

The background of the entire page is a photograph of a large, historic brick building with a prominent clock tower. The image is overlaid with a semi-transparent blue filter and several large, light-blue geometric shapes (triangles and polygons) that create a modern, architectural feel. The clock tower has two visible clock faces and a pointed roof. The building's facade features arched windows and doorways.

WATERFIELD WINCHESTER

WATERFIELD PROPERTY DEVELOPMENT PROPOSAL

AUGUST 31, 2020





August 31, 2020

Lisa Wong, Town Manager
Town Hall
71 Mount Vernon Street
2nd Floor
Winchester, MA 01890

RE: Request for Proposals | Waterfield Property Redevelopment

Traggorth Companies and Civico Development (“Civico”) are genuinely excited to respond to the Town of Winchester’s Request for Proposals for the redevelopment of the Waterfield Lot.

The Town of Winchester has taken a stand for equity by committing to meaningful affordability in a marquee redevelopment in the Town Center. It is our commitment to acknowledge this progressive step while honoring the historic character of Winchester.

Our acclaimed team has led and participated in many transformative developments in the Commonwealth. We are committed to collaboration and are excited to work with the Town and the many remarkable stakeholders in the Town Center. Our recent development in the newly created 40R district in downtown Reading, as well as our public-private partnership with the Town of Lincoln’s Affordable Housing Trust, demonstrate our expertise developing in complicated multi-stakeholder environments. We facilitate authentic development by using our expertise in planning, architecture, development, and construction to inform a dialogue with local communities.

Our team has the placemaking skills, design sensibilities, sustainability acumen, and financial capacity to contribute to Winchester’s vibrant Town Center. We look forward to engaging deeply in the planning, development, and construction process alongside Winchester’s leadership, businesses, organizations, and residents.

Thank you for the opportunity to work together.

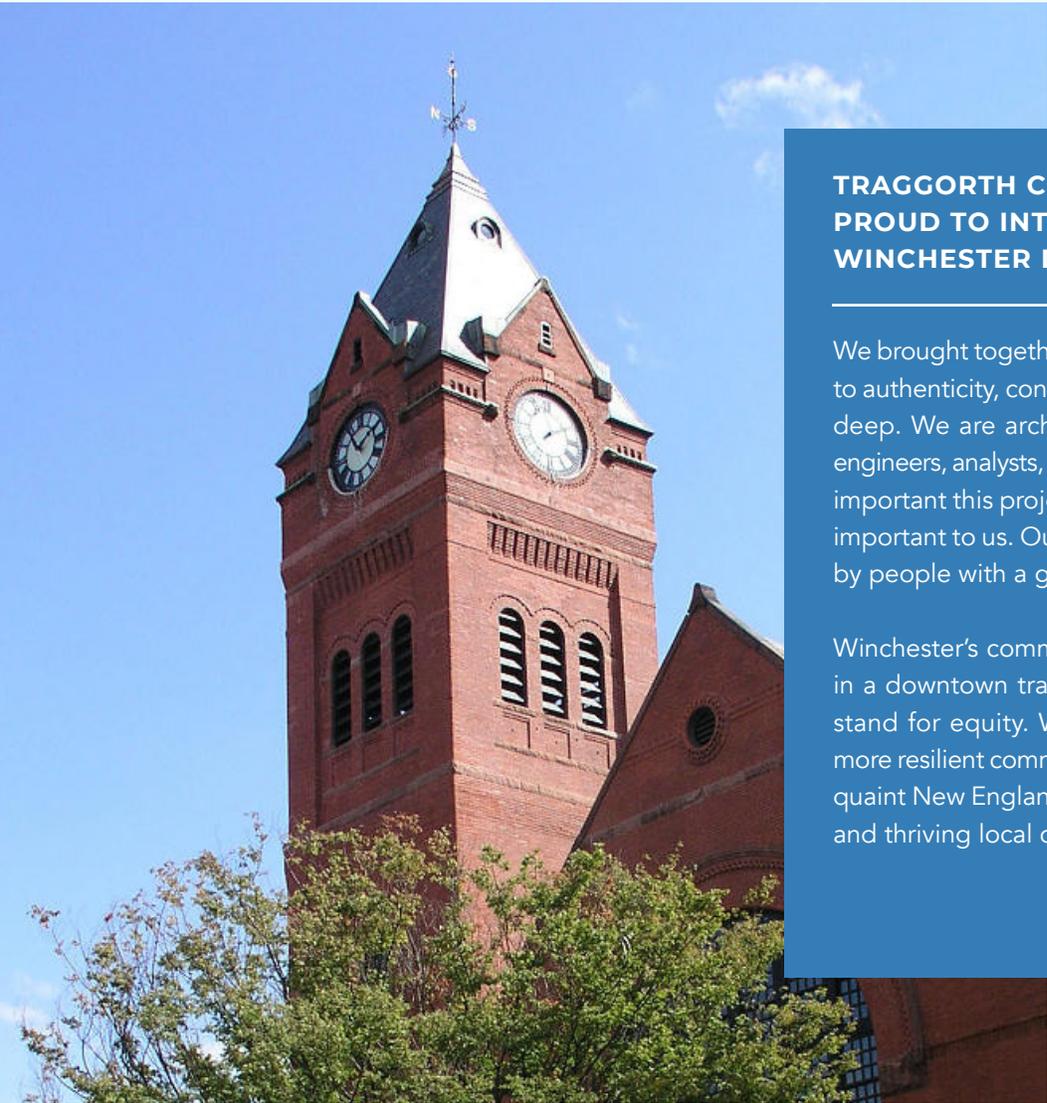
With gratitude,

Dave Traggorth
617- 817-2520
dave@traggorthcompanies.com

Andrew P. Consigli
617-646-9020
aconsigli@civicodevelopment.com

COMMITMENT TO AUTHENTICITY

OUR WATERFIELD | WINCHESTER DEVELOPMENT TEAM



TRAGGORTH COMPANIES AND CIVICO ARE PROUD TO INTRODUCE THE WATERFIELD | WINCHESTER DEVELOPMENT TEAM.

We brought together practitioners whose commitment to authenticity, contextual design, and community runs deep. We are architects, urban designers, planners, engineers, analysts, and developers who understand how important this project is to Winchester, which makes it important to us. Our proposal was lovingly manifested by people with a genuine affection for great places.

Winchester's commitment to meaningful affordability in a downtown transit-oriented community is a bold stand for equity. We are honored to work toward a more resilient community while respecting Winchester's quaint New England streetscape, historic architecture, and thriving local culture.



FIVE CRITICAL COMPONENTS

Our design and development experience shows our qualifications, but it is our intentional and creative approach that qualifies us to be a member of the Winchester community. Here we highlight the five essential elements of our proposal.

01

OUR COMMITMENT TO DIVERSITY AND INCLUSION

Towns in the Commonwealth struggle to provide diverse housing choices for residents. Winchester is taking a proactive approach to addressing these issues by prioritizing meaningful affordability in downtown development. Our team is prepared to meet this challenge together. Our dedication to developing housing diversity is shown in our project history across the Commonwealth.

Great spaces are not built so much as they are born at the intersection of thoughtful design and engaged citizenry. We designed Waterfield | Winchester as a canvas for the spontaneous placemaking that happens every day when friends read together in the park, greet their neighbors, start their morning commute, or host a summer concert.

02

CONTEXTUAL DESIGN

The existing architectural character of Winchester's Town Center is quintessentially New England. Our approach to Waterfield | Winchester is not defined by style, but by a respect for the historic New England character and a thoughtfulness about what makes places great. The Waterfield Lot is a marquee location in Winchester's Town Center, and our design evokes the authenticity of the Town Common while creating a gateway to Winchester from the MBTA station.

04

PARKING AND CIRCULATION

We see an opportunity to improve pedestrian circulation in the Town Center without sacrificing parking. Urban planners value pedestrian and bicycle infrastructure because of the myriad benefits for health, wellness, and environment. But a historic community contending with twenty first century infrastructure also needs parking to support its vibrant local businesses. Though the Waterfield Lot's ample parking and lax enforcement has supported commuters and area businesses, it does not add vibrancy to the Town Center. The proposed design creates an active courtyard level for pedestrians, bicyclists, shoppers, and residents without sacrificing access, loading, or unloading for area businesses. Public parking in a garage is provided on grade with resident parking below grade.

03

PUBLIC SPACE AND PLACEMAKING

Winchester's Town Center is authentic New England Town Center. Human-scale streetscapes and historic architecture, independent local businesses, and ample greenspace are the beating heart of the community. Our approach to Waterfield | Winchester is to amplify those qualities and to thoughtfully add to the Town Center.

The Waterfield Lot is uniquely situated at the doorstep of the MBTA station and the Town Common. Our layered approach to public space celebrates the heart of Winchester by ushering residents and visitors alike from the MBTA platform through a vibrant courtyard and onto the Town Common.

05

SUSTAINABILITY

More than features of building science, we believe environmental sustainability and resilience should be reflected in every aspect of the planning and development process. We take a holistic approach to sustainability by committing to meaningful affordability, creating flexible public space, and supporting diverse transit options for residents. Our commitment to decarbonizing energy sources goes hand-in-hand with our commitment to supporting local business in the proposed Waterfield Road retail. Sustainability and resilience are deeper than innovations in building science. It is our responsibility to create a built environment that is responsive to an uncertain future, and we did not compromise.

COMPARATIVE EVALUATION CRITERIA

OUR WATERFIELD | WINCHESTER DEVELOPMENT TEAM

EVALUATION CRITERIA	HIGHLY ADVANTAGEOUS (2+)
<p>1 - Very High Importance - 4x Development meets the Town’s affordable/mixed-income housing objectives for the Waterfield Lot as stated in this RFP.</p>	<p>Proposal provides additional units, beyond the minimum threshold criteria, that are restricted for occupancy by households covering a mix of incomes ranging from at or below 30 to 120 percent AMI, with an emphasis on households with an AMI of less than 80 percent. Total income-restricted units exceed 50 percent of total proposed units. All units are rental.</p>
<p>2 - High Importance - 3x Development concept narrative and drawings demonstrate thoughtful consideration of the Waterfield site and are appropriate in scale and style for Town Center and its status as a National Historic District.</p>	<p>The design of the new development complements the neighboring buildings, complies with CBD regulations (see appendix), and reinforces the historic character of Town Center.</p>
<p>3 - High Importance - 3x Site layout integrates with the streetscape, the design of the new MBTA station, and existing limitations present on the site.</p>	<p>Layout shows careful consideration of the site and transitions well into the streetscape and the MBTA station. Includes reasonable approach to deal with the MWRA easement and the Chamber of Commerce building</p>
<p>4 - High Importance - 3x Proposed design meets the sustainability objectives for the site as stated in this RFP.</p>	<p>The proposed design fully meets the defined sustainability objectives for the Waterfield Lot</p>
<p>5 - Medium Importance - 2x Proposal provides sufficient parking for building residents, and addresses the loss of public parking.</p>	<p>Site design includes vehicle and bicycle parking for residents, and addresses the loss of public parking</p>
<p>6 - Medium Importance - 2x Developer exhibits a willingness to work with the community and Town officials to refine the conceptual design.</p>	<p>Developer provides descriptions of 2 to 3 previous instances of working with a community to develop land and demonstrates how specific conflicts were resolved with mutual satisfaction</p>

ADVANTAGEOUS (+1)	NOT ADVANTAGEOUS	HOW WE MEASURE UP
<p>Proposal provides additional units, beyond the minimum threshold criteria, that are restricted for occupancy by households covering a mix of incomes ranging from at or below 30 to 120 percent AMI, with an emphasis on households with an AMI of less than 80 percent. Total income-restricted units do not exceed 50 percent of total proposed units. All units are rental.</p>	<p>Proposal provides additional units, beyond the minimum threshold criteria, that are restricted for occupancy by households covering a mix of incomes ranging from at or below 30 to 120 percent AMI, with an emphasis on households with an AMI of less than 80 percent. Total income-restricted units do not exceed 50 percent of total proposed</p>	<p>The Waterfield Winchester proposed unit mix meets the Highly Advantageous criteria by proposing meaningful affordability in excess of 50% of the proposed units. This program is also in alignment with the Commonwealth’s housing goals, while providing a mix of housing opportunities for residents of Winchester’s Town Common. All units proposed are rental.</p>
<p>The design of the new development generally complies with CBD regulations, but the style or site layout does not fully integrate with its surroundings or reinforce historic character.</p>	<p>The design of the new development does not comply with the CBD regulations, and is poorly-integrated with its surroundings</p>	<p>The proposed development is contextually sensitive and honors the architectural integrity of the surrounding district. The building forms are designed to be harmonious with the surrounding streetscape, while celebrating the importance of public space.</p>
<p>Layout shows adequate consideration of the site and transitions well into the streetscape and the MBTA station, but does not include a reasonable approach to deal with the MWRA easement and the Chamber of Commerce building.</p>	<p>Layout lacks recognition of the site limitations, and shows minimal effort to blend with the streetscape or the MBTA station.</p>	<p>The site plan layout recognizes the limitations of the MWRA easement by using the site constraints to create great public space. The COC Building will be retained and programmed to increase retail and entertainment opportunities on the Common.</p>
<p>The proposed design incorporates some, but not all, of the defined sustainability objectives for the Waterfield Lot.</p>	<p>The proposed design does not incorporate any of the defined sustainability objectives for the Waterfield Lot.</p>	<p>Sustainable Comfort was engaged early to ensure that every aspect of the development is responsive to the sustainability objectives outlined in the RFP.</p>
<p>Site design incorporates vehicle and bicycle parking for residents, but does not address the loss of public parking.</p>	<p>Site design lacks bicycle parking for residents and does not address the loss of public parking.</p>	<p>The proposed program includes vehicle and bike parking for residents as well as replacement public parking.</p>
<p>Developer provides at least one example of working with a community to develop land and demonstrates how specific conflicts were resolved with mutual</p>	<p>Developer does not demonstrate previous collaboration with communities to develop land or does not demonstrate how specific conflicts were resolved with mutual satisfaction.</p>	<p>Traggorth and Civico have worked with municipalities across the Commonwealth to collaboratively realize stakeholder goals.</p>

COMPARATIVE EVALUATION CRITERIA

OUR WATERFIELD | WINCHESTER DEVELOPMENT TEAM

EVALUATION CRITERIA	HIGHLY ADVANTAGEOUS (2+)
<p>7 - Medium Importance - 2x Development project incorporates elements that enhance the Cultural District or provide other essential public amenities.</p>	<p>Project design incorporates public art (e.g. sculptures, murals, rotating exhibits) and has other public amenities, such as a pocket park or benches.</p>
<p>8 - Medium Importance - 2x Developer identifies anticipated traffic mitigation measures, including circulation and delivery access for abutters, and bicycle and pedestrian improvements.</p>	<p>The design of the new development complements the neighboring buildings, complies with CBD regulations (see appendix), and reinforces the historic character of Town Center.</p>
<p>9 - Lower Importance - 1x Developer outlines the proposed key terms of the land disposition and lease agreements.</p>	<p>Developer outlines the proposed key terms of the land disposition and lease agreements.</p>
<p>10 - Lower Importance - 1x Proposal includes an initial pre-development timeline, which specifies zoning, permitting, and financing milestones.</p>	<p>Development proposal demonstrates high level of understanding of the permitting and financing process, and provides a reasonable estimate of the timing for each stage.</p>
<p>11 - Lower Importance - 1x Development team includes details on their property management approach, including services to support low-income residents.</p>	<p>Provides detailed narrative of their management proposal, including resident services.</p>
<p>12 - Lower Importance - 1x Developer specifies how noise, traffic, construction debris will be mitigated during the construction phase.</p>	<p>Developer demonstrates high level of commitment to and understanding of best practices to mitigate construction impacts.</p>

ADVANTAGEOUS (+1)	NOT ADVANTAGEOUS	HOW WE MEASURE UP
<p>Project design incorporates either public art (e.g. sculptures, murals, rotating exhibits) or has other public amenities, such as a pocket park or benches.</p>	<p>Project design does not include either public art or other public amenities.</p>	<p>The focal point of Waterfield Winchester is the public courtyard and stage. The co-working, pop-up, and retail spaces provide ample support for an active public realm.</p>
<p>The design of the new development generally complies with CBD regulations, but the style or site layout does not fully integrate with its surroundings or reinforce historic character</p>	<p>The design of the new development does not comply with the CBD regulations, and is poorly-integrated with its surroundings</p>	<p>We reached out to abutting owners and businesses to better understand use and access patterns, including anticipated impacts. The ground plane is responsive to this feedback and favors pedestrian connectivity to the Town Common.</p>
<p>Developer outlines the proposed key terms of the land disposition OR lease agreement (but not both)</p>	<p>Developer does not outline the proposed key terms of the land disposition or lease agreements.</p>	<p>Key details of the LDA are provided by Counsel and included in the RFP response.</p>
<p>Development proposal demonstrates high level of understanding of the permitting and financing process, and provides a reasonable estimate of the timing for each stage.</p>	<p>Development proposal does not demonstrate adequate level of understanding of the permitting and financing process and timeline.</p>	<p>The zoning and permitting narrative include key milestones and projected start/end dates for pre-development, development, construction, and lease-up events.</p>
<p>Provides detailed narrative on management proposal but may not include any resident services.</p>	<p>Management approach is not detailed or is completely absent</p>	<p>Included herein for reference is our proposed property management partner's management plan.</p>
<p>Developer demonstrates moderate commitment to and understanding of best practices to mitigate construction impacts.</p>	<p>Developer does not demonstrate commitment to or understanding of best practices to mitigate construction impacts.</p>	<p>Included herein for reference is our preliminary construction management plan.</p>



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01

SECTION 1 THE DEVELOPER

TRAGGORTH | CIVICO DEVELOPMENT TEAM



PERMITTING | TEAM LEAD

Dave will have primary responsibilities for project permitting and the leadership of the development and consulting team. Dave will manage construction of Waterfield | Winchester with Andrew. Dave's real estate career spans more than 20-years from construction to complex real estate finance. He started Traggorth Companies to provide high quality real estate asset and project management services for residential, commercial, and mixed-use ventures. Dave has a holistic understanding of the many phases of urban design and development, specializing in zoning and permitting, development,

DAVE TRAGGORTH



FINANCIAL ANALYST

Dan will be responsible for financial analysis, deal structure, and the management of affordability requirements for Waterfield | Winchester. Dan is a partner at Traggorth Companies and leads financial analysis and underwriting for both consulting and in-house development projects. He previously worked for Mitchell Properties as a project manager on a variety of mixed-income residential projects in the Commonwealth.

DAN HUBBARD



ARCHITECTURE | URBAN DESIGN

Andrew will be primarily responsible for urban design and the management of the architecture, landscape architecture, and civil engineering consultants. Andrew will manage construction of Waterfield | Winchester with Dave. Andrew's career in the real estate industry spans more than 20 years from architectural design, urban and town center planning, to development and construction of complex mixed-use projects. He founded Civico to provide towns and cities with the collaborative partner they need to create authentic and contextually-sensitive places.

ANDREW CONSIGLI



PROJECT MANAGER

Taylor will be primarily responsible for project management and will lead the community engagement and outreach aspect of the Waterfield | Winchester project. Taylor will manage the property management partner during lease-up. Taylor is a partner at Civico with primary responsibilities for deal sourcing, partnership outreach, and project management. He was previously VP of Operations for Sustainable Comfort, Inc., a green building consulting, construction, and management company. Taylor has a comprehensive understanding of zoning and permitting, community development, and stakeholder engagement.

TAYLOR BEARDEN

TRAGGORTH | CIVICO DEVELOPMENT TEAM



The name, address, and telephone number of the proposer, the name of any representative authorized to act on his/her/its behalf, the name and contact information of the person to which all correspondence should be addressed, and the names and primary responsibilities of each individual on the development team.

Traggorth Companies LLC
50 Summer Street
Boston, MA 02110
dave@traggorthcompanies.com
617-542-6500

The development entity is a joint venture between Traggorth Companies and Civico. The point of contact and authorized representative for the Traggorth | Civico partnership is Dave Traggorth from Traggorth Companies. Key team members for Traggorth | Civico and their primary responsibilities are listed on the preceding pages.

TRAGGORTH COMPANIES AND CIVICO

TRAGGORTH COMPANIES

Traggorth Companies LLC (TCLLC) provides high-quality real estate advisory services for residential, commercial, and mixed-use ventures. Dave Traggorth and Dan Hubbard formed TCLLC in January 2012 and have a combined 30-years experience in real estate development in the northeastern and mid-Atlantic states. TCLLC responds to real estate development challenges by providing cost-efficient and thoughtful solutions.

CIVICO DEVELOPMENT

Civico Development LLC (Civico) is a community-focused real estate investment and development group founded on the commitment to quality design, historic preservation, and neighborhood-oriented infill development. Our mission is to design and construct high quality buildings, streetscapes, and neighborhoods that significantly enhance the social livability and environmental sustainability of our communities. Our work includes projects of all scales that are focused on walkability and human-scale development.





Traggorth Companies have been responsive to our input throughout the permitting, design, and construction process; built extremely high quality, well designed buildings; continue to be good stewards post construction as long term owners; and perhaps most importantly worked with the City to support locally-owned small businesses.

William Pillsbury
Economic Development Director and
Planning Director
City of Haverhill

B

If the proposer is not an individual doing business under his/her name, a description of the firm and status of the organization (e.g. whether a for-profit or charitable institution, a general or limited partnership, a corporation, LLC, LLP, business association, or joint venture), and the jurisdictions in which it is registered to do business. If the proposers are a non-profit, please include a list of the organizations Board of Directors and areas of expertise they represent.

The Waterfield Lot development will be undertaken by two Limited Liability Companies (LLC) formed in the Commonwealth of Massachusetts, Traggorth Companies and Civico Development. If chosen as the preferred developer, a joint venture LLC will be formed as the General Partner named "Waterfield Traggorth Civico LLC." As this joint venture entity has yet to be formed, Traggorth Companies is the respondent to the Waterfield Lot RFP.

C

The nature of the entity to enter into the Land Disposition Agreement for the Property, and the borrower and guarantors of debt, if any.

The joint venture limited liability company or its designee will enter into the Land Disposition Agreement. The Waterfield Lot development transaction will be a ground lease structure and will be placed under the legal entity to be formed by Traggorth and Civico.

D

Identification of all principals, partners, co-ventures, or sub-developers participating in the transaction, and the nature and share of the participants' ownership in the project.

Traggorth Companies and Civico Development will be the parties to the to-be-filed entity named Waterfield Traggorth Civico LLC. Owners Dave Traggorth and Andrew Consigli are the sole shareholders and managing partners of their respective firms. The Waterfield | Winchester Development will be 50% / 50% each party.

E

Discussion of whether the Property developer will also be the property manager and if this is not the case, the legal and financial relationships between the entities. If the developer will not be the property manager, the proposer shall describe the process for securing property management services.

Traggorth Civico LLC will be responsible for all aspects of the permitting, design, and construction of the development. Upon completion of the construction, the building will be managed by a third party.



Identification of the development team, such as architects, engineers, landscape designers, contractors, development consultants. Background information, including firm resumes and resumes for principals and employees expected to be assigned to the project, should be provided (if not already included in the RFQ Submission).

The Traggorth | Civico team is composed of firms and individuals that have deep-rooted experience in building contextually-sensitive, innovative, and community-based development projects in New England, and specifically Greater Boston. Cities and towns across our Commonwealth have a truly special blend of history, governance, and community. The team that we assembled is committed to honor those traditions while innovating to contribute toward a more resilient Winchester.

Union Studio Architects will serve as the architect and urban designer for the Waterfield Lot development. Union Studio was founded with one overarching goal: to use their skills as architects and urban designers to make a civic contribution to communities of all types. They are dedicated New Urbanists and perpetual students of history, who believe that traditional town planning and architecture have resulted in our most vibrant and beautiful spaces in the past, and can help to enrich our communal and civic life in the future.



Traggorth | Civico and Union Studio will collaborate with these key design consultants:

Ryan Associates – Landscape Architecture

Horsley Witten – Civil Engineering

Robinson + Cole – Legal Counsel

Sustainable Comfort – Sustainability

Street Light Ventures – Retail | Commercial Advisor

CoUrbanize –Community Outreach Platform

PLEASE SEE THE RESUMES AND FIRM OVERVIEWS INCLUDED IN THE APPENDIX

Traggorth Companies are thoughtful and responsive in their development work with a track record in well-designed high quality buildings. They also provide long-term stable ownership with continued investments in their properties.

Ned Keefe
Deputy City Manager
City of Chelsea



A description demonstrating the extent to which the members of the developer team have successfully worked together on development projects of a similar scope to the proposed development including completed projects of similar size, total cost, and affordability levels.

Traggorth and Civico have an established history successfully collaborating as development partners. With complementary skill sets and aligned visions for high quality, community-based development, we believe this partnership can deliver on all of the Town's development objectives. Both Traggorth and Civico have had tremendous experiences working with the consultants chosen for the Waterfield Lot development.



BELOW ARE A FEW EXAMPLES OF PAST AND CURRENT WORKING RELATIONSHIPS:

Traggorth and Civico are currently developing Ace Flats, a 55-unit mixed-income mixed-use project in downtown Reading. This project was permitted under Chapter 40R of Massachusetts General Law and is adjacent to the commuter rail station.

Civico and Union Studio are currently working on a new construction pocket neighborhood in Worcester to be built for the chronically homeless using Department of Mental Health and DHCD funding.

Civico, Union Studio, Horsley Witten, and Robinson + Cole have a long standing relationship with The Congress for New Urbanism, including the local New England chapter for over 20-years.

Traggorth and Civico previously collaborated on Abbey Road in the historic town center of Sherborn, Massachusetts, where Civico was the developer and Traggorth served as development consultant.

Union Studio and Ryan Associates collaborated on the landscape at Emerson Green, a new construction pocket neighborhood in Devens. They have also worked together for Cornish Associates and Northland Development.

Sustainable Comfort (SCI) is currently working with Traggorth and Civico in varying capacities including green building consulting, design-build services, and property management. Both Civico principals are independent directors of SCI.

PROJECTS



For each similar project identified, provide project name, location, project type, start date, projected completion date and actual date of completion, total development costs and key project people. Also indicate the total number of units, number of affordable and accessible units, 1, 2, 3 bedrooms units vs. condo, and whether they are currently managed by the developer.

