

# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



## Milton's Town Farm Housing Proposal to the Town of Milton

The Milton Partnership for Community Reinvestment, LLC

Primary Project Representative:

Ralph A. Parent  
83 Sassamon Ave  
Milton, Massachusetts 02186

Feb 16, 2024

Prepared by: Parent + Diamond and Urban Spaces with ICON Architecture, Inc.



**Original**

**THE MILTON PARTNERSHIP**  
**For**  
**COMMUNITY REINVESTMENT, LLC**

A Joint Venture of Parent + Diamond, LLC (MBE) & Urban Spaces, LLC  
Ralph A. Parent, Primary Project Representative  
83 Sassamon Ave  
Milton, Massachusetts 02186

Date: 16 February 2024

To: The Governor Stoughton Trust  
c/o Nicholas Milano  
Milton Town Hall  
Milton, Massachusetts 02186

Re: Request for Proposals  
165 Governor Stoughton Lane  
Milton, Massachusetts 02186

Dear Trustees:

The Milton Partnership for Community Reinvestment, LLC ("MPCR"), is pleased to submit a Response to the Request for Proposals to acquire and develop the 4 +/- acres located at 165 Governor Stoughton Lane Milton, MA 02186

Called **The Homes at STOUGHTON FARM**, our approach is predicated on historic preservation, adaptive re-use, and new construction that is architecturally, historically, and environmentally compatible with the subject site. To that end, our site plan reflects an "agrarian" tone that evidences the history of this important location.

In addition to WHAT we create, we are especially proud to note HOW we intend to create it. Specifically, in order to extend the benefits of our development beyond the bounds of the project itself, we have allocated a significant amount of the Development & Construction Budget to M/WBE, minorities and women.



The MPCR sincerely appreciates your consideration of our proposal to create **The Homes at STOUGHTON FARM**, and we would be pleased to respond to any questions or concerns, either in writing or in person.

Yours truly,

*Ralph A. Parent*

Ralph A. Parent,  
Primary Project Representative  
for  
The Milton Partnership for Community Reinvestment, LLC

## Development Team

The Milton Partnership for Community Reinvestment, LLC (“MPCR”) is populated with firms and individuals with a wide range of experience, much of it directly related to the requirements of the Request for Proposals and our own proposal for **The Homes at STOUGHTON FARM**. To acquaint the Trustees with the roles and responsibilities of same, kindly review the following:

The name, address, e-mail address, and telephone number of the proposer; the name of any representative authorized to act on his/her behalf, and the name, title and contact information for the individual designated by the developer to receive all correspondence from the Trust and its agents.

The Proposer for the project is The Milton Partnership for Community Reinvestment, LLC (“MPCR”), a Joint Venture of Parent + Diamond and Urban Spaces, LLC. The address for the MPCR is 83 Sassamon Ave Milton, Massachusetts 02186. This is also the street address for the MPCR’s Primary Project Representative, Ralph A. Parent, who is authorized to act on behalf of the Proposer. He is a principal owner of Parent + Diamond, a certified MBE, and can receive all correspondence at the address above or at [rparent@parentdiamond.com](mailto:rparent@parentdiamond.com).

The names and primary responsibilities of each individual on the development team

With other members of the team noted below, the names and primary responsibilities of each company representative on the development team are as follows:

Ralph Parent, Principal Owner  
Parent + Diamond, LLC  
Project Manager  
Primary Project Representative

Merrill H. Diamond, RA  
Parent + Diamond, LLC  
Development & Design Oversight

Paul Ognibene, CEO  
Urban Spaces, LLC  
Development Oversight  
Project Financing

David Notter, COO  
Urban Spaces, LLC  
Administrative Coordinator  
Contract Administrator

Jeffrey Hirsch, RA, VP Operations  
Urban Spaces, LLC  
Development, Design, & Construction Oversight  
Primary Project Manager

If the proposer is not an individual doing business under their own name, a description of the firm and legal form and status of the organization (e.g., whether a for-profit, not-for-profit, a general or limited partnership, a corporation, LLC, LLP) and the jurisdictions in which it is registered to do business. If the proposer is a non-profit entity, please include a list of the organization's Board of Directors and areas of expertise they represent.

The Milton Partnership for Community Reinvestment, LLC, is comprised of two development companies. Parent + Diamond, LLC is a for-profit, Certified Minority Business Enterprise (MBE) and a Limited Liability Company registered to do business in the Commonwealth of Massachusetts. The other half of the Joint Venture is Urban Spaces, LLC, a for-profit, Limited Liability Company also registered to do business in the Commonwealth of Massachusetts.



The ownership structure of the entity to enter into the Ground Lease and the Land Disposition Agreement with the Trust and its relationship to any investors, lenders, and guarantors of debt, if any.

The Milton Partnership for Community Reinvestment, LLC, is owned jointly and equally by the two companies noted above. It is the entity that would enter into a Ground Lease and the Land Disposition Agreement with the Trust. The Principal Owner of Parent + Diamond, LLC, Ralph A. Parent and Paul Ognibene, the CEO of Urban Spaces, will be responsible for the equity, debt, and guarantees required for the project.

Identification of all principals, partners, co-venturers, or sub-developers participating in the transaction, and the nature and share of each participant's ownership in the project.

The Milton Partnership for Community Reinvestment, LLC, is comprised of two development companies.

Parent + Diamond, LLC is a for-profit, Certified Minority Business Enterprise (MBE) and a Limited Liability Company located in Milton, Massachusetts. Its principals are Ralph A. Parent, Primary Owner, and Merrill H. Diamond, Co-Owner.

The other half of the Joint Venture is the Cambridge-based development company, Urban Spaces, LLC, a for-profit, Limited Liability Company. Its principals include CEO Paul M. Ognibene, COO David Notter, and VP of Operations, Jeffrey Hirsch.

Each company is a 50% owner and partner in the MPCR.

Identification of the person designated to be the property manager if the property developer will also be the property manager. If this is not the case, state the legal and financial relationship between the entities and describe the process for securing property management services and criteria and minimal qualifications it will use in selecting the property management firm.

The Milton Partnership for Community Reinvestment, LLC, is pleased to note that the Property Manager for **The Homes at STOUGHTON FARM** will be managed by UHM Properties, a Boston-based minority-owned property management company.

Identification of the development team, such as architects, engineers, landscape designers, contractor, and development consultants. In addition, provide background information, including firm qualifications and resumes for principals and employees expected to be assigned to the project.

The Milton Partnership for Community Reinvestment, LLC, is pleased to note the palette of consultants engaged for **The Homes at STOUGHTON FARM**.

Architect:

[ICON Architecture](#)

101 Summer St.

Boston, MA 02110

Landscape Architect:

[Crowley + Cottrell](#)

171 Milk St.

Boston, MA 02109

Civil Engineer:

[Bohler Engineering](#)

45 Franklin St.

Boston, MA 02110

Property Management:

[UHM Properties](#)

530 Warren St.

Boston, MA 02121

Marion V. McEttrick

[Attorney at Law](#)

10 Crown St.

Milton Ma 02186

A summary of the developer's and the development team's experience, both collectively and individually, with similar projects. Particular attention should be given to demonstrate experience with **projects of a similar scale and complexity, site conditions, permitting issues, design and/or financing**, community involvement, as well as location. Proposers should demonstrate the ability to perform as proposed and to complete the project in a competent and timely manner, including the ability to pursue and carry out design, permitting, financing, construction, and marketing/unit absorption.

Parent + Diamond, LLC, and Urban Spaces, LLC, the two development companies of The Milton Partnership for Community Reinvestment, LLC, are pleased to provide the following information:

Parent + Diamond, LLC:

For complete information related to Parent + Diamond, LLC, we respectfully request that you visit our website at [www.parentdiamond.com](http://www.parentdiamond.com). Originally founded as PARENCORP in 1979, Parent + Diamond has experienced almost every conceivable issue related to "site conditions, permitting issues, design, and/or financing." Regarding community involvement, we start every project with an introductory meeting and as many follow-up meetings as necessary to achieve consensus.

For over four decades, we have made it a point to act as guests in our host neighborhoods and all of our projects have been welcomed in the communities in which they're located.

Urban Spaces, LLC:

For complete information related to Urban Spaces, LLC, we respectfully request that you visit our website at [www.urbanspacesllc.com](http://www.urbanspacesllc.com)



Information related to other key members of the team includes the following:

See Team Qualifications Tab #1

A list of all projects in progress or planned with details of their status.

For referenced projects: project name, location, project type, number of residential units, project scope, start date, projected and actual completion date, total development costs, development team, key personnel, and status.

The Milton Partnership for Community Reinvestment, LLC, is pleased to provide the following information related to the planned and ongoing projects for the two companies in Joint Venture as the Project Developers:

**Parent + Diamond, LLC:**

All of P+D's planned and ongoing development projects are being done in Joint Venture with Urban Spaces, inclusive of our proposal for **The Homes at STOUGHTON FARM**. The individuals, along with their respective roles and responsibilities, have and will remain consistent with those noted in the Development Team section of this presentation.

Ongoing projects of the Joint Venture include *SolAire*, a 13 unit Townhome development at 615 Boylston Street, overlooking the Brookline Reservoir. Construction began December 2023 with a completion scheduled for the summer of 2025.

The Joint Venture of P+D and Urban Spaces is currently negotiating for a parcel of land in Charlestown, Massachusetts (location withheld at Owner's request) and for a multi-building parcel in Boston's North End.

### Urban Spaces, LLC:

49 Sixth St. Cambridge MA - a multifamily adaptive reuse of the former rectory, convent and school properties of the Sacred Heart Church in Cambridge MA. The project is 100% affordable and will utilize both federal and state historic tax credits as part of its financing.

75 First St Cambridge MA - a mixed use multifamily, 6 story building, approximately 90,000 sqft and 6 stories high. Construction expected to start Fall '24

### Narrative on why the Proposer's experience is relevant to the 165 Governor Stoughton Lane housing development

The Milton Partnership for Community Reinvestment combines Parent + Diamond's 40+ years of real estate development experience with the 20 years of real estate development experience of its Joint Venture partner, Urban Spaces. Included in that experience are both for-sale and rental projects ranging from 3 units to 240 units - with a particular emphasis on marrying historic architecture with new construction that is architecturally, historically, and environmentally compatible with its host setting.

Our proposal is based on retaining and restoring the historic buildings on the site and, when appropriate, adding to them with architecturally and historically compatible new construction to create a pastoral development of 35 affordable homes. To do so successfully requires a vast array of skill sets and experiences. Although **The Homes at STOUGHTON FARM** is a relatively small development, it is no place for "on the job" training.

We would respectfully note that a principal of the MPCR is a former Commissioner of the Massachusetts Historic Commission, a former Board Member of Preservation MASS, and was a member of the Senate Special Commission on Historic Preservation. A clear passion for historic preservation and adaptive re-use, much of it combined with new construction, can be evidenced from the projects shown on the Parent + Diamond website ([www.parentdiamond.com](http://www.parentdiamond.com)).

The other half of the Joint Venture comprising the MPCR is Urban Spaces, LLC. Their record of adaptive re-use and historic preservation includes:

Blessed Sacrament Church, School, Convent and Rectory –  
48 residential units phased over time during 2006 - 2011

Description of the organizational structure of the development team and a plan for the maintenance of effective communications between the Trust and the development team during all phases of the project.

The Milton Partnership for Community Reinvestment, LLC, will be structured as a Limited Liability Company with principals of both Parent + Diamond, LLC, and Urban Spaces, LLC, as managers.

Communication with the MPCR and the Trust will be through P+D principal owner, Ralph A. Parent, from the present until the completion of the proposed project. Upon designation, Mr. Parent will be responsible for creating and maintaining a protocol of regularly scheduled updates on the progress made regarding **The Homes at STOUGHTON FARM.**

Information regarding any legal or administrative actions past, pending or threatened that could relate to the conduct of the Proposer, its principals, or any affiliates.

The Milton Partnership for Community Reinvestment hereby confirms that, to the best of its knowledge, no legal or administrative actions past, pending, or threatened, exist that could relate to the conduct of the Proposer, its principal, or any affiliates.



Confirmation that no local, state, or federal taxes are delinquent and outstanding for the development team or any constituent thereof.

The Milton Partnership for Community Reinvestment hereby confirms that, to the best of its knowledge, no local, state, or federal taxes are delinquent and outstanding for the development team or any constituent thereof.

Provision of third-party references for 3 completed projects including at least one affordable housing project. Provide contact names, title, and current telephone numbers, who can provide information to the Trust concerning the Proposer's experience with similar projects.

In 2023, Ralph Parent, the managing partner of Parent + Diamond, attended the Builders of Color Coalition - 6 month Affordable Housing Fellowship. The program was designated to expose minority real estate developers to the dynamics of affordable housing through the use of industry-experts as guest lecturers. The result was a powerful introduction to the affordable housing eco-system and the life-cycle of a typical, 100% or majority affordable housing development. It also inspired Mr. Parent to focus more of his firm's practice on expanding the scope and amount of affordable housing projects in its portfolio.

References:

Ken Willis  
Federal Home Loan Bank of Boston,  
800 Boylston Street, Boston, MA 02199  
Office: [REDACTED]  
[REDACTED]

Colleen Fonseca  
Builders of Color Coalition  
Executive Director  
[REDACTED]  
[REDACTED]

# Development Concept

The proposal must include a detailed description of the development concept for the property and its improvements, including but not limited to:

The story of Milton's Town Farm on Governor Stoughton Lane is well documented with elements of a rich dialogue between the buildings and site. With the proposed plan for the Homes at Stoughton Farm the site will remain part of the ongoing tale of service, envisioned as a new active family living community celebrating Milton's past in the preservation of local cultural assets. The existing historic structures will be retained on site and adaptively reused - providing thirty-five affordable rental housing for families in a series of courtyards that *cultivate community... steward the story...harvest home*.

Through Adaptive re-use and intentional new construction, the built environment respects and preserves the mature natural setting. A simple meandering drive and discreet walking loops organically weave through the estate connecting a series of places- natural and structured, preserving open outdoor space for access to sunshine and free play while respecting wetlands buffer and mature tree growth- creating a bucolic place to call home. The homes consist of diverse size and housing typology 11-one bedroom, 18- two bedroom and 6-three-bedroom units meeting the needs of residents of all ages. Families have options for new townhome living or one level flats. Smaller households have the kinship of close neighbors in the more formal courtyard setting of the building referred to as the Homestead.

**The "STEWARD" courtyard** — The *Pest House*, recently moved to the entry approach, will serve as the rejuvenated historic gateway to the neighborhood and serve as a community gathering spot. The nearby existing *Upper Almshouse* will be reused and adjoined with new construction to the rear mimicking the massing of an accreted farmhouse. Together these buildings are sited around the first courtyard; one that stewards the story and preservation of place while continuing the dialogue into the future.

**The “HARVEST” courtyard** — Across the road, a central community open space allows a common gathering and nurturing place for the neighborhood to play in the natural setting and connect through community gardening. The smaller *Lower Almshouse and adjoined new construction, is situated adjacent to the easement* and provides a quintessential vernacular New England backdrop of home. Individual private entries are provided for all units.

**The "CULTIVATE" courtyard** — Anchoring the site toward the wetlands, the new construction Homestead offers a comfortable garden setting for cultivating community - one neighbor at a time. The U-shaped courtyard plan draws on the turn of the century walk-up garden apartment typology and is articulated with varied rooflines and punctuated forms.

**Number and size of units (square footage and number of bedrooms)** and affordability levels. Include narrative as to why/how the mix of bedrooms, sizes and affordability was determined to ensure project financial feasibility and appropriateness for the marketplace.

Unit Type	Studio	1 BR/ 1 BA	2 BR/1 BA	3BR/2BA	Total	% of Total
S.F. (Avg)						
<u>Number of Units</u>						
Market Rent	-0	-0	-0	-0	-0	0%
Market Rent	-0	-0	-0	-0	-0	0%
Workforce 100% AMI	-0	-0	-0	-0	-0	0%
Workforce 80% AMI	-0	-0	-0	-0	-0	0%
LIHTC 60% AMI	-0	10	11	3	24	69%
MRVP (60% AMI)	-0	1	2	-0	3	9%
LIHTC 60% AMI PBVs	-0	-0	2	1	3	9%
LIHTC 30% AMI PBVs	-0	-0	3	2	5	14%
<b>TOTAL</b>	-0	11	18	6	35	100%
<b>%</b>			69%	17%		
<b>Bedrooms</b>		11	36	18	65	

The homes consist of diverse unit sizes and housing typology: 11-one bedroom, 18- two bedroom and 6-three-bedroom units- meeting the needs of residents of all ages. Families have options for new townhome living or one level flats. Smaller households have the kinship of close



neighbors in the more formal courtyard setting of the building referred to as the Homestead .

Preliminary site design.

See Site Design Tab #2

Discussion of the physical plan and architectural character of the project and the various programmatic and physical elements of the development, **including energy savings and green design elements** of the buildings and site design.

The physical plan of the Homes at Stoughton Farm consists of numerous 2-1/2 and 3-story gabled structures reflecting an accreted farmhouse aesthetic that blends the existing structures with new additions. The *preservation* of the existing structures [and sensitive renovation/ change of use] is at the core of sustainability- maintaining a previously developed site and all its embodied carbon, inherently leveraging existing utility and site infrastructure while preserving cultural fabric of the site.

#### **ICON is committed to sustainable design:**

- We work with sustainability consultants to meet Energy Star for Multi Family for New Construction detailing at New Construction
- We use the Enterprise Green Community's standards during our integrated design process, to meet and exceed recognized standards in green technology at adaptive reuse buildings
- We integrate Healthy Homes strategies into this new housing to ensure that products used during construction have minimal pollutants and do not adversely affect residents.
- We are early practitioners in Passive House design with 6 PHCP on staff and 9 passive house projects currently in construction.

As Milton is considering the adoption of the opt-in specialized energy code, higher energy efficiency for newly constructed multi-family homes is required. The question will be before voters at the annual town meeting. If

passed, the biggest building on site at approx 19,500 SF - the all-new construction Homestead - would be built to the Passive House standard.

- **Energy Efficient Envelope.** The project will be constructed offering efficient and sustainable living quarters with a focus on air tightness throughout the full envelope at both the new construction of the additions / Homestead building, and where possible at the historic buildings. The interior of the existing structures to remain will essentially be “gut” rehabilitated for the conversion with scope to include: New replacement roof systems with new attic insulation; Insulated exterior wall assemblies at the interior face – while preserving the historic trim; full replacement of existing retrofit windows with historically sensitive and energy efficient windows.
- **Efficient Building Systems.** The proposed design will be all electric including heat pump DHW generation and a VRF heating and cooling system. Units will be outfitted with energy star appliances, LED lighting, and low-flow plumbing fixtures.
- The exterior façade consists of low maintenance, high-performance products such fiber cement board siding materials, PVC trim; asphalt shingles. New fiberglass double glazed window systems with low-e coating offer high thermal performance [or triple glazed at passive house building]. Continuous exterior insulation and optimal insulation in the wall cavity is coupled with a focus on tight air sealing throughout the construction. Individual HVAC equipment will be provided within each unit offering high efficiency and individual controls for residents.
- **Healthy Indoor Air Quality.** Interior paints, primers and sealants will be no-VOC. A No Smoking policy will be implemented. Exhaust air will be removed from kitchens and bathrooms and ducted through an ERV to the exterior.

Construction staging plan and **discussion of construction and future impacts as to how the project will be managed to limit impact on neighbors**, in particular with respect to noise and traffic during and after the construction period and drainage and vehicle access after the project is completed.

See Construction Staging Plan Tab #3

Project financing – provide a sources and uses pro forma (see comparative evaluation criteria), and describe previous experience in securing such funding. Describe in detail what, if any, local, state, or federal subsidy funds will be sought to create affordability and the timeline for securing those sources.

See Project Financing and Operating Budget Tab #4

Letters of interest from both construction and permanent lenders (mentioned in the comparative evaluation criteria)

See Project Construction and Permanent Tab #5

## **Management Plan**

See Management Plan Tab #6

# Team Qualifications

**THE MILTON PARTNERSHIP  
FOR COMMUNITY REINVESTMENT, LLC**  
A Joint Venture Parent + Diamond, LLC (MBE) & Urban Spaces, LLC



(Minority Business Enterprise)



*Architecture*



(Women Business Enterprise)

*Landscape Architecture*



(Women Business Enterprise)

*Engineering*



*Property Management*



(Minority Business Enterprise)

*Marion McEttrick - Attorney*



(Women Business Enterprise)



## THE PARENT+DIAMOND STORY

Ralph Parent's relationship with Merrill Diamond dates back 30 years, starting with Diamond's coaching Parent in Little League baseball when he was 10. Since that time, Mr. Diamond has continued the mentoring relationship throughout Mr. Parent's academic and professional career.

More recently, Ralph Parent became a real estate broker. Concurrently, he had been in partnerships with other real estate developers to develop single and two-family homes in the City of Boston.

With the retirement of Merrill Diamond's longtime partner in Diamond Sinacori, Mr. Parent and Mr. Diamond have agreed to join forces and rebrand Diamond Sinacori, LLC as Parent+Diamond, LLC, ("P+D") in order to continue doing socially responsible development work in the private sector as well as continuing such work in the public sector.

Both Parent and Diamond have previously developed real estate projects, but the principals differ in their respective experience and scale of their projects. However, for P+D, most of the principal responsibilities will overlap, with Ralph Parent being the majority owner and thus the decision-maker for the partnership. All of our work occurs under the umbrella of P+D's mission to bring Diversity & Inclusion strategies to the private sector. This includes sourcing land or buildings for projects, project management, and the oversight of projects from start to finish.

