



Presentation to the Boston Cannabis Board
May 12, 2021

Why Heritage?

A. Diversity & Inclusion

The Heritage Club is Social Equity and Boston Equity Certified. We are committed to furthering the opportunity by continuing to prioritize diversity & inclusion in our company credo and specific initiatives highlighted in this presentation.

B. Boston Owned & Operated

The Heritage Club is for the 617 and by the 617. Most importantly, we are local residents who will be onsite running the day to day operations ourselves.

C. Community Focused

First and foremost, the Heritage Club wants to give back and honor our roots. We take pride in where we are from and show this by including our Boston family in our plans. We are focused on creating a measurable impact and leaving a legacy we are proud of.

D. People Driven Mission

In an industry where the focus tends to be anything green, Heritage sees the people as the most important thing. The people are our Heritage team, the local community we are a part of, and the people who have come before and after us.

E. Educational Offerings

The Heritage Club will provide educational opportunities at every level of the client experience. Our staff will be prepared with pertinent product information for customers. The Heritage website and store will also feature informational guides and compliant videos. An introductory info sheet included in every client's first purchase.



The Heritage Club seeks to work collaboratively with the Charlestown community to open a Cannabis Establishment engaged in the retail sale of cannabis and cannabis products at 116 Cambridge Street. The Heritage Club is committed to operating its business in a manner that *does well by doing good*. Since our last presentation to the Boston Cannabis Board, The Heritage Club has worked collaboratively with the City of Boston, local advisors, and the neighborhood to strengthen its application through refinement of its goals and measurable plans to meet these goals.

The Heritage Founder



- 9 + years of Business experience
- 8+ years Customer Service experience
- 5+ years Management experience
- 2+ years Retail Sales experience

Adenike John “Nike”

FOUNDER & OWNER
Dorchester, MA



Background

- Born & raised in Boston
- Current Boston resident
- Daughter of a first-generation immigrant and descendent of enslaved people
- Northeastern University
D’Amore McKim School of Business
B.A. ’15 - Finance & Minor in Psychology

Business Experience

- Vibe Residential - Real Estate Broker -
Founder/Owner
- BNI Legacy Charlestown
Founding President
- Apple Specialist- 2012-2013

Cannabis - Related

- Social Equity Applicant
- CCC’s Social Equity Program- ’20 -1st Cohort
- Lantern’s Delivery Accelerator- ’20
- Massachusetts Cannabis Association for Delivery (MCAD) *Founding Member; Events Coordinator*

Proposed Site: 116 Cambridge Street



Heritage Club's proposed site was chosen since it meets the requirements in terms of Zoning, Security, Parking. The building is located towards the back of the lot and is in a convenient and easily accessible location. The building's footprint is currently 3,000 sq ft. This simple square frame has been redesigned for an open retail layout that allows ample space for social-distancing, crowd control, and efficient flow of customers.

Key Features:

Zoned: Commercial

Walkability; Very Close to Transit

Dedicated Customer Parking

Standalone Building for Increased Security

Ample waiting room to minimize queue

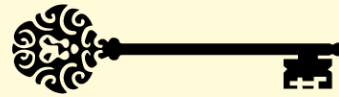
Spacious back of house space

Village & StreetView

Retail store to be located behind this building



Key Security Features



24-hour
Surveillance System



Increased Lighting



Limited Access Areas



Local Law Enforcement
& Grounds Patrol



Secure Storage Vaults
for Product & Cash

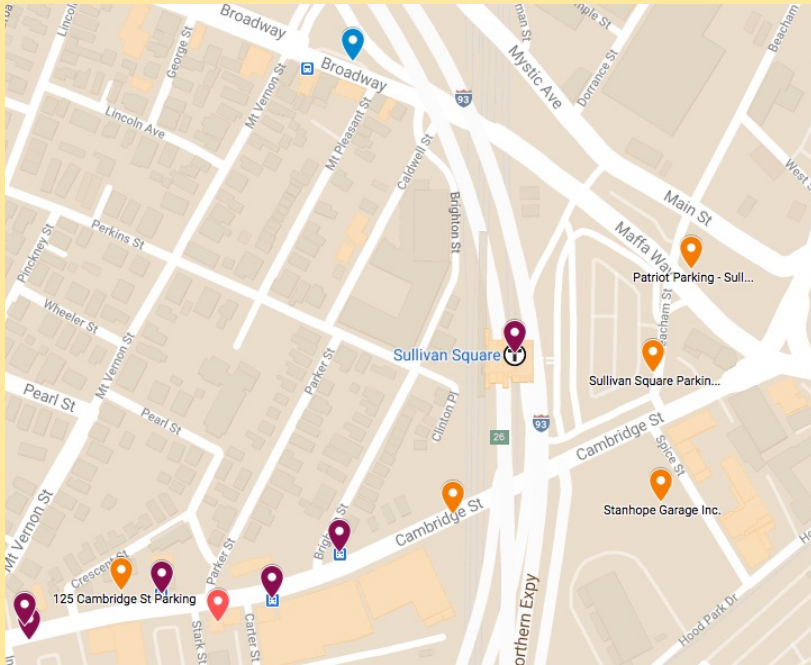


CCC Compliant
Operating Procedures

Public Transportation



Local Transit & Parking Map



- Proposed Location
- MBTA T & Bus Stops
- Public Parking
- Blue Bike Station

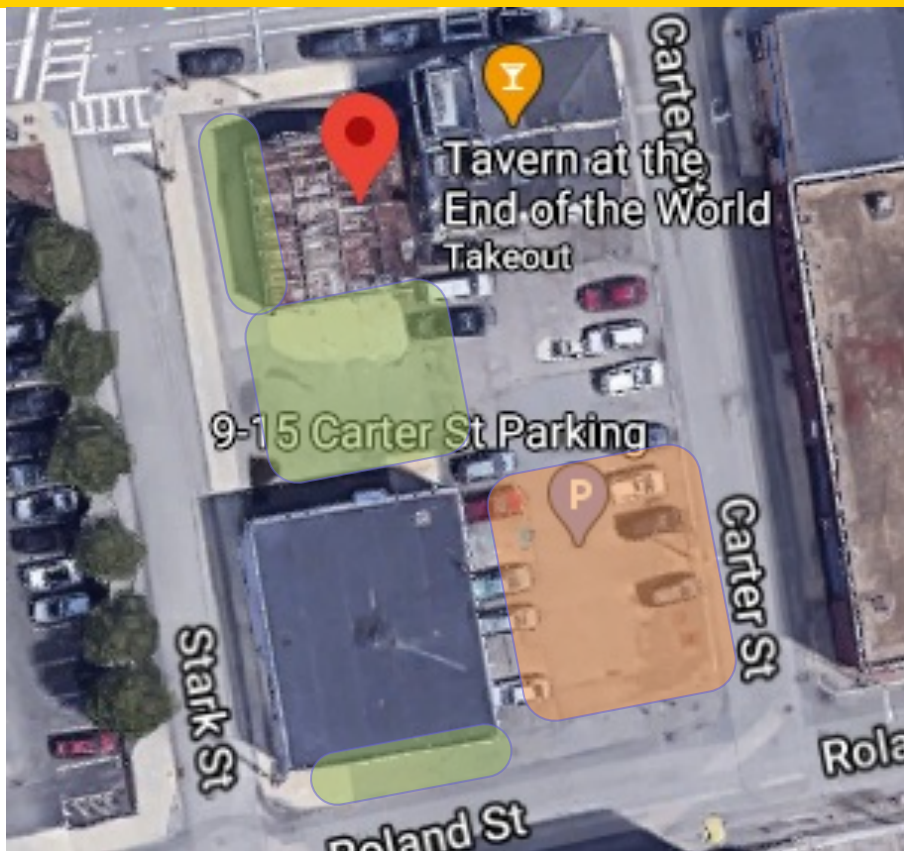
Very Accessible by Public Transportation

- **MBTA Orange Line - Sullivan Square: 0.2 miles, 5-minute walk**
- **MBTA Bus (Over 10+ Lines nearby)**
 - Closest bus stop #86/91: **500 feet, 2-minute walk**

Other Affordable Transportation Options

- **Ride-share** Drop-off Point – to be located on Roland
- **BC/BS Blue Bike** stations – nearby at Broadway, Sullivan Station, and corner of Washington & New Washington in Somerville
- **Employee Transportation Program** – subsidized T-pass /Bike Share Membership

Parking Features



Parking

11 dedicated spaces, (green area) including, and 12 overflow spaces:

- 1 (ADA dedicated space)
- 2 Spaces for Delivery Vehicles
- 2 Spaces for Curbside Pick-up (during pandemic)

Also several paid lots and garages less than 0.25 mile away

During Peak Hours

12 additional dedicated spaces (orange area) for **23 total** available onsite during our peak hours

Employees

No onsite parking. Violators will be given one time warning, then terminated.