	PROJECT NAME	LOCATION	START DATE COMP. DATE	TDC	UNITS	INCOME LEVEL
TRAGGORTH	JM LOFTS	HYDE PARK	Q1 2016 Q3 2017	\$10M	18	MARKET RATE
	FAIRMONT STATION	HYDE PARK	Q1 2016 Q3 2018	\$12M	27	MIXED INCOME
	MOSAIC ON THE RIVERWAY	MISSION HILL	Q1 2014 Q3 2016	\$63M	145	MIXED INCOME
	CABLE MILLS	WILLIAMSTOWN	Q2 2014 Q1 2016	\$26M	61	MARKET RATE
	FLATS @ 22	CHELSEA	Q3 2012 Q1 2014	\$23M	96	MIXED INCOME
JV	ACE FLATS	READING	Q1 2019 Q2 2021	\$21M	55	MIXED INCOME
	ABBAY ROAD	SHERBORN	Q1 2017 Q3 2018	\$10M	18	MARKET RATE
CIVICO	ORIOLE LANDING	LINCOLN	Q1 2018 Q2 2020	\$21M	60	MIXED INCOME
	COOLIDGE SCHOOLHOUSE	MAYNARD	Q2 2021 Q3 2022	\$5M	12	MIXED INCOME
	LAGRANGE MILL LOFTS	WORCESTER	Q2 2020 Q3 2024	\$32M	75	MIXED INCOME

CONDO RENTAL	MANAGER	KEY PEOPLE
RENTAL	3RD PARTY	DAVE TRAGGORTH
RENTAL	3RD PARTY	DAVE TRAGGORTH
RENTAL CONDO	3RD PARTY	DAN HUBBARD
RENTAL CONDO	3RD PARTY	DAVE TRAGGORTH
RENTAL	3RD PARTY	DAN HUBBARD
RENTAL	3RD PARTY	DAVE TRAGGORTH ANDREW CONSIGLI
CONDO	3RD PARTY	ANDREW CONSIGLI
RENTAL	3RD PARTY	ANDREW CONSIGLI
RENTAL	3RD PARTY	TAYLOR BEARDEN
RENTAL	3RD PARTY	TAYLOR BEARDEN



PROJECTS



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

There are no known past, pending, or threatened legal or administrative actions that would adversely affect the proposer's, or the parties' to the joint venture agreement, ability to perform contractually.



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

There are no known local, state, or federal taxes outstanding for the Traggorth | Civico partnership or its principals or consultants.



Provision of references for the three completed projects, with contact, names, titles, and current telephone numbers, who can provide information concerning the proposers experience with similar projects.

CITY/TOWN	CITY OF HAVERHILL	TOWN OF READING	TOWN OF LINCOLN
PROJECT	JM LOFTS	ACE FLATS	ORIOLE LANDING
FIRM	TRAGGORTH	TRAGGORTH CIVICO	CIVICO
CONTACT	Haverhill City Hall Community Development Att: William Pillsbury Jr. 4 Summer Street Rm 309 Haverhill, MA 01830 978-374-2344	Reading Town Hall Planning Department Att: Julie Mercier 16 Lowell Street Reading, MA 01867 781-942-6648	Lincoln Town Hall Planning Department Att: Jennifer Burney 16 Lincoln Road Lincoln, MA 01773 781-259-8735

Civico incorporated Low Impact Development Standards (LID) which resulted in a rain water collection system, community vegetable gardens, and a LEED Certified Building. Throughout the process Civico has been collaborative, creative, and thoughtful.

Jennifer Burney
Director of Planning and Land
Use for the Town of Lincoln





ACE FLATS IN DOWNTOWN READING



APPENDIX TO SECTION 1- QUALIFICATIONS

RESUMES AND RELEVANT EXPERIENCE

Traggorth

Civico

Union Studio

Ryan Associates

Horsley Witten

Streetlight Ventures

Sustainable Comfort

Robinson + Cole



UNION STUDIO

ARCHITECTURE & COMMUNITY DESIGN



Union Studio was founded in 2001 with one overriding goal: to use our skills as architects and urban designers to make a civic contribution to communities of all types.

Union Studio is a nationally practicing architecture and community design firm based in Providence, Rhode Island. Founded in 2001, our growing office of 24 architects and urban designers shares the mission to use architecture to encourage social connection, walkability, and sense of place to help create and sustain true neighborhoods and communities.

Union Studio brings a comprehensive approach to the design of buildings. We infuse rigorous technical detail with an “expert generalist” viewpoint; a combination that integrates a broad understanding (and respect for) key building trades with our architectural practice. This results in a project that is not only effectively managed, but ultimately exhibits a sense of overall cohesion. We design places that “feel right,” while being memorable and firmly grounded in the realities of today’s market driven real estate world.

This unique combination of talents has attracted clients – and awards – from across the U.S. and Canada. With projects in Texas, Arkansas, Oregon, Washington State, Michigan, Virginia, New York and throughout New England, Union Studio has developed a national reputation in perfecting techniques for distilling the nuances of local character combined with a traditionally inspired view of economy and simplicity.



HOTEL

NEWBURYPORT

WATERFRONT MASTER PLAN

NEWBURYPORT, MA



All images © Union Studio 2013

"The thoughtful, caring and insightful method and philosophy of Union Studio was key to producing a plan that not only has achieved the support of the NRA and the mayor, but a broad level of support throughout the community...I would highly recommend Union Studio for the most challenging of urban design problems."

James Shanley
Chair, Newburyport Redevelopment Authority

AWARDS

2013 American Institute of Architects,
Rhode Island Chapter: Merit Award in
Urban Design



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

This proposed master plan was completed for the Newburyport Redevelopment Authority (NRA), an agency that owns 4.2 acres of waterfront land surrounding a public park in the town's downtown commercial district. The NRA hired Union Studio to help develop a vision for the property, which will be the basis for an RFP for its development. The goal was to balance viable economic development opportunity with the public's enjoyment of this special waterfront open space. The process involved several public meetings and a thorough analysis of the existing site. It resulted in recommendations for more clearly defining the park, increasing open space by 30%, improving circulation & pedestrian connections, preserving parking, and creating two new mixed-use buildings at the perimeter of the site to generate economic development opportunity. Union Studio's proposed master plan was met with applause when presented at a public meeting with over 200 people in attendance. Union Studio designed the master plan, created all visuals, participated in public engagement and presented design concepts to the public.

140 Union Street Providence, Rhode Island 02903 p. 401.272.4724

WATERFRONT MASTER PLAN

PROJECT DATA

USE

4.2 acre proposed waterfront master plan that was the basis of a subsequent development RFP

DATE

2012

SIZE

4.2 acres

COST

n/a

CLIENT TYPE

Quasi-public agency

REFERENCE

James Shanley, Former Chair
Newburyport Redevelopment Authority
978.518.1025

UNION STUDIO SCOPE

Master plan, concept visualization, public engagement and presentation



Union Studio | Architecture & Community Design

CAPITOL SQUARE

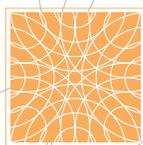
PROVIDENCE, RI



Photo: Nat Rea, all images © Union Studio 2011

Capitol Square is a 22,000 sf mixed-use development in the heart of Smith Hill in Providence. Designed to be the new gateway to this historic neighborhood, these two buildings created much needed affordable housing and economic opportunity to support the neighborhood's ongoing revitalization.

The large mixed-use development was strategically sited on vacant city lots along a major city arterial. Its two buildings, consisting of 13 mixed-income residential units above 5,500 sq. ft. of retail and commercial space, frame a terraced neighborhood plaza with recreational open space and parking at the rear of the site. The building architecture reflects the forms of the adjacent buildings allowing for a strong building frontage that knits seamlessly with the surrounding neighborhood.



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

140 Union Street Providence, Rhode Island 02903 Union Studio Architecture & Community Design

CAPITOL SQUARE

PROJECT DATA

USE

Mixed-Use: 13 units of affordable housing with 5,500 sf of first-floor retail space

SIZE

22,000 SF

DATE

Completed in 2007

COST

\$2.3 million

CLIENT TYPE

Non-Profit Community Development Corporation

REFERENCE

Jean Lamb, Executive Director
Smith Hill Community Development Corporation
(401) 521-0159

UNION STUDIO SCOPE OF WORK

Full architectural services from conceptual design through construction administration.



TRINITY PLACE

TOWNHOUSES & MIXED-USE
PROVIDENCE, RI



All images © Union Studio 2013

AWARDS

*2014 Providence Preservation Society: Historic Preservation Award
Neighborhood Revitalization Award*

Designed for a non-profit community development corporation, this urban infill project transforms a large derelict site in the heart of Providence. Trinity Place provides 22 units of much needed affordable rental apartments and retail space on a major thoroughfare of the city. The rehabilitation of four existing buildings nearby, known as Princeton Place, updated the aging housing stock. A second phase of this project included 11 homeownership townhouses on newly established adjacent lots.



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ARCHITECTURE & COMMUNITY DESIGN

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TRINITY PLACE

PROJECT DATA

USE

Mixed-Use: 22 units of affordable housing with first-floor retail space; 11 townhouses for ownership

SIZE

24,000 SF

DATE

First three phases completed 2013

COST

\$5 million

CLIENT TYPE

Non-Profit Community Development Corporation

REFERENCE

Carla DeStefano
SWAP, Inc.
(401) 272-0526

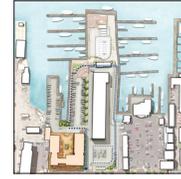
UNION STUDIO SCOPE OF WORK

Site planning & full architectural services from conceptual design through construction administration.



HAMMETT'S WHARF HOTEL

NEWPORT, RI



Rendered perspective from Memorial Boulevard

All images © Union Studio 2018

In Downtown Newport, RI, Union Studio is working with our client to design a new 47,000 sf boutique hotel and mixed-use building to fill in a “missing tooth” gap along the historic waterfront. Located between the bustling pedestrian corridor of America’s Cup Avenue and the proposed Harborwalk along Newport’s wharfs, the building includes an 84-key hotel, retail, restaurant, and office spaces, with a 9,500 sf public deck overlooking the harbor. Union Studio’s design for the building complements the neighboring scale and context, enhances the pedestrian experience, and provides a legacy project that will become an important part of the city’s historic waterfront and public spaces. On the hospitality side, Union Studio is working with interior architect DiLeonardo to conceptualize the boutique hotel’s interiors and branding.



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

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HAMMETT'S WHARF HOTEL

PROJECT DATA

USE

84-key boutique hotel with mixed-use on the first floor including retail, restaurant, and office spaces

SIZE

47,000 sf

DATE

Summer of 2020

COST

\$25 Million

CLIENT TYPE

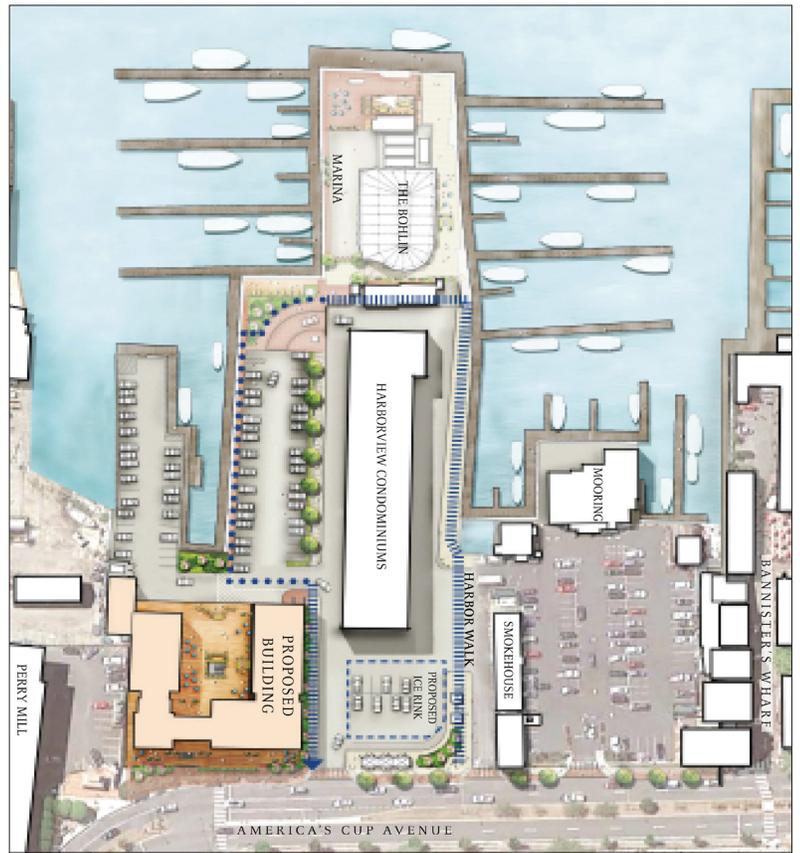
Private Developer

REFERENCE

Sam Bradner, Principal
Scott's Wharf LLC
(401) 270-0600

UNION STUDIO SCOPE

Conceptual design through construction administration, including the city approvals process



Site Plan



Front Elevation



Rendered perspective from America's Cup Avenue



DO NOT ENTER

HAMMETTS



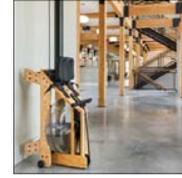


KOTEL

8' - 2"

WATERROWER, INC.

WORLD MANUFACTURING HQ
WARREN, RI



All images © Union Studio 2017

AWARDS

*2017 Rhode Island Monthly: RI
Monthly Design Award Silver Award
for Commercial Interior Design*

*2017 AIA Rhode Island: AIA RI Design
Award Honor Award for Commercial/
Industrial*

WaterRower, Inc. is growing company that designs and sells rowing simulation equipment to an international audience from its headquarters in the historic, waterfront neighborhood of Warren, RI. Union Studio designed a corporate visitor's center and headquarters that provides an engaging environment for clients and employees. An existing manufacturing building was renovated, and a new 30,000 sf building was designed on the corporate campus. The new building includes marketing, sales, and administrative offices, a product museum, a showroom, gym space for product demonstrations, and a lunch room.



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

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WATERROWER HQ

PROJECT DATA

USE

Renovations to an existing building and construction of a new building to include offices, a product museum, a showroom, gym space for product demonstrations, and a lunch room.

SIZE

35,000 sf (existing building); One new 30,000 sf buildings

DATE

Completed June 2017

COST

N/A

CLIENT TYPE

Corporation

REFERENCE

Peter King, Owner
WaterRower, Inc.
(401) 247-7742

UNION STUDIO SCOPE

Interior programming, site planning for the campus, phasing, conceptual design through construction administration.



Above & left: Office interiors were inspired by WaterRower's unique product design
Below: Rear entrance



Union Studio | Architecture & Community Design

WRIGHT LOCKE FARM

NEW EDUCATION & PROGRAM CENTER

WINCHESTER, MA



All images © Union Studio 2016

The historic Wright Locke Farm is a non-profit working farm that hosts farm-based educational programs and community events. It also features hiking trails, ponds, wetlands and hilltop glades free for the public to enjoy. The farmstead has been continually operating since 1628 and is listed on the National Register of Historic Places. A generous donor gifted the land adjacent to the farmstead to the Wright Locke Conservancy, expanding their property to 20 acres and giving them ample space to build a new facility. Union Studio has been hired to design a new Education and Program Center to accommodate gatherings of up to 100 people, a classroom for kids, and a multi-purpose educational kitchen.



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

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WRIGHT LOCKE FARM

PROJECT DATA

USE

New education & program center

SIZE

Approx. 10,000 sf

DATE

TBD

BUDGET

\$35,000 through conceptual design phase

CLIENT TYPE

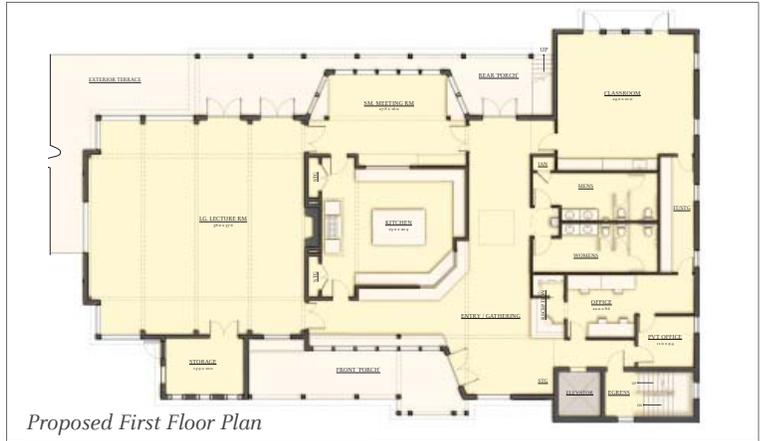
Non-profit working farm

REFERENCE

Archie McIntyre
Wright-Locke Land Trust, Inc.
(781) 721-7128

UNION STUDIO SCOPE

Full architectural services: conceptual design
through construction administration



EAST ELEVATION



WEST ELEVATION

DONALD W. POWERS AIA, LEED AP, CNU

PRESIDENT & FOUNDING PRINCIPAL



Donald W. Powers has nearly three decades of experience in all aspects of architectural practice. His completed work includes urban and town planning, commercial and institutional buildings, affordable housing, historic restoration of landmark buildings, and single-family residences. In recent years, his work has concentrated on integrated, mixed-use planning and architectural design with the goal of creating truly diverse and vibrant neighborhoods. A 20-year association with the Congress for the New Urbanism and frequent collaboration with some of the best firms in the country doing traditional urban design has brought an expertise in the technique and art of creating livable communities and cherished places. Donald has a single-minded vision to restore communities and save the world from sprawl.

REGISTRATIONS

Registered Architect: Licensed in Rhode Island, Massachusetts, Connecticut, Michigan, Virginia. NCARB.

EDUCATION

Harvard University, Graduate School of Design - Cambridge, MA
Master of Architecture

University of Virginia - Charlottesville, VA

Bachelor of Science, Architecture

Honors: Annual Design Prize

AFFILIATIONS & ACCREDITATIONS

LEED Accredited Professional

American Institute of Architects

Congress for the New Urbanism - *New England Chapter Board of Directors*

CNU IX Providence - *Executive Committee & Program Co-Chair 2006*

GrowSmartRI - *Board of Directors*

Institute for Classical Architecture - *New England Chapter Founding Board Member*

City of Providence Zoning Commission - *Subcommittee for Form-Based Zoning, Committee Chairman*



UNION STUDIO

ARCHITECTURE & COMMUNITY DESIGN

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DONALD W. POWERS AIA, LEED AP, CNU

PRESIDENT & FOUNDING PRINCIPAL

SPEAKING ENGAGEMENTS

Small Housing Trends: Recession Survival Tactics & Moving Forward
12th Annual New Partners for Smart Growth Conference, 2013

**Innovating Community Design and Mass Market Housing - and -
Deconstructing the Mass Appeal and Continued Relevance of
Traditional Architecture**

Residential Architect magazine's Reinvention, 2012

The Real Deal: Implemented Incremental Urbanism

CNU 20, 2012

Cottage Housing & Innovative Zoning

6th Annual Massachusetts Housing Institute, 2012

Principles of Compact Cottage Court Development

Build Boston, 2011

Utopias: A Conversation

List Art Gallery at Brown University, 2011

(a panel discussion responding to the David Winton Bell Gallery exhibition
Building Expectation: Past & Present Visions of the Architectural Future)

Planning and Designing Successful Mixed-Use Centers

Healthy Places by Design Community Workshops, 2011

Small Site Development: Resources and Best Practices

Massachusetts Municipal Association Conference, 2011

The "New" Increment of Urbanism: Opportunity & Technique

CNU New England, 2009 (*presented with Douglas Kallfelz*)

**The Details of the New Urbanism: From Curb to Cupola - The Case for
Simplicity**

CNU 2007, CNU 2008, & CNU 2009 (*presented with Douglas Kallfelz*)



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JEREMY R. LAKE AIA, LEED AP, CNU

SENIOR ASSOCIATE



REGISTRATIONS

Registered Architect: Licensed in Maryland.

Jeremy brings nearly 20 years of experience working on architecture and community design projects at a range of scales. At Union Studio his specialty is neighborhood-scale projects, including the design of new neighborhoods, crafting vision plans to revitalize existing communities and generating design guidelines to help guide future development. For these types of projects he often serves as both a designer and project manager, with a talent for serving as a versatile liaison between planning and architecture. Jeremy joined Union Studio in July of 2012 after eleven years at Torti Gallas and Partners where he worked on a variety of market-rate neighborhoods, HOPE VI revitalization projects, and residential architecture projects.

Jeremy has served on the Board of Directors of the Rhode Island Chapter of the American Institute of Architects and is an active member of the Congress for the New Urbanism.

EDUCATION

University of Miami - *Miami, FL*

Master of Architecture

Master of Architecture in Suburb and Town Design

Bowdoin College - *Brunswick, ME*

Bachelor of Arts, Anthropology; Minor: Biology

AFFILIATIONS & ACCREDITATIONS

LEED Accredited Professional

American Institute of Architects - *RI Chapter Board of Directors, 2013 - 2016*

Congress for the New Urbanism

SPEAKING ENGAGEMENTS

Successful and Effective Land Use and Zoning Policies: Cottage Courts, Massachusetts Municipal Association Annual Meeting, 2018

Meeting Changing Housing Preferences Through A Form Based Approach, Cape Cod Commission OneCape Summit, 2018

Creative Approaches to Moderate Density: Filling the Missing Middle on Cape Cod, Cape Housing Institute, 2018

Filling the Gap: Affordable Housing Crisis Through Design, CNU Illinois & AIA Chicago, 2019

Getting Great Multifamily Housing in Your Community: Fieldstone Way SNEAPA, 2019



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

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RYAN ASSOCIATES

LANDSCAPE ARCHITECTURE & PLANNING

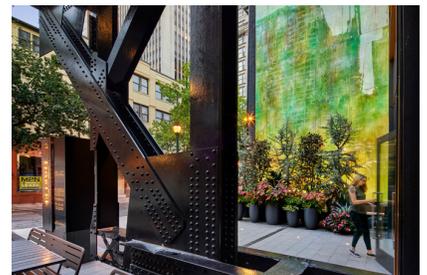
FIRM PROFILE

Founded in 1998, Ryan Associates provides Landscape Architecture, Planning and Project Management services for projects of all sizes. We engage in a wide range of work including institutional, corporate and mixed-use development, residential design, master planning, public open space, and ecological planning and design. Ryan Associates is frequently invited to partner with other firms based on our strong technical expertise and design innovation.

We pride ourselves on our ability to work with clients, consultants, and contractors, promoting clear and open communication between all participants. Working as a team of skilled professionals with technical expertise, we strive to realize our clients' goals and meet the challenges inherent to individual sites. From master planning and ecological design to planting design and construction detailing, Ryan Associates excels at providing long term value, designing landscapes that are sustainable, beautiful, and successfully meet the needs of our clients.

Ryan Associates' design philosophy encompasses the entire life of a project from initial concept to construction and maintenance. We understand that a design is only as good as its ability to meet a client's needs, in both the long and short term. Ryan Associates' work is united by this attention to detail and by the ability of each design to transform a site's most difficult conditions into opportunities.

Ryan Associates has collaborated with Union Studios on many recent projects. These include: Dorset Park in Weymouth, MA; Fieldstone Way in Wellesley, MA; Woodward Village in Carlisle, MA; Emerson Green in Devens, MA; Grant's Block in Providence, RI; Amberbelle Mills in Vernon, CT; and Net-Zero House in Jamestown, RI.





THOMAS R. RYAN, RLA, FASLA, PRINCIPAL

Tom Ryan, founder of Ryan Associates, is a master builder of landscapes. He has both an extensive knowledge of the theory that underpins built landscapes and the practical skills needed to build and maintain them. His work strives to be memorable, contextual, durable and flexible.

SELECTED PROJECTS

Woodward Village, Carlisle, MA - Traditional Neighborhood Development (TND) with community park, open space and housing
Amerbelle Mills, Vernon, CT - Study for mixed-use housing and retail Mill redevelopment
Emerson Green, Devens, MA - TND community with range of housing types, parks and community open space
Boyd's Crossing, Norfolk, MA - Pocket Neighborhood Transit Oriented Design
Upland Woods Apartments, Norwood, MA - Apartment complex infill within an Industrial Park
The Pinehills, Plymouth, MA - Planning, documentation and construction phase services for 7 neighborhoods
Devon Woods Apartments, Norton, MA - 40B Apartment complex
The Rice Silk Mill, Pittsfield, MA - Mill renovation for public housing including community gardens
Granada Highlands, Malden, MA - Rehabilitation master plan for 40-acre 1970's apartment complex
Red Mill Village Housing, Norton, MA - Mixed use of retail and housing with public open space
Chapman's Reach at Marina Bay, Quincy, MA - Neo-traditional infill housing development
GreatBrook Senior Housing, Norton, MA - Senior housing development with community gardens
Stonebridge Commons, Hanson, MA - Mix of townhouse units, affordable and market rate housing development
New Brunswick Housing, New Brunswick, NJ - Upgrade of low-income housing
Westport Housing, Westport, MA - Townhouse, affordable and market rate housing development

EDUCATION

Harvard University, Graduate School of Design - Master of Landscape Architecture, 1979
University of Wisconsin, School of Agriculture & Life Science - Bachelor of Science in Landscape Architecture, 1975

AWARDS, PUBLICATIONS, PRESENTATIONS

2020 William D. Smith Award for Accessible Design, Boston Society of Architects, Tower Hill Botanic Garden, Boylston, MA
2017 BRAGB Awards, Best Rental Community, Best + Community and Judges Choice awards
2018 Presenter, Enduring Landscapes: Stewardship from Design to Maintenance and Management
2013-14 Presenter, Landscape Forensics: Why Things Fail
2013 Presenter, Contract Documents in a Digital Age
2013 Presenter, Webinar on Forgiving Landscape Details for Ease of Construction
2011 Published Landscape Architectural Detailing for Wiley Publishing
2008 Arbor Day Foundation & NAHB: Building w/ Trees Award of Excellence - The Woodlands
2006 Builder's Magazine Builder's Choice Grand Award: Active Adult Community - Red Mill Village
2005 NAHB Silver Award, Best Active Adult Community- GreatBrook Senior Community
1998 Contributing author Time-Saver Standards for Landscape Architecture

TEACHING

2012 - present Harvard University, Graduate School of Design, Landscape Architecture Program, Instructor in Grading & Drainage, Detailing & Documentation (also in 1981, 1986, 1995)
2008 - 2012 University of Pennsylvania, Landscape Architecture Program, Instructor
2004 SUNY ESF Syracuse, Landscape Architecture Program, Instructor

REGISTRATION

Massachusetts Registered Landscape Architect Registration #590, 1978



ALAN AUKEMAN, RLA, ASLA, PRINCIPAL

Alan has been with Ryan Associates since 2005. His work has ranged from performing initial planning studies and assembling permitting and construction document packages to providing project oversight and construction administration. In his time at Ryan Associates, Alan has overseen a full range of project types ranging from institutional to mixed-used public and private development.