Ralph Parent will provide a special focus and responsibility regarding the management of the entitlement process and, at the completion of construction, working with the marketing and sales team. Merrill Diamond's primary focus will include, with Ralph Parent's participation and input, deal negotiations, development management, and the identification of appropriate funding sources for Parent+Diamond's ongoing development projects.

# # #



## RALPH PARENT

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Ralph Parent attended Boston College and, among many other activities, was a four-year defensive starter for Boston College football team. Upon graduation, he coached football at both Brookline High School and Everett High School.

Always interested in real estate, he began a mentor-mentee relationship with current business partner, Merrill Diamond, that resulted in his complete immersion in the field. As a real estate agent with *Blueprint Brokers* in Everett, MA, he learned about his chosen profession and soon became a Real Estate Broker creating *Parent Realty Advisors (MBE)*. It wasn't long before his entrepreneurial spirit led to founding Pederson Consulting (MBE). Pederson Consulting eventually became one of the key members of a number of development teams who wanted to draw upon his experience and talent working with Boston's Inspectional Services Department regarding permits and approvals. His activities in this regard include coordinating and managing all activities related to securing approvals from Boston's Zoning Board of Appeals and Building Permits.



More recently, Ralph Parent and Merrill Diamond, in conjunction with Urban Spaces, created a company called The Boston Partnership For Community Reinvestment, LLC, ("BPCR") in order to partner with Boston's Department of Neighborhood Development ("DND") in the creation of affordable housing on scattered sites in Dorchester, Roxbury, and Mattapan. His efforts proved to be the key to sourcing local, disadvantaged General Contractors, Subcontractors, and Venders in order to comply with DND's requirements for a socially responsible approach to this type of development, one focused on Diversity and Inclusion.

The above led to the creation of Parent+Diamond, LLC (MBE), real estate development company. Its mission is to bring the type of Diversity and Inclusion that is more frequently mandated in the public sector to our private sector work. Based on a strategic alliance with



Urban Spaces, a company with whom Diamond had an ongoing relationship and development projects, Parent+Diamond, LLC has the operational and financial foundation to accomplish this mission, the basis of which is shared by Urban Spaces.

# # #

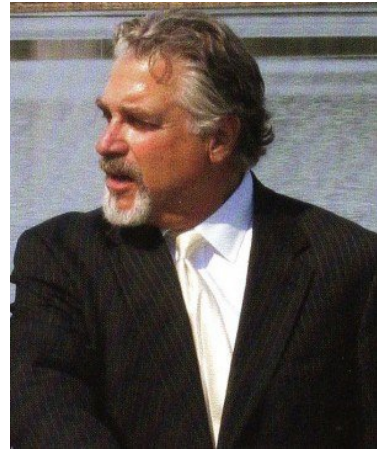


## MERRILL H. DIAMOND

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Merrill H. Diamond is a founding partner of Diamond Sinacori, LLC, a Boston-based Real Estate Development company that was founded in 1978.

Merrill H. Diamond has been the recipient of numerous national awards for environmentally sensitive design, historic preservation, adaptive re-use, and creative business development. He has served as both a gubernatorial appointee to the Massachusetts Historical Commission and to the Senate Special Commission on Historic Preservation. Mr. Diamond is a recent member of the Board of Directors of Preservation Mass, the Commonwealth's statewide, non-profit preservation agency. In addition, Mr. Diamond has been named "Entrepreneur of the Year" by Arthur Young / "Venture Magazine," "Merchant Builder of the Year" by the National Association of Homebuilders (NAHB), and one of "America's Most Valuable People" by "USA Today," the nation's national newspaper. He has been profiled in Jeffrey L. Seglin's book, America's New Breed of Entrepreneurs, and his development firm has twice been named "One of America's Fastest Growing Companies" by "Inc. Magazine."



Mr. Diamond's recent private-sector real estate development projects include the following: Stoneleigh, the historic preservation and revitalization of Stoneleigh, the Old Norfolk County Jail in Dedham, Massachusetts into residential condominiums; Kendall Crescent, the adaptive-reuse, historic preservation, and new construction of the historic Public Works Complex, including the historic Sewell School and Old Town Barn in Brookline, Massachusetts into residential condominiums and office space; The Waterworks at Chestnut Hill, a 112 unit residential condominium complex and museum developed in a JV with EAF and overlooking the Chestnut Hill Reservoir in Chestnut Hill, Massachusetts; and The Shops at OCEAN'S GATE, A 40,000 sf retail center that is the new "face" of the downtown in Marshfield, Massachusetts. The firm recently developed The Lancaster, a JV development with Urban Spaces of 55 new condominium units in Boston, Massachusetts.

and the historic Wild-Sargent Estate in Brookline, Massachusetts. Currently, the firm is developing 10 condominiums in the historic Kelley School in Newburyport; 61 condominiums in downtown Salem and 13 residences on the historic Richardson Estate overlooking the Brookline Reservoir; both in Joint Venture with Urban Spaces. Permitting for another multifamily residential project in Brookline will begin shortly.

Mr. Diamond has also done work in the public sector under the auspices of HUD's innovative HOPE VI program. In addition to working on the revitalization of a number of distressed communities across the country, Mr. Diamond is credited with creating and implementing "The Indianapolis Approach," a method of utilizing local disadvantaged contractors to construct HOPE VI developments -- thus turning HOPE VI construction dollars into an economic development generator to: a) build capacity for local businesses; b) create sustaining jobs; and c) keep most of the HOPE VI grant re-circulating within the impacted community. Mr. Diamond has spoken at a number of national symposiums relative to this approach and his views on public and affordable housing have been widely published.

# # #

# THE LANCASTER

## Project Description:

Sited on top of a hill in the Brighton section of Boston and featuring skyline views of downtown Boston, this 55 unit new-construction condominium building has been designed in the English Jacobean architectural style and, as such, reflects the best of the history and fabric of this part of Commonwealth Avenue. Programmatically, Charing Cross represents an infusion of much-needed homeownership opportunities for young professionals in an area of Boston that has traditionally been a repository for student and senior rentals.

## Marketing Challenge:

To pre-sell 50% of the market-rate condominiums prior to the start of construction in the Brighton section of Boston.

### Merrill Diamond bets on Brighton High-end condos planned

By Scott Van Veenhuysen | Friday, September 5, 2008 | <http://www.bostonherald.com/> | Real Estate

Local developer Merrill Diamond is known for his contrarian market bets, having, for example, transformed a drafty old Dedham jail into luxury condos.

Now Diamond is rolling the dice on what may be his biggest gamble yet: a market-rate condo project in the heart of Brighton's student ghetto.

Diamond recently won a City Hall competition to redevelop a dilapidated nursing home at 1501 Commonwealth Ave.

He did it with a bold, \$18 million plan that involves knocking down the rundown structure and building an upscale condo complex with a retro, pre-World War II look. And in a section of Brighton dominated by student rentals and low-income elderly housing, Diamond and project partner Hart Development are looking to sell some of the project's units for nearly \$600,000, with most averaging about \$400,000.

Now, as he begins a year-long city review process before construction begins, Diamond is bullish on the prospects for his new project, despite a down market and its frontier location.



## There was a time...

*When architecture was more art than engineering. When architects created buildings that fit within the overall architectural fabric of the community. That time has come again at*

## THE LANCASTER

1501 Commonwealth Avenue, Boston, Massachusetts



*Conceived by Diamond Sinacori, LLC and Hart Development Associates  
Imagined by Tise Design Associates, Inc.  
Brought to life by Suffolk Construction*

*The Charing Cross development team is pleased to note some of the differences between its proposal and those of the other proponents:*

*The highest percentage of Market-rate Condominiums (67%)*

*The only proposal focused on Family Living*

*Least amount of Government Subsidies*

*The most Beautiful Building*

*&*

*The only proposal with Specific Community Benefits*

*for more information visit:*

*[www.BelieveInBrighton.com](http://www.BelieveInBrighton.com)*





## THE WATERWORKS AT CHESTNUT HILL

### Project Description:

The Waterworks at Chestnut Hill is a 112 unit condominium development that was the result of Diamond Sinacori, LLC being given the designation by the Commonwealth to develop an 8 acre site overlooking the Chestnut Hill Reservoir in the Brighton section of Boston. The site consisted of three historic buildings, two of which were historic pumping stations, to which we added a new building which has become a landmark in its own right. After designation, EA Fish Associates was brought on as a development partner and the project was completed in 2010.

### Marketing Challenge:

To pre-sell 50% of the condominiums at an average of \$1MM each in the Brighton section of Boston, an area where this kind of price-point for a multi-family development had never been achieved.



**R10 Real Estate**  
The Boston Globe  
SATURDAY, AUGUST 14, 2009

# Real Estate

THE BOSTON GLOBE SATURDAY, AUGUST 14, 2009

## Pumped about the Waterworks

The 1895 pumping station (above), designed in the Beaux-Arts style by the architectural firm Bradley, Butler and Corbridge, will feature some of the project's 27 condos by Edward Green Associates. A new building (below) on the right was designed in the Renaissance style of architect H.A. Richardson, will become 24,000 square feet of office, community space, and a steam-engine museum.

**Edward Green Associates**  
Diamond Sinacori, LLC and Edward Green Associates, LLC, the developers of the 112-unit Waterworks project, on the left, are shown in a meeting with city officials.

**Edward Green Associates**  
Diamond Sinacori, LLC and Edward Green Associates, LLC, the developers of the 112-unit Waterworks project, on the left, are shown in a meeting with city officials.

The landmark buildings are at the heart of an \$80m project to bring vital housing and office space to Chestnut Hill

**By Susan Chen**  
The Waterworks at Chestnut Hill, a \$80-million project to bring vital housing and office space to Chestnut Hill, is the result of a partnership between Diamond Sinacori, LLC and Edward Green Associates, LLC. The project will feature 112 units of condominiums, 24,000 square feet of office space, and a steam-engine museum. The project is located on the site of three historic buildings, two of which were historic pumping stations. The project is designed in the Beaux-Arts style of architect H.A. Richardson. The project is designed in the Beaux-Arts style of architect H.A. Richardson. The project is designed in the Beaux-Arts style of architect H.A. Richardson.

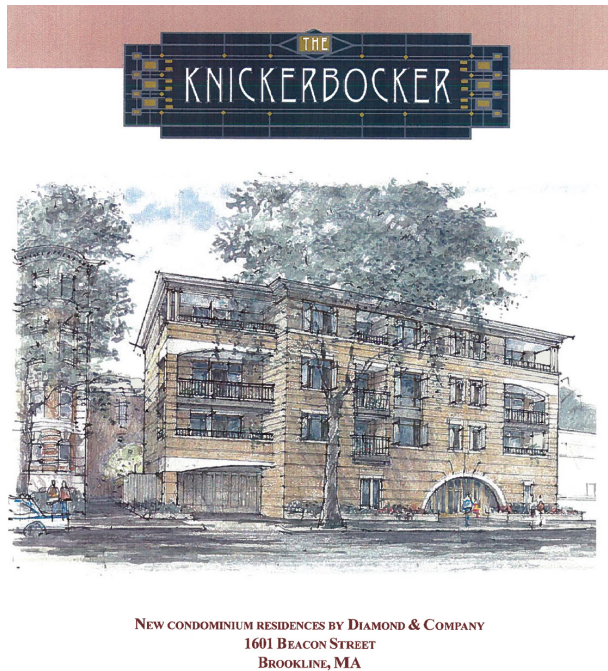


**STEP INTO THE ELEGANCE OF BOSTON'S GOLDEN AGE.**

**THE WATERWORKS**  
GRACIOUS CONDOMINIUMS, OFFICES, AND A STEAM-ENGINE MUSEUM.

**COMING SOON**  
THE WATERWORKS  
BOSTON  
617-731-9200  
www.thewaterworks.com





## THE KNICKERBOCKER

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### Project Description:

Located at 1601 Beacon Street near busy Washington Square, The Knickerbocker featured three residential floors of three units each, all over a parking/lobby level. The building was designed to reflect the scale and character of adjacent properties while avoiding replication of 19th century details. The building was hailed as, "a beautiful piece of urban sculpture" by the local Planning Board.

### Marketing Challenge:

To brand a 9-unit new condominium building along Beacon Street in the Washington Square area to appeal to a target market of urbane "empty-nesters."

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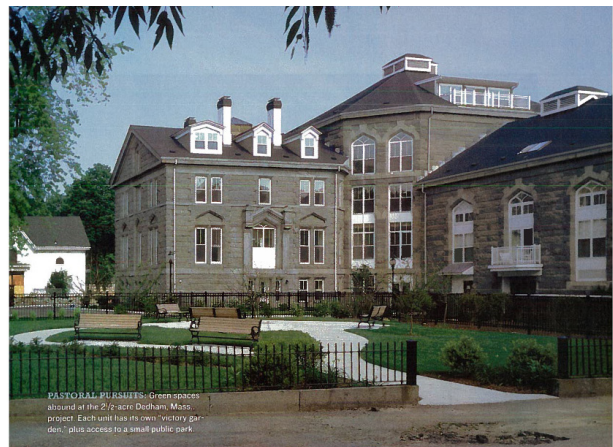
## STONELEIGH

### Project Description:

Located in the heart of Dedham's historic Precinct One, the Old Norfolk County Jail is a magnificent granite structure whose earliest elements date back to the early 19th century. Aside from the architectural significance of this facility, the jail is historically important for having provided temporary housing for Sacco and Vanzetti while they awaited trial in the 1920's. This development, the result of the developer's designation resulting from an RFP process put out by the Commonwealth, consisted of twenty-four duplex-style condominium residences, with ancillary structures transformed into four additional condominium homes. The entire site was landscaped to feature small "victory gardens" for residents and the creation of a public park which was given to the Town of Dedham.

### Marketing Challenge:

To convince the target market, "empty-nesters" from Dedham and the surrounding towns, to purchase residences in a former prison and to pre-sell 50% of the condominiums before construction began.







## KENDALL CRESCENT

### Project Description:

This project was the result of a regional competition held by the Town of Brookline for the disposition of the historic Town Yard, the Town's former DPW facility. In addition to encompassing two complete city blocks, the property included a three-story Victorian schoolhouse and a two-story, 18,000 square foot Victorian Barn. The Master Plan connected these two disparate elements with a "crescent" of 14 newly constructed townhouses designed to accommodate home offices and small ground level retail spaces. The Sewall School was converted into 22 additional condominium homes and the Town Barn was redeveloped into medical office space.

### Marketing Challenge:

To market a variety of residential and commercial uses on one site and to achieve 50% pre-sales prior to the start of construction.





[www.UrbanSpacesLLC.com](http://www.UrbanSpacesLLC.com)

Founded in 2004, Urban Spaces is an award-winning Cambridge-based real estate development company that aspires to have a transformational effect on the communities it serves. Urban Spaces is committed to delivering successful mid-sized residential and commercial projects in up-and-coming neighborhoods which are in close proximity to public transportation, universities, hospitals, and employment hubs.

#### **STRATEGIC FOCUS**

We select projects in downtown settings with unique characteristics.

#### **ENTREPRENEURIAL APPROACH**

We are creative, flexible, and tenacious in order to complete complex deals.

#### **EXPERIENCED TEAM**

We have the knowledge and sophistication to achieve success in urban development.

#### **EXCEPTIONAL RETURNS**

We achieve standout results due to our focus, approach, and experience.



**Jack Giles**  
**Chairman**

Jack is a partner at Urban Spaces and is a board member of several other businesses throughout the country. He is an active real estate investor with projects in Cambridge/Boston, Dallas, and San Diego. He is also a member of the Advisory Board for the College of Engineering at the University of Arkansas, his alma mater.



**Paul Ognibene**  
**Chief Executive Officer**

Paul sets the vision and direction for the company and provides executive oversight of all client relationships, contract negotiations, and multi-million dollar budgets. Paul earned his BA in Economics from Boston College and an MBA from Harvard Business School. Paul and his wife, Jennifer and children, Casey and Quinn, have lived in Cohasset for ten years.



**Dave Notter**  
**Chief Operating Officer**

Dave provides executive oversight of all project management and asset management activities. Dave develops and implements infrastructure, processes, and policies to help the company grow. Dave earned a BS in Finance from Boston College and an MBA from The University of North Carolina, Chapel Hill.





**Jeff Hirsch, R.A.**  
**Vice President of Operations**

Jeff oversees the day-to-day operations of all project activities, including permitting, design, and construction. With over 25 years of industry experience, Jeff is both a licensed architect and general contractor and earned a BA in Environmental Design and a Masters of Architecture from Texas A & M University.



**Skip Rose, P.E.**  
**Director of Construction and Facilities**

Skip coordinates project management activities and provides operational expertise. As a licensed Professional Engineer, Skip has more than 25 years of hands-on project management and systems development experience. Skip earned a degree in Physics from Binghamton University.



**Jesse Ruggiero**  
**Director of Accounting**

Jesse handles all project accounting and cash management, including construction requisitions and lender draws. Jesse earned a BA in Economics from Connecticut College.



**Katie Estes**  
**Asset Manager**

Katie performs financial analysis of potential projects and manages all asset management and project marketing activities. Katie serves as the company's liaison between third-party property management and marketing firms. Katie earned her BA from Tufts University and is currently taking classes in Real Estate Finance at Boston University.



**Andrea Docanto**  
**Executive Assistant and Office Manager**

Andrea is responsible for supporting all office operations. Andrea is currently earning her Entrepreneurial Science degree from Bunker Hill.

## RECENT PROJECTS

### Kendall East

**21 Charles St and 22 Hurley St., Cambridge, MA 02141**

Kendall East is a mixed-use apartment development comprised of 136 residential units and 14,800 square feet of retail. The development site is located across from The CambridgeSide Galleria, a one million square foot shopping center.

Designed by award-winning architectural firm Perkins Eastman, the two pet-friendly buildings include residential apartments, first floor retail, surface parking spaces to support the retail, and a two-level underground garage with 142 parking and 159 bicycle spaces. An expansive half-acre courtyard joins the parcels, providing green space and stadium seating for the neighborhood.



**Completion Date: March 2022**

### BRIX

**65 Washington Street Salem MA**

Located in downtown Salem MA, BRIX is a six story mixed use, multifamily building, 85,000 sq. ft. in total. The building consists of 61 one, two and three bedroom unit condominiums, striking amenity space, a second floor roof deck, fitness center and underground parking. The first floor has 3,000 sq. ft. of retail space. The building continues the revitalization and urbanization of this great city.



**Completion Date: October 2021**

**85-95 First Street**

**85-95 First Street Cambridge, MA 02141**

85-95 First Street previously consisted of a single story, 6,400 SF block of underutilized retail stores and 42 parking spaces. The structure was razed in spring 2018 to make way for a single-story, 10,000 SF retail space with 11 adjacent surface parking spaces. Designed by Perkins Eastman and located within the First Street Corridor, the project was completed in summer 2019. The three retail tenants are Loyal Companion, Sherwin-Williams, and a United States Post Office.



**Completion Date: June 2019**

**121 First Street**

**121 First Street, Cambridge, MA 02141**

Situated in the First Street Corridor within minutes of MIT and the MBTA Kendall Square and Lechmere stations, 121 First Street is the second of six mixed-use development projects being developed by Urban Spaces on First Street in Cambridge. This 60,000 SF, five-story, Class A office building is under construction and will deliver in Summer 2018. The property and surrounding area is emerging as a vibrant, pedestrian-friendly, focal point of Cambridge's technology and life sciences hub, creating an important link between Kendall and Lechmere Square.



**Completion Date: September 2019**



### **The Rand**

**1971 Massachusetts Avenue, Cambridge, MA 02140**

Located at 1975 Massachusetts Avenue, adjacent to the Porter Square station on the MBTA Red Line, this four-story mixed-use building includes 20 residential units with private parking and 3,600 sf of ground-level retail space. Built with an innovative modular construction process, the building was structurally in place in just four days. The prime location of the project led to the pre-sale of all market-rate units before the completion of the project.



**Completion Date: April 2017**

### **1047 Comm Avenue**

**1047 Commonwealth Avenue. Boston, MA 02215**

Adjacent to Boston University's New Balance Stadium and located directly on the MBTA Green Line, 1047 Comm Ave is America's largest microunit apartment building. This six story mixed-use building includes 180 residential units averaging 350 sf/unit, 6,100 sf of ground level retail, and underground parking.



**Completion Date: August 2016**





### **The Lancaster**

**1501 Commonwealth Avenue Brighton, MA 02135**

The Lancaster is Boston's first LEED gold certified condominium building. Located at 1501 Commonwealth Avenue, The Lancaster is situated between Boston University and Boston College directly on the MBTA Green Line. This five-story residential building includes 55 condominium units with underground parking. All market-rate units were pre-sold prior to the completion of the project.



**Completion Date: October 2015**

### **Axiom**

**159 First Street Cambridge, MA 02141**

Situated in the First Street Corridor at 159 First Street within minutes of MIT and the MBTA Kendall Square and Lechmere stations, Axiom is a 115 residential unit, six-story mixed-use building that includes 3,800 sf of ground level retail space and underground parking.



**Completion Date: May 2015**

### **Erie Street Condominiums**

**201-205 Erie Street Cambridge, MA 02139**

Within walking distance to Central Square and the MBTA Red Line, 199 – 205 Erie Street consists of two duplex condominium units, each three stories high plus a finished basement. Each unit is inclusive of 3 bedrooms, 2 ½ bathrooms, a finished basement, both indoor and outdoor fireplaces, 3 private decks per unit, grassed private yard, and a one car garage. The project was built using modular construction.



**Completion Date: June 2013**





### **7 Cameron**

**7 Cameron Avenue Cambridge, MA 02140**

Situated on the Linear Bike Path and a short walk from Davis Square and the MBTA Red Line, the project includes 37 residential units with underground parking.

