACES

The Sofenomenal Agency Group is looking to partner with print shops across the nation to print posters for protesters who march in your local cities for free. We are also looking for Graphic designers from all over to donate/submit their talents to be distributed to these numerous print shops to be printed to push for change and justice.

AFFIRMATIVE FAIR HOUSING MARKETING

DVM CONSULTING (M/WBE)



DVM CONSULTING
35 BATCHELDER STREET
ROXBURY, MA 02119

WWW.DVMCONSULT.COM

DVM
CONSULTING

AFFIRMATIVE MARKETING EXPERIENCE

DVM streamlines complex affirmative marketing processes so developers can focus on delivering successful projects.

Our longstanding, positive relationships with local government agencies contribute to smooth affirmative marketing plan approval, execution, and lease-up.

DVM takes a holistic view of the affordable housing ecosystem. We not only build homes—we ensure that tenants and homebuyers who are most in need can access the homes that we create.



WHAT MAKES US DIFFERENT?

"THE BOSTON COMMUNITY RAISED US. WE ARE INVESTED IN THE SUCCESS OF ITS LOW AND MODERATE INCOME FAMILIES NOW MORE THAN EVER."

-JACQUELINE NEWSTEAD



40 AFFORDABLE
HOMEOWNERSHIP
UNITS

MARKETING IN PROGRESS

SAIGE ON FOUNTAIN

ROXBURY, MA

DEVELOPER:
OXBOW URBAN LLC

OUR SCOPE:
BRANDING
GENERAL MARKETING
AFFIRMATIVE MARKETING
INCOME QUALIFICATIONS
UNIT SALES/CONVEYANCING
INTERIOR DESIGN COORDINATION
MODEL UNIT STAGING

KEY PARTNERS::
BOSTON FAIR HOUSING
COMMISSION
BOSTON HOME CENTER
OUR VILLAGE INITIATIVE
SOFENOMENAL AGENCY
STUDIO 24 GRAPHIX
SASHYA THIND & ELYSE AYOUNG.

191 TALBOT AVE APARTMENTS

DORCHESTER, MA

DEVELOPER:
TLEE DEVELOPMENT LLC

OUR SCOPE:
GENERAL MARKETING
AFFIRMATIVE MARKETING
INCOME QUALIFICATIONS
LEASING SIGNING
MODEL UNIT STAGING

KEY PARTNERS:
MASSHOUSING
BRIDGESTONE PROPERTIES
LUSTERITY DESIGN + EVENTS



14 WORKFORCE RENTAL UNITS
1,800SF OF COMMERCIAL SPACE

COMPLETED IN 2021

**56-58
BOWDOIN
AVE
APARTMENTS**
DORCHESTER, MA

DEVELOPER:
TLEE DEVELOPMENT LLC

OUR SCOPE:
GENERAL MARKETING
AFFIRMATIVE MARKETING
INCOME QUALIFICATIONS
LEASING SIGNING
ONGOING COMPLIANCE
WAITLIST MANAGEMENT

KEY PARTNERS:
BOSTON FAIR HOUSING COMMISSION
BRIDGESTONE PROPERTIES
LUSTERITY DESIGN + EVENTS



31 AFFORDABLE
RENTAL UNITS

COMPLETED IN 2022

**COMING
IN
2023:**

**HANCOCK
WRENTHAM
APARTMENTS**
DORCHESTER, MA

**DOT
CROSSING
APARTMENTS**
DORCHESTER, MA

Our Team



Sophia Burks

Director of Affirmative Marketing



Jaqueline Newstead

Operations Manager



Natalie Pereira

Marketing and Communications
Coordinator



Dariela Villón-Maga

President & Founder

"HOUSING STABILITY IS THE FOUNDATION FOR PROSPERITY"



NOVEMBER • 2022

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DIVERSITY + INCLUSION PLAN

DIVERSITY + INCLUSION PLAN

ECONOMIC OPPORTUNITIES

In order to fully realize our Vision, we are committed to actively fostering diversity, inclusion, and cultural competency throughout our development, and operational efforts.

Going beyond statistics, our team includes women and people of color at the leadership levels, providing new opportunities for local people and supporting small businesses and entrepreneurs. Our development team aims to incorporate W//MBE businesses into every single aspect of the development process and plan. M//WBE consultants will receive preference in the selection/hiring process. The project's eventual general contractor and sub-contractors will be strategically selected to prioritize local people of color with a focus on residents of the Boston community.

Our development team's mission is to provide a wide range of ownership and rental opportunities for residents of diverse backgrounds. Taking into account the current demographics of the City of Boston and its surrounding communities, we have set the following participation goals for this project. These goals are important benchmarks for gauging the success of our affirmative action efforts.

In addition to our aim to provide participation opportunities in the construction phase, we will also seek to identify opportunities for MBEs, WBEs and VBEs to participate in our post-construction (non-operations) activities such as legal, property management, and marketing services.

Goal 1: Maximize the Representation of W//MBE businesses, Consultants, and Individuals on the Development Team

- JGE Development (local minority-owned business) and DVM Consulting (local woman- and minority-owned business) make up a majority of the development team.
- Currently engaging J. Garland Enterprises (local minority-owned business) for architectural services.
- Currently engaging Ground Inc. (local woman-owned business) for landscape architectural services.
- Currently engaging LJV Development (local minority-owned business) with regard to construction services for the commercial space.

- Currently engaging Nitsch Engineering (local woman-owned engineering business) for civil engineering and survey.
- Currently engaging Hannah Kilson of Nolan Sheehan Patten LLP as legal counsel (Hannah Kilson is a WM-identifying Partner at Nolan Sheehan Patten).



- Currently engaging Sashya Thind of Warm Minimalism (woman- and minority-owned business) to lead our interior design efforts.
- DVM Consulting (local woman- and minority-owned business) leads the affirmative fair housing marketing activities.
- Will engage Sofenomenal Branding Agency (minority/woman owned business) for branding and marketing content creation.

Goal 2: Increase the Number of People from Diverse and Underserved Populations on our Construction Site

- Develop outreach timetable for recommendations on general and sub-contractors.
- Outreach to the Massachusetts Supplier Diversity Office (SDO) and the Greater New England Supplier Development Council to alert their member subcontractors to the specific opportunities.

DIVERSITY + INCLUSION PLAN

- Outreach to the Black Economic Council of Massachusetts to alert their members to specific opportunities.
- Outreach to the Massachusetts Minority Contractors Association.
- Outreach to the Boston of Color Coalition.
- Outreach to the Office of Veteran Services.
- Outreach to the National Association of Women in Construction, Boston Chapter.
- Develop a jobs referral program for community residents, stakeholders, and professionals to make recommendations on contractors and sub-contractors.



Goal 3: Establish Clear M/W/VBE Goals with General Contractor and Determine Next steps for Accomplishing Goals

- At least 51% of total work hours of journey people and 51% of the total work hours for apprentices in each trade must go to Boston residents.
- At least 40 % of the total work hours of journey people and 40% of the total work hours of apprentices in each trade must go to people of color.
- At least 12 % of the total work hours of journey people and 12% of the total work hours of apprentices in each trade must go to women.

- As part of the requisition process, subcontractors will be required to provide proof of payment to lower tier M/W/VBE subcontractors.
- The project team will provide a monthly report on initial commitments, current contracts, and payments to date to verify that the subcontractors follow through with contractual commitments.

Goal 4: Ensure Worker Rights are Protected

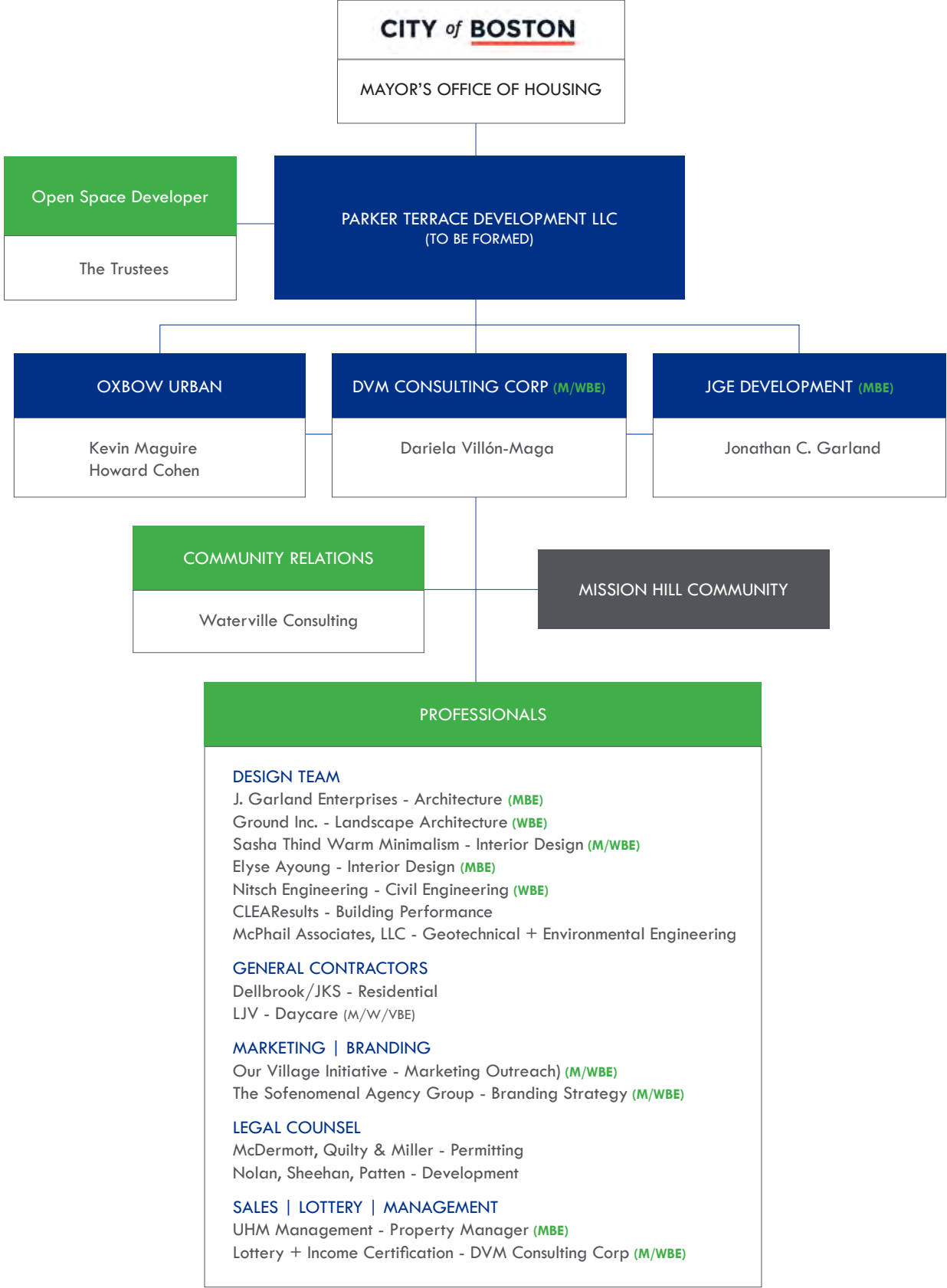
- Prior to the start of a subcontractor's work on site, a meeting is held where the workforce goals and previous subcontractor performance will be discussed. If during the bid process it was noted that the awarded subcontractor had a history of noncompliance, the subcontractor will have submitted a written plan for working towards goals on this project. This plan will be revisited and updated if needed at this meeting.
- Any subcontractor who is not reporting in a timely fashion or whose numbers are falling short of the goals will be required to attend a corrective action meeting with the Project Team. Non-compliant subcontractors will submit a written corrective action plan with steps they will take to improve their percentages moving forward.