SELECTED PROJECTS

Frost Homes, Waterbury, CT – Renovations and redevelopment of a supported housing community
LePage Pondview Apartments, Gloucester, MA - Full design services for affordable housing infill
The Coolidge School, Watertown, MA - Senior housing school conversion
Johnston Square and Sharp Leadenhall Apartments, Baltimore, MD - Renovations to low income and assisted apartment community
Skyview Apartments, Scranton, PA - Renovations to low income housing community
Telford 180, Boston, MA - Design and development for a public plaza, green roof, and urban streetscape
The Woodlands at Belmont Hill, Belmont, MA – Age-targeted Townhouse development on the site of historic hospital grounds
The Villages at Seven Springs, Burlington, MA - Townhouse development on a former industrial site
The Residences at Black Rock, Hingham, MA - Full design services for residential golf community
The Villages at Brookside, Falmouth, MA - Full design services for townhouse golf club development
Red Mill Village Housing, Norton, MA - Mixed use development with public open space
Hammatt Street Block, Ipswich, MA - Redesign of downtown block
Mount Ida College, Newton, MA - Redevelopment of numerous campus spaces and master planning
Beaver Brook, Belmont, MA - Redesign and documentation for spray park and playground renovation
Mount Wachusett Community College, Gardner, MA - Master planning for campus
Hammatt Street Block, Ipswich, MA - Redesign of downtown block
Regional Headquarters for the FBI, Albany, NY - Design services for secured office complex on a landfill site
Crosstown Center, Boston, MA - Mixed use center with streetscape and greenroof
MIT Brain and Cognitive Science Building, Cambridge, MA - Urban plaza and pedestrian connection

EDUCATION

University of Virginia, School of Architecture - Master of Landscape Architecture, 2005
Michigan State, School of Arts and Sciences - Master of English, 1997
Calvin College - Bachelor of Arts, 1995

PUBLICATIONS

2016 Presenter, "Bridging the Design-construction Divide" at 2016 ASLA Annual Meeting
2011 Reviewer, *Landscape Architectural Detailing*, Tom Ryan. Wiley Publishing, February 2011
2007 "Site Maintenance: Landscape management is essential for operational efficiencies and positive results," *Today's Facility Manager*. June 2007 with Tom Ryan.

REGISTRATION

Massachusetts Registered Landscape Architect Registration #1577 (2009)



LAURA KNOSP, RLA, LEED AP, ASLA, PRINCIPAL

Laura rejoined Ryan Associates in early 2014. Her work covers variety of scales and project types, from large parks and mixed-use developments to smaller scale residential and institutional works.

Prior to rejoining Ryan Associates, Laura worked with several firms in the Boston area where she was involved in a wide range of local and international projects.

SELECTED PROJECTS

Ryan Associates, Waltham, MA

- Garden Within Reach, Tower Hill Botanic Garden, Boylston, MA - Design and project management for fully accessible garden
- The Ramble, Tower Hill Botanic Garden, Boylston, MA - Project management for new children's garden
- Accessibility Improvements, Tower Hill Botanic Garden, Boylston, MA - PM for new pedestrian circulation and parking expansion
- Neilson Library, Smith College, Northampton, MA - Project management for new library landscape with Maya Lin Studio
- Healing Garden, UMass Memorial, Worcester, MA - Design and project management for new hospital healing garden
- Longview Residence, Lexington, MA - Design and project management for new private residence
- Partners Health Care, Somerville, MA - Design and documentation for new urban health care campus
- Jalmudah Central Park, Jubail, Saudi Arabia - Design and project management for new urban park
- City Center, Jubail, Saudi Arabia - Design guidelines for new CBD, urban waterfront and residential communities
- Jubail Industrial College, Jubail, Saudi Arabia - Concept design for rehabilitation and expansion of engineering college

Landworks Studio, Boston, MA

- Washington Elms, Cambridge, MA - Project management and existing conditions report for public housing redevelopment
- Dareen East Beach, Jubail, Saudi Arabia - Project management and full design services for large waterfront park
- Regional Park, Jubail, Saudi Arabia - Project management and concept design for large constructed wetland and park
- Jalmudah Shoreline, Jubail, Saudi Arabia - Concept design for large waterfront park and streetscape

Ground, Inc, Somerville, MA

- MassArt Plaza, Boston, MA - Planting design for plaza at new student residential tower Sowwah Central Park Competition, Abu Dhabi, UAE-
- Project management and design for international competition

Martha Schwartz Partners, Cambridge, MA

- Natick Collection, Natick, MA - Concept design for large commercial landscape and interior
- MGM CityCenter, Las Vegas, NV - Concept design for large hospitality landscape
- Lulu Island Masterplan, Abu Dhabi, UAE - Concept design and planning for large island development
- United States Land Port of Entry, Donna, Texas - Concept design for border crossing

EDUCATION

- Rhode Island School of Design - Master of Landscape Architecture, 2005
- The Evergreen State College - Bachelors of Art, 1998

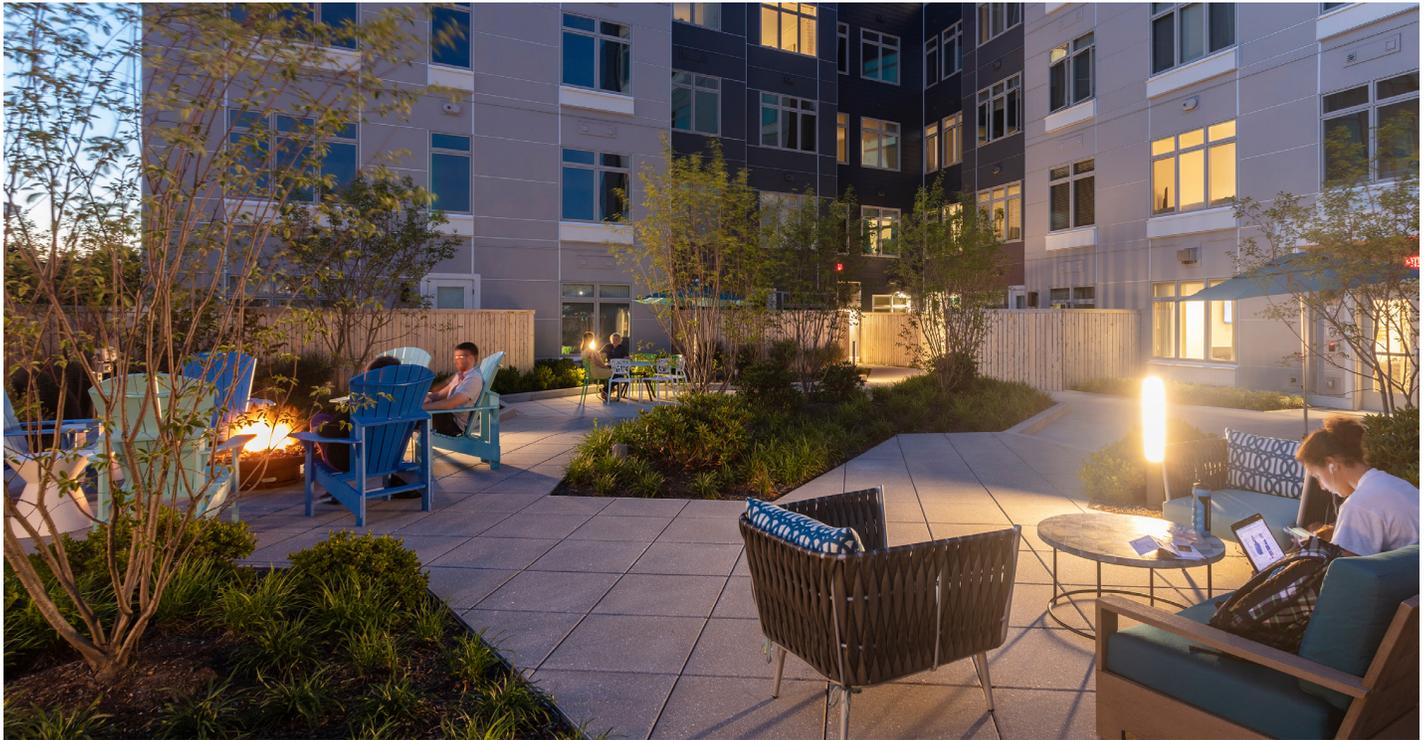
REGISTRATION

- Massachusetts Registered Landscape Architect Registration #1584 (2009)

AWARDS

- 2020 William D. Smith Award for Accessible Design, Boston Society of Architects, Tower Hill Botanic Garden, Boylston, MA
- 2008 GSA Citation of Excellence, United States Land Port of Entry, Donna, TX

TELFORD 180, BOSTON, MA



Located between Soldiers Field Road and Western Avenue in the Allston-Brighton neighborhood, Telford 180 contains 85 residential condominiums within six stories. A two-level garage provides parking for cars and bicycles.

At the ground level, the contemporary streetscape and 6,000 SF publicly accessible plaza enhance the urban neighborhood. The site is located within easy walking distance of public transit and is connected to the Charles River Reservation by an immediately adjacent pedestrian bridge.



A roof terrace contains a series of garden rooms that allow for multiple small groups to gather simultaneously. Raised planting areas containing small trees (*Amelanchier canadensis*) and groundcovers (*Liriope muscari*) provide airy separation between the grilling, dining and lounging areas while maintaining visual transparency across the roof.



MASS GENERAL BRIGHAM ADMINISTRATIVE CAMPUS, SOMERVILLE, MA



Located adjacent to the Assembly Row development and the MBTA Orange line, the project transforms a large swath of unused industrial land into an urban healthcare campus complete with plazas, green roofs and a large public open space.

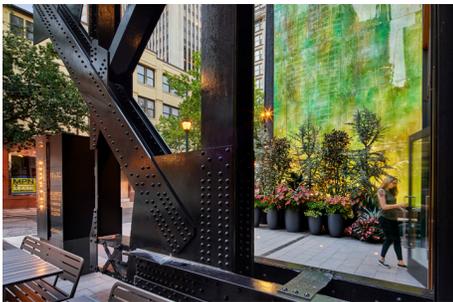
Designed in collaboration with the Office of James Burnett, the campus plan is focused around a 2.5 acre open space that allows the employees and public to come together in a shared space.



The project goals were the creation of an event space for different program opportunities, the development of clear site circulation, and a design which prioritizes thoughtful stormwater management and the use of regional building materials.



THE HARPER, PHILADELPHIA, PA



The Harper is a 24-story apartment building, located a block away from Rittenhouse Square in the heart of Philadelphia's Center City. The 2nd and 3rd floors open onto a two-story 12,200SF roof-top park. The levels of the park are connected by a sweeping stair, a focal point in its own right, which provides an outdoor connection between the major amenity spaces. The lower level features a soaking pool with a cascading waterfall and an adjacent terrace is used for lounging, grilling, and outdoor dining. The upper level features a large central lawn with a fire pit, trellised dining terrace, and custom designed swing benches that encircle the lawn. A fenced dog run is an additional amenity. Both levels are enlivened by lush plantings which create a private oasis for the 169 Harper residences.



At street level, a small plaza frames a massive truss relocated from the theater that formerly occupied the site. A two-story mural extends from the street through the building and vibrant container plantings reinforce the connection between indoors and out. At the third level a green roof, designed to be seen from above, is patterned with alternating bands of sedum and stone. This roof, along with the amenity terraces, captures and stores rainfall, mitigating the impacts of stormwater run-off in this highly impervious urban site





Horsley Witten Group

Sustainable Environmental Solutions



Science

Wetlands & Streams:

Delineation | Ecological Restoration | Habitat Survey | Rare Species | Permitting

Hydrogeology:

Sampling & Monitoring | Modeling | Groundwater Protection | Water Supply Development

Environmental Site Services:

Environmental Due Diligence | Site Assessment & Remediation | Licensed Site Professional Services

Planning

Community planning:

Comprehensive Planning | Conceptual Design | Community Engagement | Regulatory Reform | Climate Resilience & Adaptation

Water Resource Planning:

Integrated Water Management | Watershed Assessment & Planning | Nutrient Management | GIS Development

Coastal Resources:

Land Use & Ecosystems | Coastal Watershed Planning | Habitat Assessment | Pacific & Caribbean Island Water Resources

Engineering

Core Services:

Civil | Environmental | Survey | Construction Administration | Permitting

Specialization:

Stormwater | Water Supply | Wastewater | Shoreline Stabilization | Stream Restoration

Design

Site Design:

Landscape Architecture | Low Impact Design | Parks and Recreation | Multi-modal Pathways | Affordable Housing | Urban Design

Marketing & Education:

Graphic Design | Design | Branding | Manuals

Training

Public Sector:

Emergency Preparedness & Response | Water Security | GIS Development | Custom Technical Trainings

Best Practices:

Regulatory Tools | Stormwater Management & Design | Source Water Protection | Watershed Planning





Horsley Witten Group

Sustainable Environmental Solutions

Profile

Horsley Witten Group, Inc. (HW) is an interdisciplinary team of engineers, scientists, planners, and landscape designers committed to providing our clients with sustainable solutions. The success of our practice is rooted in responsiveness, innovation, and client relationships. Our dedicated staff of highly skilled professionals manages complex projects in New England and beyond. For 30 years, the firm has excelled serving as a liaison between decision makers and the public, translating technical subjects into understandable concepts. The ability to move across disciplines and communicate with groups from all backgrounds sets us apart.

HW's award-winning projects address critical environmental challenges including climate change, coastal resiliency, watershed health, and resource protection.

Our services include site and community design, green infrastructure implementation, public engagement, regulatory reform, data system development, resource assessment, habitat restoration, and emergency preparedness. Our clients include the U.S. EPA, NOAA, and the U.S. Department of Justice as well as more than 100 New England municipalities, several state agencies, tribal agencies, non-profit organizations, private organizations, and multiple universities and colleges. HW is a New England-based corporation headquartered in Sandwich, MA with regional offices in Boston, MA, Providence, RI, and Exeter, NH.





Richard Claytor, Jr.

President

rclaytor@horsleywitten.com

Areas of Expertise

Stormwater Management

Green Infrastructure

Wetland & Natural Resource Area

Assessments

Environmental Permitting & Compliance

Watershed Planning & Assessment

Civil Engineering

Environmental Engineering

Surveying

Site Design

Training

Professional Registrations & Affiliations

Professional Engineer: Massachusetts,

New Hampshire and Maryland

Massachusetts Certified Soil Evaluator

LEED Accredited Professional

Town of Sandwich, Historic District Committee

American Society of Civil Engineers

Academic Background

Bachelor of Science, Union College, Civil

Engineering, Concentration in Hydrology,

Hydraulics, Water Resources, and

Geotechnical Engineering

Professional Experience

Horsley Witten Group, Inc.,

President, 2013- Present;

Principal Engineer, 2001 to 2013

Center for Watershed Protection, Principal

Engineer, 1994 to 2001

Loiederman Associates, Inc. (now Soltesz,

Inc.), Vice President and General

Manager, 1985 to 1994

Greenhome and O'Mara, Inc. (Now

Stantec, Inc.), Design Engineer, 1983

to 1985

Rich Claytor has more than 37 years of practical experience in civil and environmental engineering with specific expertise in water resources planning, design, implementation, research, education, and training. Rich has extensive experience and expertise in stormwater management design, implementation, program assessment, policy and evaluation. Rich also is experienced in watershed planning, training and education; water resources assessment, research, and permitting; water supply and wastewater design; land use planning, site design and research; storm drainage, erosion/sediment control, and roadway design; and construction administration.

KEY PROJECTS

Green Infrastructure Solutions for Boston Public Schools and the Boston Water and Sewer Commission (BWSC), Boston, MA: Principal-in Charge for the implementation of green infrastructure (GI) solutions to manage stormwater runoff and engage students at five Boston Public Schools.

Fuller Brook Restoration, Wellesley, MA: Principal-in-Charge for the stream restoration of a 2.2-mile reach of a suburban impaired stream/wetland system using natural channel-based geomorphologic principles.

Massachusetts Department of Ecological Restoration: Principal-in-Charge for master services contracts for the assessment, design, and implementation of ecological restoration for more than two dozen projects in the Commonwealth of Massachusetts, beginning in 2005.

Willard Street, Cambridge MA Sewer Separation: Principal-in Charge for the assessment and design of green infrastructure measures to manage stormwater runoff prior and reduce phosphorus loading for a new discharge pipe to the Charles River in compliance with the Lower Charles TMDL.

Assessment of Climate Change Impacts on Stormwater BMPs in Coastal Massachusetts: Principal-in-charge for this assessment of likely impacts to stormwater management practice performance as a consequence of climate change and resulting sea level rise and changes in precipitation characteristics with funding from the Massachusetts Office of Coastal Zone Management.

Engineering Design and Assessment of Stormwater Management for MassDOT's Impaired Waters Program: Principal-in-charge for several project assignments to evaluate existing drainage/stormwater characteristics and design stormwater retrofit improvements to address runoff from MassDOT rights-of-way that drain impaired waters.

Morrissey Boulevard Redesign to Accommodate a Changing Climate and Provide Coastal Resiliency: Principal-in-Charge for the design of a set of green infrastructure controls and living shoreline along a 2.5 mile segment of Morrissey Boulevard, a scenic parkway in a vulnerable coastal location subject to increasingly frequent inundation from sea level rise.

Washington, DC MetroRail Wetlands Mitigation, Greenbelt, MD: Lead design engineer for the development of wetland mitigation plans for a 15-acre riverine wetland mitigation project sited on the lands of the Beltsville Agricultural Reserve in Greenbelt, Maryland, completed in 1994 the project has been providing functional values for wetlands impacts associated with construction of the final stages of the Washington DC MetroRail service.



Maine Mall Retrofit Design and Construction, South Portland, ME: Principal-in-Charge for the identification, design, permitting, and construction administration for the “Greening of the Maine Mall,” a key component of the Long Creek Watershed Management District’s charge to restore Long Creek to meet water quality standards.

East End Peabody Veterans Memorial Park, Peabody, MA: Principal-in-Charge for the design of a downtown urban park, including site remediation of contaminated soil, stormwater management and flood mitigation, park features and landscaping.

Roger Williams Park Water Quality Improvement Plan and Implementation, Providence, RI: Principal Engineer for planning and design of implementation projects to improve the water quality and biodiversity conditions of the Park’s urban ponds.

Comprehensive Evaluation of Alternative Strategies for Combined Sewer Overflow Reduction, New York City: Principal Engineer and part of a team under contract with the New York City Department of Environmental Protection to evaluate and implement a series of pilot green infrastructure stormwater retrofits projects to reduce the contribution of stormwater to combined sewer systems.

Barnstable Municipal Airport Terminal Improvement Project, Hyannis, MA: Principal Engineer for the permitting and design of civil site improvements for a \$20 million passenger terminal construction.

2010 Rhode Island Stormwater Design and Installations Manual Update: Principal-in-Charge and co-author for the update to the statewide Rhode Island Stormwater manual to incorporate low impact development practices for all new and redevelopment projects.

Oak Bluffs Streetscape Improvements: Principal-in-Charge for the Oak Bluffs Downtown Streetscape Master Plan to provide a framework for future planning, development, and design of the commercial district of Oak Bluffs on Martha’s Vineyard, Massachusetts.

Centennial Brook Flow Restoration Plan, Burlington, VT: Principal-in-Charge for a watershed assessment and plan to develop a flow restoration approach to meet the flow based TMDL for the 1.4 square mile Centennial Brook watershed.

Integrated Water Resources Planning for Burlington, VT: Principal-in Charge for a team evaluating phosphorus load reductions from stormwater and wastewater sources to help the City meet Lake Champlain TMDL requirements.

Salmon River Watershed Evaluation of Municipal Policies and Regulations, Eastern Connecticut: Principal-in-Charge of a two-phase project for the Salmon River watershed to evaluate municipal codes and management practices contributing to water resource impacts. Completed technical training, and support for policy revisions to Conservation Subdivision Design, parking regulations, roadway standards, and LID design standards for two Connecticut municipalities.

Upper Charles River Sustainable Stormwater Funding Assessment, Bellingham, Franklin, & Milford, MA: Project Director for the assessment and dissemination of a technical report documenting the feasibility of widespread implementation of stormwater control measures to meet TMDL requirements and the requirements for a sustainable funding source through a Stormwater Utility structure.

Phase II Stormwater Permit and LID Training Clinics for Municipal Officials in New England, EPA Region I: Conducted a series of training clinics and hands-on assistance to New England municipal staff on the requirements of the new Phase II permits, as well as helping municipal officials and decision-makers encourage the use of low impact development/green infrastructure practices.

Massachusetts Statewide Stormwater Training Seminars, Various Locations in Eastern Massachusetts: Prepared technical presentations for more than a dozen one-hour stormwater design, policy, implementation and maintenance topics for a range of stormwater management strategies and presented at more than ten one full-day training sessions.



Jonathan Ford, P.E., NCI

Senior Project Manager
Community Design
jford@horsleywitten.com
401-272-1717

Areas of Expertise

Civil Engineering
Urban Design
Downtown & Neighborhood
Revitalization
Land Use Planning
Mobility & Complete Street Design
Smart Growth / Low Impact Development

Professional Registrations & Affiliations

Professional Engineer: MA, RI, CT, NC,
NH, AR, TX, GA

National Charrette Institute (NCI):
Charrette Planner Certification

Co-Founder, Current President: New
England Chapter of the Congress for the
New Urbanism

Board of Directors: Blackstone Parks
Conservancy

Knight Fellow in Community Building,
University of Miami School of Architecture

Academic Background

Bachelor of Science, Civil Engineering:
University of Notre Dame

Professional Experience

Horsley Witten Group, Inc., Senior Project
Manager - Community Design, 2014 to
present

Morris Beacon Design, LLC, Principal and
Founder, 2006 to 2014

Nitsch Engineering, Project Engineer,
2002 to 2006



Jon has over 23 years of experience as a civil engineering and neighborhood planning innovator, and is a recognized leader in the area of New Urbanist planning and engineering. Jon is a 2006 Knight Fellow in Community Building at the University of Miami's School of Architecture, a co-founder of the New England Chapter of the Congress for the New Urbanism, and on the faculty of the Form-Based Codes Institute. Jon's project designs have won numerous local and national awards, including a CNU Charter Award Honorable Mention, the Rudy Bruner Award for Urban Excellence, and the Boston Society of Landscape Architects Honor Award.

KEY PROJECTS

Chattanooga West End: Collaborated with Dover, Kohl and Partners to develop a Master Land Use Plan for Chattanooga's West End, consisting of 95 acres of industrial oriented land with over ¾ mile of frontage on the Tennessee River. The plan sets a physical framework for the West End's evolution into Chattanooga's next vibrant, mixed-use neighborhood, including a riverfront nature park, streetcar line, and urban canal system woven through the proposed street network. HW led the infrastructure design and public realm elements of the plan.

Sewanee Village Implementation Plan, University of the South, Sewanee, Tennessee: Developed an evolved Village Implementation Plan to integrate sustainable neighborhood design principles and green infrastructure practices into the University's redevelopment plan for the 10+ acre Village. Deliverables include a watershed analysis map, updated Village plan reconciling urban design goals with topography and stormwater management, and concept plan for four Village blocks.

Plan West Ashley, Charleston, South Carolina: Collaborated with Dover Kohl and Partners to develop Plan West Ashley, a community vision and plan for the West Ashley area of Charleston, South Carolina - home to over half of Charleston's population. Plan West Ashley sets broad policies and identifies specific actions to enhance quality of life and protect the area's historic, cultural, and natural environment. The Plan is already playing a pivotal role in shaping the future of the area's streets, transportation systems, neighborhoods, and public spaces. HW led the infrastructure, sustainability, climate resiliency, and open space elements of the plan.

Cocheco Waterfront Development, Dover, New Hampshire: Collaborated with Union Studio to produce a community vision and development plan for the Cocheco Waterfront Site, a 21-acre City owned brownfield property across the river from downtown Dover. Currently producing construction documents with special focus on green infrastructure, street design, earthwork analysis, and shoreline design to plan for climate change.

East Farmingdale Transit Oriented Development Plan and Form-Based Zoning Code, Babylon, New York: Collaborated with Dover, Kohl and Partners and local stakeholders on a transit-oriented development plan and zoning code to encourage sustainable redevelopment of approximately 100 acres adjacent to a future Long Island Railroad train station and bus rapid transit stop. HW was responsible for civil engineering, site design, green infrastructure, and open space/parks design and code production.

Heritage Creekside, Plano, Texas: Participated in planning, urban design, and civil engineering visioning to integrate existing natural creek systems into the 156 acre development master plan, and produced construction documents for open space plazas, multi-modal paths, a pedestrian bridge, and naturalized creek restoration.

Jonathan Ford, P.E., NCI

Senior Project Manager - Community Design
jford@horsleywitten.com

Horsley Witten Group

Sustainable Environmental Solutions



Folly Road Complete Streets Corridor Study, Charleston: Collaborated with Dover, Kohl and Partners and local stakeholders on a corridor plan for the main spine of James Island, located south of the city of Charleston. Led production of ecological and green infrastructure solutions and integration with pedestrian/bicycle mobility improvements and town placemaking.

MetroPlan Jump Start Central Arkansas: Developed an infrastructure framework for each of seven communities selected for sustainable planning and design assistance from Arkansas MetroPlan, the local council of governments for the region. Work included community visioning, neighborhood/block analysis, pedestrian and bicycle oriented street design, streetscape design, and green infrastructure design.

Oak Bluffs, Massachusetts Downtown Streetscape Master Plan: Produced a comprehensive integrated plan for improvements to Oak Bluffs downtown public realm. The project included an extensive year-long public process component, with multiple visioning meetings, open house events, website/social media outreach, and a public survey. Jon was project manager, led the planning team, and directed design.

Seekonk River Revitalization Initiative, Providence, Rhode Island: Led planning and civil engineering tasks as part of a community led initiative to improve a three-quarters of a mile stretch of the Seekonk Riverfront in Providence. The plan integrates green infrastructure; complete streets rebalancing of the waterfront River Road to include an off-street multi-use path and traffic calming improvements; and plaza and boat launch improvements to increase public access to the water.

West Mill District Redevelopment, North Andover, Massachusetts: Led planning and civil engineering design as part of a phased redevelopment effort to enhance and transform the East and West Mill District in North Andover. Produced civil engineering and landscape architecture construction documents for the first redevelopment phase, including street, parking, green infrastructure, and pond buffer improvements associated with selective demolition and mixed-use redevelopment.

Key Projects Prior to joining Horsley Witten Group, Inc.

Cottages on Greene, East Greenwich, Rhode Island: Designed site layout, grading and infrastructure for a 15 unit infill cottage community one block from downtown Main Street. The stormwater management strategy overcame unique challenges, and includes an integrated system of bioretention, bioswales, and permeable bituminous pavement. The project won a CNU Charter Award Honorable Mention.

The Steel Yard, Providence, Rhode Island: Provided civil engineering services to design the innovative site transformation of the Steel Yard. The landscape and drainage systems are woven into the site to minimize contaminated soil export while also naturally filtering and infiltrating stormwater to reduce runoff to the City combined sewer system. The project design won numerous local and national design awards, including the prestigious Rudy Bruner Award for Urban Excellence.

The Box Office, Providence, Rhode Island: Provided civil engineering services for a new sustainable office building comprised entirely of repurposed shipping containers. True to the ethos of the project, the site design utilizes minimal yet strategic intervention of bioretention systems within the industrial context, designed to filter and reduce stormwater runoff to the combined sewer system by over 90%.

Simsbury Stormwater Article & Stormwater Design Guidelines, Simsbury, Connecticut: Produced a Stormwater Article, Site Design Checklist, and Site and Stormwater Design Guidelines tailored to the unique conditions within Simsbury. The project won a CNU New England Urbanism Award. According to the jury, the work "fills an important need in providing an alternative approach to stormwater regulations.... providing an extremely useful and adaptable tool for other planners and communities promoting higher density infill development"

Comparative Infrastructure Analysis of Smart Growth and Conventional Projects, U.S.EPA: Completed a peer-reviewed research project comparing infrastructure cost for conventional suburban and traditional neighborhood development patterns. Variables that drive infrastructure cost were analyzed for 750-1,000 acre sites in South Carolina and Arizona to shed light on the relationships between planning and design inputs and relative effect on the bottom line.