**Completion Date: September 2012**



### **30 Haven**

**30 Haven Street Reading, MA 01867**

Adjacent to the MBTA commuter rail station in Reading's downtown district, 30 Haven was one of the first developments in Massachusetts to use 40R Smart Growth Initiative zoning. The development includes 55 residential units, 20,000 sf of ground floor retail, and underground parking.

**Completion Date: September 2012**



### **Dana Park Place**

**20 McTernan Street Cambridge, MA 02139**

Within walking distance to Central Square and the MBTA Red Line, the property was acquired from the Archdiocese of Boston. The former school building was converted into 20 condominium units with underground parking.

**Completion Date: August 2010**





**Dana Park Place**

**10 McTernan Street Cambridge, MA 02139**

Within walking distance to Central Square and the MBTA Red Line, the property was acquired from the Archdiocese of Boston. The former church building was converted into 23 condominium units with underground parking.

**Completion Date: July 2008**





APPLETON MILLS | LOWELL, MA

## ICON Architecture, Inc.

### WOMEN-OWNED BUSINESS ENTERPRISE (WBE)

ICON is a 57 person, Boston-based, women-owned (WBE) architectural practice with award-winning work focused on sustainable transformative projects that create new paradigms for living. Our designs range from complex multi-phase redevelopments to infill transit-oriented development. We embrace innovative adaptive reuse, building sustainable communities that energize residents and neighbors alike. We celebrate existing buildings, creatively repositioning aging buildings to celebrate their rich history while embracing contemporary life. A leader in innovation, ICON's work engages sustainable building practices, such as Passive House and Fitwel, and efficient construction methods, such as modular and mass timber.

Widely recognized for our vision, creativity, and responsiveness to clients, ICON's principals and senior staff offer the skills necessary to conceive and implement complex projects that require coordination of clients, citizens and agencies. We bring to our clients an ability to listen carefully, to assimilate and synthesize, and to help build consensus among often-conflicting interests. ICON delivers projects that not only meet program and budget goals, but deliver enduring value. We have extensive experience working with public housing authorities and community development corporations throughout New England. ICON has designed and built over 20,000 housing units. We have deep experience designing for special populations, including mixed-income family housing under EOHLC's design requirements.

ICON's projects have been case studies for nationally distributed books on urban housing, published by the Urban Land Institute, Harvard University Press, and Global Green. Current make-up of the firm includes 8 principals and 45 design staff. Staff includes 19 registered architects, 13 LEED Accredited Professionals and 7 Certified Passive House Consultants. The firm has been ranked on Boston Business Journal's List of Massachusetts' Top 100 Women-Led Businesses for the past five years.

### SUSTAINABLE DESIGN

ICON brings particular passion and expertise in affordable sustainable design. Sustainability is intrinsic to our practice and to good design. Our "sensible green" approach maximizes your investment to create durable, cost-effective solutions, enhancing resident comfort and performance while reducing costs. We have designed and built numerous LEED certified buildings at all levels, and have also worked with Enterprise Green Communities. We currently have 9 Passive House projects in construction, and many more on the boards.

### AFFORDABLE HOUSING

At the heart of ICON's practice is the belief that affordable housing makes a difference; a substantial portion of our practice is devoted to the design of affordable housing and equitable neighborhoods. We are committed to the highest quality of design, sustainability, livability and long-range economy. Our designs demonstrate sensitivity to their context and display our ability to work thoughtfully with residents, neighbors, and administrators to achieve quality planning and design with superior lasting value.





**Education**

Master of Architecture and  
Master of City Planning, MIT, 2000

Bachelor of Arts,  
Dartmouth College, 1993  
*cum laude*

**Registration**

MA (20440)  
CT (0015113)

**Affiliations**

Commercial Real Estate Women  
(CREW)

Housing and Community  
Development Committee

Union Square Main Streets

**Relevant Experience**

Principal, **Simon C. Fireman**, Randolph, MA: The project includes the multi-phased modernization for this 3 story, 160 unit Senior Living Facility and the addition of 45 units to an existing senior living facility. The wood-framed infill building, situated on a tree-filled green courtyard, will be Passive House Certified.

Principal, **LeeFort Terrace**, Salem, MA: will provide 124 units of affordable, multi-generation housing in a new-construction high-performance building. This public/private partnership will allow the replacement of 50 functionally obsolete senior housing units and accommodate increased density in a transit-oriented community with ample nearby amenities.

Principal, **Ingalls Court**, Melrose, MA: Multi-phase project creating 76 affordable senior housing units in two new Passive House buildings leveraging an existing senior care campus. Phase 1 will provide expanded facilities for Element Care and 48 one-bedroom units, and Phase 2 will complete the remaining 28 units via connecting bridge. The two buildings will open onto a new shared plaza, uniting the full site, while navigating a steep grade change.

Principal, **1627 Mass Ave**, Cambridge, MA: A two-story connector provides an accessible route from the mansion to a new construction mid-rise building at the rear of the site. This new structure will provide 20 affordable family-oriented one, two and three-bedroom units in a high performance envelope built to Passive House standards.

Principal, **McDevitt Senior Homes**, Boston, MA: An existing convent built in the late 1800's will be repurposed to 36 senior, affordable housing units. This gorgeous brick building will be preserved in character and maintain its main entry at the front of the building. This structure has been designed to comply with Bostons Future overlay district and Passive House requirements.

Principal, **Pine Oaks Village**, Harwich, MA: Nestled within a wooded, 20-acre parcel, Pine Oaks Village IV will provide 264 new affordable family homes in a new neighborhood near Harwich Town Center. Tree-lined streets flanked by 2- and 3-story buildings reflect the scale and materials of traditional cape vernacular while a central green and community building provide important gathering hubs.

Project Manager, **Walden Fire House Residences Revere**, MA: ICON transformed this charming decommissioned fire station into 7 units of affordable senior housing and community space. Utilizing historic tax credits, the building's character and history were carefully restored and integrated.

Project Manager, **555 Merrimack Street**, Lowell, MA: Site adjacent to the Western Canal near downtown Lowell, this mixed-use Passive House development provides 27 safe and supportive rental units for those recovering from substance abuse. As part of an historic overlay district, the building received approval from the Lowell Historic Board, with a masonry facade punctuated by bays and taller windows, reminiscent of the commercial fabric.

Project Manager, **108 Centre Street**, Brookline, MA: The social heart of Hebrew SeniorLife's (HSL) existing community center. A highly efficient and sustainable 54-unit affordable senior housing development with shared amenities includes a common laundry; central trash and recycling; convenient circulation cores; and corridor access to natural daylight as a high-rise podium building designed to Passive House design standards and Universal Design principles.

Project Manager, **The Lighthouses**, Salem MA: The Lighthouses comprise two Passive House buildings that will create 46 new affordable units on Salem's waterfront. Together they will stand as new gateways to Salem's Point neighborhood, and contribute to El Punto Urban Art Museum, with murals on strategic facades.

Project Manager, **Harbor Village**, Gloucester, MA: This 30-unit affordable housing project is Pre-Certified for Passive House Certification through PHIUS. The four-story building introduces new vibrancy to a long abandoned parcel in the heart of downtown Gloucester and includes three new commercial spaces as well as program spaces for the residents and a leasing office.

**Education**

Bachelor of Architecture,  
University of Minnesota, 1985

Bachelor of Environmental Design,  
University of Minnesota, 1985

**Registration**

Massachusetts (7399)

**Affiliations**

AIA MA Government Affairs  
Committee, Member

Boston Society of Architects

BSA Renovate for Recovery  
Registered Design Professional

U.S. Green Building Council

**Relevant Experience**

Principal-in-Charge, **Simon C. Fireman Community Renovation and Expansion**, Randolph, MA: ICON is currently working on a multi-phase modernization for this 3 story, 160 unit Senior Living Facility. The Expansion includes an additional 50 units.

Principal-in-Charge, **WHA A Place to Live**, Worcester, MA: Working with Worcester Housing Authority and their non-profit affiliate, BFI, ICON is designed supported studio units for formerly homeless households. "A Place to Live" project is a 30,000 SF building situated in a downtown neighborhood that includes 25 micro-units.

Principal-in-Charge, **Rindge Commons**, Cambridge, MA: Optimizing full potential of this iconic site, ICON's design transforms the character of this property to include a mix of uses while adding 100 units of affordable housing. The strategic design integrates an education and training use, with other community-oriented commercial spaces; both buildings are designed to meet Passive House standards.

Principal-in-Charge, **Oxford Residences**, Fairhaven, MA: Adaptive re-use of historic Oxford School and addition of 52 units of housing for active seniors, with support services designed for aging. Using the Secretary of the Interior Standards for Historic Rehab, the cultural fabric of the school of the past is preserved and serves the needs of its residents.

Principal-in-Charge, **Helena Crocker**, Westford, MA: The development of housing for extremely low-income seniors in studios and one-bedroom units with support amenities; including Community Based Housing units. Simple, straightforward design with high performance envelope provides a supported living situation for at-risk Seniors in Westford, MA. Adjacent to a newly developed Senior Center, this at-risk population has a community that offers stable housing in a place they can call home.

Principal-in-Charge, **Smith House**, Boston, MA: Renovation and modernization of 132 one-bedroom affordable occupied apartments in a 12-story, 1970's era concrete high-rise for seniors. Reprogramming of all amenity areas for seniors supports aging in place.

Principal-in-Charge, **Cambridge Housing Authority: Washington Elms Modernization**, Cambridge, MA: Extensive Existing Conditions and Schematic design programming through construction for modernization of an occupied 15 residential + 2 support building site; \$24M construction budget for varied scope addressing most critical need across the housing development for the next 20 years; funded through HUD's Rental Assistance Demonstration program.

Principal-in-Charge, **Veterans Transition House**, New Bedford, MA: This new construction project replaced an existing 3 building facility, for homeless and at-risk veterans along with their families by providing 30 new homes and a support facility. This project entails the preservation of affordability and program services, which includes outreach programs for the greater veteran community.

Principal-in-Charge, **Fulton School Residences**, Weymouth, MA: The 1928 National Registered Alice E. Fulton School has been reborn as an affordable, active senior community of 63 units. Preserving the historic school plan, former classrooms have been transformed into single apartments, incorporating original details and historic wainscots, cloak rooms and decorative tin ceilings.

Principal-in-Charge, **The Coady School Residences**, Bourne, MA: Fifty-eight residential units for active seniors are situated amongst a variety of communal spaces rich in historic character retained in the renovations: original open stairs, full proscenium at the entry lobby, and science greenhouse restored as a sun room - all washed in natural daylight through the large restored windows.

Principal-in-Charge, **Simpkins School Residences**, Yarmouth, MA: Nestled in the historic district of South Yarmouth, the 1930's built John Simpkins School has been redesigned to offer 65 senior housing units. The adaptive reuse, which totals up to 78,000 SF, includes a historically-sensitive addition per the Cape Cod Commission's Regional Policy Plan. Amenities include a community room and an expansive green space which enlivens the landscape.



**Education**

Master of Architecture,  
Rhode Island School of Design,  
May 2008

Bachelor of Arts, Art History,  
Wesleyan University,  
May 2004

Denmark's International  
Studies Program,  
Copenhagen, Denmark,  
Spring 2003

**Registration**

Massachusetts (51014)

**Affiliation**

American Institute of Architects  
(AIA), Member

Boston Society of Architects(BSA)  
Member

Boston Society of Architects(BSA)  
Co-Chair Design for Aging  
Knowledge Community

U.S. Green Building Council  
(USGBC), Member

**Relevant Experience**

Project Manager, **Town Farm, Westford**: Creation of 35 senior units on a historic site, including the Westford Food Pantry. The project comprises the adaptive reuse of two historic buildings with a sensitive new addition.

Construction Project Manager, **Coyle School**, Taunton, MA: Adaptive reuse of 1933 historic Gothic Revival-style School into 50 units of affordable family housing. The historic school will house 32 families within the classroom wings and historic gymnasium; another 18 families will reside in an addition behind the auditorium.

Project Manager, **Ingalls Court**, Methuen, MA: Multi-phase project creating 76 affordable senior housing units in two new Passive House buildings leveraging an existing senior care campus. Phase 1 will provide expanded facilities for Element Care and 48 one-bedroom units, and Phase 2 will complete the remaining 28 units via connecting bridge. The two buildings will open onto a new shared plaza, uniting the full site, while navigating a steep grade change.

Project Manager, **Simon C. Fireman Community: Renovation + Expansion**, Randolph, MA: The project includes the multi-phased modernization for this 3 story, 160 unit Senior Living Facility and the addition of 45 units to an existing senior living facility. The wood-framed infill building, situated on a tree-filled green courtyard, will be Passive House Certified.

Project Manager, **Chelmsford Woods Residences Phase II**, Chelmsford, MA: Second phase for 56 affordable units in a suburban context. Includes a community building, two midrise, wood-frame buildings and one townhouse building.

Project Manager, **Veterans Transition House**, New Bedford, MA: The 30 unit project comprises two new multi-use buildings which serve to help homeless and at-risk veterans along with their families in the Massachusetts South Coast area. Programming includes supportive services, meals and outreach for the greater veteran community.

Project Manager, **Helena Crocker Residences**, Westford, MA: Housing for extremely low-income seniors in studio and one-bedroom units with support amenities; includes Community Based Housing (CBH) units. Simple, straightforward design for 18 dwelling units with high performance envelope, adjacent to a new Senior Center.

Project Architect, **Overlook Terrace**, East Boston, MA: Three phase transformation of an obsolete 15-acre public housing site into a leading-edge, sustainable, 331-unit affordable residential community, providing 331 units in a mix of apartment types and sizes, in 7 modernized rowhouse buildings, 9 new townhome buildings, and 3 four-story midrise buildings. The project achieved LEED for Homes Gold and Platinum certifications.

Project Manager, **Oxford Residences**, Fairhaven, MA: Adaptive re-use of historic Oxford School and will also add 52 units of housing for active seniors, with support services designed for aging. Using the Secretary of the Interior Standards for Historic Rehab, the cultural fabric of the school of the past will be preserved and allowed to serve the future needs of its residents.



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## WESTFORD TOWN FARM RESIDENCES WESTFORD, MA

Preserving its past while serving the future, the 1837 brick structure and clapboard buildings of the historic Westford Town Farm will maintain presence on Main Street, as the on-going face to the community. This historic property will be brought back to life with 35-five new well-appointed senior units and a new home for the Westford Food Pantry. A sensitive addition, designed as a series of accreted forms to reduce it's impact, will be sited behind the historic buildings. Interior spaces include supportive services for seniors including a community room and wellness activities -recalling its use by the Westford Recreation Department.

In Design

Developer: SCG Development + C.H.O.I.C.E.

Key Personnel: Michelle Apigian, Janis Mamayek, Jonathan Lashley



## OVERLOOK TERRACE EAST BOSTON, MA

Transformed an obsolete 15-acre public housing site into a leading-edge, sustainable, TOD 331-unit affordable residential community. Guided by two years of community meetings, the new site plan reclaims open space and creates "rightsized" healthy homes. Rhythmic stoops along the streetscapes and terraced outdoor meeting spaces create a new image for this visible location just north of Boston.

The total build-out includes three four-story mid-rise buildings, nine townhouse buildings, and seven renovated rowhouse buildings, constructed in three phases. The redevelopment is LEED and Enterprise Green Communities Certifiable. The entire site is scheduled to begin solar PV installation to offset common electrical utility costs.

Completion Date: 2023  
Construction Cost: \$133,300,000  
Developer: Trinity Financial  
Key Personnel: Jonathan Lashley



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## OLMSTED GREEN MATTAPAN, MA

Olmsted Green creatively weaves a new neighborhood along the 65-acre Mass Audubon Nature Preserve, Boston's largest open space. Targeting sustainable design principles, the 42-acre site, formerly Boston State Hospital, tightly clusters 520 residential units around garden courts oriented to long views of the pastoral setting, preserving existing trees and much open space. Mixing affordable rental and homeownership opportunities into distinct districts -- including the "urban farm" and the "village center"-- the residential architecture reflects the breadth of New England design traditions. In this unique, open-space setting in the middle of a city, the Olmsted Green Master Plan establishes a residential character that is not quite "city," but definitely not suburban.



Completion Date: 2022  
Construction Cost: \$26,100,000  
Developer: New Boston Properties  
Key Personnel: Michelle Apigian



## QUINNIPIAC TERRACE NEW HAVEN, MA

Based upon ICON's initial studies for modernization and improvements to the existing housing stock, the award-winning 226-unit Quinnipiac Terrace transformed an obsolete housing project into a "community of choice," blending both rental and homeownership opportunities, and mixing families and senior residents. Taking advantage of its attractive riverfront site, the plan reintroduced the neighborhood street grid, relinking the adjacent Fairhaven neighborhood, and creating views to the river with its enhanced riverfront park. Building design takes cues from this riverfront community's historic prototypical "Oyster House," lifting housing above brick flood-proof lower levels.



Completion Date: 2011  
Construction Cost: \$48,000,000  
Developer: Trinity Financial  
Key Personnel: Michelle Apigian



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## PUTNAM GREEN CAMBRIDGE, MA

Achieving a LEED-for-Homes Platinum rating, these 40 apartments surround a sunny, landscaped courtyard to maximize passive solar design. The 34-unit midrise incorporates a super-insulated building envelope, 96% efficient mechanical systems, heat recovery ventilation, and energy producing photovoltaic and solar thermal rooftop systems. Separate six-family townhouses are built with SIPS (structural insulated panel system) to achieve an R-30 envelope with individual unit energy recovery. Although targeting high levels of energy efficiency, the buildings are warm and inviting, featuring a curving entry porch and bays playfully engaging the more traditional

Completion Date: 2012  
Construction Cost: \$10,500,000  
Developer: HRI  
Key Personnel: Michelle Apigian



Completion Date: 2016  
Construction Cost: NA  
Developer: Chelsea Neighborhood Developers  
Key Personnel: Michelle Apigian



## THE BOX DISTRICT CHELSEA, MA

This former box manufacturing industrial district has been transformed as a new 250+ unit, multi-block residential neighborhood. ICON has designed four new infill developments positioned amidst existing residential and retail structures, and worked with the City of Chelsea to design and build new streets and public parks.

Highland Homes comprises 49 units in three separate buildings, mixing rental apartments with home ownership condominiums.

Nearby, Janus Homes includes 18 units wrapped around a large, native species flowering garden.

The 32-apartment Spencer Row sits above a parking podium and combines private entry townhouses with apartment flats. Highland Terrace adds 32 new flats and townhouses overlooking a new city park.



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## CHELMSFORD WOODS CHELMSFORD, MA

Thoughtfully sited amongst mature plantings and natural growth on the sloping hills overlooking the lower river wetlands, Chelmsford Woods Residences is designed with a focus on community. A variety of living environments are offered- from the pockets of family townhomes that flank either side of the entry lane approach to an array of three story multi-family structures that provide anchorage to the site. 115 new respectable affordable family housing units including 30-1BR, 62-2BR and 12-3BR Flat + 11-3BR townhouse. Central to each resident's arrival sequence is a view of the Community clubhouse, a multi-function building that engages the community for daily activities of mail, wellness, and management.

Completion Date: 2018  
Construction Cost: Ph 1 - \$11.2M; Ph 2 - \$12.8M  
Developer: CHOICE + SCG  
Key Personnel: Janis Mamayek, Jonathan Lashley



## HIGH MEADOW TOWNHOMES BOURNE, MA

High Meadow Townhomes marks the completion of a 117-unit affordable housing project in Bourne that includes Canal Bluffs and Clay Pond Cove. High Meadow consists of 44 mixed-income, 2BR and 3BR townhouses. Organized around a central, elliptical common landscape, the multi-unit buildings (4 to 6 units per building) are designed to give individuality to each duplex townhouse. A range of siding types and colors complement the townhouse scaled massing, offering a residential rhythm of porches, bays and canopies. Private front doors sit conveniently beyond parking courts that array around the central green. Each unit has a private backyard patio; boulders unearthed during construction were used to edge paths and border landscape.



Completion Date: 2017  
Construction Cost: \$10,100,000  
Developer: POAH  
Key Personnel: Michelle Apigian



# ICON ARCHITECTURE RELEVANT EXPERIENCE

## SIMPKINS SCHOOL RESIDENCES SOUTH YARMOUTH, MA

Nestled in the historic district of South Yarmouth, the 1930's built John Simpkins School has been redesigned to offer 65 senior housing units. The adaptive reuse, which totals up to 78,000 SF, includes a historically-sensitive addition per the Cape Cod Commission's Regional Policy Plan. Amenities include a community room and an expansive green space which enlivens the landscape.



Completion Date: 2015  
Construction Cost: \$9,900,000  
Developer: SCG Development  
Key Personnel: Janis Mamayek



## COADY SCHOOL RESIDENCES BOURNE, MA

Coady School Residences connects the community to the town's rich cultural history with affordable housing options set within the former elementary school. Fifty-eight residential units for active seniors are situated amongst a variety of communal spaces rich in historic character retained in the renovations: original open stairs, full proscenium at the entry lobby, and science greenhouse restored as a sun room – all washed in natural daylight through the large restored windows. Connecting corridors between the school and new addition frame intimate outdoor resident gathering spaces.



Completion Date: 2017  
Construction Cost: \$13,500,000  
Developer: SCG Development  
Key Personnel: Janis Mamayek



# EXCELLENCE IN BUILDING PERFORMANCE

## PASSIVE HOUSE

### **FINCH** | CAMBRIDGE, MA

Finch Cambridge is a new 98-unit affordable rental development, celebrated as the largest affordable development project in Cambridge in the last 40 years. Enhancing the existing neighborhood, the building includes numerous resilient and sustainable measures. Designed to Enterprise Green Communities and Passive House standards, the building is lifted above the 2070 flood plane, with all mechanical systems levels up, as well. Additional design features include a raised residential level, an energy-efficient and airtight building envelope, high performance mechanical and ventilation systems, solar panels, back-up power and an Area of Refuge.