Goal 5: Increase Post Construction Representation through Active Research of Qualified, Viable Options

- Currently engaging Our Village Initiative (minority-owned business) for buyer engagement and sales facilitation.
- Currently engaging UHM (local minority-owned business) with regard to property management of association post sales.
- Looking to engage Law Offices of Israel Collazo (minority-owned law firm) for role of conveyance attorney.

It is our development team's commitment to diversity across platforms that have garnered the support by neighbors, abutters, and community residents. We will strive to not only meet but exceed goals set forth by the City of Boston.

DIVERSITY + INCLUSION PLAN



DELLBROOK/JKS DEI PROGRAM + INITIATIVES

The Backstory

In 2018, Dellbrook|JKS formed an internal Diversity, Equity, and Inclusion (DEI) Committee comprised of several Executives and Sr. level managers. The committee in 2019 made the decision to formalize the position for DEI, and later that year hired Sheryce Hearn as Director of Diversity, Equity, and Inclusion. The formation of the DEI department allowed Dellbrook to have a full focus on creating a diverse and inclusive culture at the company internally as well as externally on all our job sites. Our Diversity department provides both our staff, M/WBE trade partners, and our local resident, people of color and women trade workers with support and valuable resources to grow and develop within the industry.

We strategically created goals for DEI at Dellbrook|JKS as it relates to internal and external company awareness, hiring, contracting, education, outreach and engagement of minority and women owned businesses and trade workers. We have created several initiatives, programs, and practices to ensure we get the best outcomes from those goals.

At Dellbrook|JKS we are committed to a Culture of Care in our offices and on our job sites. We are committed to building a culture that is safe, welcoming and includes everyone. We are committed to the Culture of Care principles which are:

>> Commit

to hire and pay based on skill and experience, regardless of ability, age, ethnicity, gender identity nationality, race religion, sex, or sexual orientation.

>> Attract

prospective employees, suppliers, and subcontractors by creating inclusive workplaces that are free from harassment, hazing and bullying.

>> Retain

high-performing employees by identifying and removing barriers to advancement.

>> Empower

every individual to promote a culture of diversity and inclusion

Dellbrook|JKS DEI Programs & Initiatives



One of our top priorities at Dellbrook|JKS is to continually increase diversity amongst our office and field staff. The construction industry does not currently have a surplus of diverse candidates as only 3% is made up of minorities. With the demographics in the industry being such a challenge our approach to increasing diversity is one of organic training, development, growth, and career advancement within the company. Like many companies, we looked at several strategies in the past to recruit a more diverse pool of candidates into our organization. We knew to be successful, we had to tie these initiatives to our core values. We believe that the best way to diversify the construction industries future

workforce will be achieved by recruiting and retaining young women and people of color to start their journey with us. The Construction Immersion Program (CIP) is a two-year rotational program that allows individuals who are new to, but passionate about, construction management to gain experience and a thorough understanding of what it takes to be successful in this industry. Through hands-on rotations in Estimating, Project Management, and Field Supervision, we can provide them with valuable experience in how to run a wide variety of projects. The Field Engineer Program is a one-year structured employee development program designed to promote and accelerate the development of field



engineers through a wide range of assignments across all phases of a projects field operations. Trainees will be exposed to a diverse training and onboarding process and be immersed in all aspects of construction. They will be evaluated throughout their assignments and be paired with a mentor. The successful candidate will be exposed to a tremendous amount of learning, hands-on experience and real-life construction management experience that will benefit them as they continue their work career with Dellbrook|JKS.

At Dellbrook|JKS, the population of women makes up 21% of the company with a mix of office and field staff. We started the Dellbrook Women's Collaborative (DWC) an employee resource group (ERG), which supports that population of women and some men who have also joined the group as allies. The Dellbrook Women's Collaborative (DWC) cultivates a supportive and inclusive environment that encourages women to develop their skills through engaging discussions, cross-industry partnerships, and exciting mentorships. The DWC host monthly meeting, provides educational resources, conference outings, events, and activities throughout the year. We host an annual awards celebration to honor the women/members who really stood



out over the year for their participation, volunteerism, outstanding personal and professional growth, and development. As part of the DWC membership, we offer everyone the opportunity to be a member the National Association of Women in Construction (NAWIC). NAWIC offers several resources, educational opportunities, networking events and more to its members which we see as an added benefit for the DWC members. Our community outreach and engagement with diverse trade partners and trade workers also remains a top

priority for Dellbrook JKS. We have created initiatives, programs, and events to engage the local, minority and women owned trade firms as well as local resident, people of color and women trade workers. At Dellbrook JKS we want to get to know our trade partners and develop lasting working relationships that allow us to provide obtainable and tangible contract opportunities. We are genuine in our approach to providing opportunities and expanding diversity within our subcontractor base.



Corporate Citizenship & Philanthropy



2022 Honoree, Mike Fish
The Children's Advocacy Center

PHILANTHROPY

At Dellbrook |JKS we are committed to leaving our mark where we work and where we live through meaningful contributions to the community and a personal commitment to corporate and personal social responsibility.

For many years we've been included among the Boston Business Journals **Largest Corporate Charitable Contributors**. The BBJ recognizes companies that have demonstrated innovation and developed best practices in specific partnerships with nonprofits at any level of engagement, including volunteer work, cash donations, in-kind donations and board participation.

In 2022 we were again selected to the Top Charitable Organizations and are ranked #2 within construction management firms in their top 60 charitable contributors. We are committed to being an involved and stable partner both on and off site. We routinely provide our time, skills and support to further our clients mission with the same passion and focus we bring to building our projects. That passion for giving back is exemplified by Dellbrook |JKS President and CEO, Michael Fish and his contributions to the strength, resiliency and health of the communities in which we build.

The Children's Advocacy Center

Most recently, Mike was named a 2022 Honoree of the Children's Advocacy Center of Suffolk County (CAC) at its Annual Step Up & Speak Out Benefit. This annual recognition goes to individuals who have demonstrated a unique level of support for the CAC's mission in responding to children and families who are victims of violence, exploitation, and abuse. In addition to Mike's dedication as a CAC Board Member and donor, Dellbrook |JKS' sponsorship of key CAC events has fostered a lasting partnership between the organization and our firm.

Mike has also been awarded the **You Matter Award** for his commitment to building the new Elizabeth Stone House in Roxbury, creating a haven for thousands of domestic violence survivors. The Elizabeth Stone House partners with adult and child survivors of domestic violence and related trauma - mental illness, housing instability and substance misuse to achieve safety, stability, and overall wellbeing.

NeighborWorks® also recognized the community contributions of Dellbrook |JKS and Mike specifically, when they honored him with the **Good Neighbor Award**. The Board of Directors chose Mike and Dellbrook |JKS as recipient because of our unwavering support of their mission to bring more affordable housing to our area and help families achieve the dream of homeownership.

In addition to our work with non profits to address and prevent housing instability, Dellbrook |JKS has been recognized as one of the top philanthropic companies in the region. In 2019 we were honored to receive the **Community Champion Award from Gosnold Cape Cod**. Gosnold, a leader in the prevention, treatment, and recovery of men and women affected by mental health and substance use disorders, presented Dellbrook |JKS with the Community Champion Award in recognition of our strong support for the Gosnold mission and support of the organization's valuable but unfunded initiatives.

CIVIC ENGAGEMENT

Whether it's using our craft and skills to build housing with Habitat for Humanity, endowing scholarships for local high school students, or volunteering for a community service project, we support our nonprofit partners in their tireless efforts to positively impact the health, safety and education of those in need.

COMMUNITY SUPPORT

Each year our employees dedicate their energies, skill and hundreds of hours to support local and statewide charitable organizations in their missions.

President and CEO Mike Fish is a firm believer that construction is the ultimate team sport. Each year Team Dellbrook |JKS competes in the Corporate Cup for **Boston Children's Hospital**, raising money (and our heart rates!) for their Every Child fund. We support the **Greater Boston YMCA** in their Huntington Games which raises funds for youths, teens and families in our community, as well as **Save the Harbor/ Save the Bay**, the region's leading voice for clean water and continued public investment in Boston Harbor.