Ellen Biegert, RLA

Landscape Architect
ebiegert@horsleywitten.com

Areas of Expertise

Landscape Architecture
Site Planning and Design
Master Planning
Graphic Services
Green Infrastructure Design
Stormwater Management
Botanical Knowledge

Professional Registrations & Affiliations

Registered Landscape Architect, PA
Member, American Society of Landscape Architects (ASLA), Rhode Island Chapter

Academic Background

Bachelors of Science in Landscape Architecture, Temple University

Professional Experience

Horsley Witten Group, Inc., Project Manager, November 2018 to Present

Terra Design Studios LLC, Project Manager and Designer, November 2014 to 2018

Thomas J. McLane and Associates, Project Designer, 2013 to 2014



Ellen Biegert has over five years of professional experience in Landscape Architecture. She has provided landscape design services to a variety of private and public entities including, master planning, graphic and fundraising support, planting and botanical design, permitting, construction documentation and administration. Her past worked includes botanical gardens, family gardens, public recreation areas such as parks and trails, university campuses, stormwater planning and streetscape design. Prior to working in the field Ellen graduated from Temple University with a bachelors of science in landscape architecture and a focus in fine art. She frequently utilizes hand rendering for project development and graphic support.

KEY PROJECTS

Greenbush Station Development, Scituate, MA (current): Ellen is helping with the design of the site and landscape plan for the Greenbush Development. The project takes an old train station parking lot and transforms it into a mixed-use development. The building and site circulation are strategically planned to support a village scale pedestrian-oriented public realm, while integrating green infrastructure throughout the spaces. Ellen is involved in many aspects of the project including site analysis and design, material and landscape planning, and construction documentation.

Chattanooga West End, Chattanooga, TN: Provided creative and technical support for the planning of an approximately 95 acre site along the Tennessee River. The project takes an industrial-oriented site and lays out a vision for how it can be transformed into a vibrant mixed-use neighborhood. During planning Ellen aided in site and stormwater analysis, street scape design, and graphic plans and sections to communicate with the client and stake holders.

Woonasquatucket Greenway Bike Path, Providence, RI (current): Ellen is helping with the conceptual planning and design of the Woonasquatucket Greenway and multi-use path. The project takes an existing street bike path and re-organizes it to better connect users to the river and create an enjoyable path that feels comfortable for all uses. She has contributed to the development of the site analysis and initial conceptual design.

TOD District Improvements, Pawtucket, RI (current): Ellen is helping with the conceptual development of the parking layout, circulation and stormwater management at an old industrial site. This involves the production of several options for the site that take advantage of the surrounding context.

Key Projects prior to joining Horsley Witten Group, Inc.

Franklin Park Conservatory Family Garden, Columbus, OH: Aided in the development of the two acre Family Garden at Franklin Park Conservatory and Botanical Gardens. The project transformed a mowed lawn with a few trees into an imaginative garden for children to play and reconnect with nature. During this project Ellen helped develop the master plan, refined smaller garden within the site to schematic design, worked on graphic materials for presentation and fundraising, developed the site grading and drainage, material selection, assembled the construction documents and aided in construction administration.

Ellen Biegert, RLA

Landscape Architect

ebiegert@horsleywitten.com

Horsley Witten Group

Sustainable Environmental Solutions



Kingwood Center Gardens, Mansfield, OH: Aided in the development of the botanical gardens master plan and Carriage House Garden design and construction. The master plan re-organized the old Kingwood estate and prioritized key garden for construction, including an event terrace, visitor center building and entrance gardens. During this project Ellen helped develop the circulation and graphics for the overall garden master plan. She developed conceptual design options for an event space and moved the project through construction. This process included conceptual and schematic design options, material selections, rain garden and runnel sizing, planting design, and construction documents.

Tucson Botanical Gardens Master Plan, Mansfield, OH: Aided in the development of the botanical gardens master plan. The master plan re-organizes the many creative and fun pocket gardens throughout the small 2 acres site and provides direction of future expansion. During this project Ellen organized the weeklong charette for project kickoff, developed conceptual design options for future expansion and circulation, and provided graphic support for fundraising opportunities.

Back Mountain Trail Feasibility Study, Dallas, PA: Helped develop the feasibility study and master plan for the Back Mountain Trail. This document involved site inventory and analysis of the former rail road bed, surveys and interviews with stake holders, public meetings to gain feedback from the public about potential routes, assessment of alternative routes and amenities, and suggested building approaches for the length of the trail.

Stormwater Management System Review, Scranton, PA: Helped in the production of the Stormwater Management System Review, an assessment and recommendations report for sustainable infrastructure for the city of Scranton. For this document Ellen provided in depth explanation of potential green infrastructure practices, analysis of specific CSO drainage areas and potential demonstration projects that could be used throughout the city, including recommendations for next steps, techniques to use on a variety of scales both public and private, and a demonstration drainage area with suggested green infrastructure techniques.

RETAIL PARKING

A. BLDG - 4,711SF, 1 SPACE/200SF = 24 REQ.
 PROVIDED = 24 (CENTRE WAY)
 B. BLDG - 1,860SF, 1 SPACE/200F = 9 REQ.
 PROVIDED = 9 (CENTRE WAY)
 TOTAL RETAIL REQ = 33
 TOTAL RETAIL PROVIDED = 33

MBTA PARKING (240 REQ)
 MAIN LOT 44
 EAST LOT = 133
 NORTH RD = 63
 240 SPACES PROVIDED

COMMERCIAL PARKING

A. BLDG - 2,012SF 1 SPACE/300SF = 7 REQ.
 PROVIDED = 7 (CENTRE WAY)
 TOTAL COMMERCIAL REQ. = 7
 TOTAL COMMERCIAL PROV = 7

COFFEE SHOP PARKING

F. BLDG - 2,000SF, 1 SPACE/200SF = 10 REQ.
 PROVIDED = 10 (EAST LOT)

RESIDENTIAL - B, C, D AND E

B. BLDG
 TYPE #UNITS SPACES REQUIRED
 1 BED 9 1/UNIT
 2 BED 12 1.5/ UNIT
 21 D.U. 27 SPACES REQUIRED
 PROVIDED = 17 (COVERED)
 10 (CENTRE WAY)

C. BLDG
 TYPE #UNITS SPACES REQUIRED
 1 BED 6 1/UNIT
 2 BED 15 1.5/ UNIT
 21 D.U. 20 SPACES REQUIRED
 PROVIDED = 17 (COVERED)
 3 (BLDG. C LOT)

D. BLDG
 TYPE #UNITS SPACES REQUIRED
 1 BED 6 1/UNIT
 2 BED 15 1.5/ UNIT
 21 D.U. 29 SPACES REQUIRED
 PROVIDED = 23 (COVERED)
 6 (EAST LOT)

E. BLDG
 TYPE #UNITS SPACES REQUIRED
 1 BED 6 1/UNIT
 2 BED 15 1.5/ UNIT
 21 D.U. 29 SPACES REQUIRED
 PROVIDED = 23 (COVERED)
 6 (EAST LOT)



SITE MASTER PLAN
 19 February, 2019

CARR, LYNCH AND SANDELL, INC.
 1904 Massachusetts Ave.
 Cambridge, MA 02140

Rendering by Carr, Lynch and Sandell

Project Profile
 Scituate, MA

Client Contact
 Theonie Alicandro
 Drew Company
 617-385-5193

HW Contact
 Jonathan Ford, P.E.
 18004

Greenbush Transit Oriented Development

With the Greenbush Transit Oriented Development project, the Drew Company proposes seventy-eight residential units and approximately 10,000 square feet of commercial space in six new buildings across the street from the Greenbush Commuter Rail Station. The project's urban design and landscape architecture approach responds to the site's context adjacent to the train station and the Town's vision for a new transit-oriented village replacing excess commuter rail surface parking. Buildings and site circulation are strategically planned to support a village scale pedestrian-oriented public realm, including streetscape improvements to Old Driftway and a new central public plaza. HW completed extensive wastewater and inflow/infiltration (I/I) remediation analyses, which helped the Town secure a \$2.2 million MassWorks grant for water and sewer upgrades. HW is responsible for site design, permitting, landscape architecture, and construction administration for the project.



Horsley Witten Group

HW focuses on providing sustainable environmental solutions. Learn more at horsleywitten.com



Image Credit: Dove Kohl and Partners

Project Profile
East Farmingdale, Babylon, NY

Contract Value
\$62,300

Client Contact
Victor Dover
Dover, Kohl and Partners
305-666-0446

HW Contact
Jon Ford, PE.

16143-2

Transit Oriented Development Plan and Form-Based Zoning Code

Horsley Witten Group collaborated with Dover, Kohl and Partners and local stakeholders on a transit-oriented development plan and zoning code to encourage sustainable redevelopment of approximately 100 acres adjacent to a future Long Island Railroad train station and bus rapid transit stop. The Town intends to utilize the plan and form-based code as tools for recreating a rich and vibrant commercial node and corridor - linking neighborhoods, rebuilding the public realm, and creating a more predictable process for both the Town and future developers. HW was responsible for civil engineering, site design, green infrastructure, open space/parks design, and drafting related sections of the code.



Horsley Witten Group

HW focuses on providing sustainable environmental solutions. Learn more at horsleywitten.com



Project Profile
Town of Winchester, MA

Client Contact:
Beth Rudolph, P.E.
Town Engineer
781- 721-7120
brudolph@winchester.us

HW Contact:
Neal Price
13052



Horsley Witten Group

Aberjona River & Davidson Park Restoration Project

The Aberjona River is the largest tributary to the Mystic River, which empties into Boston Harbor. The river runs through downtown Winchester, as well as many areas of parkland and open space. In the 1930's following the "Olmsted style" of landscape architecture, the Town created the Davidson Park. The river was impounded to create a large, landscaped pond. As the pond was not dredged regularly, and over time sediment clogged the pond. Additionally, riverbank erosion has compromised a section of the park's bike path, and invasive species have become problematic. HW worked with the Town to complete a park feasibility study and produce conceptual restoration designs. HW's scope of work included an existing conditions survey; wetlands habitat mapping and evaluation; sediment depth and quality assessment; dredging feasibility assessment; hydraulic modeling; and public outreach. The goal of the project was to create an optimal balance between sustainable hydraulic river design (minimize sedimentation and erosion), habitat enhancement, and the passive recreational use intended in the original park design. Three different conceptual designs were prepared for public review. All river restoration and park design improvements complement the historic nature of the park.

HW focuses on providing sustainable environmental solutions. Learn more at horsleywitten.com



Energy and Green Building Experience

High-Performance Buildings

Project Approach and Action Plan

As a valuable member of the team, Sustainable Comfort, Inc. [SCI] will be providing energy and green building consulting and verification to meet the high performance and passive house goals of the project. SCI has experience in many energy and green building programs, partnering with many developers throughout the Northeast to achieve successful projects.

Sustainable Comfort, Inc. [SCI] is a green building and energy efficiency consulting headquartered in Worcester, MA. SCI specializes in green building practices, including the oversight and administration of Passive House, Net-Zero Energy, ENERGY Star Homes, LEED for Homes, Enterprise Green Communities, HERS Rating, and State Incentive Programs. As qualified consultants and raters, we can help you design and execute a successful project and minimize headaches along the way. We have certified 5,000+ units for various green building and energy efficiency programs and certifications and have secured over \$13 Million in funding through various utility incentive programs.

The team will follow an integrated design process utilizing energy modeling to provide feedback on the design and energy goals of the project. Project quality assurance will be overseen by our field inspectors who will provide third party oversight for insulation, air tightness, and green program verification.

Primary Contact:

James Moriarty
(413)262-7390
james@greenrater.com
146 Main St, Suite 301
Worcester, MA 01608

Mission Statement

We work to create thoughtful, sustainable, impactful buildings.

Company Vision

As buildings change over the course of their life, their effect on people, the environment, and the community changes too. We have setup a company that understands this evolution and how to make an impact at every turn, from design, construction and renovation through everyday building operations. With each touchpoint we strive for a more sustainable future for the building and the community that surrounds it.

Headquarters

146 Main St, Suite 301
Worcester, MA 01608

Email: info@greenrater.com
Phone: 508-713-6680



New York Office

6333 Route 298, Suite 101
East Syracuse, NY 13057

Email: info@greenrater.com
Phone: 315-552-9060



High-Performance Project Experience

Creekview Apartments at Woodland Park

Creekview Apartments is a 96-unit apartment project in 12 buildings certified to PHIUS+ 2015. As the Passive House Consultant and Passive House Verifier, SCI successfully guided the project through both design and construction to achieve full PHIUS+ certification. The \$19 Million project is the first affordable multifamily passive project in Upstate New York. In addition to Passive House Certification, the project also achieved DOE Zero Energy Ready Home, EPA Indoor AirPLUS, Energy Star Homes, and NYSERDA LRNCP. The design includes air source heat pumps for heating and cooling, electric hot water heating, 85% efficient energy recovery ventilation, and high levels of insulation including R-40 walls, R-60-80 roofs, R-20 slab insulation, and triple pane windows.



- **Location:** Canandaigua, New York
- **Owner:** Baldwin Real Estate Corporation
- **Project Cost:** \$19 Million
- **SCI Role:** PHIUS+ CPHC, PHIUS+ Verifier, HERS Rater, Energy and Green Building Consultant
- **Programs Achieved:** Passive House Certification, DOE Zero Energy Ready Home, EPA Indoor AirPLUS, Energy Star Homes, NYSERDA Low Rise N.C.

Phase II of the project was awarded the NYSERDA Buildings of Excellence Award, Phase II looks to take the lessons learned from Phase I to reach full Net-Zero energy, continuing to drive the cost effectiveness of high-performance building. The project will reach Net-Zero via on site solar PV in combination with a common ground source heat pump loop serving VRF heat pump units for heating, cooling, and ground source water to water heat pumps for hot water heating, combined with the same passive house levels of insulation and energy recovery ventilation enjoyed in Phase I. These strategies are not only repeatable, but able to be widely employed across the state.

- **Programs Targeting:** Passive House Certification, DOE Zero Energy Ready Home, EPA Indoor AirPLUS, Energy Star Homes, NYSERDA Low Rise N.C. Net Zero
- **Schedule:** Estimated Start June 2020, Completion 2021-2022





High-Performance Project Experience

Westgate Apartments

To assist Providence Housing Development Corporation, SCI conducted WUFI energy modeling targeting low carbon construction and Passive House PHIUS+ 2018. The project received \$1 Million Building of Excellence award for low carbon construction. The project features all electric systems including heat pumps for heating, cooling, and Sanden split system air source heat pump hot water heating, advanced insulation to meet PHIUS+ 2018, and solar production to achieve Net-Zero energy. SCI will also serve as the PHIUS+ Verifier to confirm all program requirements are met through construction and will conduct training on high-performance building practices.



- **Location:** Rochester, New York
- **Owner:** Providence Housing Development
- **SCI Role:** PHIUS+ CPHC, PHIUS+ Verifier, HERS Rater, Energy and Green Building Consultant
- **Programs Pursuing:** Passive House Certification, DOE Zero Energy Ready Home, EPA Indoor AirPLUS, Energy Star Homes, NYSERDA Low Rise N.C., NYSERDA Buildings of Excellence

Portville Square Retrofit NY

As a part of the Retrofit NY pilot program, Portville Square conducted a concept design of a net-zero tenant in place rehabilitation of a multifamily apartment building in Portville, NY. The Retrofit NY program intends to pioneer the use of high-performance building upgrades to achieve decarbonization of the buildings in New York. SCI conducted an ASHRAE Level 2 energy audit of the facility and produced the energy modeling and energy savings analysis for the project to provide feedback on the most cost-effective energy upgrades to achieve net-zero energy. The integrated design process included iterative energy modeling based on a variety of factors in the building. Members of the SCI toured factories in the Netherlands which features a similar EnergieSprong approach and have presented on the topic throughout the northeast region.



- **Location:** Portville, New York
- **Owner:** Conifer Realty
- **SCI Role:** ASHRAE Level 2 Audit, energy modeling, high performance energy consultant



High-Performance Project Experience

SUNY Oneonta Ford Hall Retrofit NY

SCI partnered with Pike Construction and SWBR Architects for the response to the Ford Hall Retrofit NY RFP. The team created a design build proposal to utilize highly insulated panelized wall assemblies and high efficiency mechanical systems to create a net-zero ready renovation of this campus dormitory. The team made it to the final 2 design build contractors, however neither contractor was selected for the RFP due to cost considerations of the renovation. SCI provided energy modeling and high-performance design consulting for the team to meet the aggressive energy use targets of the project.

- **Location:** Oneonta, New York
- **Owner:** SUNY Oneonta
- **SCI Role:** Energy modeling, high performance energy consultant



Union House Apartments

To assist the development of the Union House project in Cambridge, Massachusetts, SCI served as the green building and energy efficiency consultant achieving LEED for Homes Certification and Energy Star Certification. Insulation inspections and air sealing inspections and testing were critical to the project success, and rigorous inspections were conducted throughout. The project utilized a pilot program to conduct whole building air tightness testing for code compliance, and the whole building air tightness was 3 times tighter than code requirements due to enhanced air sealing of the building, contributing to the achievement of LEED Gold.

- **Location:** Cambridge, Massachusetts
- **SCI Role:** LEED Green Rater, Whole Building Testing, HERS Rater, Energy and Green Building Consultant
- **Programs Achieved:** LEED for Homes V4 Gold, Energy Star Homes





High-Performance Project Experience

Tilley Lofts Apartments

Awarded the 2015 LEED for Homes Outstanding Multifamily project of the year and LEED for Homes Platinum, the Tilley Lofts project integrated cutting edge technologies such as combined heat and power, solar photovoltaics, and advanced insulation systems in this 62 unit historic rehab. Full case studied attached.



- **Location:** Watervliet, NY
- **Owner:** Redburn Development Companies, LLC
- **SCI Role:** LEED Green Rater, HERS Rater, Energy and Green Building Consultant
- **Programs/Awards Achieved:** LEED for Homes 2008 Platinum, Historic Building Tax Credits, named the *2015 LEED for Homes Outstanding Multifamily Project*

Ebenezer Square Apartments

This \$24.4 Million mixed use development containing 100 affordable apartments in West Seneca, NY achieved LEED for Homes Platinum, Energy Star Homes, and NYSERDA Low-rise Residential New Construction Program certifications. The 3-story 124,000 sf building utilizes solar PV producing three quarters of the site electrical usage on an 11-acre brownfield. The project was designed to fit into the character of the surrounding community and provide healthy indoor air quality for residents. Project includes high efficiency furnaces and split system AC, high efficiency lighting and appliances. Achieving a HERS Index of 32 the project is estimated to reduce energy use by 68%.



- **Location:** West Seneca, New York
- **Owner:** DePaul Properties
- **SCI Role:** LEED Green Rater, HERS Rater, Energy and Green Building Consultant
- **Project Cost:** \$24.4 Million
- **Programs Achieved:** LEED for Homes 2008 Platinum, Energy Star Homes V3.1, NYSERDA Low Rise N.C.



James Moriarty, Vice President

Energy and Green Building Consultant

James Moriarty has been a practicing Energy Engineer and green building consultant for 10+ years. James consults with architects and developers on energy efficient design strategies and performs verification of energy performance for new construction and renovations for programs such as, Passive House Institute US (PHIUS), Enterprise Green Communities, ENERGY STAR™ and LEED® for Homes. James leads the quality assurance and oversight efforts of all verification programs. He has experience in whole building energy simulations for commercial buildings, nursing home facilities, multifamily residential buildings, and single-family homes.



Education

Bachelor of Science in Civil Engineering, University of Connecticut
University Scholar, Honors Scholar, Summa Cum Laude

Work Experience

Sustainable Comfort Inc.

Vice President, 2014 - Current

- Small business owner consulting on affordable housing development projects to meet energy efficient and green building standards.
- Manage LEED for Homes and Energy Star for Homes employees and programs
- Certified over 3,800 Energy Star Qualified Low Income Apartments and 1,900 LEED for Homes
- Secured over \$13 Million in owner incentives directly managing energy efficiency projects

Comfort Systems USA Energy Services

Project Manager, 2010 - 2014

- Energy consultant for architects, developers, and builders to meet green building and energy efficiency requirements for low income housing development.

Featured Speaker on High Performance Building

- High Performance Buildings – How to Get to Passive, Net-Zero, Low-Carbon, Multifamily Buildings” – Northeast Home Performance Conference 2020
- “Northeast Sustainable Energy Pro Tour – Passive Construction in the Finger Lakes” – Tour of Passive House Project in Canandaigua, NY
- “The Case for Sustainability in Affordable Housing” – New York State Association for Affordable Housing Upstate Conference 2019
- “Informing Developer’s Decision Making for High-Performance Buildings” – NYSERDA Multifamily Summit 2019
- “Buildings of Excellence Award Summary” – Hudson Valley Passive House Alliance Meeting 2019

Professional Certifications

- PHIUS Certified Passive House Consultant (CPHC)
- Passive House Institute Rater (PHIUS+ Rater)
- Passive House Institute Multifamily Verifier (PHIUS+ Verifier)
- U.S. Green Building Council LEED for Homes Quality Assurance Designee
- U.S. Green Building Council LEED for Homes Green Rater
- Residential Energy Services Network (RESNET®) Home Energy Quality Assurance Designee
- Residential Energy Services Network (RESNET®) Certified Home Energy Rater
- Building Performance Institute Inc.® (BPI) Certified Building Analyst: November 2012
- U.S. Green Building Council LEED® Accredited Professional: 10097869
- CT Engineer in Training: License # EIT.10237
- Occupational Safety and Health Administration (OSHA) 10 Hour Certification: Serial # 4562261

Isaiah Grigos, Senior Project Manager

Energy and Green Building Consultant

Isaiah has performed energy audits, technical assessments and facility performance assessments of residential and commercial properties including low, mid and high-rise buildings, medical facilities and schools. He earned his Certified Passive House Consultant (CPHC), Building Energy Modeling Professional (BEMP) and Energy Manager in Training (EMIT) certifications.



Bachelor of Science in Ocean Engineering, University of Rhode Island

Work Experience

Sustainable Comfort Inc. Worcester, MA

Senior Project Manager, 2018 - Current

- Perform comprehensive energy audits of residential and commercial buildings, which include site visits, utility usage analyses, developing energy conservation measures, energy savings calculations and technical report writing
- Construct energy models for new construction and existing building rehabilitations using industry recognized software as well as spreadsheet calculations
- Help building owners, architects and property managers achieve their efficiency, durability and health & safety goals throughout all phases of construction via the following activities:
 - Enclosure and HVAC system design reviews and submittal reviews
 - Site inspections and reports

CLEARResult, formerly CSG, Westborough, MA

Project Engineer, 2016 - 2018

- Perform energy audits, conduct utility analyses for existing buildings, compile and calculate savings for recommended energy and water conservation measures.
- Worked on site for commissioning and retrocommissioning HVAC systems including boilers, heat pumps, domestic hot water and solar thermal systems

Total Green Energy Solution, Lexington, MA

Home Energy Consultant 2016

- Performed in a HERS rating role, conducting blower door tests, duct blaster tests and visual inspections for residential properties
- Worked directly with builders, architects and homeowners throughout all stages of home construction to ensure projects are both code compliant and utilizing the best energy efficiency practices available

General Dynamics Electric Boat Company, Groton, CT

Senior Engineer 2008-2016

Professional Certifications

- ASHRAE Building Energy Modeling Professional [July 2019]
- Earned Energy Manager in Training (EMIT) Certification in November 2015 [Will become Certified Energy Manager once application is completed]
- Achieved Certified Passive House Consultant [January 2018]
- Department of Defense Security Clearance Level: Secret
- Experienced with a multitude of computer programs including WUFI, eQUEST, REM/Rate, MS Word, Excel, PowerPoint, Project, Matlab, C++, Visual Basic, CAD NX and Solid Works
- Member of Association of Energy Engineers [AEE], New England Sustainable Energy Association [NESEA] and Passive House Institute of the United States [PHIUS]
- Occupational Safety and Health Administration [OSHA] 10 Hour Certification

Introduction to the Firm

Robinson+Cole, an Am Law 200 firm, provides legal solutions to businesses, from start-ups and Fortune 100 companies to nonprofits, educational institutions, municipalities and state governments.

CLIENTS FIRST

By cultivating a thorough understanding of your industry, the nature and structure of your business, your risk tolerance level and your budget, our more than 200 lawyers tailor legal strategies that align with the overall business needs of your company. Since our founding in 1845, commitment to our clients and their success has distinguished the firm. Our goal is to help our clients achieve their objectives at the cost they expect.

GLOBAL REACH

Many of our clients' interests span the country and the globe. By nurturing a robust network of relationships, we've expanded our capabilities to serve our clients wherever their needs arise. We actively participate in ADVOC, a leading international network of independent law firms; SCG Legal, which extends our global relationships through its network of 140 law firms; and the U.S. Law Firm Group, a national network of law firms, each headquartered in a major U.S. city.

FOCUSED SERVICE

We strive to be trusted legal advisors, not vendors. With us, you won't go through layers of lawyers to get an answer or to learn a matter's status. We staff efficiently, with a senior lawyer directly involved in all aspects of each matter.

Because clients expect responsiveness and accessibility, we respond to inquiries wherever we are. We view managing costs and exceeding expectations as paramount considerations.

We constantly seek ways to use technology to the best advantage. Our in-house technology team provides support and access for our lawyers to use products and services such as document management, e-learning, Internet-based communications, and courtroom support to our clients. We are skilled in using extranets, which allow our clients to access every facet of pending matters day or night, including matter status, billings to date, key contact information, documents, and other useful tools and information.

ENGAGED PEOPLE

Not only are our lawyers experienced practitioners, they are also leaders in the profession, active in local and national bar associations, trade organizations, and local community service organizations. They speak at seminars, author substantive articles and are often quoted in the press. We are further strengthened by the team spirit our culture fosters through a broad range of pro bono and community service initiatives. In addition, our Diversity Committee promotes diversity, acceptance, and a positive work environment.

COMMITMENT TO DIVERSITY + INCLUSION

We are committed to fostering a welcoming and inclusive work environment in which the diverse backgrounds of our lawyers and other professionals are respected and each individual is empowered to succeed. At Robinson+Cole, diversity refers to the full spectrum of people who comprise our firm, our clients, and the communities we serve. Diversity reflects a culture of inclusion that welcomes all people, no matter their ethnicity, culture, race, color, gender, religion, national origin, ancestry, age, sexual orientation, disabilities, marital status, or veteran status, as well as people of diverse opinions, perspectives, lifestyles, and ideas.

PRO BONO

As our firm has grown in size and geographic reach, so has the profile of our pro bono program and the breadth of pro bono matters in which we are involved. While the partners, counsel and associates and other professionals in all our offices participate in a wide variety of pro bono matters, much of our pro bono effort has focused on assisting women and children in crisis as well as veterans. Through active involvement with community organizations, government officials and agencies, and numerous nonprofit organizations, our lawyers and staff have worked successfully to improve the quality of life for those individuals and their families.