Subsidies for alternate transportation options



Nuisance Prevention

Where we are from is where we give back!

Responsible Community Partner

Upon pre-order or purchase, customers must sign an agreement with the following terms:

- No loitering on site or in the surrounding neighborhood
- No smoking/alcohol consumption on the premises
- No diversion of cannabis products

Zero Tolerance Policy

Heritage has a Zero Tolerance Policy for any disturbance of the peace, loitering, littering or consumption of marijuana on-site or in the immediate neighborhood. Violators will be banned and reported to law enforcement immediately.

Community Communication

A 24-hour telephone line will be provided to the community and local Law Enforcement officials in order to contact a company representative during off-hours.

Updates Based on Community Feedback



1. Clear communication about The Heritage Club's ownership structure + advisors

- Nike John is the sole owner of The Heritage Club.
- The Heritage Club is guided by a variety of advisors and consultants with substantial experience in cannabis, real estate, project management, human resources, and outreach to communities that have been disproportionately impacted by drug law prohibition. Advisors and consultants do not have equity in the business or voting rights.
- Should The Heritage Club seek to modify its ownership structure at any time, it will require additional community outreach and approval from the Boston Cannabis Board.
- Additional information about Nike and the company's advisors and consultants is available in Addenda A.

Updates Based on Community Feedback



2. A traffic study to assess the impact that the proposed establishment will have on prevailing traffic conditions in the community.

- BTD and the BPDA commissioned a traffic study to assess traffic in the immediate area and identify what impacts, if any, The Heritage Club would have on existing conditions. The City guided Vanasse and Associates, Inc. as to scope, desired outcomes, and area of study to ensure the validity of the study.
- A representative of Vanasse and Associates, Inc. presented the findings of the study at The Heritage Club's community outreach meeting and will present the company's findings to the Board at the close of this update.



The Project will not have a significant impact (increase) on motorist delays or vehicle queuing over Existing or anticipated future conditions without the Project (No-Build conditions), with all movements at the study intersections shown to operate at a level-of-service (LOS) of D or better under all analysis conditions where an LOS of "D" or better is defined as "acceptable" operating conditions.

Lines of sight to and from the Project access points were found to exceed the recommended minimum sight distance to function in a safe and efficient manner.

Updates Based on Community Feedback

Vanasse and Associates, Inc. provided a series of recommendations to provide safe and efficient access to The Heritage Club's site. The Heritage Club respectfully requests that the Board condition compliance with these suggestions as part of its approval.

The following recommendations are offered with respect to access to the Project site and the on-site parking designation:

- The primary parking for customers of the Project will occur in 3 marked spaces that are accessed via Stark Street, including a handicapped space, and 4 marked spaces accessed to the rear of the dispensary via Carter Street and Roland Street. Additional parking to the rear of the dispensary is also available in the private lot, if required.
- Two existing marked spaces to the rear of the building, adjacent to Roland Street, will be utilized for curbside pick-up while allowed.
- The 2 back-to-back spaces located north of the dispensary building, parallel to Stark Street, will be reserved for delivery pick-up/drop-off activity.
- All signs and pavement markings to be installed as a part of the Project shall conform to the applicable standards of the Manual on Uniform Traffic Devices (MUTCD).²
- Snow windrows within sight triangle areas along Carter Street, Roland Street, and Stark Street shall be promptly removed where such accumulations would impede sight lines.

Off-Site Mitigation

In order to reduce the potential for conflicts between pedestrian and bicyclist activity on the east side crosswalk across Cambridge Street, it is recommended that a NO TURN ON RED sign (MUTCD R10-11) be installed on the Stark Street northbound approach to Cambridge Street. This measure would reduce the risk of conflicts between traffic turning right from Stark Street on a red signal indicator during the exclusive pedestrian phase at this location. If deemed appropriate by the Boston Transportation Department, the applicant will implement this improvement.

Transportation Demand Management

In order to promote the use of non-automotive travel modes and reduce the number of vehicles arriving and departing the site, the proponent is committed to implementing a comprehensive transportation demand management (TDM) plan.

- Information regarding public transportation services, maps, schedules, and fare information will be posted in a central location and/or otherwise made available to both employees and patrons of the project, including on any online advertising and reservation systems.
- A "welcome packet" will be provided to employees detailing available public transportation services, bicycle and walking alternatives, and commuter options.