Construction Immersion Program (CIP)

Our Construction Immersion Program is a two-year rotational program for young people just beginning their journey and careers in Construction Management.

CIPs develop technical and leadership skills through a wide range of assignments across all phases of a project from preconstruction in estimating through construction in project management and field operations.

During the program, the CIPs rotate through hands-on assignments and have the ability to customize the program

with any additional areas they have an interest in (business development, mechanical coordination accounting, etc.). We understand that those just starting their journey should test out every role in construction to find their passion and in return, develop a well-rounded approach to construction where they can grow, become leaders and then serve as mentors to the next generation of CIPs at Dellbrook |JKS.



CATHOLIC MEMORIAL HIGH SCHOOL CORPORATE SCHOLARS

The Dellbrook |JKS Corporate Scholars Program is a partnership between Dellbrook |JKS and Catholic Memorial High School that provides not only financial support, but creates meaningful relationships and leadership development opportunities between students and Dellbrook |JKS employees.

The \$25,000 scholarship is awarded annually to two students who have demonstrated extraordinary leadership skills. In addition to the scholarship funds, the CM Corporate Scholars are connected to a Dellbrook |JKS mentor, where they receive hands on learning opportunities on how to develop strong leadership skills, and build strong relationships through various engagement opportunities such as:

- Welcome Reception at DBJKS Corporate Office, with students, mentors, parents, and Dellbrook |JKS leadership
- Monthly meetings/opportunities between Dellbrook Scholars and their mentor
- Scholars and mentors dinners
- Participating in volunteering events with Dellbrook |JKS staff
- Professional Development workshops
- Jobsite visits

In 2020, our CEO Mike Fish, and COO Ed Sople recieved the Silver Shield award in which honors a member of the Catholic Memorial community who exemplifies the seven knightly virtues of courage, justice, mercy, generosity, faith, nobility, and hope.

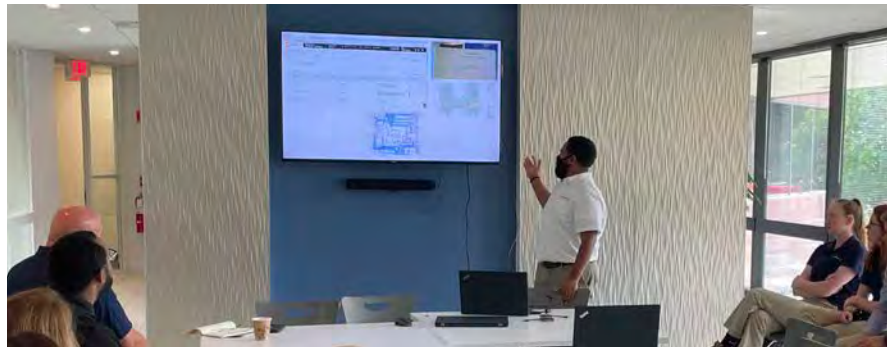


**BENJAMIN FRANKLIN
CUMMINGS INSTITUTE
OF TECHNOLOGY**

In 2020, Dellbrook|JKS established a partnership with the Benjamin Franklin Cummings Institute of Technology (BFCIT) to help the college as they build a talented, well-trained workforce well prepared for success as they complete their program and embark on their career. The partnership focuses on cooperative learning and provides internships for students in their Construction Management, HVAC and Electrical programs. Students enrolled in the City's non-profit technical college are given opportunities to grow their already strong technical foundation through practical on-the-job experience.

In addition to hands-on learning provided by Dellbrook|JKS staff and our trade partners, Dellbrook|JKS has agreed to provide annual scholarships and emergency fund grants to the college so they can continue to make a vital difference in the lives of urban youth in the greater Boston area. Dellbrook|JKS also works with BFCIT to present career success seminars; resumes and job application workshops; job site tours, mentoring opportunities and professional development classes throughout the year.

In 2022 Dellbrook|JKS and Onnew Way Development formed joint venture for BFCIT's new campus. This project will consist of 68,000 s/f, academic facility, including 23 labs, and other learning environments fit for electrical engineering, computer technology, machining, advanced manufacturing, construction management, practical electricity, and HVAC programs. Enrolled students will have access to an engineering technology robotics lab, optical shop, live automotive garage, outdoor learning lab, and more.



M/WBE and Workforce Outreach



Workforce Outreach And Coordination Program

Dellbrook|JKS's commitment to equity and diversity is rooted in more than compliance. Every project we consider, our M/WBE trade partners are included from the earliest stages. On projects with specific requirements, we approach those M/WBE, BRJP, Section 3 and CDC goals in a comprehensive and systematic manner. **Led by our Director of Diversity, Equity and Inclusion, Sheryce Hearn**, our goal and the goal of our trade partners is to make every effective effort to utilize certified, minority and women business enterprises and be held accountable for outcomes that will meet the objectives of the contracting plan.

We create a customized plan to meet the specific needs of the project as outlined in the corresponding RFQs or RFPs and related documents. Through a system of consistent communication, dedicated community outreach and our Partner Accelerator program, we

strive to have all goals be met and contractors stay in compliance for the duration of the project.

Dellbrook|JKS will conduct M/WBE Workforce Outreach on the project by:

- Developing, implementing, and monitoring a project and **neighborhood specific community engagement plan**
- **Conducting outreach at the subcontract level** and work with the Subcontractors to conduct outreach to lower-tier subcontractors
- Identification and **on-going solicitation** of minority and women owned business enterprises as bid packages are prepared
- **Removing barriers and providing equal opportunity to participate** in meaningful construction jobs with trade partners, community partners and other applicable entities
- Collaborating early with the project team to provide viable subcontracting opportunities that maximize M/WBE participation and help **get the community engaged with the project.**

- Holding educational workshops through our **Partner Accelerator Program** and other community engagement initiatives to let small and disadvantaged businesses know about new opportunities as a trade partner and support and grow those trade partners already involved
- Monitor the project during construction to **ensure goals are being met**

%

Minority and Women Owned Enterprise Engagement

In the past 5 Years
Dellbrook|JKS has awarded

\$87M

in 271 contracts and opportunities to our
Minority and Women owned
trading partners

Dellbrook | JKS Partner Accelerator Program



We're committed to building strong relationships with each of our trade partners and we understand the importance of engaging with Minority Business Enterprise (MBE), Women's Business Enterprise (WBE), Small Business (SB), Disadvantaged Business Enterprise (DBE) Veteran/Service Disabled Veteran Owned Small Business (SDVOSB) and lesbian, gay, bisexual and transgender (LGBT) on every project we build.

Our outreach programs continually work to educate, promote, track and follow up on subcontractor and workforce participation.

In 2018 we established our Partner Accelerator Program to mentor, support and strengthen our trade partners understanding and proficiency in Construction Safety Practices, Accounting and Finance procedures, and Project Management Technology programs.

Our Partner Accelerator Team holds monthly trainings on our job sites (either in person or virtually) focusing on the Procure, project accounting and Safety and Risk Management. Our team consists of Dellbrook | JKS Project Managers, Project Accountants, Construction Technology Specialists and our Safety Managers, the team provides hands on learning in:

PROCORE

- Plans & Specifications
- Submittals
- RFIs
- Workflow/Punchlist
- Project Documentation

PROJECT ACCOUNTING

- AIA G702 & 703
- Lien Waivers
- Change Orders

PROJECT SAFETY AND RISK MANAGEMENT

- OSHA Standards
- Safety Inspections
- Dellbrook | JKS Prequalification Process



Since 2018
The Dellbrook | JKS
Partner Accelerator
has provided nearly
**150 LEARNING
HOURS**
to our Minority and
Women Owned
trading partners and
their staff.



M/WBE Hiring

- We ask that prior to contract award, MBE, and WBE subcontractors submit a Letter of Intent, which includes a copy of their most recent certification letter to verify the MBE and WBE status of the firm.
- Dellbrook|JKS teams integrate their buyout reports by reflecting actual versus estimated participation goals. The total costs and percentages are calculated against the total contract amount, and as project buyout proceeds, the schedule of participation is updated so that the client and project team are up to date on the progress of the MBE and WBE participation.
- Our success in meeting and exceeding the MBE and WBE participation goals is attributed to our project managements' continued emphasis on reviewing the MBE and WBE participation goals throughout the project buyout phase.
- For certain projects we submit, we run a monthly utilization report that lists all MBE and WBE subcontractors. This allows us to track the participation percentages, as the prime contract and subcontract amounts change over the course of the project. This eliminates any surprises that can come up over the course of the job, and ensures that participation is maintained throughout the project.

M/WBE Tradepartners

The involvement of Minority and Women owned businesses on a project begins during the estimating phase. We are proactive in making sure to solicit as many qualified firms as possible.

Our current subcontractor database includes a list of subs who are approved as a Minority or Women owned business by the Commonwealth of Massachusetts and have completed our prequalification process. Based upon the scope of work for the project, Dellbrook|JKS develops a subcontractor list that includes Minority and Women owned subcontractors and supplier in conjunction with the directories of the state office of M/WBE's Business Assistance (SOMBWA) to seek qualified bidders for all contracts

Outreach efforts to solicit M/WBE and local firms will utilize local media, electronic and print, to market and promote contract business opportunities as well as traditional methods including telephone calls, We will identify centers of influence within the project area to ensure that subcontracting and supply opportunities are known to the business community.

This focus and priority of Minority and Women owned businesses continues when the project is turned over to the operations team. We include any project specific requirements within our Subcontractor Procurement log and track actual versus required Minority and Women owned businesses participation goals.

The total costs and percentages are calculated against the Guaranteed Maximum Price (GMP) or Stipulated Sum, and as project buyout proceeds, we update the schedule of participation so that the client and project team are up to date on the progress we are making towards the participation goals or requirements.