A FLEXIBLE FIRM

A modern law firm must be flexible to thrive. This means more than simply adapting to the changing legal landscape; it requires taking the initiative to ensure mutually rewarding business relationships with our clients. Alternative fee arrangements are a permanent part of the conversation between law firms and their clients, and even when they might not fit a particular set of circumstances, they warrant consideration. We welcome these conversations. Likewise, we work to add value for clients through no-cost services such as electronic newsletters and educational roundtables.

Our Practices

- + Antitrust and Trade Regulation
- + Appellate
- + Banking and Financial Services
- + Bankruptcy
- + Business Litigation
- + Construction
- + Corporate
- + Data Privacy + Cyber Security
- + Employee Benefits, Compensation, and ERISA
- + Employment Counseling and Litigation
- + Emerging Companies, Private Equity, and Venture Capital
- + Energy and Communications
- + Environmental and Utilities
- + Finance
- + Government Relations
- + Health Law
- + Immigration
- + Insurance
- + Intellectual Property
- + International
- + Labor Relations
- + Land Use and Zoning
- + M&A/Joint Ventures
- + Nonprofit Organizations
- + Products Liability Litigation
- + Real Estate Finance, Development, and Leasing
- + Securities
- + Tax
- + Technology

- + Represented major East Coast developer on local permitting matters, including Article 80 Large Project Review and obtaining zoning relief from the Boston Board of Appeal, for mixed-use project in the Allston neighborhood of Boston. This project includes 170 units of rental housing, artist space, ground floor restaurant space, and an automated parking garage for the project's uses. It is currently under construction.
- + Representing major East Coast developer on local permitting matters, including Article 80 Large Project Review and obtaining zoning relief from the Boston Board of Appeal, for proposed multifamily residential project in the Dorchester neighborhood of Boston. This project includes 206 units of rental housing.
- + Ongoing representation of Boston Redevelopment Authority and Economic Development and Industrial Corporation of Boston (both d/b/a Boston Planning & Development Agency) in all aspects of ongoing development ground lease transactions, including:
 - Southwest Corridor/South End/Roxbury – New 40,000 SF Tropical Foods at Parcel 10 North, including shared parking and access (Melnea Cass Boulevard at Washington); New Melnea Hotel and Residences 108-room hotel and 50 residential rental units (7 affordable), and 4300 SF of ground floor retail, with accessory off-street parking (Melnea Cass Boulevard at Albany Street); and sale of existing mixed-use development in Crosstown to the Boston Medical Center under lease-based purchase option.
 - Raymond L. Flynn Marine Park in South Boston – Innovation Square at 6 Tide Street 122,000 SF lab/research facility, half of which has been subleased to Mass. Innovation Labs; the relocation of Cannistraro Industries, a major specialty sheet metal producer, from suburban Boston to 25 Fid Kennedy Way to occupy a previously abandoned industrial structure; and an approximately 294,000 SF speculative office building to be located at the intersection of Drydock Avenue and Summer Street.
 - Charlestown Navy Yard – Parcel 39A, a new, ground-up building containing 54 residential units; and the Ropewalk, a major historic rehabilitation project with 97 residential rental units and publicly-accessible “flirtation walk” and exhibit space related to the historic rope-making activities at the site.
- + Represented the master developer in a major mixed-use project adjacent to the University of Connecticut. Our services included virtually all aspects of the project including the preparation of a state-level municipal development plan, the negotiation of development agreements with the municipal development agency and the town, and the creation a new special design district to streamline zoning permits, worked with the client's team in developing comprehensive design guidelines, drafted and negotiated numerous phased purchase and sale agreements with state agencies and private landowners, composed land use and environmental permit applications with local, state and federal agencies (local inland wetland permits, special use permits, subdivision approvals, state traffic agency approvals and storm water permits), drafted land easement conveyances for roadway improvements, prepared commercial leases with retail and restaurant tenants, created a condominium structure, and provided government relations services that resulted in state and federal infrastructure funding.
- + Represented borrower/developer/guarantor team on the development, permitting, and then construction to permanent senior financing and soft subordinate financing for a 27-unit all affordable transit-oriented development in the Hyde Park neighborhood of Boston. The project, adjacent to the Fairmount station on the MBTA's Fairmount/Readville Commuter Rail line, is the first new transit-oriented development in this part of Boston in several decades and the first ground-up construction project for long-term firm client Southwest Boston CDC.
- + Represented a private developer in a large mixed-use, transit-oriented development on land adjacent to the MBTA's Wonderland Station. The 1.3 million-square-foot project involved the construction of over 900 residential units; a 125-room

hotel; 187,000 square feet of retail, office, and cultural use space; and structured parking for over 2,000 vehicles. Our services included drafting the developer's response to the City's RFP, performing all due diligence for the nine-acre site, preparing and negotiating the master development agreement, and preparing a long-term ground lease with the MATA. We also prepared and negotiated the construction management contract for the MBTA parking garage, prepared several memoranda of understanding with state agencies and utility companies, and assisted with the project's federal, state, and local permitting requirements. We likewise participated in securing federal stimulus funds to construct the MBTA garage.

- + Representing international solar power investment company on multiple solar energy generation facility sites in Massachusetts. Areas within scope of assistance included review of local, state, and federal permitting, site acquisition, and PILOT agreements for facilities.
- + Represented a major real estate investment trust in land use permitting analysis in connection with the acquisition of an under-construction, 330-unit multifamily development in a southern suburb of Boston.



PARTNER

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ADMISSIONS

Commonwealth of Massachusetts

EDUCATION

Boston College Law School
J.D.
University of North Carolina at Chapel Hill
M.R.P., Regional Planning
Amherst College
B.A., Modern European History
cum laude

Our Lawyers

MATTHEW J. LAWLOR

Matthew Lawlor focuses his practice on real estate disposition for public agencies, affordable housing finance, development, permitting, land use, and urban planning matters. He regularly represents public authorities and agencies, lenders, developers, nonprofit organizations, and commercial landlords and tenants. In addition to his law degree, he has a master's degree in regional planning. Matt is a member of the firm's Real Estate + Development Group.

Real Estate Disposition for Public Agencies

Matt represents municipal and state agencies in the disposition of real property for development and redevelopment. He drafts, negotiates, and closes on long-term ground leases and related documentation.

He has assisted clients such as municipal and state development agencies in real estate-related matters, including successfully drafting, negotiating and closing on long-term ground leases for construction of a new hotel in Roxbury and a new regional light industrial contractor's headquarters in South Boston, Massachusetts.

Affordable Housing Finance

Matt represents major lenders in affordable housing financing for the construction and major rehabilitation of residential developments. This representation includes drafting all construction loan documentation, undertaking legal due diligence, and closing the loan transactions.

He has handled numerous affordable housing finance transactions on behalf of a major national bank, including for a public housing redevelopment in East Boston, Massachusetts, and for the rehabilitation of several public housing developments in Cambridge, Massachusetts.

Development, Permitting, and Land Use

Matt represents non-profit and for-profit developers, including renewable energy developers, and public agencies on development, permitting, and land use aspects of sustainable, mixed-use and transit-oriented development. This representation includes negotiating acquisition and development documentation, and providing advice and conducting due diligence related to

permitting. He assists clients with obtaining all required permits and approvals for their projects. He drafts and negotiates construction and permanent loan documentation and joint venture agreements.

Matt has handled long-term ground leases of new development, and obtained permits and development rights for developers of large-scale, mixed-use projects. He successfully obtained permits for a 27-unit residential transit-oriented development for a community development organization. For a corporate client, he negotiated a preferred equity investment in a major residential development adjacent to the central railroad station in Providence, Rhode Island. Matt frequently presents at urban planning and real estate industry conferences on the topics of land use regulation, New Urbanism, and smart growth.

Pro Bono

Matt has long-standing pro bono commitments. He serves as pro bono counsel for the Congress for the New Urbanism/New England Chapter, a smart growth and active mobility advocacy group. He also regularly provides advice on permitting, acquisition, financing, and corporate matters for the Southwest Boston Community Development Corporation, a non-profit development organization, on a pro bono basis.

Before attending law school, Matt worked for Comsis Corporation in Silver Spring, Maryland, as a consulting transportation planner for local and state governments.

Professional Associations

- + Boston Bar Association
 - o Past Co-Chair Real Estate Law Section, Member of Section Steering Committee
- + Congress for the New Urbanism
 - o Board Clerk of New England Chapter
- + Citizens' Housing and Planning Association
- + Form-Based Codes Institute
 - o Member, Steering Committee
- + Greater Boston Chamber of Commerce

- Leadership Program Fellow (2019) and Member, Regional Real Estate Development Leadership Council

Community Involvement

- + StreetsblogMASS
 - Co-Founder, Board Clerk
- + WalkBoston
 - Board Clerk
- + WalkUP Roslindale
 - Co-Founder of Steering Committee

Awards

- + Board Distinguished Service Award, Southwest Boston Community Development Corporation
- + Selected to the Massachusetts *Super Lawyers* list for 2018 and 2019. Also listed as a Rising Star in 2008 and from 2010 to 2011.
- + Robinson+Cole Pro Bono Service Award Recipient, 2016
- + WalkBoston Golden Shoe Award, 2018
- + Selected by his peers for inclusion in *The Best Lawyers in America*® in the area of Real Estate Law for 2019 and 2020.



COUNSEL

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ADMISSIONS

Commonwealth of Massachusetts
State of New York

EDUCATION

Suffolk University Law School
J.D.
Harvard University
M.A., Public Policy
Cornell University
B.A., Architecture

JEROME L. GARCIANO

Jerome Garciano focuses his practice on real estate transactions and financing, affordable housing, renewable energy, green building, sustainability, and tax credits. Jerome, a member of the firm's Real Estate + Development Group, represents a range of clients, including lenders, equity investors, owners, and developers, for real estate and project finance transactions.

Real Estate Development and Finance

Jerome advises clients in real estate project and finance structuring, and he conducts all related due diligence and transaction documentation. He has extensive experience in assisting clients with finance matters related to development, including handling complex, multi-million dollar loans. He recently represented a national affordable housing lender in connection with a \$13 million loan for a 120-unit senior housing U.S. Housing & Urban Development (HUD) Rental Assistance Demonstration (RAD) conversion transaction.

Affordable Housing and Community Development

Jerome represents for-profit and non-profit organizations in affordable housing and community development project finance transactions. He assists in coordinating financing from multiple income sources, enabling projects to succeed. He recently represented a local housing authority developer on a \$24 million transaction, utilizing low-income housing tax credits, state housing finance agency financing, and state department of housing subordinate debt.

Renewable Energy and Green Building

Jerome assists clients with renewable energy, microgrid, and energy efficiency project and finance structuring, due diligence and transaction documentation. He has represented a regional bank on a construction loan financing on a 26MW portfolio of distributed generation photovoltaic solar projects throughout the northeastern United States. He regularly contributes to the firm's LinkedIn group, R+C Sustainability Practice Center.

Tax Incentives and Tax Credit Financing

Jerome advises clients on tax incentives and tax credit financing structures, including tax credits related to low-income housing, historic status, energy investment, and new markets. He provides guidance to clients on all federal and state tax incentives. Jerome has provided assistance with several

nonprofit-sponsored real estate transactions financed with New Markets Tax Credit financing, including education, health, and community services facilities. Jerome is a LEED accredited professional and has advised clients on utilizing energy efficiency and renewable energy tax incentives. He recently represented a real estate developer and green builder in the sale and transfer of a state green building tax credit achieving Leadership in Energy and Environmental Design (LEED) requirements. He also works on tax policy initiatives promoting green energy and real estate development.

Jerome is a certified public accountant. Prior to becoming a lawyer, he worked as a finance associate at The Community Builders, Inc., a national nonprofit organization, and at Recap Advisors, a nationally recognized affordable housing financial services firm. In addition, he worked for architectural design firms after graduating from architecture school.

Jerome volunteers with the U.S. Green Building Council's Legacy Project, which provides a green facilities management training and career track for students and young adults in under-resourced neighborhoods in Boston.

Professional Associations

- + American Bar Association
- + American Institute of Architects
- + American Institute of Certified Public Accountants
- + Boston Bar Association
- + Boston Society of Architects



JESSICA D. BARDI

Jessica Bardi concentrates her practice on land use and environmental law and related litigation. She is a member of the firm's Real Estate + Development Group.

Land Use and Environmental

Jess counsels developers, landowners, businesses, and other organizations on local, state and national land use and environmental regulations, and represents them in permitting for development projects. She has experience with zoning, planning, subdivision, local and state wetlands permitting, Chapter 91 licensing, the Massachusetts Environmental Policy Act, Army Corps of Engineers permitting, NPDES permitting and Chapter 21E.

Jess has appeared on behalf of clients in a broad range of proceedings, including wetlands permitting appeals and land use disputes in front of the Massachusetts Superior Court, Massachusetts Land Court, Massachusetts Department of Environmental Protection, and local Conservation Commissions, Planning Boards and Zoning Boards of Appeals. Prior to joining Robinson+Cole, Jess practiced with a municipal law firm and with a firm focused on wetland and waterways permitting and counseling.

ASSOCIATE

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ADMISSIONS

Commonwealth of Massachusetts

EDUCATION

New England Law Boston
J.D.
cum laude
Editor, The New England Journal on
Criminal and Civil Confinement
University of New Hampshire
B.S., Marine Biology; Environmental
Conservation Studies

Professional Associations

- + Environmental Business Council
 - o Young Professionals Committee
- + Women's Environmental Network
 - o Young Professionals Committee
- + Justinian Law Society
 - o Assistant Treasurer
 - o Scholarship Committee



WHAT IS STREETLIGHT?

Streetlight ignites positive momentum through **THOUGHTFUL PLACEMENT AND STRATEGIC BUSINESS SUPPORT AND INVESTMENT**

- Streetlight creates authentically vibrant, sustainable retail environments that catalyze neighborhood revitalization in transitional cities
- Streetlight facilitates growth of successful small businesses and entrepreneurs
- Streetlight is the holistic, innovative, analytical solution to the broken retail model
- Streetlight has the potential to fundamentally disrupt the traditional landlord, broker, retail-tenant dynamic

THE PROBLEM WE ARE SOLVING

The **TRADITIONAL URBAN RETAIL MODEL** of reactive, ill-informed landlords, unthoughtful placement, and unprepared, under-capitalized retailers **NO LONGER WORKS**

- High rates of urban retail vacancy in transitional cities persists
- Landlords are not equipped to understand the performance and potential of independent small businesses
- Every city has talented entrepreneurs and great small businesses, yet most remain under-supported and under-capitalized, while failing to realize their full potential



HOW WE DO IT?

Our strategy is holistic, rigorous, process-driven, and informed by data.

Streetlight is the evolution of the broken, small business retail model.

PROGRAMMING

Neighborhood Programming:

A community-focused, data-driven, analytical approach to transitional city retail curation

SEARCH, DILIGENCE & PLACEMENT

Matchmaking:

Aggressive, targeted retail search, diligence and thoughtful real estate matchmaking

SUPPORT

Growth Support and Consulting:

A technology-based business support platform that prepares businesses for growth and sustained success

GROWTH CAPITAL

Capital Facilitation:

SLV invests into and facilitates capital needs for great companies that have authentic stories to tell, are founder-led, transitional-area-focused, and are at a crossroads.



Streetlight ignites positive neighborhood momentum through small business support, strategic placement and targeted capital investment.

- **We help companies grow**
- **We thoughtfully fill retail space**

We are a group of entrepreneurs with decades of experience who see great potential in America's underserved small businesses and transitional cities.

We Believe in The Power of American Entrepreneurs



Anthony Ackil

Co-founder: CEO

Anthony co-founded B.GOOD LLC, a Boston-based, healthy fast casual restaurant chain dedicated to using food to improve communities, in 2004. As CEO, Anthony grew the business to 80 fast casual restaurants in 10 states, with additional locations in Canada, Switzerland and Germany. In 2014, Anthony founded the B.GOOD Family Foundation; he currently serves on the board of Project Bread, a charitable organization dedicated to ending hunger in the Boston area.

Anthony was named the 2015 E&Y Entrepreneur of the Year for the New England region, and was honored as one of Fast Casual Magazine's Top 25 Executives in 2018. In 2017 and 2018, B.GOOD was named one of Fast Casual Magazine's Top 75 Brands.

Anthony attended Harvard University, graduating in 1999 with a B.A. in Government.



Mike Shreve

Co-founder: Brokerage Systems

Mike was one of the first employees at T3 Advisors, a Boston-based real estate brokerage firm advising tenants in the technology and biotech industries. Mike spent 14 years with T3, engineering creative real estate solutions for clients in the innovation economy. Mike subsequently founded his own real estate firm, expanding across a broader set of real estate interests including property investment and management focused in low-income areas.

Mike attended Harvard University, graduating in 1999 with a B.A. in Economics. He currently lives in Auburndale, MA with his wife and three children, Vivi (13), Ben (10), and Jimmy (9).

02

SECTION 2

CONCEPT NARRATIVE

TRANIST ORIENTED COMMUNITY

OUR WATERFIELD | WINCHESTER DEVELOPMENT PROPOSAL



Details on the proposed housing units, affordability levels, and accessibility, including the following information:

- A preliminary estimate of the total number of housing units to be provided.
- The type of housing to be provided; rental vs condominium ownership.
- The proposed distribution of income levels to be served, expressed as a percentage of the Boston AMI, including the percentage of housing units that will be priced at market rate.

UNIT BREAKDOWN

6 Units at 30% AMI

2 Units at 50% AMI

24 Units at 60% AMI

8 Units at 80% AMI

20 Market Rate Units

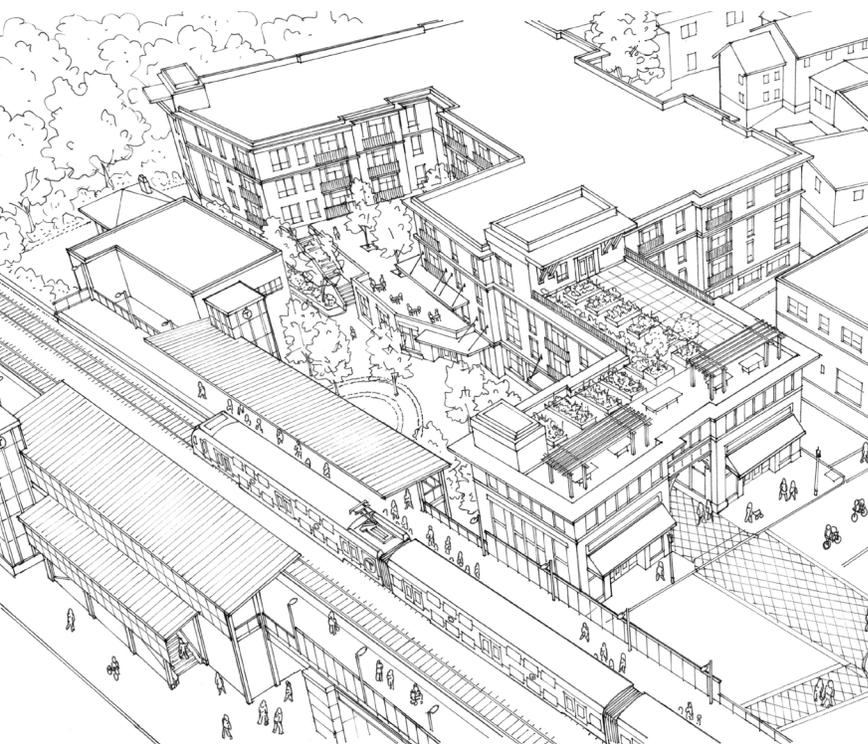
60 Total Units

We propose 60-units of rental housing at Waterfield | Winchester, of which more than half will be for residents making sixty percent (60%) or less of Area Median Income. All 60-units will count towards the Town of Winchester's Subsidized Housing Inventory. There will be 3 Handicap Accesible Units under Group 2A.

Specifically, the unit distribution based on the available data as of the date of this proposal is six (6) units at 30% AMI, two (2) units at 50% AMI, twenty-four (24) units at 60% AMI, eight (8) units at 80% AMI, and twenty (20) units at market rate. This proposed mix is subject to slight changes as design and permitting progress, but is the target distribution for Waterfield | Winchester .



Discussion of the physical plan and architectural character of the project and the various programmatic and physical elements of the development, including building scale, specifically total height and lot coverage.



The architectural massing and overall design are driven by the creation of a vibrant public space within the site at street level, the adjacency to the MBTA Station, and the street frontage Waterfield Road facing the Town Common.

The courtyard is fronted on all sides by complimentary structures and program, including the retail spaces within the arched building to the north, co-working space on the west (which also blocks views into the parking levels), the Chamber of Commerce building to the south, and the active MBTA station to the east. The MBTA traffic alone will support the retail and create a pleasant bustle. To this we've added a stage and event space.

The elevated terrace of the apartment building

Axonometric view of the proposed building



The building massing and material changes are designed to reduce the scale to something more consistent with the immediate context. Various deep or shallow setbacks of the building form suggest a series of smaller brick clad structures that have been connected by “hyphens” or infill of clapboard-sided construction.

Bird's eye view of the proposed courtyard

The architectural massing and overall design are driven by the creation of a vibrant public space within the site at street level, the adjacency to the MBTA Station, and the street frontage Waterfield Road facing the Town Common.

The courtyard is fronted on all sides by complimentary structures and program, including the retail spaces within the arched building to the north, co-working space on the west (which also blocks views into the parking levels), the Chamber of Commerce building to the south, and the active MBTA station to the east. The MBTA traffic alone will support the retail and create a pleasant bustle. To this we've added a stage and event space.

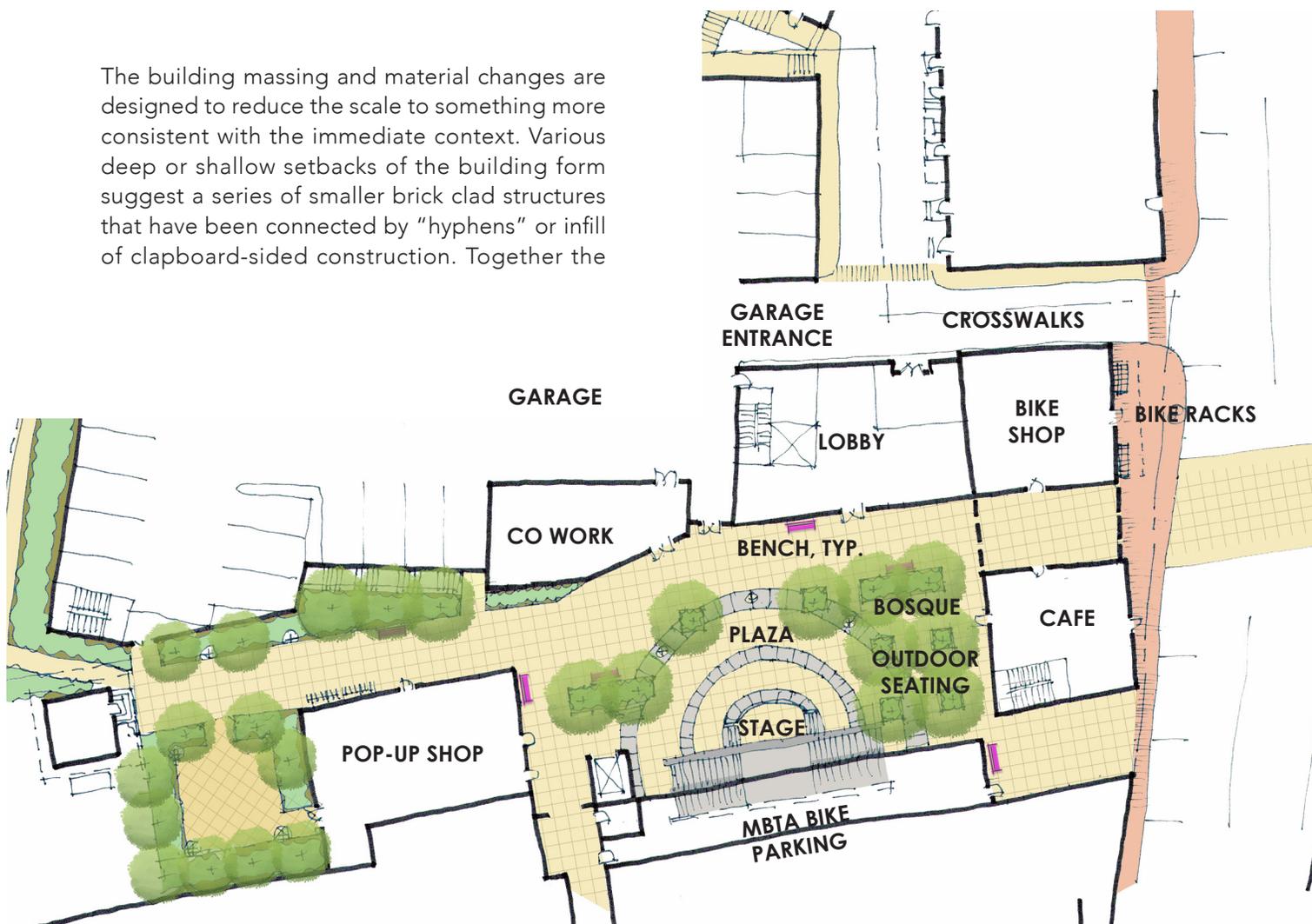


Proposed second floor plan with a landscaped courtyard for residents

The elevated terrace of the apartment building was oriented towards the tracks and the MBTA courtyard to help activate and enliven the public experience over which it looks, while also enjoying the south facing exposure. It also allows the building to present a more varied and smaller scale to the courtyard, by breaking up what otherwise would be a very long 4-story wall hemming in the courtyard.



The building massing and material changes are designed to reduce the scale to something more consistent with the immediate context. Various deep or shallow setbacks of the building form suggest a series of smaller brick clad structures that have been connected by “hyphens” or infill of clapboard-sided construction. Together the



Ground Floor Public Space Plan



Building Elevation along Waterfield Road

GROUND FLOOR RETAIL AND STREET ACTIVATION BY CULTIVATING LOCAL, INDEPENDENT BUSINESSES

The new retail along Waterfield Road is envisioned as a bike shop with public bike racks on Waterfield Road, and a quick eats or other specialty food and beverage shop to the east. Tables, chairs, and semi-private landscaped spaces on the plaza support a variety of uses at different times of day. The MBTA is including a substantial number of bike spaces in their project below the new stairs on both sides of the viaduct, and there will be additional resident bike parking within the garage.



FOOD | BIKE SHOP | CO-WORK SPACE | POP-UP SPACE

Adjacent to the Bike Shop along Waterfield Road will be a cafe, juicery bar, or specialty food shop, activating the streetscape and spilling out into the new public courtyard.

Traggorth Companies is proud to have firsthand experience with entrepreneurial businesses in Downtown Haverhill at the ground floor of JM Lofts with local operator Battle Grounds Coffee.



A small coworking space adjacent to the MBTA Commuter Rail is a natural fit. Companies like WeWork, The Hive, and WorkBar have successfully demonstrated that satellite spaces supporting remote work outside of downtown Boston are successful.