- A company subsidized MBTA transit pass (Monthly LinkPass) will be provided to all eligible full-time employees to promote the use of area transit services.
- A company subsidized Bluebikes[®] membership will be provided to all eligible full-time employees to promote the use of bicycles as a means of commuting to work. It is noted that a BluebikesSM station is provided at Sullivan Square Station.
- Specific amenities will be provided to discourage off-site trips, including providing a breakroom equipped with a microwave and refrigerator; and offering direct deposit of paychecks.
- On-site parking for employees of the Project will be explicitly prohibited.
- During the initial opening period, customer pre-registration will be required to allow for initially lower capacity and managed arrivals and departures.
- Bicycle parking will be provided consisting of: i) secure bicycle parking conveniently located proximate to the dispensary building entrances; and ii) weather protected bicycle storage located in the adjacent building for employees of the dispensary. It is expected that the on-site bicycle parking for customers of the Project will provide a minimum of 10 bicycle spaces, immediately adjacent to the dispensary entrance.

Updates Based on Community Feedback



3. Continued outreach to project abutters and local stakeholders to share information about the product and solicit feedback.

- Virtual Informational Sessions were held on December 9, 2020 and December 15, 2020 and flyered to the Lost Village.
- Founder Nike John wrote handwritten letters to all abutters.
- An official community outreach meeting was held in conjunction with the Office of Neighborhood Services on March 10, 2021.
- Continued outreach to Councilor Lydia Edwards in November, December, January, February, March, and April. Councilor Edwards reported that she could not work collaboratively with the company per the advice of internal legal counsel.

Updates Based on Community Feedback



4. Continued refinement of Diversity, Employment, Transportation, and Security Plans utilizing feedback from project stakeholders and the community to ensure The Heritage Club can provide clear, demonstrable progress towards achieving these plans upon annual renewal.

- Please see the enclosed materials.



Positive Impact Plan

Where we are from is where we give back!

- Lost Village Community Trust - We pledge to donate 3% of our annual net profits to the Lost Village. A board made up of Lost Village residents and Heritage leaders will be created and meet quarterly to determine the allocation of funds.
 - The group will be made up of 4 to 7 members, including 1 seat for a Heritage executive. The goal is that at least half of the committee be made up of Lost Village residents. David Lucier, a Lost Village resident and Quality and Safety Chair of Mass General Hospital has expressed interest.
 - This goal is actionable and measurable as it will procure funds depending on the revenues of The Heritage Club and seek to expend those funds in the following fiscal year.
- The Boston Heritage Fund - We will launch a home buying assistance program to help affected communities begin to build wealth. By leveraging our previous real estate experience, we will host financial planning and home buying seminars. The Heritage Club pledges to cover the closing costs for 10 qualifying residents per year, up to a total of \$150,000/year.
 - Other companies have proposed similar initiatives, including Rooted In, LLC; Verdant Reparative, Inc.; and Cypress Tree Management Fenway, Inc.
- Purchase 30% of Products from other Economic Empowerment/Social Equity Vendors as available
- Purchase 30% from Women Owned or Led Vendors as available



Employment



Adaptive offers an entire spectrum of HR services, freeing us to focus on our core business activities.

Certified HR Experts to guide and support us & keep our business compliant



DI & Local Hire Goals

Total hire – 20-30 people

51% Charlestown Residents

20% other Boston Residents

20% from ADIs

51% Women

51% People of Color

20% with a CORI

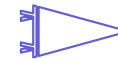
(or have parents or spouses with past drug convictions)

See previous slide for hiring & accountability plans



Wage & Benefits

- Living Wage – Currently \$16.70/hr
 - First to sign a UFCW union agreement
 - CCC, OSHA, Safety, other Trainings
 - Benefit package for FT
Paid Time Off, other
- Health Insurance
- Blue Bike Membership (\$100/yr)
or MBTA Pass subsidy
 - Parking subsidy for existing lots and Stanhope garage, if they live more than 2 miles from public transit stop. (receipts and proof of residence required quarterly)



Special Programs

- Onsite covered bike rack
- FinFit Budget Planning support
- Zay Zoom offers early wage access
- Telehealth options
- Dental and Vision insurance options
- Trainings
 - Management Courses
 - Leadership Development
 - Skills Development
 - Pandemic Awareness
 - Difficult Customer
 - Customer Service Training



Employment/ Diversity & Inclusion

Hiring Plan

Recruit

- Set hiring goals Host biannual career fairs in ADIs
- Advertise in local & community newspapers
- MassHire, Operation Exit Plan
- Connect with local groups that serve the communities we aim to include on our team
- Outreach to LGBTQ+, Veterans

Training & Promotion Plan

Train

- Create a culture of respect for both colleagues and customers
- Implicit bias training, within 60 days and annually
- Customer service training

Retain

- Educational opportunities
- Promote from within

Accountability Plan

Measurements

- Events – attendance
- Postings – number, where
- Engagement/followups
- Diverse hire numbers
- Education & Promotion tracking
- Quarterly review & progress assessment
- Semi-annual improvement plan if indicated
- Annual report

Thank you for your attendance, support & time.