Elizabeth Stone House Groundbreaking

PROJECT NAME & LOCATION	MBE Contracting		WBE Contracting		People of Color Worker Hours		Women Worker Hours		Boston Residents Worker Hours		Section 3 Resident New Hires		Section 3	
	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL
2Life - Weinberg House Brighton MA	BFE	6%	BFE	0%	25%	60%	10%	5%	50%	28%	N/A	N/A	N/A	N/A
2Life - Brown Family House Brighton, MA	25%	12%	10%	7%	20%	51%	10%	4%	N/A	N/A	30%	0%	N/A	N/A
2Life - JJ Caroll Brighton, MA <i>Under Construction</i>	30%	48.25%	10%	2.42%	51%	32%	12%	10%	51%	19%	30%	---	10%	12.39%
2Life - Coleman House Newton, MA <i>Under Construction</i>	25%	TBD	10%	TBD	20%	TBD	10%	TBD	N/A	N/A	30%	61%	10%	TBD
Addison Street East Boston, MA	N/A	N/A	N/A	N/A	40%	49%	12%	2%	51%	11%	N/A	N/A	N/A	N/A
Alma del Mar II New Bedford, MA	10.4% Combined	3% Combined	10.4% Combined	3% Combined	15.3%	28.07%	6.9%	0.18%	N/A	N/A	30%	---	10%	---
5-15 Case Street Southbridge, MA <i>Under Construction</i>	BFE	9.06%	BFE	0%	30%	57%	30%	4%	N/A	N/A	25%	28.06%	BFE	---
Elizabeth Stone House Roxbury, MA	39%	34%	10%	<1%	40%	70%	12%	4%	51%	24%	25%	--	10%	<1%
Glenbrook Way Medford, MA	N/A	N/A	N/A	N/A	20%	41.%	20%	1%	N/A	N/A	30%	27.8%	10%	0%

PROJECT NAME & LOCATION	MBE Contracting		WBE Contracting		People of Color Worker Hours		Women Worker Hours		Boston Residents Worker Hours		Section 3 Resident New Hires		Section 3	
	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL
Madison Park Melnea Cass Apts. Roxbury, MA	22.5%	20%	9%	2%	51%	50%	15%	3%	51%	25%	N/A	N/A	N/A	N/A
Madison Park Smith House Roxbury, MA	30%	49%	10%	3%	40%	77%	10%	8%	51%	46%	N/A	N/A	N/A	37%
Madison Park Haynes House Roxbury, MA	35%	28%	10%	4%	51%	73%	12%	8%	51%	39%	N/A	N/A	N/A	N/A
Madison Park IV Roxbury, MA	N/A	N/A	N/A	N/A	25%	81%	10%	2%	50%	56%	N/A	N/A	N/A	N/A
POAH Mattapan Development Mattapan, MA	30%	38.6%	10%	5.8%	40%	60.9%	12%	6%	51%	37.9%	30%	TBD	10%	11.57%
Oak Bluffs Town Hall Oak Bluffs, MA	10% Combined with WBE	3%	10% Combined with MBE	4%	15.3%	25.35%	---	14.96%	N/A	N/A	N/A	N/A	N/A	N/A
Oak Row Apartments W. Roxbury, MA	25%	55.6%	10%	1.1%	N/A	N/A	N/A	N/A	50%	25.7%	N/A	N/A	N/A	N/A
Oxford School Residences Fairhaven, MA	Combined with WBE 20%	10.56%	Combined with MBE 20%	,004%	N/A	32.48%	N/A	1.90%	N/A	N/A	30%	2.21%	10%	0%
Mass Maritime Dormitories Bourne, MA <i>Under Construction</i>	10.4% Combined with WBE	12.6%	10.4% Combined with MBE	6.23%	15.3%	23.70%	6.9%	2.37%	N/A	N/A	N/A	N/A	N/A	N/A

PROJECT NAME & LOCATION	MBE Contracting		WBE Contracting		People of Color Worker Hours		Women Worker Hours		Boston Residents Worker Hours		Section 3 Resident New Hires		Section 3	
	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL	GOAL	ACTUAL
Taverner Place Acton, MA <i>Under Construction</i>	10%	8%	10%	0%	N/A	N/A	N/A	N/A	N/A	N/A	30%	---	10%	---
Terrapin Ridge Sandwich, MA	10.4% Combined with WBE	5.6% Combined	10.4% Combined with MBE	5.6% Combined	20%	31.3%	20%	N/A	N/A	N/A	30%	5.6%	10%	---
VietAid Dorchester, MA	40%	43.25%	15%	7.5%	40%	73.5%	12%	11.6%	51%	36.9%	30%	10%	10%	5%
191 & 201 Washington Street Brighton, MA <i>Under Construction</i>	N/A	N/A	N/A	N/A	40%	66%	12%	3%	51%	22%	N/A	N/A	N/A	N/A
1550 Soldier's Field Road Boston, MA <i>Under Construction</i>	N/A	43.25%	N/A	N/A	51%	60%	12%	7%	51%	17%	N/A	N/A	N/A	N/A
Oxbow / Fountain Hill Condominiums <i>Roxbury, MA</i>	30%	22.4%	10%	14%	40%	63.4%	12%	1.3%	51%	15.3%	N/A	N/A	N/A	N/A

LETTERS OF CERTIFICATION



THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
SUPPLIER DIVERSITY OFFICE

One Ashburton Place, Suite 1017
Boston, MA 02108-1552
Charles D. Baker
Governor
Karyn E. Polito
Lieutenant Governor
Michael J. Heffernan
Secretary
William M. McAvoy
Executive Director

November 3, 2022

Mrs. Dariela Villon-Maga
DVM Consulting Corp
35 Batchelder Street
Roxbury, MA 02119

Dear Mrs. Villon-Maga:

Congratulations! Your firm has been certified as a minority and woman business enterprise (MBE and WBE) with the Supplier Diversity Office ('SDO') under the business description of PROVIDES REAL ESTATE DEVELOPMENT, MARKETING, AND CONSULTING SERVICES. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification.** Your designation as a MBE and WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is October 27, 2025. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) year certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at webmaster.sdo@mass.gov.

Sincerely,

A handwritten signature in blue ink that reads "William M. McAvoy". The signature is written in a cursive style and is placed on a light yellow rectangular background.

William M. McAvoy
Executive Director



City of Boston
Mayor Kim Janey
Economic Development

August 25, 2021

Ms. Dariela Villon-Maga
DVM Consulting, LLC
228 Almont Street
Mattapan, MA 02126

Dear Ms. Villon-Maga:

The Equity and Inclusion Unit of the City of Boston is pleased to inform you that, as of August 25, 2021, **DVM Consulting, LLC** has been certified as a **Minority Woman Business Enterprise** in the category(ies) of **Real Estate Development Consulting; Housing Development**. Small and local businesses are the lifeblood of Boston's vibrant economy -- we are delighted for this opportunity to partner with you.

DVM Consulting, LLC will be listed in the City of Boston's SLBE/MWBE Directory, which is available on-line at <https://data.boston.gov/dataset/certified-business-directory>. It is updated regularly. The Directory is used by general contractors, City departments, and various organizations, which are interested in utilizing small, small local, minority owned and woman owned vendors.

We also encourage you to utilize the City of Boston's On-Line Supplier Portal www.cityofboston.gov/procurement. On the Supplier Portal you can apply for a City of Boston vendor I.D. number, and also sign up for automatic email notifications of future bid opportunities in any category(ies) of your choice. For detailed instructions on how to apply, please email Paul McCormack, the Vendor Support Specialist for the City of Boston, Paul.McCormack@boston.gov.

DVM Consulting, LLC will be sent notification from the Equity and Inclusion Office at least once every three years requesting that you provide an information update to the Office. You will be required to submit the company's most recent **Tax Returns (all schedules, including Form 1120 or 1120S for corporations; Form 1040 and Schedule C for sole proprietorships; and Form 1065 for partnerships), most current financial statements, and a notarized letter stating whether there have been any changes in the company's legal structure, ownership or control.**

Congratulations on your successful certification with the City of Boston. We look forward to working with you, and please let me know if I can assist you in any way possible.

Sincerely,

Stacey R. Williams

Stacey R. Williams
Certification Manager
Stacey.Williams@boston.gov, (617)635-3720



City of Boston
Mayor Kim Janey
Economic Development

Note: The continuation of your company's certification is contingent upon its compliance with the City of Boston's Certification Regulations. Pursuant to the Certification Regulations, this Office reserves the right to periodically monitor, review, and investigate any of its certified companies. Within thirty days of any change in the information contained in the original application, you must notify the Office of such change, and if such change is a material change which warrants further review, the Equity and Inclusion Office will notify you. If you would like to expand the scope of services your company is certified to perform, please submit a written request along with a list of work performed in that area of service and business references.



Greater New England
Minority Supplier
Development Council

July 13, 2022

J. Garland Enterprises, LLC.
One Marina Park Drive
Suite 1410
Boston, MA. 02210

Dear Johnathan & Kiee Garland,

I am pleased to inform you that the Greater New England Minority Supplier Development Council (GNEMSDC) has approved your recertification as a Minority Business Enterprise (MBE) and enclosed your certificate, which is valid through May 31, 2023.

We look forward to continuing to serve you as the premier business organization that links private sector corporations with minority businesses.

Sincerely,

Peter F. Hurst, Jr.
President & CEO
Greater New England Minority Supplier Development Council

THIS CERTIFIES THAT

J. Garland Enterprises, LLC



* Nationally certified by the: **GREATER NEW ENGLAND MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s): 541310; 531390

* Description of their product/services as defined by the North American Industry Classification System (NAICS)

07/01/2022

Issued Date

GN09645

Certificate Number

A handwritten signature in black ink, appearing to read "Ying McGuire".