FOOD | BIKE SHOP | CO-WORK SPACE | POP-UP SPACE

As more and more of us start working remotely and major corporate employers shift to permanent remote work, flexible professional spaces are increasingly important. Coworking spaces provide freelancers with a shared work space that's affordable, as well as a community of fellow-freelancers, entrepreneurs, and remote workers to help build professional networks and community.

Waterfield | Winchester will explore a decentralized management office in the coworking space which will support residents and visitors alike. Residents of the development will choose Winchester for its unique retail, culture, and greenspace amenities. Supporting those residents with flexible workspace opportunities and a variety of transit options creates vitality throughout the day.

What will be done with the Town-owned Chamber of Commerce building?

The Chamber of Commerce Building (COC) is to remain and will be repurposed into a multi-functional creative space. If the Chamber of Commerce were to wish to remain in the building, we would work with them to determine the ideal amount of space for their needs, preferably on the second floor. The remaining space would be converted into creative "pop-up" space that would activate the ground floor of the new public courtyard with a variety of businesses. We will provide short-term space for storefront activators to launch their entrepreneurial ideas. The exterior would be improved with a fresh design that will be as unique as the tenants and provide an exciting backdrop to the public space.



Pop-up spaces incubate the future of retail while providing flexible spaces for creatives to engage with the public

What exterior materials and architectural details will be used and how will they integrate with the Town Center?

The building massing and material changes are designed to reduce the scale to something more consistent with the immediate context. Various deep or shallow setbacks of the building form suggest a series of smaller brick clad structures that have been connected by “hyphens” or infill of clapboard-sided construction.



Typical Materials:

Building Skin: Brick Veneer, Painted Fiber Cement Lap Siding, and Painted Aluminum Spandrel Panels

Base: Cast Stone

Trim: Painted PVC, GFRP Belt Course and Cornice Assembly

Unit Openings: Aluminum Clad Insulated Windows and French Doors

Parking Deck Openings: Painted Steel Frame with Mesh Infill

Entry Canopies: Painted Metal with Tie-backs or Wood Brackets

Railings and Juliette Balconies: Painted Aluminum

Exterior Stair: Painted Steel

Passageway Brackets: Painted Timber

Arbor: Timber Frame

Sign Panels: Cast Stone

Awnings: Fabric

Photovoltaic Roof Panels



How does your proposal consider the previous design concepts for the Waterfield Lot?

Based on the two site plans referenced on page 22 of the Waterfield Lot RFP (2014 and 2018), the easement seems to be treated in the same manner so the majority of the building is setback from the Commuter Rail. How the building meets the open space is where our proposal is different from the previous design concepts. Our main building courtyard faces to the east catching morning sun, while the previous design shows the courtyard facing the south, catching the most exposure. However, because the mass of the building in the previous design is against where we propose the public space, we felt it would be detrimental and would create a canyon effect by not allow light into the courtyard past early afternoon. By having the 1-story podium face east as we have proposed, the public space will get more sun exposure.

In addition, the previous design plans, particularly in the 2014 version, more pavement dedicated to the vehicle is shown, whereas our proposal is driven first and foremost by pedestrian circulation and experience.

In terms of loading access for the 2018 version, the rear portion of the existing retail would have to be accessed via Waterfield Road and through the public space. In our design, the public space is void of cars and is primarily for pedestrian usage.



Massachusetts Housing Partnership presentation, July 2018



Description of all environmental sustainability and climate change mitigation features (and the team's relevant experience) of the building design and operating systems, including measures to:

Significantly minimize, if not eliminate the use of fossil fuels and the associated greenhouse gas emissions (through measures such as heat pumps, on-site solar power generation, and features to promote the use of non-motorized transportation), and efficiently manage waste and water resources

Experience of the architect in designing, and the developer in implementing such approaches

Description of specific features that would qualify the building for certification through a program such as LEED Gold or Platinum, Passive House, Enterprise Green Communities, etc.

The Commonwealth of Massachusetts has been a leader in adopting green building standards in the US, and has been a strong advocate for a low carbon future. Winchester | Waterfield is a terrific opportunity to build on that momentum by creating a marquee green building that honors Winchester's architectural heritage. The development team is committed to creating an affordable, attractive, and extremely high performance building. This project will realize the vision of a community powered by the wind and sun, while elevating the resident's standard of living.



Ace Flats in Reading will achieve LEED Certified Status



Integrated Design

Sustainable Comfort Inc. (SCI) was engaged during the earliest conceptual phases of the project. Project teams often wait until a building has been designed before including an energy consultant, which makes it challenging to implement even the most reasonable measures. SCI's early involvement has embedded the sustainable goals at the forefront of the design, which will lead to a more efficient and cost-effective construction process.

Building Layout

One of the most important aspects of an energy efficient and durable building is the simplicity of the layout. Waterfield | Winchester, although elegant, is a fundamentally simple form, without unnecessary overhangs, bump-outs, or other features that increase the exposure to the elements. This helps to reduce heating and cooling loads, while also keeping construction costs down and reducing the risk of water leaks.

High Performance Enclosure-The enclosure design includes increased levels of continuous insulation, which is followed by a detailed air sealing process. Lastly, high performance triple pane windows will be detailed. SCI has extensive real-world experience helping design and test airtight assemblies on similar scale and form Passive House developments and will apply that knowledge to Waterfield | Winchester. A high performance building enclosure is fundamental to providing a variety of benefits for the building owner and residents, including:

Energy Consumption – The added insulation levels and reduced infiltration will result in significantly lower heating and cooling loads, which yields operational cost savings. The lowered loads also mean significantly less greenhouse gas emissions for the lifecycle of the equipment. Finally, the lowered loads mean that the heating and cooling equipment can be smaller which results in an upfront savings on equipment, and a savings decades later when the equipment is replaced.

Health and Comfort – Not only are drafty, poorly insulated buildings expensive to operate, they are also uncomfortable and can exacerbate preexisting health issues. By building an airtight enclosure, unfiltered air between the apartments and the outdoors (and adjacent units) is kept out, while a high-quality ventilation system supplies and exhausts air in a much more controlled manner.

Building Durability – Building components typically fail due to moisture issues. With air-tight assemblies and high levels of continuous exterior insulation, the more-susceptible components will have much less exposure to intruding moisture. This type of building is much less risky from a condensation standpoint and will result in a structure that will last longer and need fewer repairs. This will make the building cost less to maintain, and also lessen the environmental burden of replacing or repairing wall sections.

All Electric Mechanical Systems-All heating, cooling, water heating and ventilation will be done using high-efficiency electric systems. Not only does this align with Winchester's goal of eliminating on-site fossil fuel combustion, it will result in a more efficient building. Cold weather heat pumps will provide heating and cooling, and Energy Recovery Ventilators will provide filtered fresh air to the living spaces, while recapturing the energy from the air being exhausted. Waterfield | Winchester will be cost-effective and energy efficient.

Renewable Energy-The rooftop of the building will have a generous solar array, which will provide a significant amount of the building's electrical needs. Generating energy on-site greatly reduces transmission losses and will significantly reduce emissions associated with this project. As the rooftop does not have enough area for PV to produce the building's entire demand, Traggorth | Civico is committed to sourcing the remaining energy from other renewable sources, such as WinPower, the Town of Winchester's green energy program. The result will be a building that does not utilize fossil fuels on-site, or in the generation of electricity in any form.

Materials Selections-Essential to SCI's scope of work is to specify materials and products that help maintain a healthy environment that is consistent with the sustainability goals. Low VOC products will be used throughout the project to ensure the tenants have clean air to breathe. SCI will also help identify products that have low embodied carbon, which will lower the building's overall carbon footprint. Recognizing the lifecycle impact of materials such as concrete and XPS insulation is essential to a holistic approach to sustainability.

Transportation-Waterfield | Winchester includes a parking garage for public and residential use. Within the parking area, Electric Vehicle charging stations will be available, which will encourage the adoption of clean vehicles. Additionally, short-term and long-term bike storage will be located on site, as well as at the adjacent MBTA station, which makes it easier for residents, visitors, or commuters to make choices consistent with their sustainability values.

Operations and Maintenance-Developing a high-performance building is just one step toward creating a more sustainable development. The success of the building over time depends on how the people who call it home use and maintain their space. Education is key to ensuring the residents and property management team understand how a high performance building works to save money and energy. The development team fully appreciates the importance of this and is committed to working with SCI and the property manager to communicate these features, their importance, and to empower residents to share our sustainability goals.

Existing Site Conditions-Existing site conditions are generally comprised of paved parking areas and existing building roof area, with a vegetated parking island in fair condition and very limited tree canopy coverage. The majority of stormwater runoff is collected via catch basin and a closed pipe drainage system, with connections offsite in Waterfield Road and to the east adjacent to the MBTA platform. There appears to be limited flow offsite from the site's south edge. It is assumed there is currently no mitigation of runoff quantity or quality.

Proposed Approach-Traggorth | Civico shares the Town of Winchester's commitment to sustainability. Beyond building-related measures, we will take steps towards healing the environment of the Waterfield Lot and improving the runoff quality and quantity to the Aberjona River. This is a key site adjacent to Winchester's Town Common, and a successful development will lead to a healthier built environment in Winchester, happier residents and visitors, and ultimately a more valuable project to the community. We intend to implement innovative site landscape and stormwater management practices to achieve these objectives, which will exceed regulatory stormwater management requirements using the following strategies and techniques:

- Maximize shade trees and vegetation in balance with our vision for vibrant infill, pedestrian connectivity, and active gathering spaces;
- Utilize pervious surfaces wherever possible within the plaza to promote infiltration and reduce runoff quantity;
- Employ Silva Cells or similar tree planting techniques to provide appropriate soil volume to bolster healthy shade tree growth; and
- Utilize green stormwater infrastructure (GSI) practices to slow, filter, and absorb stormwater runoff.

Contextually-appropriate, strategically designed GSI practices will provide value as aesthetically pleasing landscape amenities in the high-visibility plaza. These simple design features are an integral and visible part of the plaza and courtyard, while softening the hardscape and framing the edges and pedestrian circulation patterns. A water quality swale is proposed to work with existing topography to divert runoff from a portion of the building roof, utilizing check dams to slow and absorb flows along the south edge of the proposed building. Plaza hardscape will incorporate permeable pavement systems, if site constraints allow, so the site's "sponge" functionality can be maximized. Green roof features are included to further reduce runoff and improve the heat island effect.

WHY SUSTAINABILITY MATTERS TO US

Sustainable site improvements, green building practices, and renewable energy are part of a philosophy fundamental to Traggorth | Civico, they are not just checkboxes. We know that our urban areas and town centers have been resilient across generations of change. It is our job to ensure that our impact on the built environment will leave a legacy that increases the resilience of its surroundings, and does not borrow from our future.



Construction staging plan and discussion of construction impacts, including but not limited to how the project will be managed to limit impact on neighbors - in particular noise and traffic during the construction period;

Pre Construction

Prior to construction, the Traggorth | Civico team will work with the Town of Winchester to formalize a construction logistics plan that outlines the potential impacts with regard to construction vehicle access and parking, mitigation to impacts on adjacent abutters and neighboring streets, and construction hours. Also, we will assure that the plan complies with local ordinances with regard to noise, dust, pests, and construction lighting.

Phase 1 – Site Prep and Excavation - 8 weeks

Site Mobilization - Prior to site mobilization, the contractor will schedule a kick-off meeting with local officials to review schedule, inspections, timing, and processes, etc. Additionally, the contractor will proactively address abutter concerns and provide onsite information throughout construction. Once contact has been made, perimeter site fencing and erosion controls will be put into place with appropriate signage around the site.

Parking Demo – The existing parking lot surface and features will be removed and stockpiled onsite to be removed/disposed of as required. All stockpiles will be protected with erosion controls to prevent run-off of silt from the site.

Support of Excavation (SOE) - Due to grade changes and depth of foundations, support of excavation will be required along the elevation facing existing structures. SOE will be engineered and reviewed with the civil engineer before proceeding with the work.

Haul Out of Excess Soils - The intent is to precharacterize existing soils and direct load and haul excess soil off-site.

Phase 2 – Foundations and Lower Level Garage Structural Steel - 12 Weeks

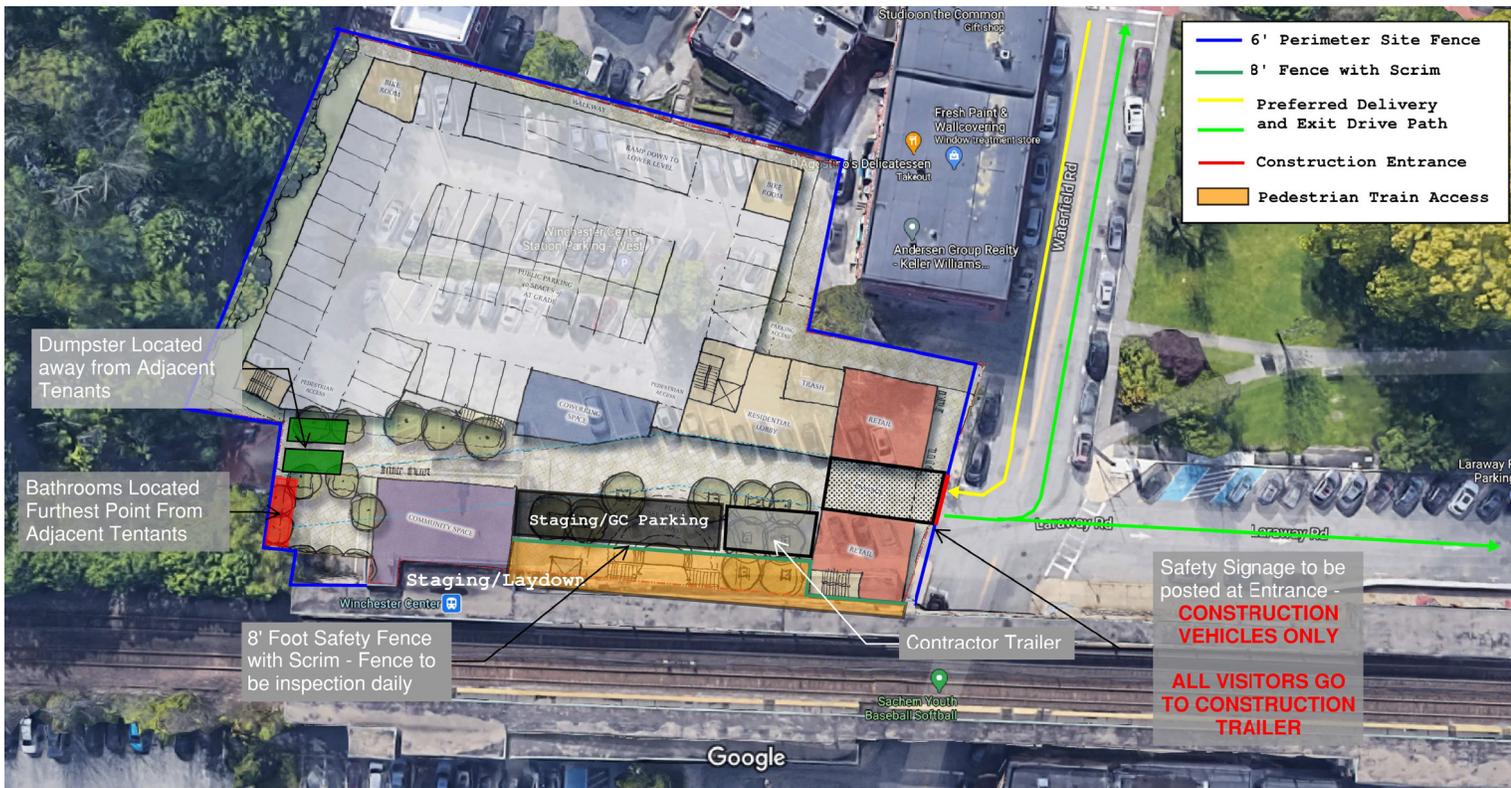
Foundations
Structural steel

Phase 3 – Buildup and Fit Out - 46 Weeks

Podium Garage Steel
Wood Frame Build Out
Façade / Window
Interior Fitout
Site Improvements and Exterior Finishes

Final Inspection | Closeout - 4 weeks

PRELIMINARY CONSTRUCTION LOGISTICS PLAN



Discussion of how the Developer will address existing site constraints, including the MWRA easement, MBTA construction, and parking and abutter access issues related to the current easement on property owned by the Waterfield Realty Trust.

Given the "Fall 2020" start date for the MBTA improvement project will convert two-thirds of existing parking to construction laydown/access space for up to three years, Traggorth | Civico requests an initial, pre-LDA access agreement to allow for, at minimum, up to date, accurate survey, geotech, and building condition assessment (for the COC Building).

We also request that the Town facilitate an agreement with the MBTA that would allow for limited access to their part of the lot even after they assume temporary site control.

Our development team has had multiple experiences facilitating coordination around and above town and city utility easements, we will work with the relevant departments to ensure a safe and coordinated effort.

F

Description of how parking on the site will be accessed, and how abutters will maintain access for deliveries and drop-offs at the rear of the neighboring businesses;

The parking on site will be accessed via the alley next to 15 Waterfield Street (Anderson Group Realty). The access will serve parking for both the public and the residents. The alley will also serve for service and drop off for the project shared with the businesses that now use the alley (Allessandro Salon, D’Agostino’s, Fresh Paint and Blinds etc.). The building is set back 5’ from the existing alley curb line allow room to maintain access through construction for the adjacent businesses.

We have spoken with several neighboring businesses about how they accept deliveries in order to inform our planning. The parking on site will be accessed via the alley next to 15 Waterfield Street (Anderson Group Realty). The access will serve parking for both the public and the residents of the building. The alley will also serve for service and drop off for the project shared with the businesses that now use the alley (Allessandro Salon, D’Agostino’s, Fresh Paint and Blinds etc.) The proposed building is set back 5’ from the existing alley curb line to allow room to maintain access through construction for the adjacent businesses.

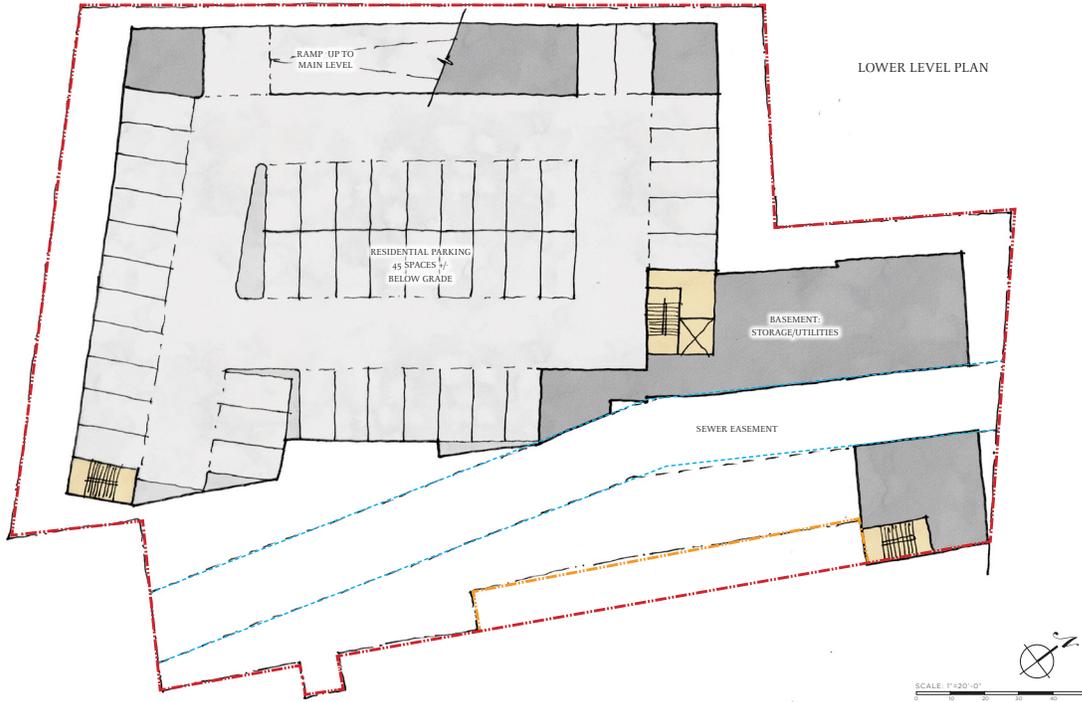
In addition, for larger truck deliveries (we understand that up to 38’ trucks make deliveries to the businesses) that traverse through the Waterfield Lot to exit from the alley and would no longer be able to do so, a business owner proposed an on street delivery zone along Waterfield Road in front of the proposed building. We would support this designation.



Ground Floor Circulation Plan

PUBLIC PARKING

The Development Team has reviewed historic data pertaining to boring logs and engineering documents that both were provided in the RFP, and also through the MBTA. We have confidence that a lower level of parking can be constructed which in turn would accommodate 2 levels of parking. The lower level would be designated to the building residents, while the ground level off of Waterfield Road would primarily be for public parking and any parking that has displaced by redevelopment.



RESIDENT PARKING

As the potential for a lower level is studied, the Development Team finds going below grade is not cost effective or not possible for other reasons, the ground floor will be used for resident parking. We will then work with the Town of Winchester to find replacement parking or allocate additional funds towards building of a parking lot/garage elsewhere in Town.

PARKING	# OF SPACES	DESIGNATE
BELOW GRADE	45 SPACES	PRIVATE
GROUND LEVEL	40 SPACES	PUBLIC
TOTAL	85 SPACES	



Details on potential impacts on traffic associated with the proposed development, including mitigation measures, and proposals to improve bicycle and pedestrian connectivity around the site, including an assessment of the feasibility of providing pedestrian access to the Town Common;

The alley behind the businesses on Waterfield Road will be maintained and a 5' wide sidewalk will be added on the south side of the alley to allow for pedestrian traffic around the building to the rear of the Businesses on Church Street. That walkway will be extended along the west side of the building to pick up the connections to the rear of A Tavola, the parking lot west of Mary D'Alba and the rest of the Church Street businesses. There is a significant change in grade between the alley and the parking behind the Church Street businesses, so new stairs will be installed to replace the rear stairs behind A Tavola that extend over the property line.

To provide an accessible connection around the building for handicapped pedestrians wishing to cut through from Church Street, we will be installing a walk along the south property line that will connect the path along the western edge to the Plaza.

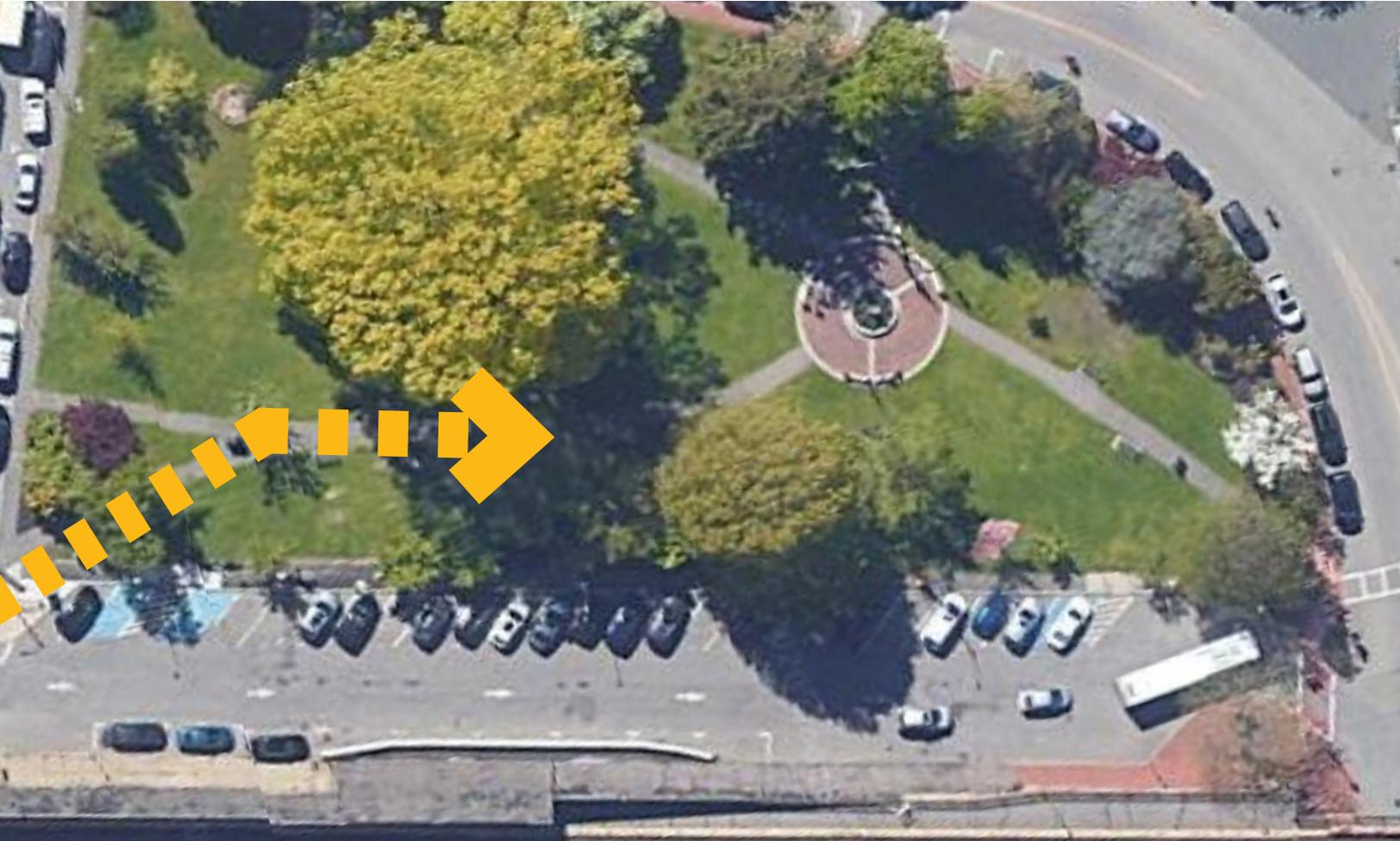


In order to facilitate a clear connection between the MBTA station and the Town Common, the proposed plan is organized around a central plaza that is accessed from Waterfield Road through a double height gateway element. The plan also proposes to create a clearly designated pedestrian crossing across Waterfield Road at the gateway to further enhance this connection. The plaza space is anchored and activated by a variety of uses, and the building's primary entries all connect to and through this space.

The public parking on the ground floor has two sets of doors that lead to the plaza and also to the MBTA entrances and the crossing to the Common. The main building lobby also fronts the plaza to provide easy access for residents to the MBTA and to the Common. In addition the new walks on the south and west edges of the project will connect the informal paths from Church Street to the Plaza and beyond."

There will be several connections from the public parking garage, the co-work space, the retail along Waterfield and the residential units to the plaza. The plaza is made up of 3 sub areas:

To the south will be a court off the COC Building that will allow for activities in the building to flow outside into a semi-private courtyard.