*Finch, Cambridge, MA | 100 Apartments*

## PASSIVE HOUSE

### **DISTILLERY NORTH** | BOSTON, MA

As one of the largest multifamily Passive House buildings in New England, and the first in Massachusetts, The Distillery in South Boston is designed to meet the world's most energy efficient performance standard, with energy savings of 60% over conventional construction. Ultimately intended to expand to 65 units, the 28-unit new building supports and enhances an existing, vibrant artist and business community created in an historic distillery mill. The new development adds additional artist live/work loft spaces, commercial/retail space, a community roof top garden and deck space, two stories of parking, a courtyard, and more.



*Distillery North, Boston, MA | 28 Apartments*

## LEED PLATINUM

### **OVERLOOK TERRACE** | BOSTON, MA

Overlook Terrace is the transformation of an obsolete 15-acre public housing site into a leading-edge, sustainable 331-unit deeply affordable residential community. The new residential buildings employ innovative building components to achieve high-performance. Certified as LEED Platinum (V3), and boasting HERS scores as low as 43, the new midrise and townhome buildings feature numerous sustainable elements. The building exterior utilizes UPVC triple-glazed windows (U 0.15, SHGC: .50) and super-insulated exterior walls offer a total exterior wall system of R-29 with a roof insulated to R-41.



*Overlook Terrace, Boston, MA | 331 Apartments*

## MODULAR

### **THE GRAPHIC** | CHARLESTOWN, MA

This new modular building has been designed to play on the industrial vibe, employing corrugated metal panels, masonry screen walls and large, multi-lite windows. The new "U-shaped" building wraps a south-facing landscaped courtyard, adding 4 stories over a podium of parking. Currently the largest modular construction development in the city of Boston, its innovative construction method offered real cost advantages, reducing construction time, minimizing disruption to this urban community, and providing a high level of quality control. The bonus is a LEED Gold certified building with amazing sound and thermal isolation.



*The Graphic, Charlestown, MA | 171 Apartments*



## REPRESENTATIVE LIST OF: AFFORDABLE HOUSING PROJECTS

- 250 CENTRE STREET, JAMAICA PLAIN, MA
- 25 AMORY STREET, JAMAICA PLAIN, MA
- 33 SYLVAN, NEW HAVEN, CT
- 525 BEACH STREET, REVERE, MA
- 555 MERRIMACK, LOWELL, MA
- ANDERSON PARK, BOSTON, MA
- APPLETON MILLS, BOSTON, MA
- ARLINGTON POINT, LAWRENCE, MA
- ARTBLOCK 731, BOSTON, MA
- BROOKSIDE ARTISTS LIVE/WORK, JAMAICA PLAIN, MA
- CARLTON WHARF, EAST BOSTON, MA
- CENTRE 50 & ENSO FLATS, BROCKTON, MA
- COADY SCHOOL RESIDENCES, BOURNE, MA
- COLUMBIA WEST, BOSTON, MA
- DARTMOUTH HOTEL, ROXBURY, MA
- EGGLESTON CROSSING, ROXBURY, MA
- FINCH, CAMBRIDGE, MA
- HELENA CROCKER RESIDENCES, WESTFORD, MA
- HARBOR LAFAYETTE HOMES, SALEM, MA
- HARBOR VILLAGE, GLOUCESTER, MA
- HIGH MEADOW TOWNHOMES, BOURNE, MA
- HOLTZER PARK, JAMAICA PLAIN, MA
- MAVERICK LANDING, EAST BOSTON, MA
- MORVILLE HOUSE, BOSTON, MA
- NEWPORT HEIGHTS, NEWPORT, RI
- OLMSTED GREEN, MATTAPAN, MA
- OVERLOOK TERRACE, BOSTON, MA
- PUTNAM GREEN, CAMBRIDGE, MA
- QUINNIPIAC TERRACE, NEW HAVEN, CT
- RESIDENCES AT CANAL BLUFFS, BOURNE, MA
- RINDGE COMMONS, CAMBRIDGE, MA
- ROXSE HOMES, BOSTON, MA
- SALEM HEIGHTS, SALEM, MA
- SCHOOL STREET RESIDENCES, ATHOL, MA
- SIMON C. FIREMAN, RANDOLPH, MA
- SIMPKINS SCHOOL RESIDENCES, SOUTH YARMOUTH, MA
- SIXTY KING, PROVIDENCE, RI
- SMITH HOUSE, ROXBURY, MA
- SOUNDVIEW LANDING, NORWALK, CT
- SPENCER ROW, CHELSEA, MA
- TEACHER'S CORNER, HARTFORD, CT
- TEMPLE LANDING, NEW BEDFORD, MA
- FITCHBURG ARTS COMMUNITY, FITCHBURG, MA
- THE BOX DISTRICT, CHELSEA, MA
- THE LIGHTHOUSES, PEABODY, MA
- THE PLANT & CUBAN REVOLUTION, PROVIDENCE, RI
- VETERAN'S TRANSITIONAL HOUSING, NEW BEDFORD, MA
- WALDEN FIRE HOUSE RESIDENCES, REVERE, MA
- WASHINGTON BEECH, ROSLINDALE, MA
- WASHINGTON ELMS, CAMBRIDGE, MA
- WEST BROADWAY, SOUTH BOSTON, MA

For more information regarding ICON Architecture's Affordable Housing projects, please visit us on the web at:  
[www.iconarch.com](http://www.iconarch.com)



*Appleton Mills*



*Quinnipac Terrace*



*Finch Cambridge*



*Putnam Green*



*Arlington Point*





HARBOR VILLAGE | SALEM, MA

## REFERENCES

### HOMEOWNERS REHAB INC.

**Sara Barcan**  
Executive Director

280 Franklin Street  
Cambridge, Massachusetts, 02139

### NORTH SHORE COMMUNITY DEVELOPMENT COALITION

**Mickey Northcutt**  
Chief Executive Officer

96 Lafayette Street 2nd floor  
Salem, MA 01970

### C.H.O.I.C.E. INC

**David Hedison**  
Executive Director

10 Wilson Street  
Chelmsford, MA 01824



At Crowley Cottrell, we bring clarity to complex sites to create beautiful, approachable, landscapes for living and learning. We believe well designed landscapes have the ability to positively affect the lives of the people who live, work, and play in them.

Our project experience is broad, including parks, campuses, cultural institutions, multi-family housing, historic properties and residences. We approach each design individually, working in close collaboration with the client, allied professionals and stakeholders to unite design aspirations with the site's unique characteristics.

## Clarity. Intention. Connection.

- + Driven by collaboration, not ego.
- + Expertise and advanced skills throughout the company.
- + Nurturing, and unapologetic about it.
- + Symbiotic relationships with clients, partners and the environment.
- + 100% female owned and a certified Women-owned Business Enterprise (WBE).
- + LEED Accredited Professional Firm.



Crowley Cottrell holds professional Landscape Architecture licenses in MA, CT, NH, NY, RI and VT





**RLA, ASLA**  
**Principal & Owner**

Registered Landscape  
Architect #1555  
MA, VT, CT, NY, NH, RI

# Michelle Crowley

*An award winning designer, Michelle began her career 30 years ago as a landscape contractor in Santa Fe, NM. She carries this practical perspective with her as she manages institutional and residential projects, whether designing fine wrought iron details for a garden or coordinating wetland reconstruction on a brownfield site.*

*Michelle is passionate about working collaboratively with clients and allied professionals to find efficient and elegant resolutions for ambitious visions and complex situations. Her down to earth style encourages all team members to bring their best thinking to the table to achieve transformations that ultimately feel both delightful and grounded.*

## Education

### Babson College

Goldman Sachs 10,000 Small Businesses  
Certificate of Entrepreneurship • Wellesley, MA 2016

### University of Pennsylvania

Master of Landscape Architecture 2001  
The Faculty Medal in Landscape Architecture 2001  
ASLA Student Certificate of Merit Award 2001

### University of Puget Sound

Bachelor of Arts, Asian Studies • Tacoma, WA 1992

## Professional History

### Crowley Cottrell, LLC

Principal/Owner • Boston, MA 2011-Present

### Reed Hilderbrand

Senior Associate • Cambridge, MA 2004-2011

### Hargreaves Associates

Landscape Designer • Cambridge, MA 2000-2004

### Morgan Wheelock Incorporated

Intern/Office Assistant • Somerville, MA 1997-2000

### Wilder Landscaping, INC.

Installation Crew Foreman/Designer • Santa Fe, NM 1988-1997

## Awards

### BSLA Award of Merit

Suburban Meadow House • Concord, MA 2021

### Concord Historic Commission Award for Landscape Preservation

Concord Academy Main Gate • Concord, MA 2016

### ASLA Award of Excellence

Scenic Hudson's Long Dock Park • Beacon, NY  
(RH) 2015

### BSLA Award of Excellence

Scenic Hudson's Long Dock Park • Beacon, NY  
(RH) 2015

### Sustainable Sites USGBC

Scenic Hudson's Long Dock Park • Beacon, NY 2012

## Community

### Newton Cemetery Arboretum

Trustee 2021- Present

### Historic Newton

Board Member 2018-2021

### Newton Girls Soccer

Chair of City League 2010-2017



**RLA, LEED AP  
Principal & Owner**

USGBC – LEED  
Accredited Professional  
Registered Landscape  
Architect Massachusetts

# Naomi J. Cottrell

*With training in both Architecture and Landscape Architecture, Naomi blends her decades of experience in modernism and minimalism with her New England Yankee roots to ground even her most playful projects in elegance and efficiency.*

*She believes in the power of quality-designed landscapes in all communities, and understands that the most important design principles apply as much for her high-end residential work as for her community-driven projects.*

*With years of experience leading public process, her charismatic personality helps her to connect with clients and communities to understand and realize their dreams for the site.*

*Naomi has led a number of projects recognized in publications and with awards, including two ASLA Honor Awards for residential work, a BSLA Merit Award for Excellence in Design of Parks and Recreation Facilities, and a BSLA Honor Award for Success with Limited Resources.*

## Education

<b>Harvard University Graduate School of Design</b>	
Master of Landscape Architecture	2002
<b>Clemson University</b>	
Bachelor of Landscape Architecture	1995
Bachelor of Arts, Architecture	1994

## Professional History

<b>Crowley Cottrell, LLC</b>	<b>2012–Present</b>
Principal/Owner	Boston, MA
<b>Reed Hilderbrand</b>	2003–2011
Senior Associate	Cambridge MA
<b>Keith LeBlanc Landscape Arch.</b>	1998–2000
Landscape Designer	Boston, MA
<b>Olson Lewis + Dioli Architects</b>	1996–1998
Architectural Designer	Manchester, MA

## Community

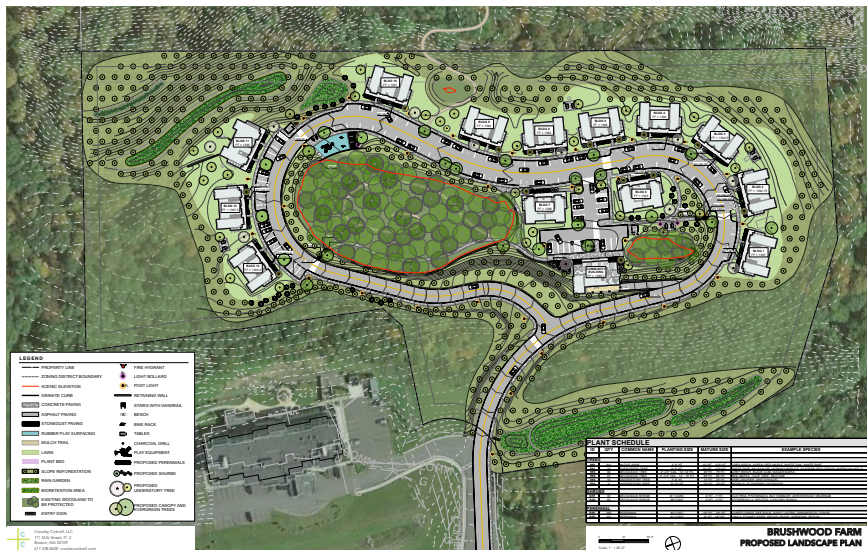
<b>North Shore CDC</b>	
Board Member	2021-Present
<b>Salem Tree Commission</b>	
Member	2019-Present

## Awards

<b>BSLA Merit Award: Design</b>	2020
Lafayette Park, Salem, MA	
<b>BSLA Honor Award: Design w. Limited Resources</b>	2016
Main Street Modular Parklet • Peabody, MA	
<b>Concord Historic Commission Award for Landscape Preservation</b>	2016
Concord Academy Main Gate • Concord, MA	
<b>ASLA Honor Award &amp; BSLA Merit Award</b>	2013
Greenlee House • Dallas, TX (RH)	
<b>BSLA Merit Award</b>	2012
Edward Leathers Community Park • Somerville, MA (RH)	
<b>ASLA Honor Award &amp; BSLA Merit Award</b>	2011
Beck House • Dallas, TX (RH)	
<b>ASLA Honor Award &amp; BSLA Honor Award</b>	2010
Truro, MA (KLLA)	
<b>Suburbia Transformed Award: James Rose Center</b>	2010
Pamet Valley • Truro, MA (KLLA)	



# Relevant Projects



## Lenox Brushwood Farm

Location: Lenox, MA

Brushwood Farm property provides opportunities for affordable housing for those working in Lenox, where low income housing is scarce. The landscape design includes many amenities including bike racks, walking paths, a playground, social and leisure areas, and lookout points with views of October Mountain and the surrounding woodlands. The development includes a clubhouse and 13 townhouse buildings with 65 long-term rental apartments that will be available to qualified, income-eligible individuals and families.

## Khuen's Way & Scott's Grove

Location: Martha's Vineyard, MA

This projects provide much needed low-income housing on Martha's Vineyard. Working together with builders, architects, and developers from the first brainstorming session was critical for the design of these sensitive developments. The goals for the sites were to limit the area of disturbance so to retain as many of the large trees as possible, enhance and retain native vegetation, minimize paving, and to provide shared and private outdoor areas for gathering.



## Tufts Housing

Location: Boston, MA

Completed at Tufts University, this project was part of the school rethinking its' housing options and their relationship to the surrounding community. It serves as a new model of campus living that increases community for students by providing a shared backyard quad while fitting into the residential neighborhood setting. Beginning with a feasibility study for the conversion of several Tufts owned woodframe structures to Junior/Senior housing, Crowley Cottrell completed the site design for 16 houses near Boston and Winthrop Streets in Medford and their common space.



# Relevant Projects



## Corcoran Residence

Location: Milton, MA

Completed in 2017, this single residential lot in Milton, MA, was divided into two separate homes and landscapes. The landscape design reflected the shift in use by extensive planting of the new property line, redefined the parking and driveway area and hardscape that reoriented each home to its individual outdoor space.

## Hingham Woods

Location: Hingham, MA

Hingham Woods was developed in the 1980s, with over 250 units nestled into clusters on approximately 75 acres. Since development, it has received minimal maintenance and no replanting. As team lead, we conducted a thorough master plan that surveyed nearly 800 trees, and outlined a long term vision for refurbishing the landscape. Phase 1 is complete, which included major tree work, replanting the single aged canopy and refreshing the curb presence of each building.



## Ticcoma Green

Location: Nantucket, MA

Ticcoma Green is designed to be a vibrant community village based on inclusivity and a sense of identity. Inspired by the vernacular of the typical Nantucket Houses of the late 18th century, the buildings reflect the principles of Nantucket design; simplicity, economy and visual refinement. The site design allows for a maximum of outdoor space to enable community interactions at a central lawn, outdoor terraces, a large play space and community gardens..



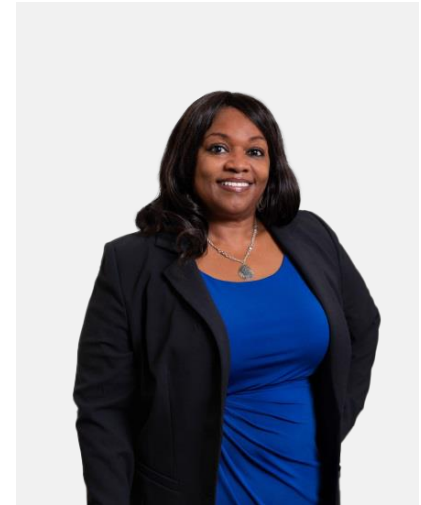
## UHM PARTNERS



**Kevin Bynoe**  
Chief Executive Officer



**Patricia Farr**  
Director of Human Resources



**Sheila Harper**  
Director of Compliance

# THE HISTORY OF UHM



**2019**

As a part of our Strategic Growth Plan we changed our name to UHM Properties

**2005**

We expanded by purchasing two commercial properties, one to house our central office and the other for facilities management

**2003**

On January 1, 2003, we became United Housing Management Company

**2015**

We shifted in ownership and an advisory board was created

Our journey began at Long Bay Management Company



## UHM PROPERTIES AT A GLANCE

- UHM Properties is the largest minority-owned property management company in the Greater Boston area.
- UHM Properties is dedicated to working with our partners.
- UHM manages over 1,700 units in the Greater Boston Area for nonprofit organizations such as Dorchester Bay Economic Development Corporation (DBEDC) and Habitat for Humanity. As well as for-profit organizations such as PNC Bank and Vitus.
- Experienced in managing every type of multi-family housing including affordable, senior, mixed-use and market-rate properties.



VBCDC



## PRESENTING TEAM



**Kevin Bynoe**  
Chief Executive Officer



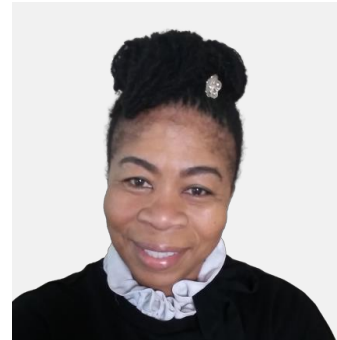
**Genesa Mendes**  
Vice President of Operations



**Jeffrey Caputi**  
Chief Financial Officer



**Dwayne Watts**  
Neighborhood Network Center



**Mayra Leith**  
Resident Engagement



## DEPARTMENTS

**RESIDENT  
SERVICES**

**COMPLIANCE**

**MAINTENANCE &  
MANAGEMENT**

**ACCOUNTING**



# COMPLIANCE

## AFFORDABLE HOUSING PORTFOLIO

- LIHTC
- Section 8
- Home
- MRVP
- Boston Housing Authority
- Metro Housing
- Condominiums

## TAX CREDIT DEALS

Since 2019 have partnered in the acquisition and tax credit syndication of over 165 million in development cost rehabbing over 350 units to maintain affordable units in Roxbury and Dorchester. Maintained 100% compliance with tenant files and other tax credit regulations with investors including MHIC, PNC Bank and Raymond James.

## IN HOUSE COMPLIANCE DEPARTMENT

Review and approve the following for each development:

All move ins and move outs  
Oversee Occupancy Department which completes all Annual & Interim recertification.

Oversee Waitlist Manager, who handles waitlist process and completes applicant files for move ins.

## TAX CREDIT EXPERIENCE

Had one of the first tax credit deals in Massachusetts in 1986.

We have had no recapture on any of our properties since we began managing tax credit properties.

# ACCOUNTING

01

Custom Financial Reporting

02

Audit Management

03

Budget Management

04

Utility Rate Monitoring

05

Optimization Rate Monitoring / Subsidy

06

Facilitation of Refinancing Goals

- UHM works with our clients on an ongoing basis to meet the needs of our clients and stakeholders
- Property Accounting and Financial Reporting
- Annual Budgeting and Long Term Forecasting
- We assist with refinancing, acquisitions, and sales
- We take a team approach which ensures that the needs of stakeholders are being met and the value of the assets increase
- Utilization of software to streamline our processes

# RESIDENTIAL



**Blue Mountain**  
Managed Since 2003  
# of Units: 217



**Boston Bay**  
Managed Since 2003  
# of Units: 88



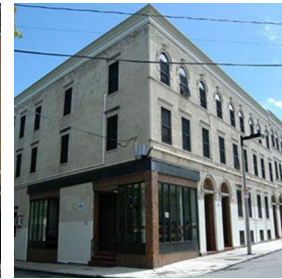
**Grove Hall Apartments**  
Managed Since 2022  
# of Units: 104



**Dudley Terrace**  
Managed Since 2013  
# of Units: 56



**Fort Hill & Esperanza**  
Managed Since 2019  
# of Units: 82



**Boston Housing Authority**  
Managed Since 2003  
# of Units: 157



**Geneva Apartments**  
Managed Since 2013  
# of Units: 47



**Hope Bay**  
Managed Since 2003  
# of Units: 45



**New Port Antonio**  
Managed Since 2003  
# of Units: 227



**Quincy Heights**  
Managed Since 2003  
# of Units: 129



**Rap Up I**  
Managed Since 2007  
# of Units: 33



**VBC Housing**  
Managed Since 2003  
# of Units: 30



**Washington Heights**  
Managed Since 2004  
# of Units: 175



**Sonoma Maple Schuyler**  
Managed Since 2022  
# of Units: 100



## CONDOMINIUMS & COMMERCIAL



### **10 Taber Street**

Managed since 2021  
# of Units: 45



### **Blue Hill Place**

Managed since 2016  
# of Units: 25



### **Heritage Corner**

Managed since 2019  
# of Units: 26



### **Bruce C. Bolling Municipal Building**

Managed since 2020



### **201 Rivermoor Archive Building**

Managed since 2022



### **Saige on Fountain**

Managed since 2023  
#of units: 40



### **94 Shirley Street**

Managed since 2023



Request for Proposal

**BOHLER //**

**BOHLERENGINEERING.COM**

# FIRM OVERVIEW

## CORE SERVICES

Due Diligence  
Land Surveying  
Land Planning  
Landscape Architecture  
Civil Engineering  
Sustainable Design  
Entitlement Services  
Program Management

**30+**

OFFICES

**900+**

PEOPLE

**40**

YEARS

## Your Growth. Accelerated.

Bohler is a land development consulting and site design firm that helps developers, owners and other real estate professionals identify and act on opportunities and, ultimately, move their projects forward faster. Working across commercial, industrial, institutional, and residential markets, we are especially adept at leveraging industry change and tackling site challenges in service of achieving successful land development projects that grow our clients' businesses and transform communities.