Ying McGuire
NMSDC CEO and President

A handwritten signature in black ink, appearing to read "Peter F. Hurst, Jr.".

Peter F. Hurst, Jr., President and CEO

05/31/2023

Expiration Date

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

Certify, Develop, Connect, Advocate.

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®



OPERATIONAL SERVICES DIVISION
SUPPLIER DIVERSITY OFFICE

THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION

One Ashburton Place, Suite 1017
Boston, MA 02108-1552
Charles D. Baker
Governor
Karyn E. Polito
Lieutenant Governor
Michael J. Heffernan
Secretary
Gary J. Lambert
Assistant Secretary for Operational Services Division

February 5, 2020

Ms. Shauna Gillies-Smith
Ground, Inc.
285 Washington Street, Unit G
Somerville, MA 02143-2902

Dear Ms. Gillies-Smith:

Congratulations! Your firm has been renewed as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of **A FULL SERVICE LANDSCAPE ARCHITECTURE FIRM SPECIALIZING IN LANDSCAPE DESIGN CONSULTING, PLANNING, AND URBAN DESIGN SERVICES AND LARGE SCALE GREEN ROOFS**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification.** Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is December 16, 2022. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wso@state.ma.us.

Sincerely,

A handwritten signature in blue ink that reads "William M. McAvoy". The signature is written in a cursive style and is set against a light yellow rectangular background.

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

SUPPLEMENTAL INFORMATION

COMMUNITY ENGAGEMENT

Our combined team is well-versed in Community Engagement and will develop an approach tailored to the proposed project that builds trust among the Mission Hill community members, gets them engaged, and provides a way for their voices to be heard and valuable input to be shared. Much of our team's multi-family housing portfolio is comprised of projects involving robust community visioning and engagement. By engaging with communities and neighborhoods, we help to determine how the existing fabric can be enhanced through new opportunities to benefit preservation, sustainability, and affordability while also reflecting users' values and needs.

For the Parker and Terrace Street Development, we have included Sean Curran to augment the development team. Sean Curran is Principal of Waterville Consulting, a public affairs and government relations firm based in Boston, Massachusetts. Not only is Sean well-versed in the community engagement process, he is also intimately familiar with the Mission Hill neighborhood. Sean's family has called Mission Hill home for four generations. They have lived through the many changes that the neighborhood has undergone since the 1930's. Working in the residential real estate marketplace for nearly thirty years, Sean has seen the need for affordable home ownership grow in the Mission Hill Neighborhood, which has one of the lowest owner-occupied housing market statistics in the City of Boston.



The issue is more than academic for Sean as he has seen family members priced out of the neighborhood that they called home. To understand more broadly how this issue affects the wider neighborhood, he has spoken with abutters and longtime neighborhood leaders about their desire to see a project that builds community, creates a personal stake in the neighborhood, and balances needed uses like early education and open space.

OWNERSHIP MARKETING OUTREACH

Our Village Initiative is a social impact consulting firm focused on leveraging real estate and financial education to actively close the racial wealth gap in local communities.

We collaborate, create and curate impact opportunities for residents to save, invest and own their legacy. We believe in the village mindset that we are stronger together and collectively can work toward more equitable opportunities for all. We are building a community of strategic partners and designing a portfolio of solutions to address barriers to wealth creation in communities of color with a focus on real estate sales, financial education and supporting local small businesses.

Goals For Parker Terrace Project:

- Ensure smooth community process
- Increase number of community income eligible buyers through direct and indirect localized community outreach
- Identify funding sources and opportunities to make home ownership more affordable for prospective buyers



SUPPLEMENTAL INFORMATION

- Work with Lottery Agent to execute AFHM Plan and lottery process
- Educate prospective buyers and community about condo ownership and navigating condo associations
- Decrease processing timeline of buyer from time of lottery winner announcement to closing
- Ensure happy homeowners post sale x 1 year... and beyond
- Impact Focus: Increase number of potential qualified buyers in the Roxbury community

Responsibilities:

Pre-Sale Community Outreach

- Engage abutters and local residents to identify key needs, answer questions and resolve concerns
- Assist developer in obtaining letters of support
- Attend community meetings pertaining to project and provide monthly update on status of project to neighborhood associations
- Work with residents to identify successful outreach strategies within their community specifically

Pre-Sale Buyer Outreach

- Strategic outreach for more diversified pool of applicants
- Facilitate Homebuyer Certification
- Facilitate prospective buyer preparation to ensure they are able to qualify for a mortgage
- Facilitate monthly accountability check in with prospective buyers
- Facilitate proper condo association operation educational content



SUPPLEMENTAL INFORMATION

Pre-Sale Branding and Marketing

- Establish online presence for project to facilitate dissemination of marketing/outreach material
- Establish email and social media campaigns
- Create and manage public facing correspondences

Lottery Process

- Facilitate Q&A on lottery application submission process
- Assist prospective buyers in lottery application completion
- Assist with facilitation of virtual and in-person informational sessions with lottery agent
- Provide outreach support for increased enrollment in lottery
- Assist lottery agent with the collection of buyer documents



Sale Process

- Identify funding sources and opportunities to make home ownership more affordable for prospective buyers
- Facilitate Sales/Closings completed expeditiously and accurately
- Coordinate w Attorneys/Buyers/Developer/Loan officer
- Provide electronic update on post lottery/pre-closing prospective buyers bi-weekly
- Facilitate open house, home inspection, punch list and final walk-through



New Homeowner Orientation and Warranty Oversight

- Facilitate quarterly homeowner followup
- Work with contractor to create a Homeowner's Manual and homeowner maintenance reminders
- Work with developer to identify property management company and other pertinent resources for new homeowners



SUPPLEMENTAL INFORMATION

LOTTERY/INCOME CERTIFICATION CAPACITY (IN COLLABORATION W HOME CENTER)

DVM Consulting, a minority- and women-owned business located in Boston will be responsible for the lottery and income certification process. DVM brings a community-centered approach to every aspect of their work. Their approach is informed by 20+ years of deep industry knowledge and experience, which spans across multi-family real estate development, property management, community engagement, and resident services programming.

DVM succeeds by caring about, listening to, and respecting our residents, clients, and staff. Their team embodies their values, enabling clients to achieve their desired physical, financial, and social outcomes.

DVM has extensive experience streamlining complex affirmative marketing processes so developers can focus on delivering successful projects. Their longstanding, positive relationships with local government agencies contribute to smooth affirmative marketing plan approval, execution, and lease-up. DVM takes a holistic view of the affordable housing ecosystem. They not only build homes — they ensure that tenants and homebuyers who are most in need can access the homes that they create.



SUPPLEMENTAL INFORMATION

COORDINATION ON ENVIRONMENTAL REMEDIATION

Summary from Weston Sampson

Stated Goal:

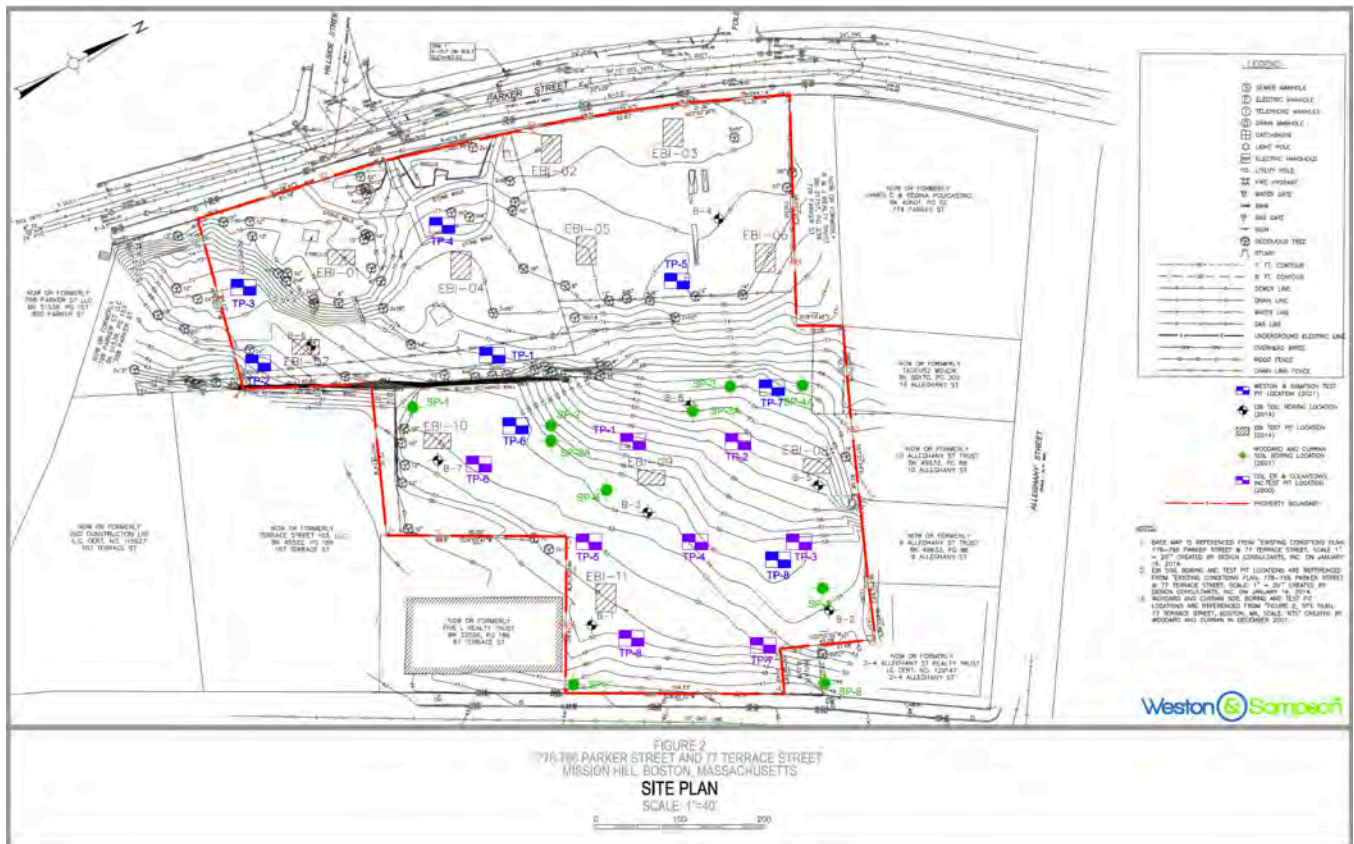
Protect human health and the environment and to redevelop an underutilized property for residential use.