Details on potential impacts on traffic associated with the proposed development, including mitigation measures, and proposals to improve bicycle and pedestrian connectivity around the site, including an assessment of the feasibility of providing pedestrian access to the Town Common;

Uses		
Acquisition		1,000,000
Parking Costs	30,000	3,000,000
Hard Costs	265	17,032,500
Hard Cost Cont	5%	1,001,625
Soft Costs		3,420,591
Reserves		600,000
Fee		2,545,472
Total	443,414	28,600,188

Construction Sources		
Construction Loan		21,845,190
LIHTC Equity	20%	1,382,262
State Funds		3,600,000
City Funds		500,000
Deferred Fee		1,272,736
		28,600,188

Stabilized Sources		
Perm Loan		15,030,515
LIHTC Equity		6,911,309
State LIHTC		1,580,000
HSF		1,000,000
AHTF		1,000,000
CBH		\$750,000
Other DHCD		700,000
HOME		550,000
Developer Equity		500,000
Local Funds		500,000
Deferred Fee		78,364
		28,600,188

Op Budget		
Income		1,512,804
Parking Income	45	108,000
Comm Income	20	50,000
CoC Building Income		25,000
Vacancy	5%	(88,540)
Op Exp	9,927	(595,633)
NOI		1,011,631
Debt Service		843,026
Cash Flow		168,605

Perm Loan		
Amount		15,030,515
Rate		3.75%
Amm		30.00
Min DSC		1.20
Max LTV		85%
Value	5.00%	20,232,621

Total Units	SF	Avg	
Studio	0	500	
One	20	690	33%
Two	34	900	57%
Three	6	1,100	10%
Total Units	60	51,000	850

Size	Total	Retail	Parking	Resi
NSF	53,500	2,500		51,000
GSF	64,500	4,500	-	60,000
	83%			85%

Affordability Breakdown						
Market	SF	Rent	UA	Eff. Rent	Ann. Income	
Studio	500	2,000		2,000		-
One	7	690		2,425		203,700
Two	11	900		2,950		389,400
Three	2	1,100		3,300		79,200
	20	16,930		56,025		672,300

80% AMI Units						
Market	SF	Rent	UA	Eff. Rent	Ann. Income	
Studio	500	1792	114	1,678		-
One	3	690	165	1,755		63,180
Two	5	900	230	2,074		124,440
Three	0	1,100	337	2,323		-
	8	6,570		17,280		187,620

60% AMI						
Market	SF	Rent	UA	Eff. Rent	Ann. Income	
Studio	0	500	114	1,230		-
One	9	690	\$165	1,275		137,700
Two	13	900	\$230	1,498		233,688
Three	2	1,100	\$337	1,658		39,792
	24	20,110				411,180

50% AMI - PBV's						
Market	SF	Rent	UA	Eff. Rent	Ann. Income	
Studio	500	1,887	57	1,830		-
One	690	2,090	83	2,008		-
Two	1	900	115	2,427		29,125
Three	1	1,100	169	3,000		35,994
	2	2,000				65,119

30% units - PBV's						
Market	SF	Rent	UA	Eff. Rent	Ann. Income	
Studio	0	500	57	1,830		-
One	1	690	\$ 83	2,008		24,090
Two	4	900	\$ 115	2,427		116,501
Three	1	1100	\$ 169	3,000		35,994
	6	5,390	\$	15,426		176,585

Total Residential Income \$ 1,512,804

The development team intends to finance the project using debt, public funds, and tax credits, a mix that we have used successfully on many previous projects. The development team has decades of experience financing affordable and mixed-income housing and working with the Department of Housing and Community Development (“DHCD”). Specifically the project is expected to be financed as follows:

Construction Loan – approx. \$21,000,000 – This will be funded by a private lender with which we have worked before. We have included letters of interest from Boston Private, Eastern Bank, Webster Bank, and Fidelity Bank.

Permanent Loan – approx. \$15,000,000 – This will also be funded by a lender with which we have worked previously. Due to the inclusion of tax credits, the loan will require a minimum of a 15-year term with fixed rates. We have LOI’s from Boston Private, Eastern Bank, and Webster Bank as well as Massachusetts Housing Partnership (“MHP”). MHP is usually the most competitive lender for this type of product and we have a successful track record closing funding with them.

9% Low-Income Housing Tax Credit Equity (“LIHTC”) – approx. \$6,900,000 – These will be requested from DHCD in their annual competitive funding round, a process with which both Traggorth and Civico are familiar. The LIHTC’s will directly support the 32 units below 60% AMI and are capped at \$250,000 per unit of eligible basis. Ultimately, this makes the project eligible for \$720,000 in annual LIHTCs (for 10-years) which we expect to syndicate at roughly \$0.96 per dollar of tax credit to an investor. We have included an LOI from National Equity Fund, a leader in the market, but we have also worked with many other syndicators and will select from among a larger group if awarded and funded.

Massachusetts Low-Income Housing Tax Credit Equity (“State LIHTC”) – “Massachusetts Low-Income Housing Tax Credit Equity (“State LIHTC”) – approx. \$1,580,000 – These will also be requested from DHCD in their annual competitive funding round.. The LIHTC’s will be to support the 32 units below 60% AMI and DHCD has suggested State LIHTC awards based on number of units, which in this case is \$400,000 of annual credit (for 5 years). We expect to syndicate at roughly \$0.79 to a tax credit investor. We have included an LOI from National Equity Fund, but we have also worked with many other syndicators and will select from among a larger group if awarded and funded.”

State Affordable Funding – approx. \$4,325,000 - This is a category that includes multiple additional subordinate lending programs that are available for affordable housing through the DHCD competitive funding rounds. The programs include HSF, AHT, CATNHP, CBH, and HOME, among others. Each program has its own rules and funding limits, but DHCD will generally fund approximately \$100,000 per affordable unit (under 80% AMI) plus some additional funding if programs such as CBH are used which requires some enhanced accessibility.

Project Based Vouchers (“PBV’s”) – 8 vouchers – as part of the DHCD funding round we will request eight vouchers for the project. These will support the 30% and 50% AMI units.

Local Affordable Housing Funding – approx. \$500,000 – DHCD requires a “local match” as part of its financing of affordable housing projects. We are requesting \$500,000 from the Town of Winchester to support the 40 affordable units on the site, which is \$12,500 per unit.

Hamilton
8/25/2020
S+U Projection

2% 5% 6% 7% 7% 7% 7% 8%
1 2 3 4 5 6 7 8
Construction Start

USES	Total Budget	Budget		Construction Start									
		Changes	Revised Budget	1	2	3	4	5	6	7	8		
Acquisition	1,000,000		1,000,000	1,000,000									
Hard Costs	20,032,500		20,032,500	400,650	1,001,625	1,201,950	1,402,275	1,402,275	1,402,275	1,402,275	1,402,275	1,602,600	
Hard Costs Contingency	5% 1,001,625		1,001,625										
Hard Costs Total	21,034,125		21,034,125	400,650	1,001,625	1,201,950	1,402,275	1,402,275	1,402,275	1,402,275	1,402,275	1,602,600	
Soft Costs													
A/E	1,190,625		1,190,625	1,010,625	11,250	11,250	11,250	11,250	11,250	11,250	11,250	11,250	
Surveys & Permits	10,000		10,000	10,000									
Clerk of the Works	122,000		122,000	7,625	7,625	7,625	7,625	7,625	7,625	7,625	7,625	7,625	
FFE	75,000		75,000										
Geotech/Environmental	70,000		70,000	23,333	23,333	23,333							
Accounting and Cost Cert	45,000		45,000										
Predev Loan Interest	70,000		70,000	70,000									
Construction Loan Interest	704,281		704,281				4,939	9,217	13,477	17,751	22,068		
Financing Fees	115,000		115,000	115,000									
Operating Deficits	100,000		100,000										
Marketing/Lease Up	101,000		101,000										
Appraisals	15,000		15,000	15,000									
Inspecting Engineer	23,000		23,000	3,000	1,250	1,250	1,250	1,250	1,250	1,250	1,250		
Title & Recording	59,800		59,800	59,800									
Legal	310,000		310,000	310,000									
Insurance	175,000		175,000	175,000									
RE Taxes	60,000		60,000	10,000			10,000	-	-	10,000	-		
Security/Property Relocation	12,000		12,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000		
Soft Cost Contingency	162,885		162,885	90,519	2,223	2,223	1,803	1,517	1,730	2,444	2,160		
Soft Costs Total	3,420,591	-	3,420,591	1,900,903	46,681	46,681	37,868	31,859	36,332	51,319	45,352		
Developer Overhead													
Overhead	1,272,736		1,272,736	424,245	26,515	26,515	26,515	26,515	26,515	26,515	26,515		
Fee	1,272,736		1,272,736										
Developer Overhead	2,545,472	-	2,545,472	424,245	26,515	26,515	26,515	26,515	26,515	26,515	26,515		
Capitalized Reserves	600,000		600,000										
Total Development Costs	28,600,188	-	28,600,188	3,725,798	1,074,822	1,275,147	1,466,658	1,460,650	1,465,123	1,480,110	1,674,468		
SOURCES													
Construction Loan					418,358	1,275,147	1,466,658	1,460,650	1,465,123	1,480,110	1,674,468		
Permanent Loan	15,030,515		15,030,515										
LIHTC Equity	6,911,309		6,911,309	1,382,262									
State LIHTC	1,580,000		1,580,000										
State Funds	4,000,000		4,000,000	1,343,536	656,464								
City Funds	500,000		500,000	500,000									
Developer Equity	500,000		500,000	500,000									
Deferred Fee	78,364		78,364										
Total Sources	28,600,188	-	28,600,188	3,725,798	1,074,822	1,275,147	1,466,658	1,460,650	1,465,123	1,480,110	1,674,468		
cash balance													
Construction Loan													
Beginning Balance					-	418,358	1,693,504	3,160,162	4,620,812	6,085,934	7,566,044		
Draw/Repayment					-	418,358	1,275,147	1,466,658	1,460,650	1,465,123	1,480,110	1,674,468	
Interest Fixed	3.50%				-	-	1,220	4,939	9,217	13,477	17,751	22,068	
Interest Paid					-	-	(1,220)	(4,939)	(9,217)	(13,477)	(17,751)	(22,068)	
Ending Balance					-	418,358	1,693,504	3,160,162	4,620,812	6,085,934	7,566,044	9,240,512	

8%	7%	7%	7%	6%	6%	5%	5%	0%						
9	10	11	12	13	14	15	16	17	18			19	20	
													Completion	Perm Closing
1,602,600	1,402,275	1,402,275	1,402,275	1,201,950	1,201,950	1,001,625	1,001,625	-	-					
						333,875	333,875	333,875						
1,602,600	1,402,275	1,402,275	1,402,275	1,201,950	1,201,950	1,335,500	1,335,500	333,875	-			-	-	
11,250	11,250	11,250	11,250	11,250	11,250	11,250	11,250	11,250						
7,625	7,625	7,625	7,625	7,625	7,625	7,625	7,625	75,000						
												45,000		
26,951	31,850	36,210	40,553	44,910	48,692	52,516	56,763	48,149	49,519	49,774	50,029	50,284	50,627	
						16,833	16,833	16,667	16,667	16,667	16,667	16,667	16,667	
1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250						
-	10,000	-	-		10,000	-	-	10,000	-			-		
1,000	1,000	1,000	1,000											
2,404	3,149	2,867	3,084	3,252	3,941	4,474	8,436	5,207	4,151	4,164	4,176	5,598	3,365	
50,480	66,124	60,202	64,762	68,286	82,758	93,948	177,157	109,357	87,170	87,437	87,705	117,549	70,659	
26,515	26,515	26,515	26,515	26,515	26,515	26,515	26,515	26,515					424,245	
													1,272,736	
26,515	26,515	26,515	26,515	26,515	26,515	26,515	26,515	26,515	-	-	-	-	1,696,981	
													600,000	
1,679,596	1,494,914	1,488,993	1,493,553	1,296,752	1,311,223	1,455,964	1,539,172	469,747	87,170	87,437	87,705	117,549	2,367,640	
1,679,596	1,494,914	1,488,993	1,493,553	1,296,752	1,311,223	1,455,964	(2,953,178)	469,747	87,170	87,437	87,705	117,549	(17,357,936)	
							4,492,350.72						15,030,515	
													1,036,696	
													1,580,000	
													2,000,000	
													-	
													-	
													78,364	
1,679,596	1,494,914	1,488,993	1,493,553	1,296,752	1,311,223	1,455,964	1,539,172	469,747	87,170	87,437	87,705	117,549	2,367,640	
9,240,512	10,920,107	12,415,022	13,904,014	15,397,567	16,694,319	18,005,542	19,461,505	16,508,327	16,978,074	17,065,244	17,152,682	17,240,387	17,357,935	
1,679,596	1,494,914	1,488,993	1,493,553	1,296,752	1,311,223	1,455,964	(2,953,178)	469,747	87,170	87,437	87,705	117,549	(17,357,936)	
26,951	31,850	36,210	40,553	44,910	48,692	52,516	56,763	48,149	49,519	49,774	50,029	50,284	50,627	
(26,951)	(31,850)	(36,210)	(40,553)	(44,910)	(48,692)	(52,516)	(56,763)	(48,149)	(49,519)	(49,774)	(50,029)	(50,284)	(50,627)	
10,920,107	12,415,022	13,904,014	15,397,567	16,694,319	18,005,542	19,461,505	16,508,327	16,978,074	17,065,244	17,152,682	17,240,387	17,357,935	(0)	

Project Name **Waterfield Lot**
 Location **Waterfield Road, Winchester, MA**
 Date **8/27/2020**
 Estimate # **10-13-83**
 Title: **Conceptual Estimate**



86,495

Trade Package #	Trade Description	Cost	\$/GSF	Comments:
2.1	Selective Demolition	\$0	\$0.00	
3.1	Concrete Foundation & Flatwork	\$657,506	\$7.60	
3.3	Gypcrete	\$100,000	\$1.16	
4	Masonry	\$343,056	\$3.97	
5.1	Structural Steel	\$715,595	\$8.27	
5.5	Misc. Metals	\$331,325	\$3.83	
6.1	Rough Carpentry	\$1,298,000	\$15.01	
6.2	Finish Carpentry	\$217,000	\$2.51	
6.5	Millwork	\$80,000	\$0.92	
7.1	Dampproofing/Waterproofing	\$24,680	\$0.29	
7.2	Insulation	\$510,202	\$5.90	
7.4	Siding	\$719,872	\$8.32	
7.5	Roofing	\$401,640	\$4.64	
7.9	Caulking/Joint Sealants	\$25,000	\$0.29	
8.1	Doors, Frames and Hardware	\$456,494	\$5.28	
8.2	Glazing and Windows	\$345,524	\$3.99	
9.1	Metal Stud and Gypsum Wallboard	\$836,845	\$9.68	
9.2	Acoustical Ceilings	\$28,800	\$0.33	
9.3	Flooring	\$436,345	\$5.04	
9.4	Painting	\$262,775	\$3.04	
10	Specialties (Signage, Accessories, FE)	\$129,650	\$1.50	
11	Appliances	\$264,200	\$3.05	
12	Kitchen Cabinets / Countertops	\$368,750	\$4.26	
12	Window Treatments	\$25,000	\$0.29	
13	Existing Brick Building Reno Allowance	\$133,575	\$1.54	
14	Elevator	\$155,840	\$1.80	
21	Fire Protection	\$342,998	\$3.97	
22	Plumbing	\$1,375,790	\$15.91	
23	HVAC	\$959,125	\$11.09	
26	Electrical	\$1,329,118	\$15.37	
31	Sitework / Site Improvements	\$1,009,359	\$11.67	
Subtotal - Trade Cost:		\$13,884,064	\$160.52	
	Contractor's General Conditions	\$995,400	\$11.51	
	General Project Requirements	\$505,918	\$5.85	
	General Liability Insurance	\$192,317	\$2.22	
	Builders Risk	\$0	\$0.00	By Owner
	Building Permit	\$204,298	\$2.36	
Subtotal:		\$1,897,933	\$21.94	

		Construction Contingency	\$315,640	\$3.65	
		Design & Estimating Contingency	\$649,023	\$7.50	
		Winter Conditions	\$100,000	\$1.16	
		Escalations and Tariffs	\$0	\$0.00	Excluded
		Subtotal:	\$1,064,663	\$12.31	
		CM Fee	\$631,750	\$7.30	
		Total Project Cost:	\$17,478,410	\$202.07	

Add Alternate:

Furnish and install subsurface garage	\$2,812,603	Add	
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Base Conceptual Estimate Qualifications

Estimate based on a 16 month schedule
 Foundation depths are assumed to be standard 4' frost walls, with a 10' wall adjacent to buildings
 Budget assumes no building or subsurface foundations demolition is required at the site
 Site is assumed to be clear of hazardous materials
 Costs for ledge or boulder removal is not included in this estimate
 Courtyard is carried as colored concrete with sawcut joints
 Estimate includes a \$20,000 allowance for the stage at the MBTA station
 Estimate includes a structural steel podium for the garage, Live/Work Space, Lobby and retail spaces.
 Finish carp based on wood base at common and units, wood trim unit entry and wood sills at windows.
 Roof deck above the garage includes a waterproofing system and precast paver system
 Roof deck above the 3rd floor residential space is an insulated roofing system with precast pavers
 Exterior finishes includes pre-finished Hardie or similar full height at residential building and masonry at the front and sides of the retail building
 Windows are based on 20% of the surface area of the façade
 Estimate includes split jamb doors, pre-hung and trimmed. Interior unit doors are masonite 1 3/8" solid core doors. Unit entries are 20 min, 1 3/4" solid
 Kitchen/Bath vanities based on TRL Cabinets or similar
 Countertops based on Granite or low cost Quartz
 Elevator is a single cab, 4 story elevator
 Estimate does not include a Fire Pump or ATS system
 Plumbing includes one bathroom at one bedroom and two bathrooms at two and three bedroom units
 Estimate assumes a generator is not required and is not included in the estimate
 Estimate does not include a solar panel system on the roof per discussions with the owner

Add Alternate Estimate Qualifications

Lower garage level is constructed of concrete foundation walls and structural steel with concrete deck.
 Estimate includes an underslab drainage system
 Estimate assumes garage is unconditioned and no heating or cooling systems are included
 Estimate assumes elevator for the building can also serve the lower level and does not include a separate elevator.

Operating Income		1	2	3	4	5	6
Residential Incoms		1,512,804	1,558,188	1,604,934	1,653,082	1,702,674	1,753,754
Parking Income		108,000	111,240	114,577	118,015	121,555	125,202
Retail Income		50,000	51,500	53,045	54,636	56,275	57,964
CoC Building Income		25,000	6,752	6,955	7,163	7,378	7,600
Resi and Parking Vacancy		(81,040)	(83,471)	(85,976)	(88,555)	(91,211)	(93,948)
Commercial Vacancy		(7,500)	(5,150)	(5,305)	(5,464)	(5,628)	(5,796)
Net Income		1,607,264	1,639,059	1,688,231	1,738,878	1,791,044	1,844,775
Operating Expenses							
Management Fees	4.0%	64,291	65,562	67,529	69,555	71,642	73,791
Administrative	1,800	108,000	111,240	114,577	118,015	121,555	125,202
Maintenance	2,300	138,000	142,140	146,404	150,796	155,320	159,980
Utilities	1,300	78,000	80,340	82,750	85,233	87,790	90,423
Insurance	500	30,000	30,900	31,827	32,782	33,765	34,778
Residential Taxes	2,242	134,490	138,525	142,681	146,961	151,370	155,911
Commercial Taxes	364	6,556	6,752	6,955	7,163	7,378	7,600
Replacement Reserve	350	21,000	21,630	22,279	22,947	23,636	24,345
TOTAL	9,927	580,336	597,090	615,002	633,452	652,456	672,030
NOI		1,026,927	1,041,969	1,073,228	1,105,425	1,138,588	1,172,746
Debt Service		843,026	843,026	843,026	843,026	843,026	843,026
Remaining		183,901	198,943	230,203	262,399	295,562	329,720
DSC		1.22	1.24	1.27	1.31	1.35	1.39

7	8	9	10	11	12	13	14	15
1,806,367	1,860,558	1,916,375	1,973,866	2,033,082	2,094,075	2,156,897	2,221,604	2,288,252
128,958	132,826	136,811	140,916	145,143	149,497	153,982	158,602	163,360
59,703	61,494	63,339	65,239	67,196	69,212	71,288	73,427	75,629
7,828	8,063	8,304	8,554	8,810	9,074	9,347	9,627	9,916
(96,766)	(99,669)	(102,659)	(105,739)	(108,911)	(112,179)	(115,544)	(119,010)	(122,581)
(5,970)	(6,149)	(6,334)	(6,524)	(6,720)	(6,921)	(7,129)	(7,343)	(7,563)
1,900,119	1,957,122	2,015,836	2,076,311	2,138,600	2,202,758	2,268,841	2,336,906	2,407,013
76,005	78,285	80,633	83,052	85,544	88,110	90,754	93,476	96,281
128,958	132,826	136,811	140,916	145,143	149,497	153,982	158,602	163,360
164,779	169,723	174,814	180,059	185,460	191,024	196,755	202,658	208,737
93,136	95,930	98,808	101,772	104,825	107,970	111,209	114,546	117,982
35,822	36,896	38,003	39,143	40,317	41,527	42,773	44,056	45,378
160,588	165,406	170,368	175,479	180,744	186,166	191,751	197,504	203,429
7,828	8,063	8,304	8,554	8,810	9,074	9,347	9,627	9,916
25,075	25,827	26,602	27,400	28,222	29,069	29,941	30,839	31,764
692,191	712,956	734,345	756,375	779,067	802,439	826,512	851,307	876,846
1,207,928	1,244,166	1,281,491	1,319,936	1,359,534	1,400,320	1,442,329	1,485,599	1,530,167
843,026	843,026	843,026	843,026	843,026	843,026	843,026	843,026	843,026
364,902	401,140	438,465	476,910	516,508	557,294	599,303	642,573	687,141
1.43	1.48	1.52	1.57	1.61	1.66	1.71	1.76	1.82



August 31, 2020

Lisa Wong, Town Manager
Town Hall
71 Mount Vernon Street
2nd Floor
Winchester, MA 01890

RE: Developer's Financial Capacity for Waterfield RFP Response

We are writing in response to the request for evidence of our joint ability to finance the proposed Waterfield | Winchester project. As you will see based on our development experience set forth in the RFP and the previously submitted RFQ responses, Traggorth Companies and Civico have developed many similar-sized projects and have a track record of successful execution. Traggorth | Civico are jointly under construction on a very similar scale project in Reading using much of the same funding sources, including from the Department of Housing and Community Development (DHCD).

Also included in the package are Letters of Interest from banks and tax credit investors, all of whom we have successfully worked with in the past. Traggorth Companies is a well-known developer respected by DHCD, and has been allocated Low-Income Housing Tax Credits as well as other Commonwealth funding sources.

Understanding that a criterion of the RFP is to demonstrate financial capacity to cover two times the pre-development budget or more, we welcome further confidential review of our financials. Information sufficient to ensure accordance with this criterion will be provided by Traggorth | Civico under separate cover should it be requested by the review committee.

Sincerely,

Dave Traggorth
617- 817-2520
dave@traggorthcompanies.com

Andrew P. Consigli
617-646-9020
aconsigli@civicodevelopment.com

Patricia A. Capalbo
Senior Vice President

August 25, 2020

Mr. Daniel Hubbard
Traggorth Companies LLC
50 Summer Street
Boston, MA 02110

Re: Winchester Project

Dear Dan:

I am writing to confirm that Eastern Bank is very interested in providing a construction loan of approximately \$21,845,190 that will convert to a permanent mortgage of approximately \$15,030,515 for the above referenced project that will be developed by joint venture entity to be formed between Traggorth Companies LLC and Civico. We understand that this project would consist of building a 60 unit, new construction, mixed income rental units and two retail spaces on the Waterfield Lot in Winchester, MA that will create 40 units, affordable to families earning at or below 80% of AMI, therefore serving those in the community who are most in need, and that the remaining 20 units will be rented at market rate. We have worked with Traggorth Companies in the past and know that you are very experienced in the nuances of affordable housing and we hope to be a key partner in making this project a reality.

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 is, of course, subject to the completion of the Bank's due diligence and underwriting process for final commitment. However, we are extremely interested in your proposed project and are confident that your development team will be successful in developing a financial structure that will meet our needs.

Eastern Bank has financed a number of affordable and mixed-income 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 36 months for construction and up to 20 years for the permanent mortgage 2.) Amortization: up to 30 years 3.) Collateral: First mortgage on the real estate with a maximum LTV of 80% (an 85% LTV may be considered on an exception basis) and an assignment of the LIHTC equity and/or public funds we are bridging with a maximum advance rate of 90% 4.) Guarantee: Guarantee of Traggorth Companies and Civico will be required. 5.) Covenants: Borrower: Minimum DSCR of 1.10 times. Guarantor: Minimum liquidity and minimum net worth covenants to be determined. 6.) Interest rate: Fixed at closing at the FHLB cost of funds plus a spread in the 210 bps to 225 bps range with a floor of 3.75%. 7.) Commitment fee: ½%

Please note that this is not a commitment to extend credit but shall instead serve as a basis for future discussion. The Bank's ultimate decision will be based on the completion of due diligence and underwriting and will require additional information which will be requested at a later date. However, we would like to reiterate our interest in this project and are confident that your development team will be successful in negotiating a financial structure that meets our mutual needs. Please keep us informed as the project moves ahead. We welcome the opportunity to work with you on this exciting and worthwhile project.

Sincerely,



Patricia Capalbo
Senior Vice President



Fidelity Bank
16 South Main St.
Millbury, MA 01527

August 20, 2020

To Whom It May Concern:

It is our understanding that Civico has proposed a 60-unit mixed-income development in Winchester, Massachusetts in response to a competitive RFP issued by the Town of Winchester. We would be pleased to review potential construction or permanent debt financing for the proposed project at 25 Waterfield Road.

Please be advised that our bank has had loans with Civico and Consigli Real Estate Holdings, LLC. Our experience with the companies and the principals have been nothing less than outstanding. The principals have always provided everything requested for underwriting in a timely and complete manner. Their financials have been strong, and their cash flow sufficient to satisfy the loan requests.

We look forward to a continuing strong relationship with the companies and the principals. If presented with a loan opportunity our bank would look forward to the opportunity to review.

Please feel free to give me a call if you have any specific questions. I can be reached at my office at (508) 762-3644 or on my cell at (978) 502-6916.

Sincerely,

A handwritten signature in blue ink that reads "David Perry".

David Perry
Senior Vice President
Fidelity Bank



Massachusetts
Housing
Partnership

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

www.mhp.net

August 25, 2020

Dan Hubbard
Traggorth Companies, LLC
50 Summer Street
Boston, MA 02110

RE: Waterfield Lot
Winchester, MA

Dear Mr. Hubbard:

This letter is meant to indicate the interest, on the part of the Massachusetts Housing Partnership, in providing a permanent loan on a future mixed-use development project in downtown Winchester, sponsored jointly by The Traggorth Companies and Andrew Consigli. We understand the proposed transit-oriented project may involve the creation of approximately 60 units on what is currently the MBTA Commuter Rail parking lot for the Winchester Center stop on the Lowell Line. This location should be an ideal one for the mixed-income residential apartments and retail spaces planned for the site.

As the project scope is still in the nascent development stage, we are not able to quote a rate and term at this time. However, after a preliminary review of your operating projections we have determined that a loan amount of up to approximately \$15,000,000 would be feasible.