Questions?



Contact info: www.617Heritage.com



Addendum A

The Heritage Advisors & Consultants



Robin Reed, MD, MBA

- **Boston Resident**
- **CEO, Co-founder The Wellness Collaborative, Inc.**
- **30+ years of medical experience**
Chief of Medicine at Shattuck Public Health Hospital
Medical Director at Old Colony and Boston Prerelease
- **30+ years of Teaching experience**
Northeastern & Tufts Universities, 2006 – 2019.
- **Education:**

Stanford University – *B.A., Psychology*

New York University – *Doctor of Medicine*

Northeastern University – *Masters in Business Administration*

Harvard School of Public Health – *MPH candidate*



Laury C. Lucien, Esq.

- **Managing Member - Major Bloom**
- **Partner in, and advisor to, a marijuana-infused products manufacturing company in California**
- **Adjunct Cannabis Law professor**
Suffolk University Law School
- **Areas of expertise:** business licensing, corporate services, health care regulations
- **Education:**

Suffolk University Law School – *Juris Doctor*

Umass Amherst – *B.A. Biology*

* *Advisors do not have any financial or voting interest in the business*

Strategic Partners & Consultants*



Nial McManus
President/CoOwner

Valiant America

10+ year Specialization in Design & Ops
for cannabis dispensaries in the U.S.



MacCalvin Romain, MBA
Head of Product Team

Lantern

Specialization in Delivery Services
for Cannabis businesses and consumers



Scott Newman
Business Development Manager

Adaptive HR

Specialization in HRM
exclusively for cannabis industry companies

- Banking — Century Bank
- Insurance— Gilbert Insurance Agency, Inc.
- Legal Counsel — Vicente Sederberg (CO & MA)
- Logistics — Onfleet
- Product — Coast, Co. brand manufactured by T. Bear (woman owned)
- Secure Armored Car Service – Plymouth Armor Group
- Security – Safe and Sound Security, LLC

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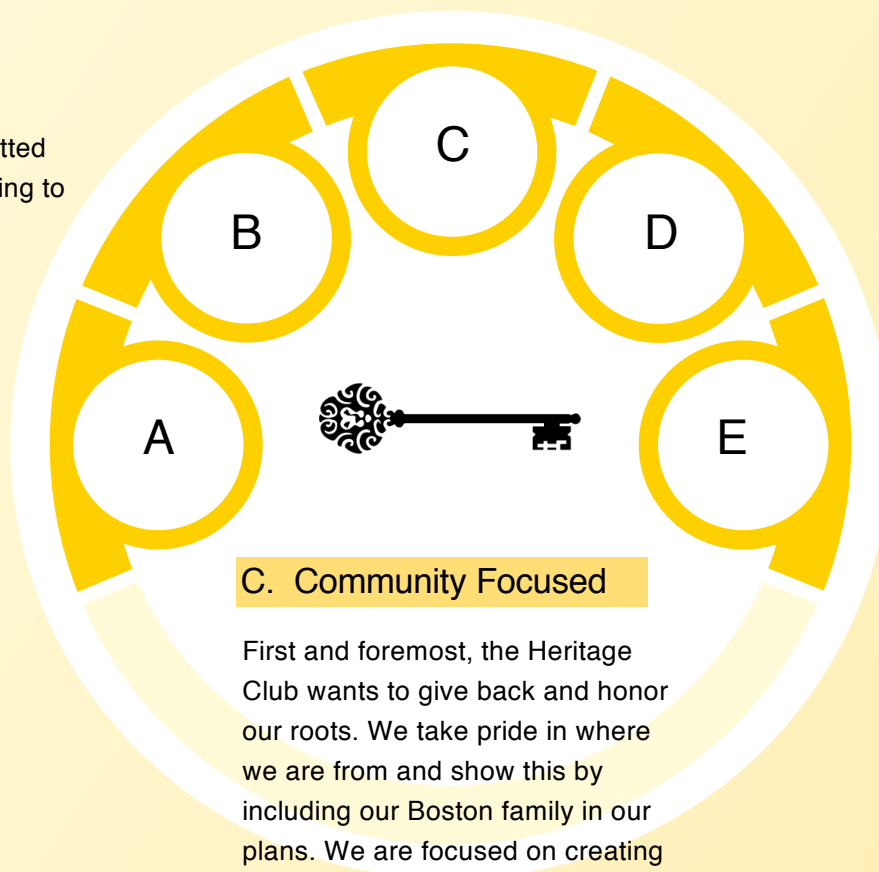
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Security Personnel