Process:

- A Release Tracking Number (RTN) has been established for the site (RTN 3-32280)
- Remove targeted soils
 - Overseen by Massachusetts Licenses Site Professional
- Obtain a Permanent Solution Statement (PSS) to close out Response Actions per MCP: 310 CRM 40.000

Recommended Cleanup Alternative:

Removal/Transport/Off Site Disposal of Targeted Impacted Soil.



SUPPLEMENTAL INFORMATION

Effective and Efficient Remediation - Developer. MOH Coordination

It is not an understatement to say that the strategic coordination and implementation of the soil remediation will be the critical factor that defines success for the Parker Terrace Development. The Oxbow.DVM.JGE team has extensive experience dealing with these conditions on difficult urban sites in coordination with MOH.

Experience Working w MOH Staff on Environmental Remediation

In the past 6 years, the Oxbow.DVM.JGE team has successfully remediated and closed out four (4) sites that required filing with MassDEP under the Massachusetts Constancy Plan (MCP).

- We understand the timing for review with Jamie Smith.
- We are familiar with establishing the allowances and tracking costs with David Lewis and John Feuerbach.
- We have reconciled allowances with MOH Development Managers and MOH Construction Inspectors.

Edson Peacevale						
Environmental Cost per Site						
	54-56 Edson Type BB	50 Peacevale Type B	15 Whitman Type B	46 Peacevale Type B	53 Wentworth Type 4A	19 Edson Type A
Mass DEP	No	No	No	No	Yes	Yes
Soil/Trucking	\$20,548	\$15,771	\$22,137	\$15,771	\$28,298	\$18,239
LSP	\$3,957	\$3,958	\$3,463	\$3,463	\$31,800	\$31,900
Total	\$24,505	\$19,729	\$25,600	\$19,234	\$60,098	\$50,139

Familiar with Regulatory Process

The ability to limit costs and limit delays to the development schedule requires a detailed understanding of regulatory requirements while also being able to closely coordinate between MOH (field/office), MassDEP, In State and Out of State Landfills, Certified Trucking Companies and Licensed Site Professionals.

	Responsible Party	Lead Time (Business Days)
Supplemental Testing of Treated Soil	McPhail/Oxbow	5
Test Results of Treated Soil	McPhail/Oxbow	1
Backfill Foundation/Lose Soil on Site to Minimize Export	Excavator/CAPE	2
Form/Rebar/Pour Foundation	Excavator/CAPE	14
Export Material Off-Site	Excavator/CAPE	2
Final Rough Grade	Excavator/CAPE	7
Manifest Tickets Submitted by Excavator to CAPE	Excavator/CAPE	14
CAPE Prepared Change Order	CAPE	14
Manifest Tickets forwarded to McPhail	CAPE	14
McPhail Files Compliance Notification	McPhail/Oxbow	14
State Confirmation of Compliance (AUL or No)	McPhail/Oxbow	28
McPhail Provide Final Package to Oxbow	McPhail/Oxbow	7

SUPPLEMENTAL INFORMATION

3. Understand How to Coordinate the Soil Management Plan with the Evaluation Plan with the Evolution of the Design

Key elements to be understood and identified as part of this planning process:

- Remediation must meet the highest standards along the Parker Street open space;
- Opportunities exist to place soil that is structurally sufficient beneath the foundation and paved plaza areas of the Terrace Street building;
- The design and incorporation of sub slab radon/vent piping within the Terrace Street building is critical to ensuring that end loan providers will be comfortable taking a mortgage on the condominium.

APPENDICES 1-13

PROPOSAL FORM

SUBMITTED TO: MAYOR'S OFFICE OF HOUSING

DATE RECEIVED BY MOH: November 7, 2022

SUBMITTED BY: NAME: Oxbow.DVM.JGE

ADDRESS: 75 Arlington Street, Suite 500 Bo

TELEPHONE: 917-340-3187

EMAIL: kmaguire@oxbowurban.com

Under the conditions set forth by the Mayor's Office of Housing (MOH), the accompanying proposal is submitted for:

Property Address: 778-796 Parker and 77 Terrace Street

For this proposal to be properly evaluated all questions must be answered by the Proposer. The Awarding Authority (MOH) will regard all responses to questions and all submissions as accurate portrayals of the Proposer's qualifications and any discrepancy between these statements and any subsequent investigation may result in the proposal being rejected.

- i. The name(s) and address(es) of all persons participating in this application as principals other than the undersigned are:

Jonathan Garland:

Dariela Villon-Maga: 228 Almont Street, Mattapan, MA

Howard Cohen: 46 Chestnut Hill Rd, Chestnut Hill, MA

Use separate sheet and attach if additional principals are involved.

- ii. The applicant is a/an:
Single Purpose Limited Liability Company
(Individual/Partnership/Joint/Venture/Corporation/Trust, etc.)

- A. If applicant is a Partnership, state name and residential address of both general and limited partners: _____

B. If applicant is a Corporation, state the following:

Corporation is incorporated in the State of: Massachusetts
President is: Kevin Maguire
Treasurer is: Dariela Villon-Maga
Place of Business: 75 Arlington Street, Suite 500 Boston 02116

C. If applicant is a Joint Venture, state the names and business addresses of each person, firm or company that is a party to the joint venture:

A copy of the joint venture agreement is on file at: _____ and will be delivered to the Official on request.

D. If applicant is a Trust, state the name and residential address of all Trustees as:

Trust documents are on file at _____
And will be delivered to the Official on request.

- iii. Bank reference(s): _____
- iv. If business is conducted under any title other than the real name of the owner, state the time when, and place where, the certificate required by General Laws, c.110, §5 was filed:

- v. Number of years organization has been in business under current name: _____
- vi. Has organization ever failed to perform any contract? _____ Yes/No

If answer is "Yes", state circumstances): _____

We propose the following purchase price:

vii. AUTHORIZATION:

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

[Signature]
Signature of individual submitting proposal

Managing Member
Title

OMD DEV LLC
Legal Name of Organization

Dated at: 35 Batchelder st Roxbury, MA 02119

This 7th day of November, 2022

NAME OF ORGANIZATION:
OMD DEV LLC ("Oxbow")

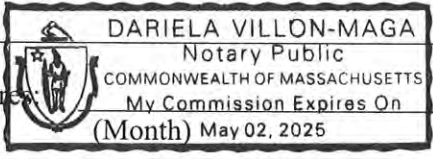
BY: Kevin Maguire

TITLE: Managing Member

i. ATTESTATION:

Kevin Maguire being duly sworn deposes and says that (he/she) is the Managing Membrer of OMD DEV LLC and that all answers to foregoing questions and all statements contained herein are true and correct.

Subscribed and sworn before me this 7th day of November 2022

Notary Public: [Signature]
My Commission Expires: [Signature],
 (Year)

NOTE: This proposal form must bear the written signature of the applicant.

If the applicant is an individual doing business under a name other than his own name the application must state so, giving the address of the individual.

If the applicant is a partnership a partner designated as such must sign the application.

If the applicant is a corporation, trust or joint venture the application must be signed by a duly-authorized officer or agent of such corporation, trust or joint venture and contain written evidence of the authority to bind the entity.

(Please include the name of the agency or department and position held in that agency or department.)

Project Summary'Hqto

Project Name: _____

Project Street Address(es): _____

Developer: _____

Types of Units: Family___ Individuals ___Elderly ___Special Needs___

Other? (Describe) _____ Commercial ___Yes ___No

Number of Units _____ Number of Affordable Units _____ Homeless Units _____

Number of Units	SRO	Studio	1-Bdr	2-Bdr	3-Bdr	4-Bdr	Total
<30% AMI							
<60% AMI							
<80% AMI							
Market							

Rents	SRO	Studio	1-Bdr	2-Bdr	3-Bdr	4-Bdr
<30% AMI						
<60% AMI						
<80% AMI						
<100% AMI						

Housing Budget

TDC: \$ _____

Hard Cost/sf \$ _____

Operating Exp/unit \$ _____

TDC Per Unit: \$ _____

Hard Cost/unit \$ _____

Reserves/unit \$ _____

Developer Fee and Overhead \$ _____

Funding Sources: (Check all that apply)

- | | | | |
|---|--------------------------------------|--|----------------------------------|
| DND – HOME <input type="checkbox"/> | DHCD-HOME <input type="checkbox"/> | DHCD-CIPF <input type="checkbox"/> | Others: <input type="checkbox"/> |
| HSNG BOSTON 2030 <input type="checkbox"/> | DHCD-HSF <input type="checkbox"/> | 9% LIHTC <input type="checkbox"/> | _____ <input type="checkbox"/> |
| NHT <input type="checkbox"/> | DHCD-HIF <input type="checkbox"/> | 4% LIHTC <input type="checkbox"/> | _____ <input type="checkbox"/> |
| IDP <input type="checkbox"/> | DHCD-TOD <input type="checkbox"/> | New Market TC <input type="checkbox"/> | _____ <input type="checkbox"/> |
| FHLB <input type="checkbox"/> | DHCD-CATNHP <input type="checkbox"/> | Historic TC <input type="checkbox"/> | _____ <input type="checkbox"/> |
| AHTF <input type="checkbox"/> | DHCD-CBH <input type="checkbox"/> | MA State TC <input type="checkbox"/> | _____ <input type="checkbox"/> |
| MTC Grants <input type="checkbox"/> | DHCD-FCF <input type="checkbox"/> | HUD-Section 202 <input type="checkbox"/> | _____ <input type="checkbox"/> |

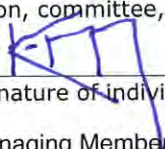
STATEMENT OF PROPOSER'S QUALIFICATIONS FORM

All questions must be answered. All information must be clear and complete. Attach additional pages, if needed.