## SEIZING OPPORTUNITIES IN THE PLACES WE LIVE

We work proactively to develop unique residential solutions that offer an abundance of lifestyle choices across all housing types, price points, and settings. Committed to building communities and tenacious when it comes to keeping projects moving forward, we bring the foresight and location-specific experience needed to align your priorities with the realities of the land development process and topographic challenges — saving you time and money. Our areas of focus include:

- + Leveraging existing conditions to maximize ROI
- + Zoning
- + Permitting and entitlements
- + Environmental due diligence
- + Planning and phasing
- + Stormwater management
- + Utility infrastructure
- + Regulatory compliance
- + Stakeholder and community outreach
- + Third-party coordination

**BOHLER //**

**BOHLERENGINEERING.COM**



# RELEVANT EXPERIENCE

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## Affordable Housing Experience

Bohler partners with clients to accomplish their vision of building residences that attract homebuyers and tenants with all incomes, while contributing to community growth. Our team creates opportunities to maximize site value by leveraging existing conditions, navigating environmentally sensitive areas, and getting creative with pedestrian and vehicular needs. To align budget and schedule with client goals, we strategize permitting solutions and phasing plans that keep projects moving forward. A select list of Bohler's Affordable Housing experience in Massachusetts is shown below, and further detailed in the case studies.

### SELECT EXPERIENCE

Leefort Terrace, Salem, MA: Two newly constructed buildings offering 123 units of affordable housing.

Marriner Mill, Lawrence, MA: A 110,000 SF historic complex that was renovated and converted into affordable multi-family residential units.

Massachusetts Housing Partnership: Projects related to assisting multiple communities with RFP's for affordable housing on public properties. Completed approximately 50 sites to date.

Arlington Point, Lawrence, MA: 102 mixed-income apartment units. Bohler coordinated with the Massachusetts Historical Commission, community groups and affordable housing authority.

299 Broadway, Somerville, MA: Two mixed-use buildings totaling 330,000 SF offering 288 rental housing units. 132 of the units are affordable and restricted to households earning 80% or below of AMI.

49 Sixth Street Redevelopment, Cambridge, MA: The proposed plan would provide 46 residential apartments, 100% affordable to families earning below 80% of the AMI.

247 Hancock Street, Dorchester, MA: A 16,564 SF lot proposed to be redeveloped into a 47-unit multifamily residential development comprised of a six-story building. Of those units, 29 will be income-restricted.

4198 Washington Street, Boston, MA: The development will replace a block of stores with a 31-unit apartment building and calls for 19 of the apartments to be rented to people making no more than 70% of the Boston area median income.

Pine Hill Crossing, Bedford, MA: Renovation of existing units as well as the addition of 16 new units offering a combination of mixed-income rental and home ownership.

59 Fountain Street, Framingham, MA: New six-story building with 98 units, 26 units designated affordable.



# RELEVANT EXPERIENCE

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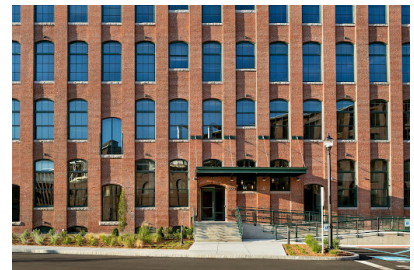
## Leefort Terrace

**SALEM, MA**

This redevelopment of the Salem Housing Authority's Leefort Terrace property is proposing 123 units of affordable housing, including 53 one-bedroom for elderly and disabled residents, 47 two bedroom and 23 three-bedroom units. The development consists of two newly constructed buildings connected by a shared lobby and bridge with heights of three or four stories above grade. The building configuration will remove the residential units from the flood plain by building them on a podium that is partially built into the land. The building and site plan design result in a development that reduces scale by breaking down the massing and stepping down when closer to neighbors, creates space between buildings that serve as sheltered area, is connected to and engaged with the waterfront, and serves as a gateway to the larger Salem social and ecological system. Bohler is providing site civil and consulting engineering for this project.

# RELEVANT EXPERIENCE

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## Marriner Mill

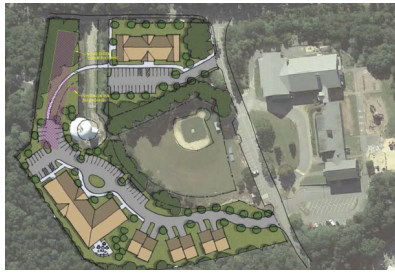
**LAWRENCE, MA**

Marriner Mill is a 110,000 SF historic complex that was renovated and converted into affordable multi-family residential units. The project includes 17 units for those earning up to 30 percent of the area's median income, 49 units will serve residents earning below 60 percent AMI, and 21 units are set aside as workforce housing, available to those earning up to 80 percent AMI. The site amenities and improvements include approximately 115 at-grade parking spaces, access driveways, lighting, landscaping, utilities, and stormwater conveyance facilities. Bohler provided site civil and consulting engineering, surveying, and landscape architecture for this redevelopment near downtown Lawrence.



# RELEVANT EXPERIENCE

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## Massachusetts Housing Partnership

### VARIOUS LOCATIONS

Bohler has worked closely with Massachusetts Housing Partnership (MHP) for over five years to provide civil engineering and master planning services for over 50 sites across Massachusetts. Our teams assist MHP in providing due diligence and conceptual planning efforts to review the viability of various parcels for contemplated affordable housing developments. Due diligence efforts typically include a review of available record plans and documents, performance of a site visit to review existing conditions, identification of potential project constraints and resource areas, and a review of the available utility infrastructure to serve the contemplated development. Master planning and conceptual design efforts often include evaluation of highest yield and best housing type (single family, townhomes, multifamily, etc.) based on the observed site conditions and constraints, as well as feedback from the municipality and community. Bohler typically prepares several concept plans which are often rendered in color for public presentation. These efforts ultimately assist MHP and the subject municipalities or housing authorities in preparing and issuing Request for Proposals (RFPs) for the contemplated affordable housing on the selected sites.

# PROJECT TEAM

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**SMARTORANO@BOHLERENG.  
COM**

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## EDUCATION

B.S. Civil Engineering  
University of New Hampshire

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## PROFESSIONAL LICENSES

MA PE #45942  
NY PE #103664  
LEED BD+C

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## PROFESSIONAL AFFILIATIONS

American Society of Civil  
Engineering (ASCE)  
National Association of Industrial  
and Office Properties (NAIOP)  
Urban Land Institute (ULI)

## Stephen Martorano, PE

### Principal

With over 20 years of experience in land development, Steve is a “go-to” consultant for the Greater Boston area. Having guided dozens of projects through the city and surrounding region’s regulatory processes, Steve is an expert in navigating various agencies including Boston Redevelopment Authority Article 80 Review, Public Improvement Commission and the Boston Transportation Department. His well-rounded background in site civil engineering, surveying and construction facilitates constructable designs and smooth entitlements.

As Principal and Branch Manager of Bohler’s Boston office, Steve oversees project teams working in the education, residential, commercial, recreational, industrial, retail and mixed-use market sectors.

### RELEVANT EXPERIENCE

- + Arlington Point, Residential, Lawrence, MA
- + Marriner Mill, Residential, Lawrence, MA
- + Leefort Terrace, Residential, Salem, MA
- + Massachusetts Housing Partnership, Various Locations
- + 247 Hancock Street, Residential, Dorchester, MA
- + 4198 Washington Street, Residential, Boston, MA
- + 525 Lincoln Street, Residential, Boston, MA
- + 30 Penn, Residential, Allston, MA
- + Linden Street, Mixed-Use Development, Boston, MA
- + Marine Wharf, Mixed-Use Development, Boston, MA
- + The Harlo, Mixed-Use Development, Boston (Fenway), MA
- + Woburn Village, Mixed-Use Development, Woburn, MA
- + Arboretum Road, Mixed-Use Development, Roslindale, MA
- + 400 Riverside Avenue, Industrial Manufacturing, Medford, MA
- + Beth Israel Deaconess Medical Center West Campus - Libby Building, Boston, MA
- + Boston Marriott Burlington, Burlington, MA
- + 4 Life Street, Fitness Studio, Boston, MA
- + Boston College Campus Improvements, Boston/Newton, MA
- + South Bay Town Center, Shopping Center, Boston, MA
- + Two Drydock, Office Building, Boston, MA



# PROJECT TEAM

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## Zachary Richards, PE

### Senior Project Manager

As Senior Project Manager in Bohler's Boston office, Zack helps owners and developers identify opportunities to become accomplished. By tackling site challenges and leveraging industry change, Zack and his team keep land development projects moving forward, transforming the Boston community and beyond.

Bringing experience in site civil engineering design and permitting, Zack leads a growing team of talented engineers and designers who bring clients' visions to life in the education, multifamily, industrial, mixed-use, commercial, and life sciences sectors.

Zack drives the development process, guiding projects from due diligence and conceptual design through site design, entitlements and construction.

**ZRICHARDS@BOHLERENG.COM**

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#### EDUCATION

B.S. Civil & Environmental  
Engineering  
Bucknell University

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#### PROFESSIONAL LICENSES

MA PE #51848

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#### PROFESSIONAL AFFILIATIONS

Urban Land Institute (ULI)  
Former ULI Boston Chapter Young  
Leaders Group Co-Chair  
ULI Climate Resiliency Committee  
ULI Urban Plan  
ULI Program Oversight Committee  
ULI Boston/New England Housing  
and Economic Development Council

#### RELEVANT EXPERIENCE

- + Leefort Terrace, Residential, Salem, MA
- + 299 Broadway, Somerville, MA
- + 49 Sixth Street Redevelopment, Cambridge, MA
- + 121 First Street, Cambridge, MA
- + 85-95 First Street, Cambridge, MA
- + Kendall East, Cambridge, MA
- + 50+ Site Due Diligence & Concepts for Massachusetts Housing Partnership, Boston, MA
- + 22 Everett St, Residential, Westwood, MA
- + Overlook at St. Gabriel's, Student Housing, Brighton, MA
- + Avalon at Hilltop, Mixed-Use Development, Saugus, MA
- + 5 Washington Street, Mixed-Use Development, Boston, MA
- + 1690 Revere Beach Parkway, Mixed-Use Development, Everett, MA
- + 65 Norman St, Mixed-Use Development, Everett, MA
- + 811 Lynnway, Mixed-Use Development, Lynn, MA
- + Woodspring Suites, Hotel, Saugus, MA
- + 135 Fulkerson Street, Residential, Cambridge, MA

# Site Design



# THE HOMES AT STOUGHTON FARM

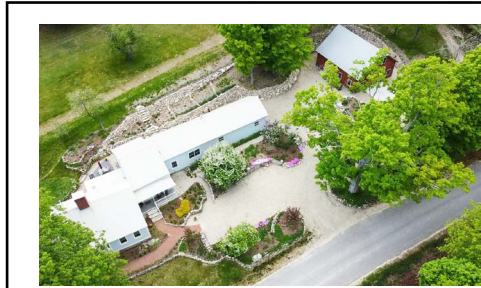
CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME





# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



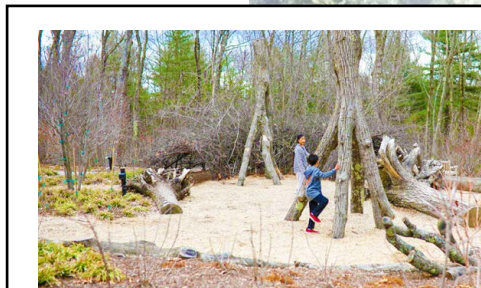
ACCRETED FARMHOUSE



CONTEMPORARY VERNACULAR



COURTYARD GREEN SPACE



NATURAL PLAY



ORCHARD  
WALKING LOOPS

PASTURE  
WILDFLOWER MEADOW  
PRESERVE MATURE  
NATURAL SETTING

CULTIVATE

THE CULTIVATE COURTYARD  
OFFERS A COMFORTABLE  
GARDEN SETTING FOR CULTIVATING  
COMMUNITY ONE NEIGHBOR AT A  
TIME. THE NEW CONSTRUCTION  
HOMESTEAD IS ARTICULATED  
WITH VARIED ROOFLINES AND  
PUNCTUATED FORMS.

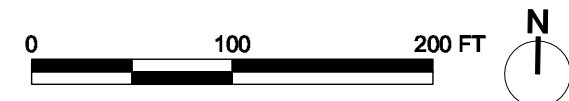
GARDEN  
ACCESSIBLE  
BEDS AND TOT  
LOT

STEWARD

THE STEWARD COURTYARD  
REFLECTS THE NARRATIVE OF  
MILTON TOWN FARM THROUGH TWO  
EXISTING BUILDINGS - THE PESTHOUSE  
AND THE UPPER ALMSHOUSE. THESE  
STRUCTURES, SITED WITH A NEW  
ADDITION, STEWARDS THE STORY  
AND PRESERVATION OF PLACE  
WHILE CONTINUING THE  
FUTURE DIALOGUE.

HARVEST

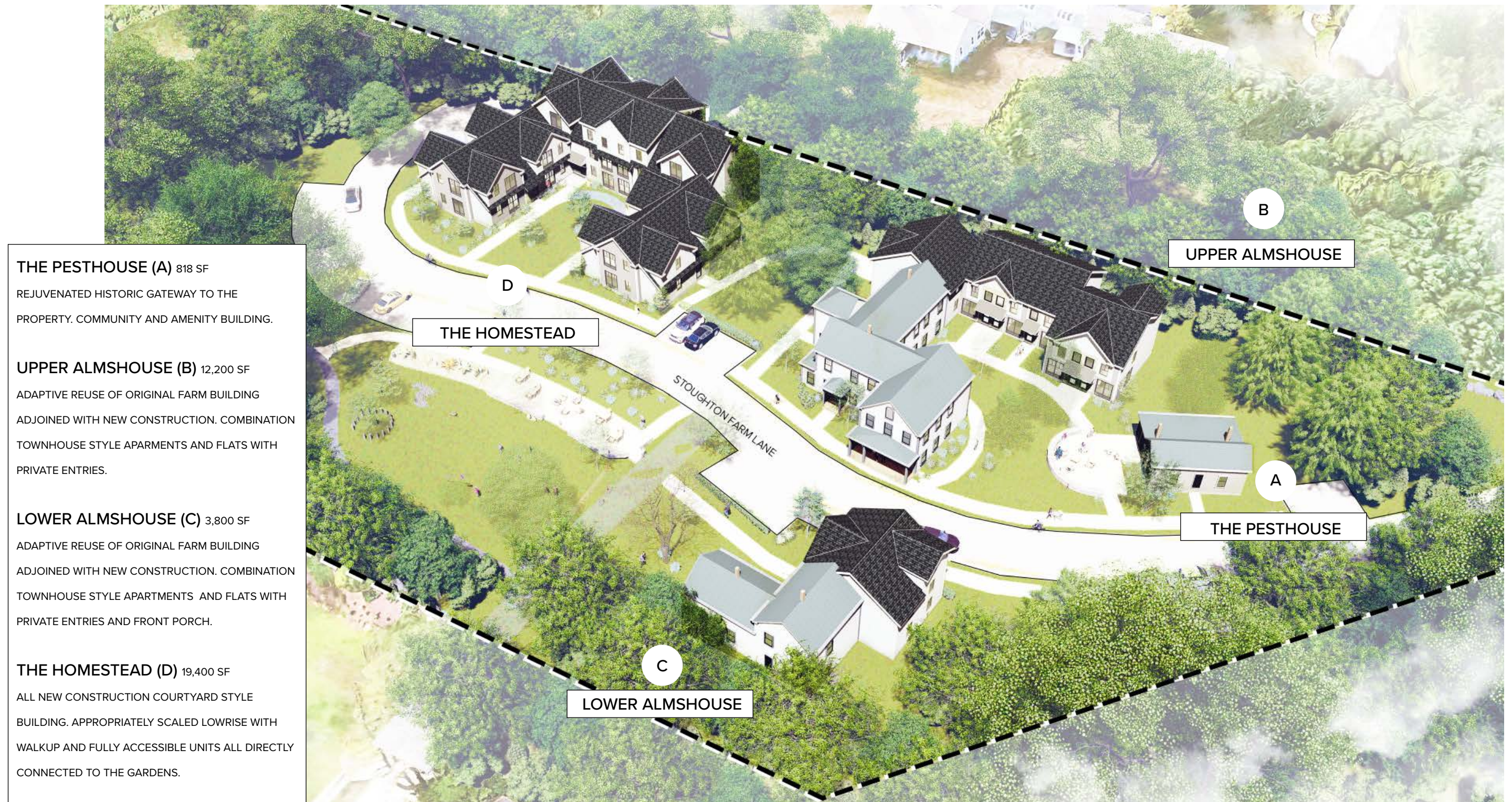
THE HARVEST COURTYARD  
SERVES AS A COMMUNAL AND  
NURTURING GATHERING SPACE.  
IT ENCOURAGES NEIGHBORHOOD  
PLAY AND FOSTERS CONNECTION TO  
THE NATURAL SETTING THROUGH  
COMMUNITY GARDENING. THE  
LOWER ALMSHOUSE PROVIDES  
THE BACKDROP.





# THE HOMES AT STOUGHTON FARM

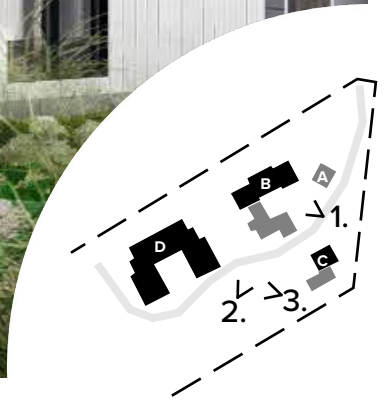
CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME





# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



1. VIEW CENTERED AT GATHERING SPACE BETWEEN THE PESTHOUSE AND UPPER ALMSHOUSE

KEY PLAN



# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



2. VIEW CENTERED AROUND PRIMARY OUTDOOR SPACE WITH ALMSHOUSES SERVING AS BACKDROP



KEY PLAN

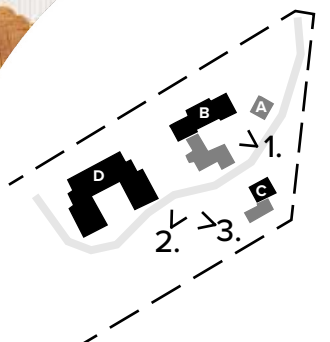


# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



3. VIEW CENTERED AROUND PRIMARY OUTDOOR SPACE WITH THE HOMESTEAD SERVING AS BACKDROP



KEY PLAN

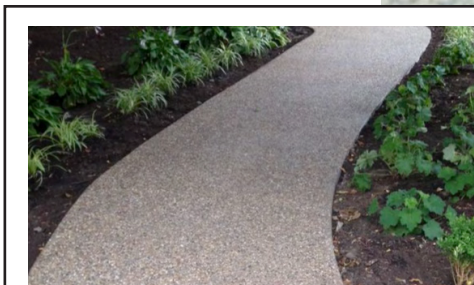


# THE HOMES AT STOUGHTON FARM

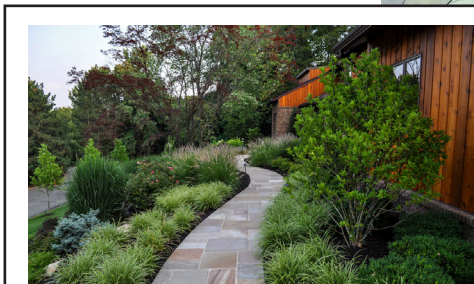
CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



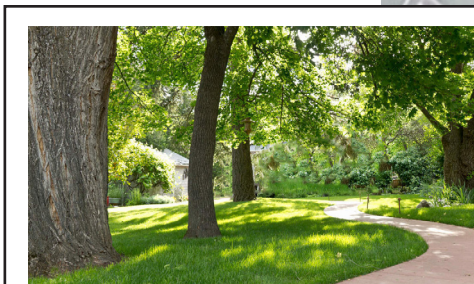
GATHERING CHARACTER



WALKWAY CHARACTER



PLANT BED CHARACTER



COURTYARD CHARACTER



LEGEND	
	PROPERTY LINE
	EXISTING TREE
	PROPOSED TREE
	EX. BUILDING
	PRO. BUILDING
	ASPHALT
	EXPOSED AGG. CONC.
	PAVERS
	GRAVEL PAVING
	LAWN
	MEADOW
	WET MEADOW
	PLANT BED
	WOODLAND
	WOOD DECK
	CROSSWALK
	FURNITURE
	RAISED GARDEN BED
	PLAY EQUIPMENT