- **Security Personnel**

- A minimum of 3 security personnel on site during operational hours
- Throughout hiring & training process all general employees will also receive security procedural training. They must renew this training every 6-12 months.
- Random Grounds Patrol, no more than 1 hour apart, by security personnel or staff person if 3rd security person not available.
- Prevent loitering outside the facility
- Check Roland street for loitering

- Identify illegally parked cars and flag for towing
- Monitor all security cameras during operational hours
- Screen any individuals entering the facility and confirming that the person has a valid non-expired ID
- Screen/ID, and log in/out all vendors and visitors for Limited Area Access badges after verifying access permission for access.
- Check ID at 3 points during entry and transaction
- Ensure the safety of all employees and customers
- Assist with disruptive customer or employee



Product & Cash Security



• Product

- Written product management policy, and employee training
- METRC Supply Tracker (Seed to sale)
- Deliveries will be weighed and recorded immediately
- Secure Vault for storage of cash and marijuana products
 - Locked and secured when not in use
- Separate entry for product deliveries with video intercom
- Deliveries to be scheduled at random off-peak houses
- GPS tracking of deliveries, pre-announce and confirmed delivery communications.
- Products will be kept out of plain site and not visible from outside the facility

- Direct footage of any area that contains marijuana products
- Licensed transport service for transportation of products
- Regular Inventory Reconciliation - daily, weekly, monthly and annually

• Cash

- Written cash management policy, and employee training
- Debit Card payments accepted to minimize the use of cash
- Secure Cash Vault, separate from the sales floor
- Direct footage of any area that contains cash such as registers, sorting, or storage areas.
- Licensed transport service for transportation of cash



Security & Diversion Prevention

- **Customers MUST be 21+ to enter the facility, order online, or to place a delivery order**
 - IDs will be verified at 3 points during the purchase
 - Entry, Point of Sale, and Pick up
- **Secure on-site product storage policies**
- **Product storage areas not visible from customer areas, or from outside**
- **Cameras in product areas**
- **Strict dispensing protocol**
- **Minimum Purchase – on pre-rolled products of \$30**
- **METRC (Seed-to-Sale Tracking)**
- **Customer Education**
- **Good Neighbor Policy**



Preventing Youth Consumption

- **Customers MUST be 21+ to enter the facility, order online, or to place a delivery order**
 - IDs will be verified at 3 points during the purchase
 - Entry, Point of Sale, and Pick up
- **Strict dispensing protocol**
- **Childproof Packaging with proper labels**
 - All products will contain the following label in childproof packaging: “THIS PRODUCT HAS NOT BEEN ANALYZED OR APPROVED BY THE FDA. THERE IS LIMITED INFORMATION ON THE SIDE EFFECTS OF USING THIS PRODUCT, AND THERE MAY BE ASSOCIATED HEALTH RISKS. MARIJUANA USE DURING PREGNANCY AND BREAST-FEEDING MAY POSE POTENTIAL HARMS. IT IS AGAINST THE LAW TO DRIVE OR OPERATE MACHINERY WHEN UNDER THE INFLUENCE OF THIS PRODUCT. KEEP THIS PRODUCT AWAY FROM CHILDREN.”



Operation Details



1 Restricted Hours of Operation

MONDAY TO FRIDAY
10:30AM to 9:00PM- General Operations

SATURDAY & SUNDAY
9:00AM to 9:00PM- General Operations

3 Pre-Order

Customers will be able to pre-order online and come in for pick up during a specified window. We will be able to anticipate and control the flow of customer traffic. In addition to the website being a source of educational information, the site's pre-order feature will allow experienced and repeat customers a more efficient shopping experience.

2 Initial Opening

We plan to start at lower capacity. In our first few weeks, we will require customer pre-registration. Covid-19 policies will also likely still be in place. Requirements such as 6' distances will add to control during the initial opening.

4 Delivery*

(*Upon license availability) 8:30 - 8:30. This is a another way to make the experience time effective and to limit neighborhood impact. Registered and approved customers will be able to receive home delivery of our products.