1. Name of proposer: OXBOW.DVM.JGE
2. Names and titles of principals: Kevin Maguire, Managing Member, Dariela Villon-Maga, Manager
Jonathan Garland - Manager
Howard Cohen - Manager
3. Names of authorized signatories: _____
Kevin Maguire
4. Permanent main office address: _____
75 Arlington Street, Suite 500 Boston MA 02116
Phone: 917-340-3187 Fax: _____ Email: kmaguire@oxbowurban.com
5. Date organized: OMD DEV LLC - 2022 OXBOW.DVM.JGE to be created
6. Location of incorporation: Massachusetts
7. Number of years engaged in business under your present name: 15 Years
8. List at least three private or public agencies that you have supplied/provided with similar services to that in this solicitation:
 - a. City of Boston Mayors Office of Housing
 - b. Massachusetts Housing Finance Agency (MassHousing)
 - c. Massachusetts Department of Housing & Community Development

Has organization ever failed to perform any contract? YES NO
If YES, attach a written declaration explaining the circumstances.

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



Signature of individual submitting proposal

Managing Member

Title

OMD DEV LLC ("OXBOW")

Legal Name of Organization

10/4/22

Date

CONSTRUCTION EMPLOYMENT STATEMENT FORM

PROPOSER'S NAME: _____

How many full time employees does your firm currently have?

Under 25 25 -99 100 or more

Are you a Boston-based business? YES NO

Boston Based: where the principal place of business and/or the primary residence of the Proposer is in the City of Boston.

Are you a Minority-owned Business Enterprise? YES NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? YES NO

Are you a Woman-owned Business Enterprise? YES NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? YES NO

RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT

DND encourages MIHI builders to seek to achieve the following construction employment goals:

Boston Residents	50% of project hours
Minority	25% of project hours
Female	10% of project hours

These are targets, not requirements, but proposals that provide better evidence of their ability to achieve these targets will be more highly ranked. Explain what actions you will undertake to promote employment of these groups:

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with "Supplementary Construction Employment Statement" and the Proposer's name. *Note: if you are, according the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND's employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City's Office of Jobs & Community Services, please list the most recent here: _____

City of Boston (COB) – Property Affidavit Form

Instructions: List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest. If there are any past due amounts owed to the Department of Neighborhood Development, the Inspectional Services Department, the Treasury Department and/or the Boston Water and Sewer Commission, such **must be paid in full** before: (1) a vote request can be presented to the City of Boston Public Facilities Commission concerning the sale of property to the applicant or any other business entity in which the applicant has an ownership or beneficial interest; OR (2) the commitment of funding to the applicant or any other business entity in which the applicant has an ownership or beneficial interest. Public Facilities Commission votes are not to be requested until the Property Affidavit has been approved and the Legal Unit has signed the Property Clearance Form.

Upon approval, the Property Affidavit will be valid for ninety (90) calendar days from the date it is signed by the Applicant.

For any additional properties that do not fit on this form, attach a spreadsheet. Do not use another property affidavit form. Only one signature page is to be submitted. All entries made on this form must be typed in the form fields provided below.

Applicant:

List Addresses of Boston Properties Owned:	PARCEL ID NUMBER
SEE ATTACHED SPREADSHEET FOR COMPREHENSIVE LIST	
Boston Properties Previously Foreclosed Upon by COB:	PARCEL ID NUMBER
NONE	

I declare under pains and penalties of perjury that the foregoing representations are true, accurate, complete and correct in all respects.

Kevin Maguire, Managing Member

11/4/22

Print Name and Title

Authorized Representative's Signature

Date

Applicant Contact (If different from above)

917-340-3187

Telephone Number

OFFICIAL USE ONLY (Fax the completed form to DND at 635-0262. Delinquency Reported: (If Yes (Y) state the amount owed):

Boston Water & Sewer Commission

Y\$ _____ N

Signature and Date: _____

Notes:

Department of Neighborhood Development

Y\$ _____ N

Signature and Date: _____

Notes:

Public Works Department

Y\$ _____ N

Signature and Date: _____

Notes:

Treasury Department

Y\$ _____ N

Signature and Date: _____

Notes:

DND Contact

Division

Program

Phone: ext.

Property Affidavit Form

City of Boston MOH Proposal

Parker Terrace Mission Hill

Addresses of Boston Properties Owned	Parcel Tax ID Number	Previously Forclosed (Y / N)	Name
25 Fountain Street, Roxbury MA 02119	1201489010	N	OFR Dev LLC, Kevin Maguire
88 Chandler Street, Boston 02116	500982002	N	Kevin Maguire
228 Almont Street, Boston, MA 02126	1803284001	N	Dariela Villon-Maga
Blake Estates I, 1344 Hyde Park Ave	1809255000	N	Beacon Communities, Howard Cohen
Blake Estates II, 1344 Hyde Park Ave	1809255010	N	Beacon Communities, Howard Cohen
Camden Apartments, 50-60 Camden Street	9012300	N	Beacon Communities, Howard Cohen
Chapman House, 61 Eutaw Street	102829000	N	Beacon Communities, Howard Cohen
Conway Court, 1 Conway Court	2005234000	N	Beacon Communities, Howard Cohen
Georgetown Homes One	1812326000	N	Beacon Communities, Howard Cohen
Georgetown Homes Two	1812328000 & 1812332000	N	Beacon Communities, Howard Cohen
Mandela Homes	0901150000 & 0901855000	N	Beacon Communities, Howard Cohen
Old Colony, 1204-1210 Columbia Rd	700540100	N	Beacon Communities, Howard Cohen
Old Colony, 25 James O'Neil St	700540130	N	Beacon Communities, Howard Cohen
Old Colony, 35 Patterson Way	700540160	N	Beacon Communities, Howard Cohen
Old Colony, 20 Patterson Way	700540230	N	Beacon Communities, Howard Cohen
Old Colony, 12 Mary Boyle Way	700540360	N	Beacon Communities, Howard Cohen
Old Colony, 20 Mary Boyle Way	700540400	N	Beacon Communities, Howard Cohen
Old Colony, 10-18 Gen Jozef Pilsudski Way	700540040	N	Beacon Communities, Howard Cohen
Old Colony, 328 Rev Richard A Burke	700539001	N	Beacon Communities, Howard Cohen
Quincy Tower, 5 Oak St West	305550000	N	Beacon Communities, Howard Cohen
Tockingham Glen LLC, 30 Rockingham Ave	2003041000	N	Beacon Communities, Howard Cohen

Signed under the pains and penalties of perjury this

4th _____ day of November _____, 20 22

SIGNATURE:  _____

TITLE: Managing Member _____

ORGANIZATION: Oxbow Urban LLC _____

ADDRESS: 75 Arlington Street, Boston MA 02116 _____

Conflict of Interest Affidavit Form

The undersigned hereby certifies, under the pains and penalties of perjury, that neither they, nor those with whom they have business ties, nor any immediate family member of the undersigned, is currently or has been within the past twelve months, an employee, agent, consultant, officer or elected or appointed official of the City of Boston Department of Neighborhood Development. For purposes of this affidavit "immediate family member" shall include parents, spouse, siblings, or children, irrespective of their place of residence.


I declare under penalties of perjury that the foregoing representations are true, correct, accurate, complete and correct in all respects.

WITNESS:



Jonela Diby

BORROWER:



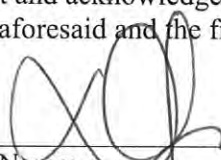
Kevin Maguire, Managing Membe

THE COMMONWEALTH OF MASSACHUSETTS

Suffolk, ss.

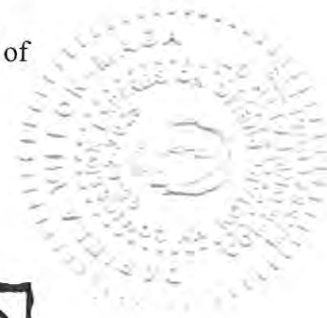
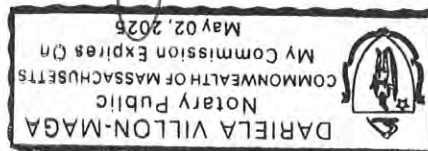
November, 7th 2022

Then personally appeared the above named Kevin Maguire, (title) of (organization) and executed the foregoing instrument and acknowledged the foregoing instrument to be (his/her) free act and deed as (title) aforesaid and the free act and deed of (organization), before me.



Name:
Notary Public

My Commission Expires:



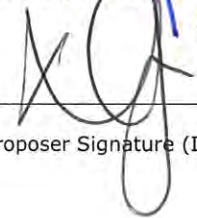
CHAPTER 803 DISCLOSURE STATEMENT FORM

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this 4th day
of November, 2022
Month Year



Proposer Signature



Co-Proposer Signature (If Applicable)

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

INSTRUCTION SHEET

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

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

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

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

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

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

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

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

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

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

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

Deputy Commissioner for Real Estate
Division of Capital Asset Management and Maintenance
One Ashburton Place, 15th Floor, Boston, MA 02108

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

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

C. (1) REAL PROPERTY:

778-796 Parker Street, Boston MA
77 Terrace Street, Boston MA

(2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT: Deed, copy attached.