0 50 100 FT





# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME

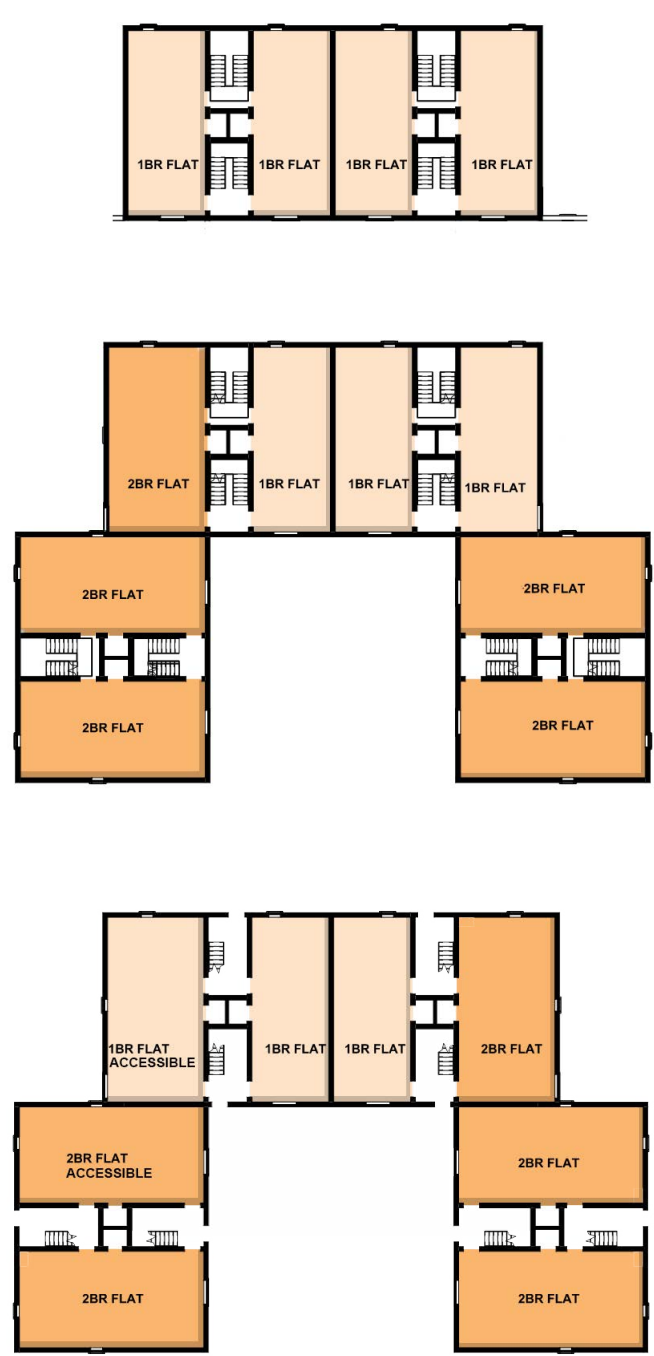
## LEGEND

- 1 BEDROOM
- 2 BEDROOM
- 3 BEDROOM
- COMMON
- EXISTING WALLS
- NEW WALLS

## DEVELOPMENT SUMMARY

BLDG	RESIDENTIAL	GSF	1 BR	2 BR	3 BR
A	760	818	0	0	0
B [N]	7,120	7,453	0	0	4
B [E]	3,860	4,747	0	6	1
C [N]	2,172	2,310	0	1	1
C [E]	1,370	1,500	1	1	0
D	15,018	19,472	10	10	0
TOTAL	30,300	36,300	11	18	6

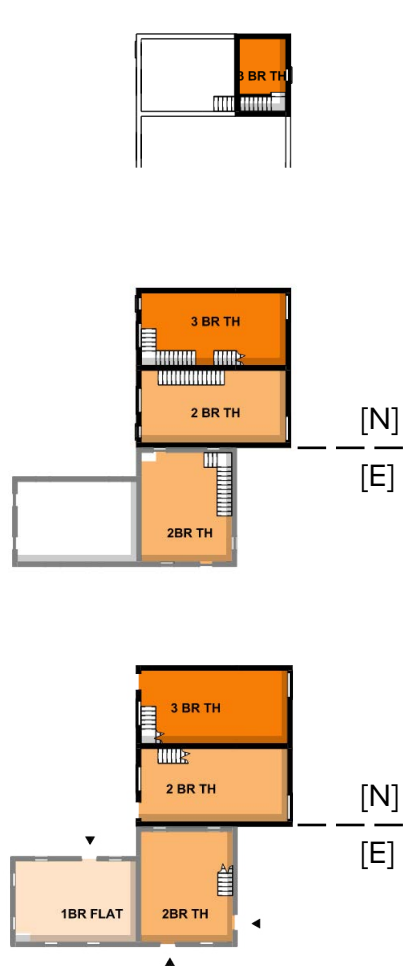
TOTAL: 35 UNITS



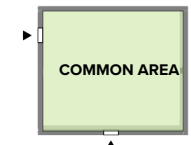
D THE HOMESTEAD  
1" = 40'



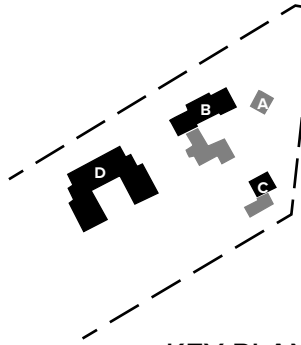
B UPPER ALMSHOUSE  
1" = 40'



C LOWER ALMSHOUSE  
1" = 40'



A THE PESTHOUSE  
1" = 40'



KEY PLAN

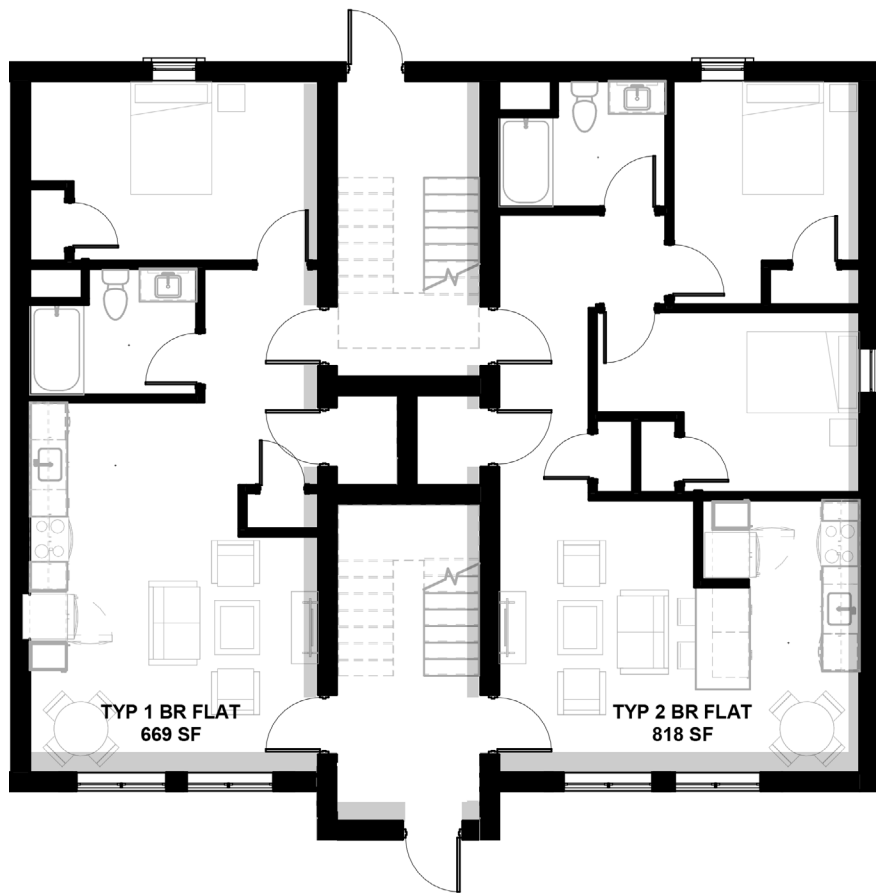


# THE HOMES AT STOUGHTON FARM

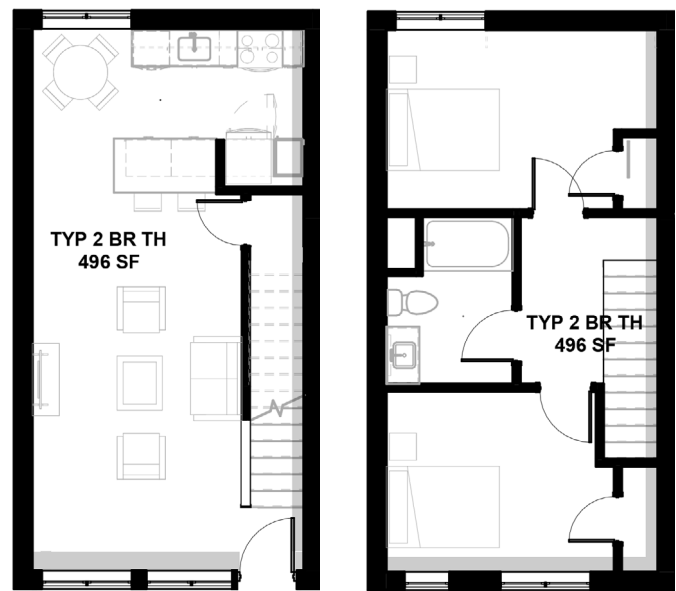
CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME



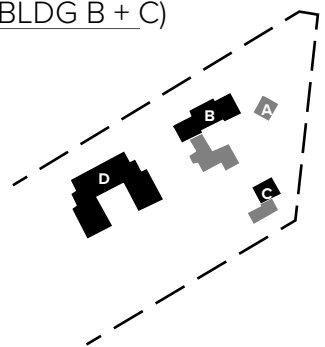
TYPICAL 3 BEDROOM FLAT UNIT (EXISTING BLDG B)  
3/32" = 1'-0"



TYPICAL 1 + 2 BEDROOM FLAT UNITS (BLDG D)  
3/32" = 1'-0"



TYPICAL 2 BEDROOM TOWNHOUSE (BLDG B + C)  
3/32" = 1'-0"



KEY PLAN

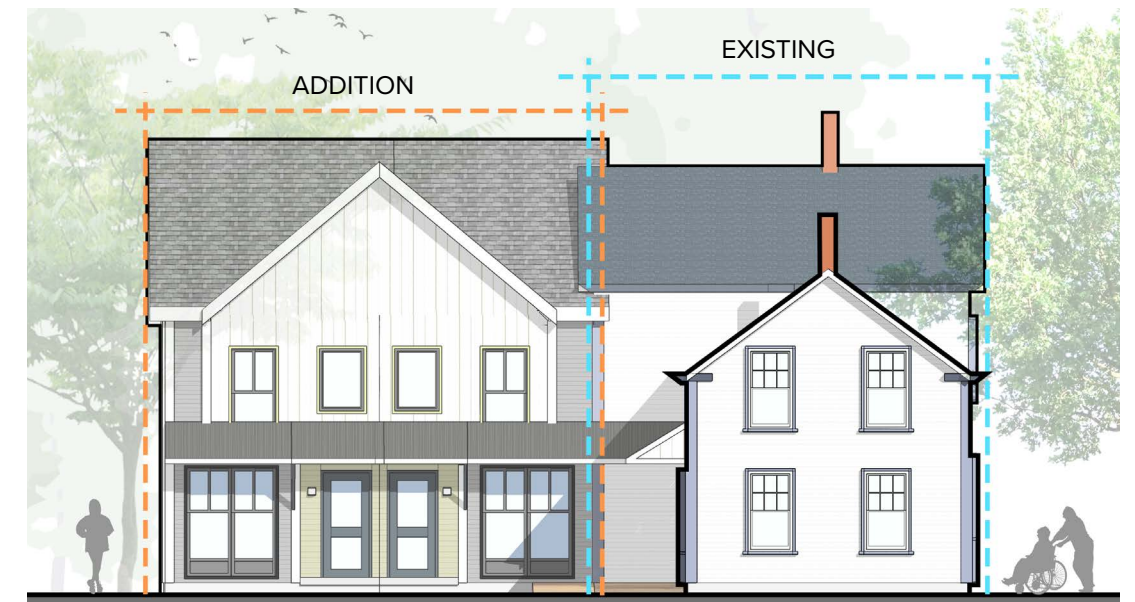
# THE HOMES AT STOUGHTON FARM

CULTIVATE COMMUNITY - STEWARD THE STORY - HARVEST HOME

## ELEVATIONS (PRELIMINARY SCHEMATIC)\*



UPPER ALMSHOUSE (B) - FRONT ELEVATION  
1/16" = 1'-0"



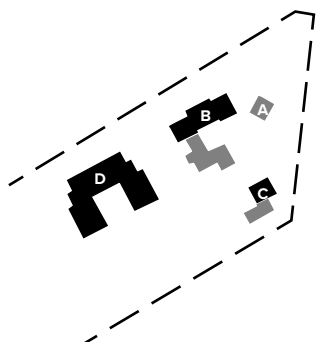
LOWER ALMSHOUSE (C) - SIDE ELEVATION  
1/16" = 1'-0"



THE HOMESTEAD (D) - FRONT ELEVATION  
1/16" = 1'-0"

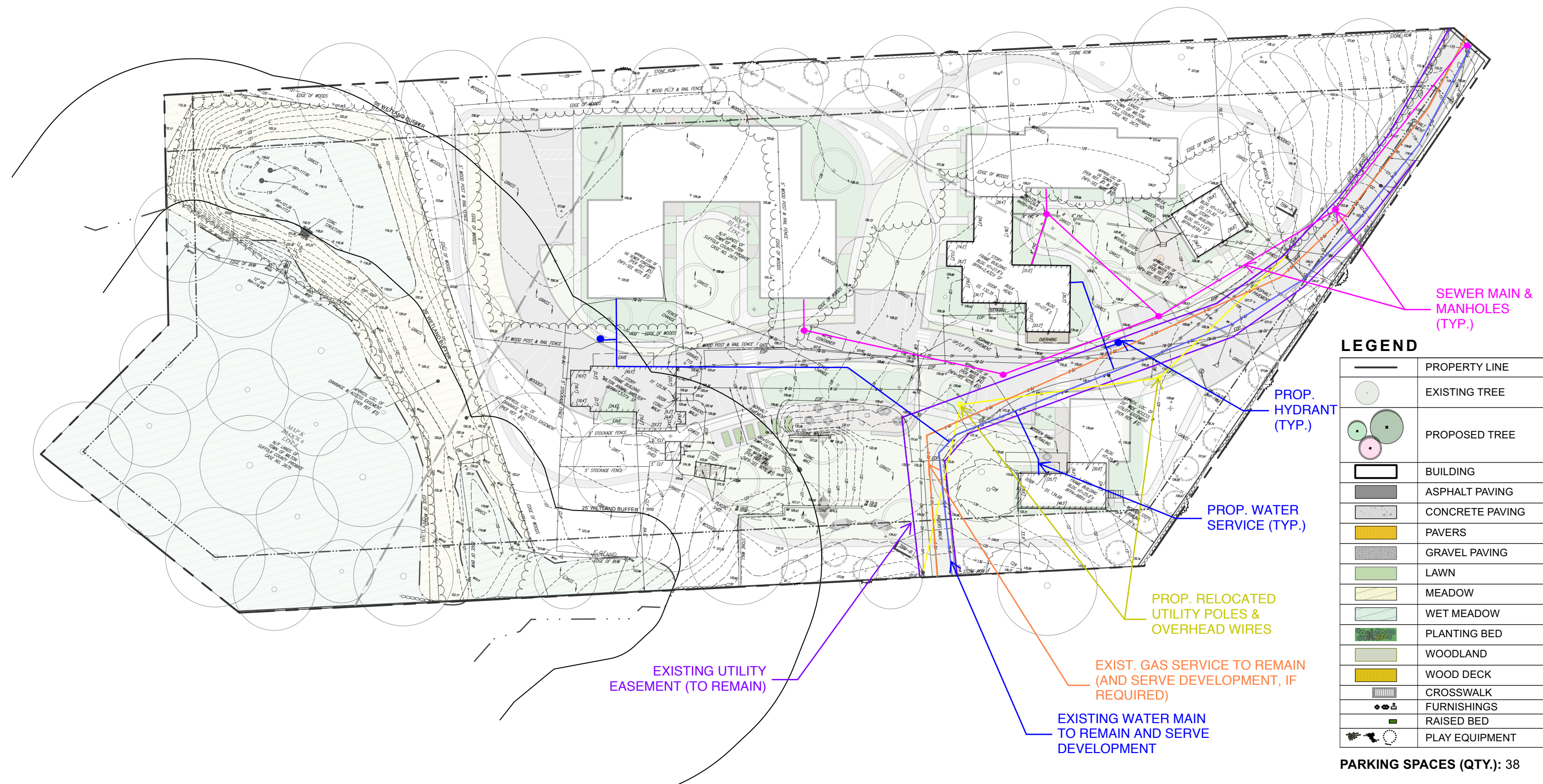
## MATERIAL LEGEND (PRELIMINARY SCHEMATIC)\*

- PRIMARY - WHITE BOARD + BATTEN
- ACCENT - GREY SIDING
- WINDOWS - TRIPLE GLAZED
- ACCENT - SOFT GREEN CEMENT FIBER



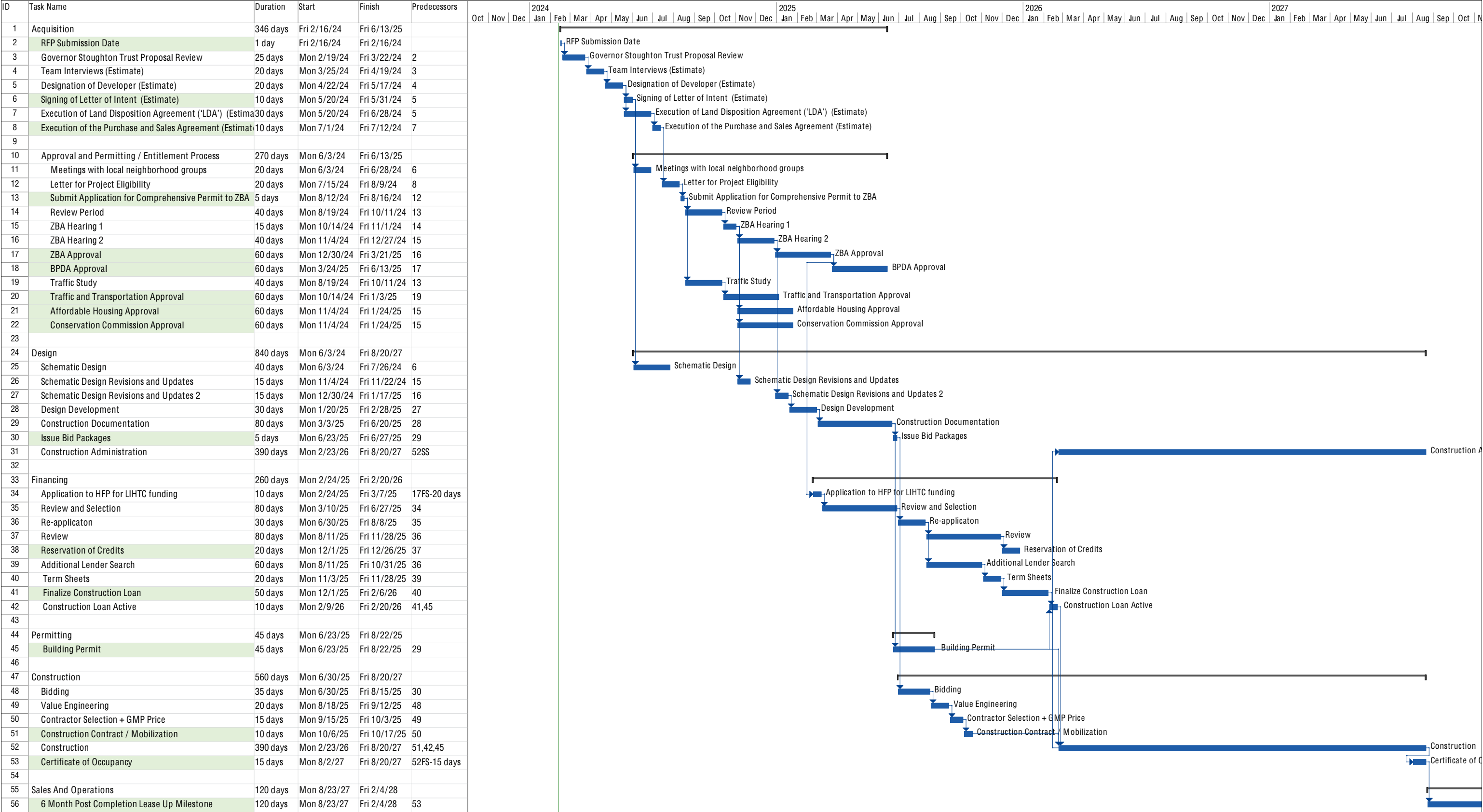
KEY PLAN





# Construction Staging Plan





Project: Milton Schedule 2-13-24  
Date: Tue 2/13/24

Task

Split

Milestone

Summary

Project Summary

External Tasks

External Milestone

Inactive Task

Inactive Milestone

Inactive Summary

Manual Task

Duration-only

Manual Summary Rollup

Manual Summary

Start-only

Finish-only

Deadline

Progress

Manual Progress

## ***Construction Logistics Plan 165 Governor Stoughton Lane Milton, MA***

### ***Overview:***

The following represents the project description for the initial logistics plan that will be required for the construction and adaptive reuse of 35 residential units located at 165 Governor Stoughton Lane Milton, MA. The project will be built in a single phase and will take approximately 18 months to complete.