FUTURE SALE

+

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

CITY OF BOSTON ACTING BY AND THROUGH THE PUBLIC FACILITIES
COMMISSION BY THE DIRECTOR OF THE DEPARTMENT OF NEIGHBORHOOD
DEVELOPMENT, **Grantor**

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

Boston Redevelopment Authority an independent body politic and
corporate, **Grantee**

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

- | | | | |
|--------------------------|--|-------------------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> Lessor/Landlord | <input type="checkbox"/> | <input type="checkbox"/> Lessee/Tenant |
| <input type="checkbox"/> | <input type="checkbox"/> Seller/Grantor | <input checked="" type="checkbox"/> | <input type="checkbox"/> Buyer/Grantee |
| <input type="checkbox"/> | Other (Please describe): _____ | | |

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

NAME

Kevin Maguire
Dariela Villon-Maga
Jonathan Garland

RESIDENCE

88 Chandler Street Boston
228 Almont Street, Boston
One Marina Park Drive Ste. 1410, Boston, MA

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

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

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

No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the Securities and Exchange Commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arm's length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

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

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

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

Signature: _____



Dated: _____

11/4/22



City of Boston
Jobs and Living Wage Ordinance
THE LIVING WAGE DIVISION • (617) 918-5236

BENEFICIARY AFFIDAVIT

Any for-profit Beneficiary who employs at least 25 full-time equivalents (FTEs) or any not-for-profit Beneficiary who employs at least 100 FTEs who has been awarded assistance of \$100,000 or more from the City of Boston must comply with the *First Source Hiring Agreement* provisions of the Boston Jobs and Living Wage Ordinance.

If you are submitting a request for proposal, request for qualification, or invitation for bid, or negotiating a loan, grant, or other financial assistance that meets the above criteria, you must submit this affidavit along with your proposal. If you believe that you are exempt from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance, complete Part 4: Exemption From First Source Hiring Agreement Provisions, or if you are requesting a general waiver, please complete Part 5: General Waiver Reason(s).

IMPORTANT

Please print in ink or type all required information. Assistance in completing this form may be obtained by calling the Living Wage Administrator in the Living Wage Division of the Office of Workforce Development, telephone: (617) 918-5236.

PART 1: BENEFICIARY OF ASSISTANCE INFORMATION:

Name Of Beneficiary: Oxbow.DVM.JGE

Contact Person: Kevin Maguire

Company Address: 75 Arlington Street, Suite 500, Boston, MA 02116

Telephone #: 917-340-3187 E-Mail: kmaguire@oxbowurban.com

PART 2: ASSISTANCE INFORMATION:

Name Of The Program Or Project Under Which The Assistance Is Being Awarded:

778-796 Parker Street and 77 Terrace Street

City Of Boston Awarding Department: Mayor's Office of Housing

Bid Or Proposal Amount: _____

Date Assistance Documents Executed: _____ Award End Date: _____

Duration Of Award: 1 year 2 years 3 years Other: _____ (years)

PART 3: ADDITIONAL INFORMATION

Please answer the following questions regarding your company or organization:

Your company or organization is: (check one): For Profit Not For Profit

Total number of employees whom you employ: N/A

Total number of employees who will be assigned to work on the above-stated award: N/A

Do you anticipate hiring any additional employees? Yes No

If yes, how many additional FTEs do you plan to hire? TBD

PART 4: EXEMPTION FROM THE BOSTON JOBS AND LIVING WAGE ORDINANCE

Any Beneficiary who qualifies may request one of the four categories of exemptions from the provisions of the Boston Jobs and Living Wage Ordinance by completing the section below. Attach any pertinent documents to this application to prove that you are exempt from the Boston Jobs and Living Wage Ordinance. Please check the appropriate box(es) below indicating your exemption request. NOTE: Unless you receive written confirmation from The Living Wage Division approving your exemption request, you remain covered by the Boston Jobs and Living Wage Ordinance.

I hereby request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance for the following reason(s): Attach any pertinent documents to this application to prove that you are exempt. Please check the appropriate box(es) below:

- The construction contract awarded by the City of Boston is subject to the state prevailing wage law; or
- Assistance awarded to youth programs, provided that the award is for stipends to youth in the program. "Youth Program" means any city, state, or federally funded program which employs youth, as defined by city, state, or federal guidelines, during the summer, or as part of a school to work program, or in other related seasonal or part-time program; or
- Assistance awarded to work-study or cooperative educational programs, provided that the assistance is for stipends to students in the programs; or
- Assistance awarded to vendors who provide services to the City and are awarded to vendors who provide trainees a stipend or wage as part of a job training program and provides the trainees with additional services, which may include but are not limited to room and board, case management, and job readiness services, and provided further that the trainees do not replace current City-funded positions.

Please give a full statement describing in detail which of the four exemptions applies to your assistance and the reasons your assistance is exempt from the Boston Jobs and Living Wage Ordinance *(attach additional sheets if necessary)*

PART 5: GENERAL WAIVER REASON(S)

I hereby request a general waiver from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance. The application of the First Source Hiring Agreement to my assistance violates the following state or federal statutory, regulatory or constitutional provision(s).

State the specific state or federal statutory, regulatory or constitutional provision(s), which makes compliance with the First Source Hiring Agreement unlawful:

No proponent has more the 25 full time staff

GENERAL WAIVER ATTACHMENTS:

Please attach a copy of the conflicting statutory, regulatory or constitutional provision(s) that makes compliance with this ordinance unlawful.


Please give a full statement describing in detail the reasons the specific state or federal statutory, regulatory or constitutional provision(s) makes compliance with the First Source Hiring Agreement unlawful (*attach additional sheets if necessary*):

PART 6 : BENEFICIARY OF ASSISTANCE AFFIDAVIT

The following statement must be completed and signed by an authorized owner, officer or manager of the Covered Vendor. The signature of an attorney representing the Covered Vendor is not sufficient:

I, (print or type Kevin Maguire), the Beneficiary, certify and swear/affirm that the information provided on this **Beneficiary Affidavit** is true and within my own personal knowledge and belief.

Signed under the pains and penalties of perjury.

SIGNATURE:  DATE: 11.7.22

TITLE: MANAGING MEMBER

PRELIMINARY DEVELOPMENT BUDGET FORM

PROPOSER'S NAME: _____

Complete this Preliminary Development Budget or you may substitute another form that provides substantially equivalent information. Note: Total of Uses of Funds should equal Total of Sources of Funds.

USES OF FUNDING	AMOUNT
Acquisition - Land	\$
Site Prep/Environmental	\$
Construction	\$
Construction Contingency	\$
Architect(s) and Engineer(s)	\$
Sustainability Consultant	\$
Survey and Permits	\$
Legal (Owner, Affordable Sale Conveyance, and Lenders)	\$
Title and Recording	\$
Real Estate Taxes / Appraisal/Accounting	\$
Insurance	\$
Construction Loan Interest	\$
Construction Inspection Fees	\$
Other:	\$
Other:	\$
Other:	\$
Other:	\$
Other:	\$
Soft Cost Contingency / Reserves	\$
Developer Overhead	\$
Developer Fee	\$
TOTAL: ALL USES	\$

SOURCES OF FUNDING	AMOUNT
MOH Funding (NHT, HOME, CPA)	\$
MassHousing Commonwealth Builders Fund	\$
Unit Sales Proceeds	\$
Unit Sales Proceeds	\$
Retail Sales Proceeds	\$
Contributed Developer Fee	
Other:	\$
Other:	\$
TOTAL ALL SOURCES:	\$

Committed

If any of the above-listed funding sources are already in hand or have been committed subject to designation/conveyance by DND, check off the right-hand box under "Committed".

Explanatory notes:

DEVELOPMENT BUDGET

APPLICANT'S NAME: THE TRUSTEES w OXBOW.DVM.JGE

Complete the below Development Budget, or substitute another form that provides substantially equivalent information. Note: Total of Uses of Funds should equal Total of Sources of Funds for the development.

PROJECT NAME: PARKER TERRACE OPEN SPACE, MISSION HILL

Hard costs		TOTAL (\$)	Grassroots (\$)	OTHER SOURCES (\$)
Demo/removals		25,000		\$25,000
Earthwork/excavation/geotex		125,000		\$125,000
Drainage/utilities		85,000	22,000	\$63,000
Paving/edging		65,000		\$65,000
Masonry/concrete		30,000		\$30,000
Fencing		18,000		\$18,000
Site furnishings/structures		12,000		\$12,000
Planting		20,000		\$20,000
Other		15,000		\$15,000
General conditions		35,000		\$35,000
	Subtotal:	430,000		
Contingency		21,500		\$21,500
	Subtotal:	21,500		
Soft costs				
Consultants		35,000	35,000	
Construction documents		25,000	25,000	
Bid documents		15,000		\$15,000
Civil Eng/Survey		18,000	18,000	
Insurance		9,000		\$9,000
Permits		7,000		\$7,000
Staff				
Project Management (non-staff)		15,000		\$15,000
Materials		4,000		\$4,000
	Subtotal:	128,000		
Overhead (not to exceed 10% of total project costs)		35,000		\$35,000
Fee		0		
	Subtotal	35,000		
	TOTAL project costs	\$ 614,500	\$100,000	\$514,500

Sources of Funds			Uses of Funds		
		Amount (\$)			Amount (\$)
Grassroots		\$ 100,000	Construction		\$ 430,000
Applicant Organization			Contingency		\$ 21,500
Foundation 1		\$ 89,500		Subtotal:	\$ 451,000
Foundation 2			Consultants		\$ 108,000
Foundation 3			Materials		\$ 4,000
Grant 1 - CPA		\$ 350,000	Staff		\$ 0
Grant 2			Other soft costs:		\$ 16,000
In-kind donations		\$75,000		Subtotal:	\$ 128,000
			Overhead		\$35,000
			Fee		\$0
				Subtotal:	\$35,000
	Total Project Costs:	\$ 614,500		Total Project Costs:	\$ 614,500