The project anticipates a start time in the Summer of 2026 with a target completion by Winter of 2028. Full plans and documents will be filed with the appropriate state and local building authorities prior to the commencement of any construction. All plans and documents will be sensitive to all conditions imposed by the local building agencies any other required agencies to complete the project. Appropriate permits will be obtained for any curb cut that will permit access to the site. A building permit will be acquired for construction and any work that will involve temporary usage or disruption to the existing streets and sidewalks. When required, a police detail will be used. It will be the intent of the construction management team to minimize activities or disruption to the normal vehicular and pedestrian traffic patterns during the construction phase of this project.

Prior to the contractors mobilization on site an existing conditions survey will be conducted by the owner for neighbors and abutters. All neighbors and abutters will be notified in advance regarding the start of construction and for any disruptive activities during construction.

### ***Working Hours:***

Working hours for the project will be 7:00 am to 7:00 pm Monday through Friday and 7:00 am to 5:00 pm on Saturdays. If required, work on Sundays and Holidays will be between 10:00 am and 3:00 pm. These hours are in conformance with Town of Milton Ordinances.

### ***Noise and Dust Control:***

Noise and Dust Control will be accomplished by means of a 6' high temporary construction fence with a woven fabric liner to reduce the transmission of dust and noise emanating from the on-site construction activities associated with the project. Water from existing fire hydrants (temporary) may be used to control the amount of airborne dust. Heavy equipment associated with the project will utilize low sulfur diesel to the extent practical and this equipment will not idle for longer periods than necessary to accomplish the onsite activities. The team will set up vibration meters at selected point on the site to monitor excessive vibration activity. Additionally, all project dumpsters will be located within the fenced area and secured project site limits and will be emptied as required.

### ***Construction Methodology:***

Construction will consist of a concrete foundation and wood structure. The wood structure may be panelized. If so, panels will be placed by crane.

### ***Construction Traffic and Parking:***

During construction of the project it is anticipated that all deliveries for the project will occur primarily from Canton Ave to Governor Stoughton Lane.

Construction parking will be onsite.

The primary egress trucking route to/from the site will be via Governor Stoughton Lane to Canton Ave.

### ***Construction Lay Down Area:***

During construction of the project it is anticipated that all material lay down, subcontractor material storage, and the General Contractor's office trailer will be located within the fenced-in construction area of the site.



***Sidewalks and Temporary Sidewalk Obstructions:***

We don't anticipate any building construction work to interfere with pedestrian walkways in the neighborhood. There should not be a need for temporary sidewalks

***Signage:***

If required, and as per DPW requirements, we will install temporary signage

***Police Details:***

Town of Milton Police Details may be used at select points during the project. These details will help maintain the pedestrian and vehicular traffic flow along Governor Stoughton Lane during the construction phase.

***Temporary Fencing:***

We will erect a 6' high Chain Link Fence around the perimeter of the property. A Woven Screen Material will be installed to the Chain Link Fence to provide additional Dust Control.

***Street Cleaning:***

During all site work and utility activities the contractor will sweep the streets once a week. After these activities are complete the site contractor will sweep the streets once a month until project completion.

***Mobilization:***

We will initiate a mobilization phase in Summer of 2026. During mobilization a construction trailer will be brought on site. The temporary construction fence location will be revised and repaired as necessary. Erosion controls will be established. Portable construction toilets will be set up on the construction site.

***Temporary Erosion Controls:***

Temporary erosion controls will be placed within the site at the utility construction areas as required in the form of silt fencing and hay bales.

***Temporary Utilities:***

Temporary electricity will be provided to the site for construction from the existing pole mounted services provided by Milton Community Electricity Aggregation. It is expected that temporary water for the project will be provided from existing services and hydrants as required.

***Demolition:***

No building demolition will be required, as the existing structures will be adapted for reuse as part of the residential complex.

***Sitework:***

Site test pits and borings will be performed during the design phase of the project. Information gained from these Borings and Monitoring Wells will be used to verify the findings of the soil and geotechnical reports previously produced. Soil test samples will be periodically removed from the site and tested as and if required. Licensed testing subcontractors will be used. Should contaminants and or volatile organic compounds (VOC) be discovered, proper disposal will be done in accordance with federal, state and local regulations. "Dig safe" will be notified prior to any site work.

The utility infrastructure systems will be thoughtfully designed with the Town goals in mind, as well as any private utility provider requirements. Bohler will engage with Milton Department of Public Works (DPW) and Engineering Department early on to understand any existing constraints or concerns in the area and incorporate feedback and requests early on in the design process. The stormwater management systems will be designed to manage runoff from the proposed development and roadways to meet DPW requirements and Massachusetts Stormwater Standards (ie. Massachusetts Department of Environmental Protection (MassDEP) requirements). The systems are anticipated to consist of a series of catch basins, water quality treatment units, and subsurface infiltration chambers that will provide proper treatment and groundwater recharge, prior to discharge to the existing stormwater basin(s). Opportunities to implement Low Impact Development (LID) stormwater management techniques (ie. rain gardens and bioretention areas) will also be evaluated closely with the landscape architect and project team. The proposed sanitary sewer and water systems will be coordinated closely with Milton DPW and Engineering

to ensure their requirements are met. The existing utility easement and associated infrastructure that serves the site's abutters will be maintained under the proposed project. The existing water loop through the site will also provide sufficient redundancy to serve the contemplated development. Private utility services, including electrical, telecommunications and gas, will be coordinated closely with the private utility providers, architect and electrical and plumbing engineers to ensure proper space is dedicated early on for any associated equipment and access.

***Excavation:***

General excavation will begin in Summer 2026. We expect most of the site work and digging for foundations to be completed within the first 5 month of the project

After existing soil removal takes place, the sub surface storm water systems will be installed. Foundation footings and walls, as well as slabs-on-grade will be placed. All foundation components will be cast-in-place, reinforced concrete. Concrete trucks and truck-mounted concrete pumps, if required, will be staged onsite. The team plans to schedule all material deliveries to minimize any inconvenience to the abutters during the concrete placement operation and the overall project. Police details will be provided during this operation, as required.

Throughout the entire construction phase, trucks will be required to drive over a trap rock construction entrance/staging area to remove mud and debris from the vehicles. Wash downs will be confined to one onsite designated area on site. Street sweeping will be provided as required.

During the excavation site utilities and infrastructure will be installed. These utilities include sewer, storm, gas, water, and electric services.

***Building:***

It is anticipated that the wood frame and decking will follow once the concrete operations are completed for each building. Wood framing will begin in early 2027 and should take approximately a month for each building to complete.

The contractor may choose to expedite the process by the use of pre-manufactured wood panels. Once the building framing is complete, the building "make tight" phase of the project will begin. Exterior rain screen, flashings, roofing, siding and window components will all be sequenced in an efficient manner. These items will be installed with combinations of pipe staging, conventional lifts and roof mounted swing staging. All appropriate protections to maintain safety will be incorporated.

After the building is deemed to be weather tight, the rough mechanical and electrical installations will begin. Drywall and finishes will begin on the grade level at the amenity areas and will continue up through the top floor. As drywall operations are completed within each area, unit cabinets, millwork and finishes will continue throughout the project. Standard methods of construction will be employed with full adherence to all federal, state, and local regulations governing the construction of this project.

We believe that the entire project will be completed in approximately 18 months depending on site and winter conditions.

Once the project has been fully designed, a more accurate schedule and construction narrative will be produced.



# Project Financing & Projected 10-year Operating Budget

SOURCES AND USES OF FUNDS and LIHTC ANALYSIS

Unit Types	# Units	% Units
Market	0	0.0%
Workforce	0	0.0%
LIHTC	35	100.0%
<b>Total Residential</b>	<b>35</b>	<b>100.0%</b>
<b>Total Commercial</b>	<b>0</b>	

Sources of Funds							
Source	Construct'n Amount	%	Permanent Amount	Per Unit	Per LIHTC Unit	Term (years)	Interest Rate
9% LIHTC Equity	\$ 3,027,437	32%	\$ 9,399,060	\$ 268,545	\$ 268,545		
State LIHTC Equity	\$ 644,200	32%	\$ 2,000,000	\$ 57,143	\$ 57,143		
Federal Historic Equity	\$ -	32%	\$ -	\$ -	\$ -		
State Historic Equity	\$ -	32%	\$ -	\$ -	\$ -		
1st Mortgage	\$ -	0%	\$ 3,250,000	\$ 92,857	\$ 92,857	40	7%
Construction Loan	\$ 10,000,000	51%	\$ -	\$ -	\$ -	2	7%
Deferred Developer Overhead/Fee	\$ 2,000,000	21%	\$ 411,018	\$ 11,743	\$ 11,743		
<b>State Debt Total</b>	<b>\$ 3,300,000</b>	<b>94%</b>	<b>\$ 3,500,000</b>	<b>\$ 100,000</b>	<b>\$ 100,000.00</b>	50	0%
AHTF	\$ 1,500,000	100%	\$ 1,500,000	\$ 42,857	\$ 42,857		
HSF	\$ 900,000	90%	\$ 1,000,000	\$ 28,571	\$ 28,571		
TOD	\$ -	90%	\$ -	\$ -	\$ -		
HLC HOME	\$ 900,000	90%	\$ 1,000,000	\$ 28,571	\$ 28,571		
	\$ -	90%	\$ -	\$ -	\$ -	50	1%
Milton funding	\$ 500,000	100%	\$ 500,000	\$ 14,286	\$ 14,286		
South Shore Home Consortium	\$ 225,000	75%	\$ 300,000	\$ 8,571	\$ 8,571	50	0%
Workforce Housing Funds	\$ -	90%	\$ -	\$ -	\$ -	50	1%
Sellers note	\$ -	100%	\$ -	\$ -	\$ -		
<b>TOTAL SOURCES</b>	<b>\$ 19,696,637</b>		<b>\$ 19,360,078</b>	<b>\$ 553,145</b>	<b>\$ 553,145</b>		

Uses of Funds						
Use	Amount	Per Unit	Acquisition Credit	LIHTC Basis	Per Unit Based on Existing/ Land	
Land Acquisition	\$ -	\$ -	\$ -	\$ -	Land	
Existing Residential Acquisition	\$ -		\$ -		Existing	
Existing Commercial Acquisition	\$ -			\$ -	Existing	
TOTAL Acquisition	\$ -	\$ -				
Direct Construction	\$ 13,338,696	\$ 381,106	\$ -	\$ 12,955,900		
Soft Costs	\$ 3,649,538	\$ 104,273	\$ 51,723	\$ 2,420,675		
Developer Overhead/Fee	\$ 2,000,000	\$ 57,143	\$ 100,000	\$ 1,900,000		
Capitalized Reserves	\$ 371,845	\$ 10,624	\$ -	\$ -		
<b>TOTAL USES</b>	<b>\$ 19,360,078</b>	<b>\$ 553,145</b>	<b>\$ 151,723</b>	<b>\$ 17,276,575</b>	<b>\$ 17,428,298</b>	
Gap Between Sources and Uses	\$ (0)	\$ (0)				



OPERATING PRO FORMA

		Trend	Trend	Trend	Year 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
	Vacancy	1-3	4-6	7-20	Per Unit	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	
INCOME																										
Market Rent																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Vacancy	5.0%				\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Rental Income					\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Market Rent																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Vacancy	5.0%				\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Rental Income					\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Workforce 100% AMI																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Vacancy	5.0%				\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Rental Income					\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Workforce 80% AMI																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Vacancy	5.0%				\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Rental Income					\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
MRVP (60% AMI)																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	2,122	\$ 74,260	\$ 75,745	\$ 77,260	\$ 78,805	\$ 80,381	\$ 81,989	\$ 83,628	\$ 85,301	\$ 87,007	\$ 88,747	\$ 90,522	\$ 92,332	\$ 94,179	\$ 96,063	\$ 97,984	\$ 99,944	\$ 101,943	\$ 103,981	\$ 106,061	\$ 108,182
Vacancy	5.0%				\$ (106)	\$ (3,713)	\$ (3,787)	\$ (3,863)	\$ (3,940)	\$ (4,019)	\$ (4,099)	\$ (4,181)	\$ (4,265)	\$ (4,350)	\$ (4,437)	\$ (4,526)	\$ (4,617)	\$ (4,709)	\$ (4,803)	\$ (4,899)	\$ (4,997)	\$ (5,097)	\$ (5,199)	\$ (5,303)	\$ (5,409)	
Rental Income					\$ 2,016	\$ 70,547	\$ 71,958	\$ 73,397	\$ 74,865	\$ 76,362	\$ 77,889	\$ 79,447	\$ 81,036	\$ 82,657	\$ 84,310	\$ 85,996	\$ 87,716	\$ 89,470	\$ 91,260	\$ 93,085	\$ 94,946	\$ 96,845	\$ 98,782	\$ 100,758	\$ 102,773	
LIHTC 60% AMI																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	12,995	\$ 454,814	\$ 463,911	\$ 473,189	\$ 482,653	\$ 492,306	\$ 502,152	\$ 512,195	\$ 522,439	\$ 532,888	\$ 543,545	\$ 554,416	\$ 565,505	\$ 576,815	\$ 588,351	\$ 600,118	\$ 612,120	\$ 624,363	\$ 636,850	\$ 649,587	\$ 662,579
Vacancy	5.0%				\$ (650)	\$ (22,741)	\$ (23,196)	\$ (23,659)	\$ (24,133)	\$ (24,615)	\$ (25,108)	\$ (25,610)	\$ (26,122)	\$ (26,644)	\$ (27,177)	\$ (27,721)	\$ (28,275)	\$ (28,841)	\$ (29,418)	\$ (30,006)	\$ (30,606)	\$ (31,218)	\$ (31,842)	\$ (32,479)	\$ (33,129)	
Rental Income					\$ 12,345	\$ 432,074	\$ 440,715	\$ 449,529	\$ 458,520	\$ 467,690	\$ 477,044	\$ 486,585	\$ 496,317	\$ 506,243	\$ 516,368	\$ 526,695	\$ 537,229	\$ 547,974	\$ 558,933	\$ 570,112	\$ 581,514	\$ 593,145	\$ 605,007	\$ 617,108	\$ 629,450	
LIHTC 60% AMI PBVs																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	2,848	\$ 99,671	\$ 101,664	\$ 103,698	\$ 105,771	\$ 107,887	\$ 110,045	\$ 112,246	\$ 114,490	\$ 116,780	\$ 119,116	\$ 121,498	\$ 123,928	\$ 126,407	\$ 128,935	\$ 131,514	\$ 134,144	\$ 136,827	\$ 139,563	\$ 142,354	\$ 145,202
Vacancy	5.0%				\$ (142)	\$ (4,984)	\$ (5,083)	\$ (5,185)	\$ (5,289)	\$ (5,394)	\$ (5,502)	\$ (5,612)	\$ (5,725)	\$ (5,839)	\$ (5,956)	\$ (6,075)	\$ (6,196)	\$ (6,320)	\$ (6,447)	\$ (6,576)	\$ (6,707)	\$ (6,841)	\$ (6,978)	\$ (7,119)	\$ (7,260)	
Rental Income					\$ 2,705	\$ 94,687	\$ 96,581	\$ 98,513	\$ 100,483	\$ 102,493	\$ 104,542	\$ 106,633	\$ 108,766	\$ 110,941	\$ 113,160	\$ 115,423	\$ 117,732	\$ 120,086	\$ 122,488	\$ 124,938	\$ 127,437	\$ 129,985	\$ 132,585	\$ 135,237	\$ 137,941	
LIHTC 30% AMI PBVs																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	4,823	\$ 168,805	\$ 172,181	\$ 175,625	\$ 179,137	\$ 182,720	\$ 186,375	\$ 190,102	\$ 193,904	\$ 197,782	\$ 201,738	\$ 205,773	\$ 209,888	\$ 214,086	\$ 218,368	\$ 222,735	\$ 227,190	\$ 231,733	\$ 236,368	\$ 241,095	\$ 245,917
Vacancy	5.0%				\$ (241)	\$ (8,440)	\$ (8,609)	\$ (8,781)	\$ (8,957)	\$ (9,136)	\$ (9,319)	\$ (9,505)	\$ (9,695)	\$ (9,889)	\$ (10,087)	\$ (10,289)	\$ (10,494)	\$ (10,704)	\$ (10,918)	\$ (11,137)	\$ (11,359)	\$ (11,587)	\$ (11,818)	\$ (12,055)	\$ (12,296)	
Rental Income					\$ 4,582	\$ 160,365	\$ 163,572	\$ 166,844	\$ 170,181	\$ 173,584	\$ 177,056	\$ 180,597	\$ 184,209	\$ 187,893	\$ 191,651	\$ 195,484	\$ 199,394	\$ 203,382	\$ 207,449	\$ 211,598	\$ 215,830	\$ 220,147	\$ 224,550	\$ 229,041	\$ 233,621	
Commercial (NNN)																										
Gross Potential Rent		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Vacancy	25.0%				\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Rental Income					\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other Income																										
Laundry		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Parking		2.00%	2.00%	2.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Fees/Other		2.00%	2.00%	2.00%	\$	95	\$ 3,325	\$ 3,392	\$ 3,459	\$ 3,529	\$ 3,599	\$ 3,671	\$ 3,744	\$ 3,819	\$ 3,896	\$ 3,974	\$ 4,053	\$ 4,134	\$ 4,217	\$ 4,301	\$ 4,387	\$ 4,475	\$ 4,565	\$ 4,656	\$ 4,749	\$ 4,844
Gross Other Income					\$	95	\$ 3,325	\$ 3,392	\$ 3,459	\$ 3,529	\$ 3,599	\$ 3,671	\$ 3,744	\$ 3,819	\$ 3,896	\$ 3,974	\$ 4,053	\$ 4,134	\$ 4,217	\$ 4,301	\$ 4,387	\$ 4,475	\$ 4,565	\$ 4,656	\$ 4,749	\$ 4,844
TOTAL OPERATING INCOME					\$	21,743	\$ 760,998	\$ 776,217	\$ 791,742	\$ 807,577	\$ 823,728	\$ 840,203	\$ 857,007	\$ 874,147	\$ 891,630	\$ 909,462	\$ 927,652	\$ 946,205	\$ 965,129	\$ 984,431	\$ 1,004,120	\$ 1,024,202	\$ 1,044,686	\$ 1,065,580	\$ 1,086,892	\$ 1,108,630
EXPENSES																										
Renting Expense																										
Administrative Expense																										
Management Fee	6.0%				\$ (571)	\$ (20,000)	\$ (20,600)	\$ (21,218)	\$ (21,855)	\$ (22,510)	\$ (23,185)	\$ (23,881)	\$ (24,597)	\$ (25,335)	\$ (26,095)	\$ (26,878)	\$ (27,685)	\$ (28,515)	\$ (29,371)	\$ (30,252)	\$ (31,159)	\$ (32,094)	\$ (33,057)	\$ (34,049)	\$ (35,070)	
Office expenses		3.00%	3.00%	3.00%	\$ (1,305)	\$ (45,660)	\$ (46,573)	\$ (47,505)	\$ (48,455)	\$ (49,424)	\$ (50,412)	\$ (51,420)	\$ (52,449)	\$ (53,498)	\$ (54,568)	\$ (55,659)	\$ (56,772)	\$ (57,908)	\$ (59,066)	\$ (60,247)	\$ (61,452)	\$ (62,681)	\$ (63,935)	\$ (65,214)	\$ (66,518)	
Marketing Expense		3.00%	3.00%	3.00%	\$ (571)	\$ (20,000)	\$ (20,600)	\$ (21,218)	\$ (21,855)	\$ (22,510)	\$ (23,185)	\$ (23,881)	\$ (24,597)	\$ (25,335)	\$ (26,095)	\$ (26,878)	\$ (27,685)	\$ (28,515)	\$ (29,371)	\$ (30,252)	\$ (31,159)	\$ (32,094)	\$ (33,057)	\$ (34,049)	\$ (35,070)	
Legal		3.00%	3.00%	3.00%	\$ (371)	\$ (13,000)	\$ (13,390)	\$ (13,792)	\$ (14,205)	\$ (14,632)	\$ (15,071)	\$ (15,523)	\$ (15,988)	\$ (16,468)	\$ (16,962)	\$ (17,471)	\$ (17,995)	\$ (18,535)	\$ (19,091)	\$ (19,664)	\$ (20,254)	\$ (20,861)	\$ (21,487)	\$ (22,132)	\$ (22,796)	
Accounting		3.00%	3.00%	3.00%	\$ (229)	\$ (8,000)	\$ (8,240)	\$ (8,487)	\$ (8,742)	\$ (9,004)	\$ (9,274)	\$ (9,552)	\$ (9,839)	\$ (10,134)	\$ (10,438)	\$ (10,751)	\$ (11,074)	\$ (11,406)	\$ (11,748)	\$ (12,091)	\$ (12,444)	\$ (12,836)	\$ (13,223)	\$ (13,619)	\$ (14,028)	
Operating Expense		3.00%	3.00%	3.00%	\$ (886)	\$ (24,000)	\$ (24,720)	\$ (25,462)	\$ (26,225)	\$ (27,012)	\$ (27,823)	\$ (28,657)	\$ (29,517)	\$ (30,402)	\$ (31,315)	\$ (32,254)	\$ (33,222)	\$ (34,218)	\$ (35,245)	\$ (36,302)	\$ (37,391)	\$ (38,513)	\$ (39,668)	\$ (40,858)	\$ (42,084)	
Gas - Oil - Grease																										
Electricity		3.00%	3.00%	3.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Water and Sewer		3.00%	3.00%	3.00%	\$ (1,060)	\$ (38,000)	\$ (39,140)	\$ (40,316)	\$ (41,524)	\$ (42,769)	\$ (44,052)	\$ (45,373)	\$ (46,735)	\$ (48,137)	\$ (49,580)	\$ (51,066)	\$ (52,603)	\$ (54,179)	\$ (55,800)	\$ (57,467)	\$ (59,200)	\$ (60,979)	\$ (62,806)	\$ (64,692)	\$ (66,633)	
Fuel, Gas - Heat		3.00%	3.00%	3.00%	\$ (1,571)	\$ (55,000)	\$ (56,650)	\$ (58,350)	\$ (60,100)	\$ (61,903)	\$ (63,760)	\$ (65,673)	\$ (67,643)	\$ (69,672)	\$ (71,763)	\$ (73,915)	\$ (76,133)	\$ (78,417)	\$ (80,769)	\$ (83,192)	\$ (85,688)	\$ (88,259)	\$ (90,907)	\$ (93,634)	\$ (96,443)	
Other Operating / Utility Late Fee		3.00%	3.00%	3.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Maintenance Expense		3.00%	3.00%	3.00%	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Payroll		3.00%	3.00%	3.00%	\$ (857)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	\$ (30,000)	
Elevator Maintenance		3.00%	3.00%	3.00%	\$ (229)	\$ (8,000)	\$ (8,240)	\$ (8,487)	\$ (8,742)	\$ (9,004)	\$ (9,274)	\$ (9,552)	\$ (9,839)	\$ (10,134)	\$ (10,438)	\$ (10,751)	\$ (11,074)	\$ (11,406)	\$ (11,748)	\$ (12,091)	\$ (12,444)	\$ (12,836)	\$ (13,223)	\$ (13,619)	\$ (14,028)	
Pest Control		3.00%	3.00%	3.00%	\$ (114)	\$ (4,000)	\$ (4,120)	\$ (4,244)	\$ (4,371)	\$ (4,502)	\$ (4,637)	\$ (4,776)	\$ (4,919)	\$ (5,067)	\$ (5,219)	\$ (5,376)	\$ (5,537)	\$ (5,703)	\$ (5,874)	\$ (6,050)	\$ (6,232)	\$ (6,419)	\$ (6,611)	\$ (6,810)	\$ (7,014)	
Trash		3.00%	3.00%	3.00%	\$ (400)	\$ (14,000)	\$ (14,420)	\$ (14,853)	\$ (15,298)	\$ (15,757)	\$ (16,230)	\$ (16,717)	\$ (17,218)	\$ (17,735)	\$ (18,267)	\$ (18,815)	\$ (19,379)	\$ (19,958)	\$ (20,559)	\$ (21,182)	\$ (22,466)	\$ (23,140)	\$ (23,843)	\$ (24,549)	\$ (25,249)	
Landscaping/snowplowing		3.00%	3.00%	3.00%	\$ (257)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	\$ (9,000)	
Taxes and Insurance																										
Taxes		3.00%	3.00%	3.00%	\$ (428)	\$ (150,000)	\$ (154,500)	\$ (159,135)	\$ (163,900)	\$ (168,825)	\$ (173,891)	\$ (179,108)	\$ (184,481)	\$ (190,016)	\$ (195,716)	\$ (201,587)	\$ (207,635)	\$ (213,864)	\$ (220,280)	\$ (226,885)	\$ (233,695)	\$ (240,706)	\$ (247,927)	\$ (255,365)	\$ (263,026)	
Insurance		3.00%	3.00%	3.00%	\$ (600)	\$ (21,000)	\$ (21,630)	\$ (22,279)	\$ (22,947)	\$ (23,636)	\$ (24,345)	\$ (25,075)	\$ (25,827)	\$ (26,602)	\$ (27,400)	\$ (28,222)	\$ (29,069)	\$ (29,941)	\$ (30,839)	\$ (31,764)	\$ (32,717)	\$ (33,699)	\$ (34,710)	\$ (35,751)	\$ (36,824)	
Rent/Service Fees		3.00%	3.00%	3.00%	\$	-	\$	-	\$	-	\$	-	\$	-</												

# Construction and Permanent Lenders





**Massachusetts  
Housing  
Partnership**

February 12, 2024

Ralph Parent  
Parent+Diamond  
83 Sassamon Avenue  
Milton, MA 02186

160 Federal Street  
Boston, Massachusetts 02110  
Tel: 617-330-9955  
Fax: 617-330-1919  

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www.mhp.net

RE: Town Farm Development, Milton

Dear Mr. Parent:

As you know, Massachusetts Housing Partnership is a quasi-public organization that uses private sources of capital to provide long-term, fixed rate financing for affordable multi-family housing. Since our creation in the early 1990s, we have provided over \$1.4 billion in loans and commitments for the financing of affordable housing developments that have resulted in the creation of over 26,000 units across the Commonwealth. We are the largest permanent lender for housing developments utilizing the Low-Income Housing Tax Credit program.

I am writing to express my strong support for the Parent+Diamond and Urban Spaces team's application to the Town of Milton, to develop much-needed affordable family rental housing at the Town Farm site located at 165 Governor Stoughton Lane. The team consisting of Ralph Parent; partner Urban Spaces; , ICON Architects; Crowley / Cottrell Landscape Architect, and BOHLER Civil Engineer, are experienced development professionals who have created transformative community projects.

I understand the proposed development will consist of three newly constructed sustainable to create 35 units of rental housing for individuals and families that will be affordable to households in the range of 30% up to 60% of the area median income. Of the 35 units, eleven (11) will contain 1BR; 18 will have 2BRs and six (6) will have 3BRs to accommodate larger families.

After a preliminary review of both your development and operating projections for the project, I have determined that a permanent first mortgage loan of \$5,265,000 with a term of 17 or 40 years (amortizing over 40 years) with your projected interest rate of 7.0% (which provides for a 30-month rate lock as well as with a number of construction lenders as the permanent takeout, including Eastern Bank and Citizens Bank.

MHP looks forward to growing our relationship with Parent+Diamond and Urban Spaces to create critically needed affordable housing to the Town of Milton.

Please feel free to call me with any questions or more information at [REDACTED]

Sincerely,

*Alma Balonon-Rosen*

Alma Balonon-Rosen  
Senior Relationship Manager



21 Custom House Street  
8<sup>th</sup> Floor  
Boston, MA 02110  
(617) 850-1000

Elizabeth Gruber  
*Chair*

Moddie Turay  
*President and CEO*

February 13, 2024

Mr. Ralph Parent  
Principal  
Parent + Diamond

Via: e-mail to [REDACTED]

Re: 165 Governor Stoughton Lane, Milton, MA, 02186

Dear Ralph,

Thank you for your interest in having the Massachusetts Housing Investment Corporation (MHIC) support your development plans for the site located at 165 Governor Stoughton Lane, Milton, MA. It is our understanding from the information you have provided to us that you plan to construct an approximately 35,000 square foot building consisting of up to 35 rental apartments, of which five (5) will be affordable to households earning 30% of area median income and 30 will be affordable to households earning 60% of the area median income.

Based on the information we received, we understand that the total development cost for the project is approximately \$19,360,078, and that planned sources for the project include \$11,399,060 in federal and Massachusetts state LIHTC equity, \$10,000,000 in construction debt, a \$3,250,000 permanent loan, \$4,300,000 in state and local soft debt sources, and \$411,018 in deferred developer fees. If your project is awarded and moves toward closing, MHIC would be interested in providing the construction or permanent financing that you indicate is needed.

This letter is an indication of interest in providing construction or permanent financing. Either source of financing will also be conditioned upon normal and customary due diligence, availability of funding, and approval of MHIC's Board of Directors. We are very interested in supporting your redevelopment of this key site in Milton and appreciate your efforts to create transformative, affordable rental opportunities for the Milton community. We wish you the best of luck as you move your development plans forward.

Sincerely,

A handwritten signature in black ink that reads "Sean O'Neill". The signature is fluid and cursive, with the first name "Sean" and last name "O'Neill" clearly distinguishable.

Sean O'Neill  
Investment Officer



**Aaron Gladden**  
*Vice President*

February 12, 2024

Ralph Parent  
83 Sassamon Ave  
Milton, MA 02186

Re: Milton Town Farm Milton, MA

Dear Ralph,

I am writing to confirm that Eastern Bank is very interested in providing a construction loan in the amount of up to \$10,000,000, with up to \$3,500,000 of that converting to an amortizing mortgage, for the above referenced project that will be developed by Parent + Diamond. We understand that the project, when complete, will provide 35 units of newly constructed, affordable housing that will include a mix of one, two and three bedroom units. Five of the residential units are expected to be rental units affordable to those at or below 30% of AMI and thirty of the residential units are expected to be rental units affordable to those at or below 60% of AMI, therefore serving those in the community who are most in need. We appreciate the extraordinary work Parent + Diamond is planning with this project. We hope to be a key partner in making this project a reality.

Eastern Bank has financed many affordable housing projects over the years, and we appreciate the opportunity to finance this one. Our typical terms for projects such as this include the following: 1.) Term: Up to 20 years including a construction period of up to 24 months 2.) Collateral: First mortgage on the real estate with a maximum LTV of 80% and an assignment of the tax credit equity and/or public funds we are bridging with a maximum advance rate of 90%. 3.) Guarantee: Full completion and repayment guarantee of the sponsor will be required during the construction period 4.) Borrower Covenants: Minimum debt service coverage of 1.10x will be required when the loan converts to an amortizing mortgage of up to 35 years. 5.) Interest rate: Fixed at closing at the FHLB cost of funds plus a spread in the 225 bps to 250 bps range. 6.) Commitment fee: ½% 7.) Tax credit equity funding requirements must be acceptable to the Bank.

Please note that this is not a commitment to extend credit but shall instead serve as a basis for future discussion. Based on your organization's demonstrated ability to successfully develop projects such as this 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 that 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.

Sincerely,



Aaron Gladden  
Vice President



February 14, 2024

Parent + Diamond  
Ralph Parent, Principal  
Via email

Urban Spaces, LLC  
Paul Ognibene, CEO  
55 Bent Street  
Cambridge, MA 02141

Re: \$10,250,000 Construction Loan Facility  
Town Farm (Project), Milton MA

Dear Mr. Parent and Mr. Ogniben:

Thank you for giving Citizens Bank, N.A. ("Bank") an opportunity to finance the construction of the Town Farm development. This Term Sheet outlines the general terms and conditions under which Citizens Bank, N.A. would consider financing for the project. This Term Sheet is for discussion purposes only and does not represent a commitment to lend on the part of Citizens Bank, N.A. or any of its affiliates, as all terms are subject to review and approval of the Bank's Commercial Credit Committee.

Borrower:	The "Borrower" is a to-be formed, for-profit, single purpose taxable entity, owned by Parent + Diamond and Urban Spaces, LLC.
Developer:	Parent + Diamond and Urban Spaces, LLC
Guarantors:	During the term of the Loan, Ralph Parent and Paul Ognibene, shall unconditionally provide a 100% completion guaranty and an unconditional repayment guarantees of the Loan Amount.
Loan Amount:	The principal amount of the Loan shall be an amount not to exceed the lesser of (i) Ten Million, Two Hundred and Fifty Thousand(\$10,250,000); (2) 70% of the loan-to-value based upon an appraisal satisfactory to Bank. (3) 50% of the loan-to-cost.
Purpose:	Financing for the construction of 35 units of multi-family housing known as Town Farm located 165 Governor Stoughton Lane, Milton, MA (the "Project").
Security:	<ol style="list-style-type: none"><li>1. First mortgage (or leasehold mortgage) &amp; assignment of rents on the proposed 35 units, 165 Governor Stoughton Lane, Milton, MA (the "Project").</li><li>2. First priority Assignment of the obligations of the LP/Equity Investor to make LIHTC equity investments in Borrower;</li><li>3. First priority assignment of undisbursed developer fee</li></ol>
Loan Term:	Thirty (30) months
Extension Option:	6-month extension option will be available subject to the following requirements:



1. Construction is completed
2. Written request is made 60 days prior to maturity
3. No events of Default
4. 25% of units leased
5. Extension fee of 12.5 basis points of the Loan Amount

Loan Fee:	35 basis points, (0.35%) with half due at commitment and half due at closing. Based on the current loan amount the total amount would be \$35,700.
Interest Rate:	Daily Simple SOFR, plus 210 bps, (with a Daily Simple SOFR floor of 75 bps ) adjusted daily. Current indicative rate is 7.41%. Interest paid Monthly.
LIHTC Equity:	<p>Prior to or at closing the Borrower shall provide a fully executed letter from the Equity Syndicator as well as a fully executed limited partnership agreement or operating agreement that provide for a capital contribution into the Borrower in an amount sufficient to meet project budget requirements currently projected to be \$9,399,060.</p> <p>The Bank has based its projections on information provided by the developer providing for the capital contributions to go into the Borrower substantially in the following manner:</p> <ul style="list-style-type: none"><li>• \$1,879,812 (20%) at closing</li><li>• \$1,534,458 (16%) construction completion</li><li>• \$5,984,790 (64%) at stabilization and perm loan conversion based on three consecutive months of a 1.15 and 8609s</li></ul> <p>The Borrower shall cause the 3rd capital contributions net of any scheduled development fee and operating reserves to be paid to the Bank to fully repay the outstanding Loan. The Equity Syndicator will be acceptable to the Bank in all respects.</p>
State LIHTC Equity:	Prior to or at closing the Borrower shall provide a fully executed letter from the Equity Syndicator as well as a fully executed limited partnership agreement or operating agreement that provide for a State LIHTC capital contribution into the Borrower in an amount sufficient to meet project budget requirements currently projected to be \$2,000,000. The proceeds from the State LIHTC equity (loan) shall be paid to the Bank to fully repay the outstanding loan.
Subordinated Debt:	<p>Prior to closing, Borrower or its affiliate shall provide evidence of the committed subordinate debt financings outlined below. The subordinate debt will not have any current pay provisions. This subordinate debt may be secured by liens on the Property but shall be subordinate to the Bank's Construction Loan as documented in a subordination agreement.</p> <ul style="list-style-type: none"><li>• \$1,000,000 HLC HOME Funds committed at closing and available during construction</li><li>• \$1,500,000 AHTF funds committed and available during construction</li><li>• \$900,000 HSF funds committed at closing and available during construction</li><li>• \$500,000 Town of Hilton funds committed at closing and available during construction</li></ul>

- \$300,000 South Shore Home Consortium funds committed at closing and available during construction

The amount, timing and terms of funding will be reviewed and satisfactory to the Bank in all respects.

**Permanent Loan:** Prior to construction loan closing, Borrower shall have obtained a Commitment for Permanent Financing in an amount of no less than \$3,250,000, with terms sufficient to meet the Project's budget requirements, including an amortization of not less than 40 years and an interest rate of not more than 7.00%.

Permanent Financing will be closed and funded after construction completion, and at stabilization of the project. Permanent Financing funds will serve, in whole or in part, as take out financing for the Bank's construction loan. All terms and conditions of Permanent Financing shall be acceptable to the Bank.

Permanent loan conversion requirements should not require a DSCR of greater than 1.15.

It is expected that the permanent debt will be a MHP execution.

**Developer Fee:** Total developer fee shall be \$2,000,000. No more than 50% of cash developer fee to be paid prior to construction completion and the construction loan being paid in full. Currently \$411,018 is deferred.

**Expenses:** Borrower to be responsible for any and all closing costs relating to the loan, including but not limited to the appraisal costs, survey costs, title work, environmental reports, plan and cost review and Bank's legal expenses.

**General Conditions:**

**Disbursement of Proceeds:** Funds shall be disbursed subject to the Bank's customary construction disbursement procedures including an up-front cost review, monthly inspections by a third-party architect and receipt of title endorsements. The Bank will require a 5% retainage until substantial completion, and in accordance with Massachusetts State Law.

**Construction Budget:** The final construction budget shall contain an Interest Reserve sufficient to cover the anticipated Construction Loan interest for the term of the Construction Loan, which shall be used to fund the interest on the Construction Loan on a monthly basis. The preliminary estimate of the Interest Reserve is \$845,000. The final construction budget shall contain hard cost contingencies of not less than 5% of hard costs.

**Borrower Equity Commitment:** Prior to closing Borrower shall provide evidence that a minimum of 20% of the development budget is committed and funded by the Borrower. This can include Subordinate Financing and Equity and must be committed at construction loan closing.



Additional Closing  
Conditions:

Additional closing conditions shall include but not be limited to the following:

- (1) Satisfactory receipt, review and acceptance by Bank of an appraisal indicating the appraised values of the Project supporting the loan-to-values set forth above.
- (2) An acceptable environmental review of the subject Project and property in compliance with the Bank's environmental protocols.
- (3) Review and acceptance of the final Project budget indicating sufficiency of costs and funding sources to complete the project.
- (4) Completion of a satisfactory plan and cost review by Bank's inspecting architect.
- (5) Current ALTA boundary and location survey of the property certified to Bank and Title Insurer.
- (6) Property hazard, liability, rent loss and other insurance naming Bank as mortgagee, loss payee and additional insured; evidence relating to the flood plain status of the Project and flood insurance where required by Bank.
- (7) Acceptable ALTA Loan Policy of Title Insurance issued by a title company satisfactory to Bank and insuring Bank has a first mortgage lien upon all of the sites in the project.
- (8) Receipt and review of Borrower's ownership structure and documents.
- (9) Receipt and Review of General Contractor's financial statements and experience.
- (10) Receipt, review and acceptance of all permits and approvals for the Project.
- (11) Receipt, review and acceptance of Guarantor's and Sponsors financial statements.
- (12) Payment and Performance Bond for the General Contractor acceptable to the Bank
- (13) Funding Agreements for 3 MRVP units and 8 PBV units

Covenants:

- (1) The Guarantors on a combined basis shall maintain on a minimum liquidity which will be determined after review of financial statements.
- (2) Substantial Completion is to be achieved at the end of month 20 from Construction start.

Deposit Accounts:

Borrower shall maintain property operating and reserve accounts with Bank.

Financial Reporting:

Final loan documents to require the following:

- 1) Annual submission of audited financial statements and tax returns for Borrower and Guarantors within 150 days of year end.
- 2) Quarterly submission of rent rolls and internally prepared financial statements for Borrower and Project upon completion, upon request of Bank.

Application Fee:

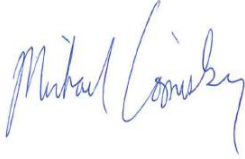
The cost of the Bank's third party appraisal to be determined upon receipt of bids.

This Term Sheet should not be construed as a loan commitment. A commitment by the Bank to lend remains subject to the Bank's approval process and review and approval of all the due diligence information, including without limitation, receipt of appraisal, environmental reports, and all final budgets and operating pro forma, all of which shall be satisfactory to Bank in its sole and absolute discretion.

If approved, a formal commitment letter will be issued, which will set forth more fully the terms and conditions under which the Bank will be prepared to make the Loan.

Thank you for considering Citizens Bank, N.A. for this financing. If you have any questions please contact me at (508) 612-0874. I look forward to your response.

Best Regards,

A handwritten signature in blue ink, appearing to read "Michael Comiskey".

Michael Comiskey  
Vice President

ACKNOWLEDGED AND ACCEPTED:

By: Mesolella Development

By: \_\_\_\_\_  
Derek Mesolella, Principal



# Management Plan

February 14, 2024

Dear Mr. Parent:

I am writing on behalf of UHM Properties, a distinguished Boston-based minority-owned real estate management firm. We were recently introduced to the Milton Town Farm RFP and learned about your impressive 35-unit affordable housing townhome proposal called The Townhomes at Stoughton Farms.

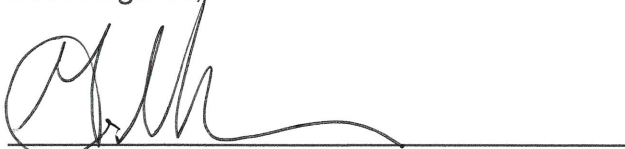
At UHM Properties, we pride ourselves on delivering tailored and efficient property management solutions. With our extensive experience overseeing similar residential developments, we believe we can contribute significantly to the success and smooth operation of the development. Our services encompass many property management aspects, including lotteries for affordable housing developments, LIHTC, project-based rental assistance, and ensuring a hassle-free experience for both developers and residents.

We have reviewed the management requirements of the RFP. Although time is limited to respond to each question, we can assure you that with our 21 years of affordable housing management, we have extensive experience in all facets of affordable housing management.

We understand the unique challenges of managing multi-unit residential properties, and our team is well-equipped to address them effectively.

By entrusting the management of your townhome development to UHM Properties, you can focus on the continued success and growth of your projects, confident in the knowledge that your properties are in capable and experienced hands.

Best Regards,



Genesa Mendes  
Vice-President of Operations  
UHM Properties  
Office: 617-541-5510 x247  
Email: [gmendes@uhmproperties.com](mailto:gmendes@uhmproperties.com)

**GOVERNOR STOUGHTON TRUST  
LEASE OF THE TOWN FARM**

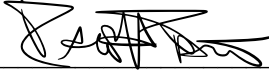
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PRICE PROPOSAL

- A. The undersigned submits the following price Proposal:

Annual Lease Payment	\$ <u>10,000</u>
Total Lease Period:	\$ <u>50 Years</u>

- C. The undersigned certifies that he or she is familiar with the property and its condition and has thoroughly reviewed the Request for Proposals.
- D. The undersigned certifies under the 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 certified, the word "person" shall mean any natural person, business, partnership, corporation, club, or other organization, entity, or group of individuals.



\_\_\_\_\_  
Signature

PRINTED NAME: Ralph Parent

PRINTED TITLE: Duly Authorized

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

DATE: 2/16/24

The Governor Stoughton Trust reserves the right to reject all Proposals submitted, should it be deemed by the Trust to be in its best interests.