We can furthermore state our interest in working with this development team again. MHP currently will be the permanent lender on a \$7,100,000 loan for a 55-unit mixed-income new construction project currently underway in Reading, MA. We have found this team to be a strong and experienced one with whom we would entertain an application for financing in the future. Additionally, we have had several positive experiences with Traggorth Companies as a top-level affordable housing developer and consultant where, even as consultants, they really often act as developers on behalf of their clients.

We look forward to learning more about this project and providing more detailed information about MHP's terms and conditions related to a prospective permanent loan.

Sincerely,

Amanda Roe



Webster Bank, N.A.
200 Elm Street
Stamford, CT 06902

(203) 328-8145

August 20, 2020

Mr. Dan Hubbard
Traggorth Companies
50 Summer Street
Boston, MA 02110

RE: Waterfield Lot, Winchester, MA

Dear Dan,

This letter serves to express Webster Bank's interest in providing financing to an entity comprised of Traggorth Companies to assist with its efforts to develop 60 mixed income residential units, two levels of parking, and street level retail. Of the 60 units, 40 units will be restricted units and 20 market rate units. The 40 restricted units will include 8 at 80% AMI, 24 at 60% AMI, 2 at 50% AMI, and 8 at 30% AMI. The project will be funded utilizing 9% Low-Income Housing Tax Credits and Massachusetts Low-Income Housing Tax Credits.

Webster Bank understands and appreciates the need for affordable housing in MA, and is pleased to consider participating in this project. Depending on the ultimate approved project design and budgets, Webster would consider providing construction. We look to support Traggorth Companies because of our excellent banking relationship and our appreciation of the organization's well-recognized track record in affordable housing development.

Sincerely,

Robin M. Gallagher

Robin M. Gallagher
Senior Vice President
Webster Bank

CC: Peter Mosbacher, SVP, Webster Bank
Tony Lyons, National Equity Fund

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Outline of the proposed terms of the Land Disposition Agreement that will be provided for the use of Town-owned land;

We propose the following terms for consideration when negotiating the Land Disposition Agreement (LDA) as were recommended by Counsel.

Initial, pre-LDA Access Agreement – Below are proposed key terms for inclusion in a pre-LDA Agreement:

Given the estimated “Fall 2020” start date for the MBTA improvements project (which will convert two-thirds of the parking lot to “temporary” construction laydown/access space for the MBTA for up to an estimated three years), we would like an initial, pre-LDA access agreement. This would allow for updated site surveys, geotech, and a building condition assessment (for the COC Building). We would also hope for the Town’s assistance in facilitating an agreement with the MBTA that would allow for some limited access to their part of the lot even after they take ownership from the Town.

Land Disposition Agreement – Below are proposed key terms for inclusion in the LDA:

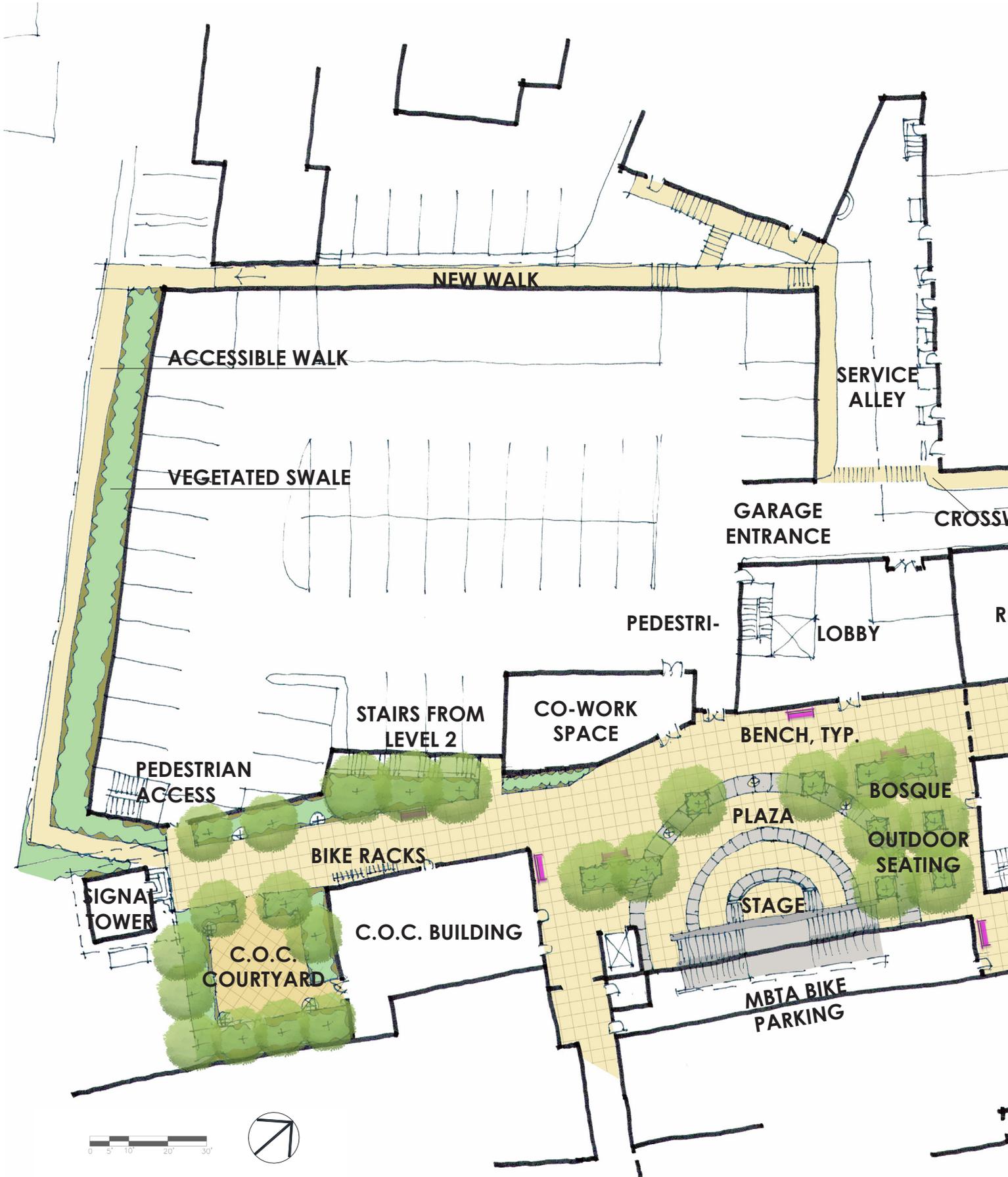
1. Initial Good Faith Deposit – We would be open to a relatively modest, refundable deposit, which would be deposited with a national title company.
2. Due Diligence Period – Similar to our other projects, we would prefer at least a 6-month due diligence period. This would allow for the complete review of all required aspects of the site and permitting of the mixed-use project, We would ask the Town to provide all available materials related to the property, in particular: any prior environmental assessments and information, correspondence, and agreements with the MBTA regarding the station improvement project.
3. Title and Survey Review – Running concurrently with the due diligence period, the goal of this would be to ensure that no further title matters would arise after the effective date of the LDA. Given the Town’s uncertainty regarding the “abandoned area” subject to the recorded access easement and the registered/recorded condition of title, this will be a meaningful part of the effort.
4. Ground Lease Negotiation Contingency – We would propose at least 12-months after the conclusion of the due diligence period to negotiate a reasonably acceptable form of a ground lease.
5. Permitting Contingency – We would propose at least 18-months after the conclusion of the due diligence period to permit the preferred mixed-use project. This contingency would need to be extendable for Force Majeure and any potential delays arising from the Town.
6. Financing Contingency – We would propose at least 24-months after the conclusion of the due diligence period to finance the preferred mixed-use project.
7. Town Cooperation – We would propose that the Town would have some continued obligations to cooperate with a variety of aspects related to the project. In particular, public financing to support affordability, support in permitting (both local and state levels) and abutter outreach.
8. Other – We would propose the LDA should include other mutually agreeable standard provisions (e.g., notice, closing documents/deliverables in addition to the ground lease, and default (ample opportunity to cure)).

Ground Lease – Below are potential key terms of the ground lease. We suggest that this lease would only be executed when called for under the LDA (essentially, at the point in which the MBTA has vacated the Waterfield Lot and Traggorth | Civico have fully permitted and financed the project and are ready to proceed with construction).

1. Base Ground Rent – We would propose payment of the one-time lease payment on a monthly basis over the first 12-months of the construction period.
2. Leasehold Financing – We believe this should be available without requiring the Town’s consent as landlord, within certain parameters (ex. real financing source, not over-levered). This would include standard leasehold mortgagee protections (notice, extended opportunity to cure, participation in casualty and condemnation adjustments/awards, standstill for period during which leasehold mortgagee would have to exercise leasehold mortgage rights to gain control of the property, no amendment or termination without leasehold mortgagee consent, new lease upon termination).
3. Assignment/Subleasing – We would suggest for the free assignability/subleasing of the entire leasehold interest upon completion of the project. It is acceptable for Town to have consent right prior to that benchmark. Subleasing to residential tenants should be without any Town involvement as long as commercially reasonable form of residential lease is used. The same flexibility for commercial leasing is preferred.
4. Insurance – We would support terms requiring commercially reasonable insurance, typical for similar ground lease transactions with construction component.
5. Alterations – We would support reasonable control being given to the Town over significant exterior design changes. We believe any interior/non-publicly viewable areas may be modified at our sole discretion.
6. Pre-Existing Conditions (especially hazardous materials) – We imagine that acceptance of the property will be on “as-is” basis, with all faults, especially for cleanup of any hazardous materials, with an indemnification of the Town with respect to pre-lease conditions and cleanup/remediation costs. However, we would propose that there be a carveout for 3rd party, non-cleanup related claims against the Town for the pre-ground lease period.
7. Indemnity/Guaranty – We would seek to avoid any separate environmental indemnity and/or a separate completion guaranty for the project.
8. Other – We would propose the Ground Lease to also include other mutually agreeable standard provisions (e.g., notice, default, remedies (excluding termination post-completion)).

03

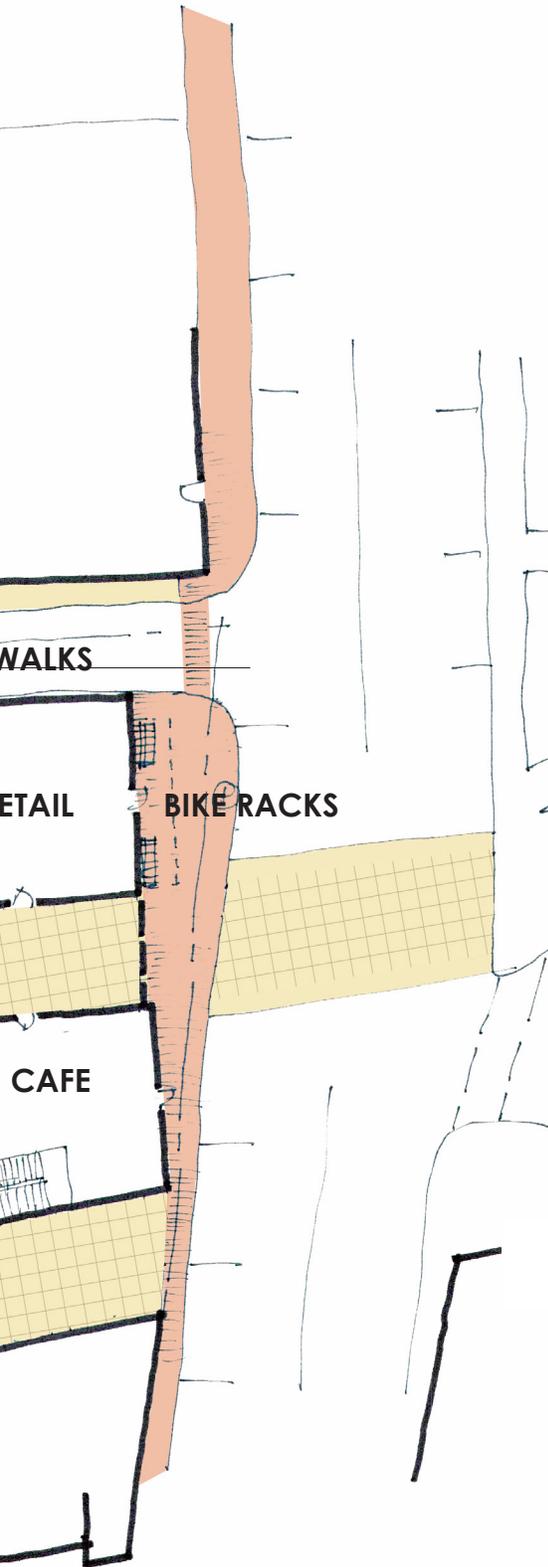
SECTION 3
DESIGN DRAWINGS



Placemaking in the Public Realm

The heart of Waterfield Block will be the new plaza that will be built to accommodate the new stairs to the MBTA platform. A monumental archway, which opens onto Waterfield Street and the Common, will frame the entrance to the plaza. The new plaza is designed with three distinct areas that will accommodate a variety of public uses.

- The Main Plaza north of the Chamber of Commerce (COC) Building will be anchored around a new stage that will back up to the new MBTA staircase. This stage can be a home for morning buskers performing for commuters or for programmed performances that require a small venue. To the north of the performance space is a bosque of trees that will provide shade for patrons of the new coffee shop on Waterfield. To the south of the performance space, will be a smaller grouping of trees and benches that provide a shaded area to wait for a companion or listen to a performance. This new plaza will provide a public space that will supplement the existing spaces on the Common. The plaza will be predominantly paved and will therefore appeal to the public when the grass of the Common is unwelcomingly soft and wet. It will be an urban space bound by buildings, softened at the edges by shade trees and enlivened by buzz of commuters. There will be strongly defined circulation paths and intentionally designed spaces on the edges of those paths to have a morning coffee and watch the movement throughout the site. It will be sunny in the morning with shady spots at its edges to allow for a reprieve on hot days. In the evenings and on weekends, when the inbound traffic lessens, it will be available for performances and used by community groups for events and gatherings.
- In front of the main entrance to the west of the COC Building there will be an open gathering area that will allow for more public events to be held at the COC. A row of trees next to the building will provide privacy for the residents of the 3rd floor common space.
- To the south end of the plaza, will be a courtyard off the COC Building that will allow activities in the building to extend outside into a semi-private enclosed courtyard. This will increase the square footage available for meetings and other events that the COC may have. The trees and plantings in this shady courtyard will serve as a contrast to the various hard-surfaced spaces found throughout the plaza.



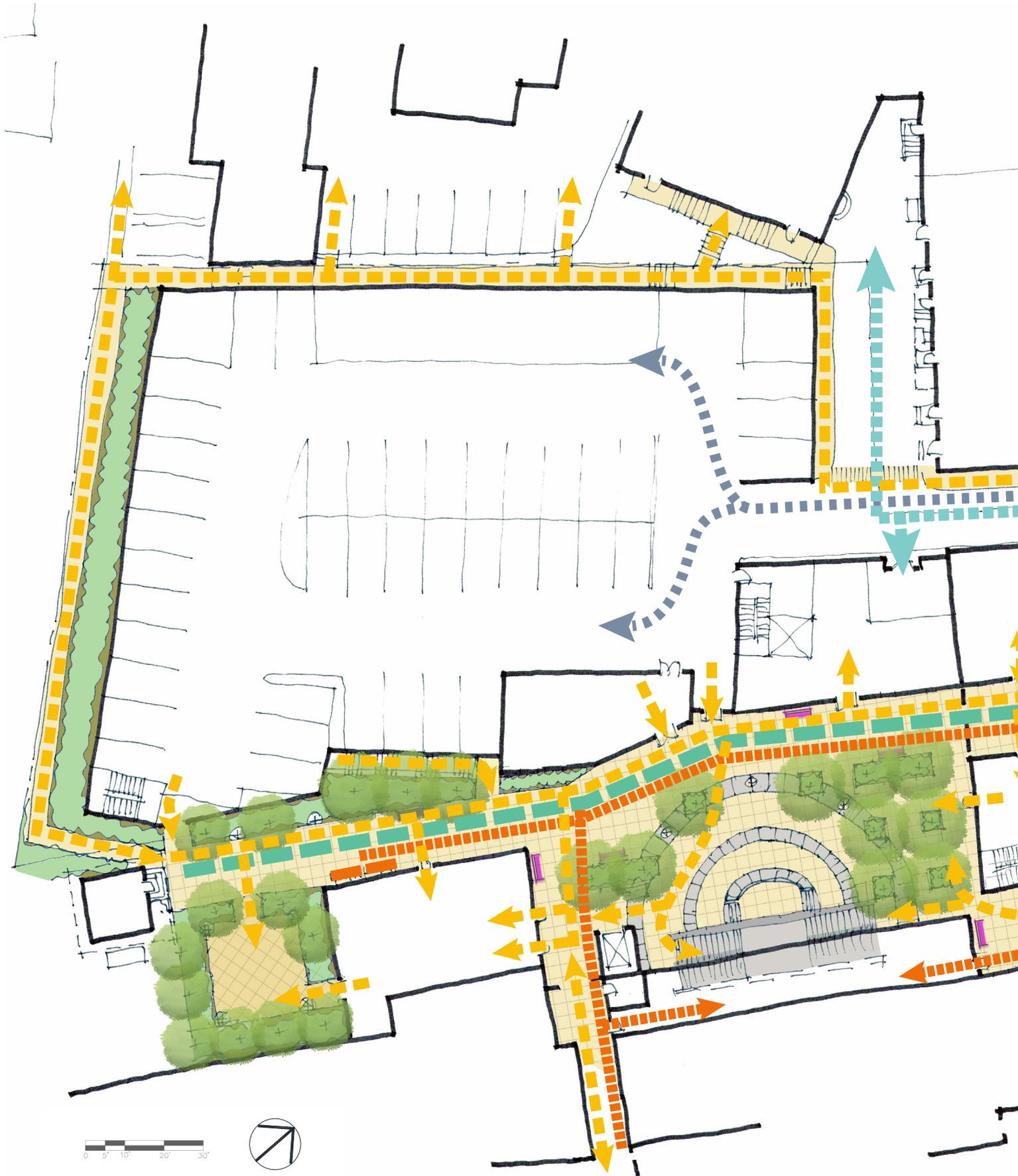
Tying the Project Into the Context of the Site

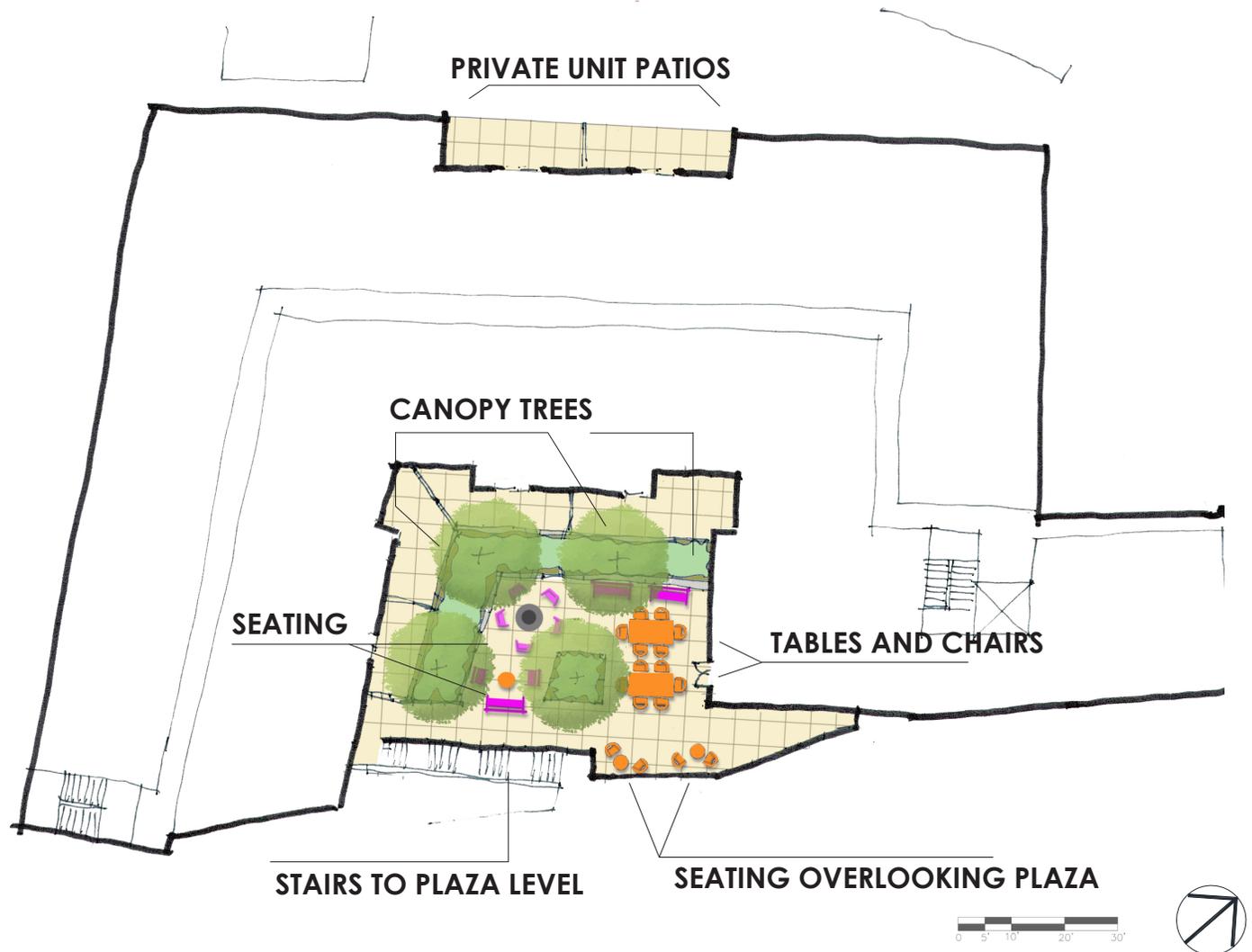
The new building's brick façade will carry the texture of the rest of Waterfield Street to the viaduct and the streetscape will also extend to fill the gap. The brick walks and light fixtures on upper Waterfield Street will be extended across the site to provide a consistent streetscape throughout the length of the street. The arched opening in the building will frame a view to the Plaza and invite the public into the space while sheltering the plaza from any noise pollution that may come from Waterfield Street.

The informal circulation throughout the existing parking lot will be rerouted to the edges of the site. This new system of walks will provide an accessible route along the south side of the property that will reimagine the walkways from Church Street for the new station and plaza. The walk along the south side of the property will run between the existing woods and a new vegetated swale that will clean the site runoff prior to entering the storm sewer system and eventually Wedge Pond.

The service alley behind the Waterfield Street businesses will be widened and a new walkway will be added to safely connect the path along the western side of the property to Waterfield Street. The new service areas and parking access for the project will share the existing service alley.

The new plaza will enhance the new entrance to the MBTA inbound platform. It will create a strictly pedestrian zone around the entrance creating inviting places to relax before or after a commute.





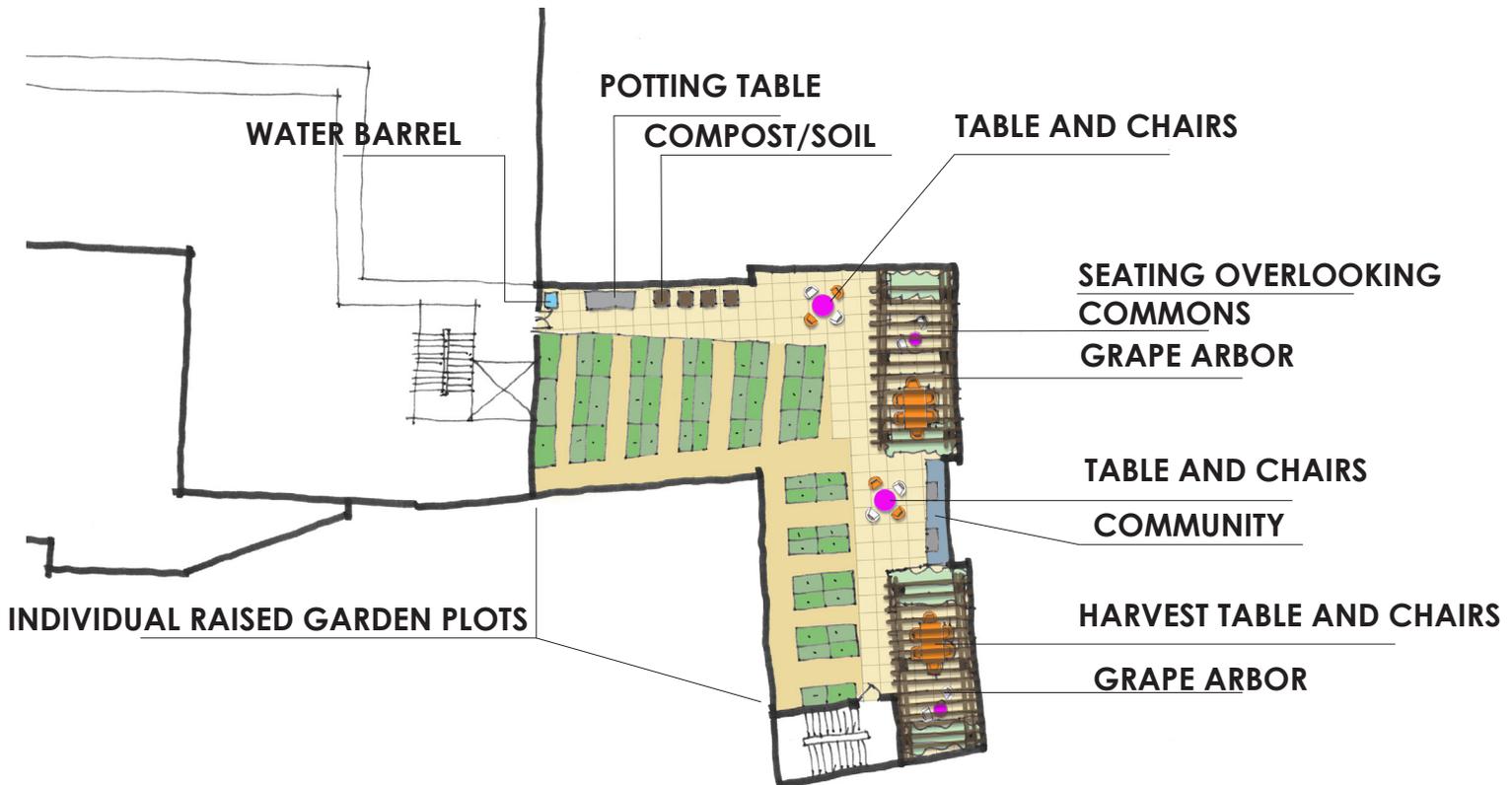
2nd Floor Roof Garden

Above the Garage Level will be a Roof Garden that will include small, private fenced gardens for the residential units that face the Roof Garden and an outdoor Common Space that will supplement the 2nd floor common room. The Roof Garden will provide outside Common Spaces that the residents can use to get outside, relax and socialize at a distance.

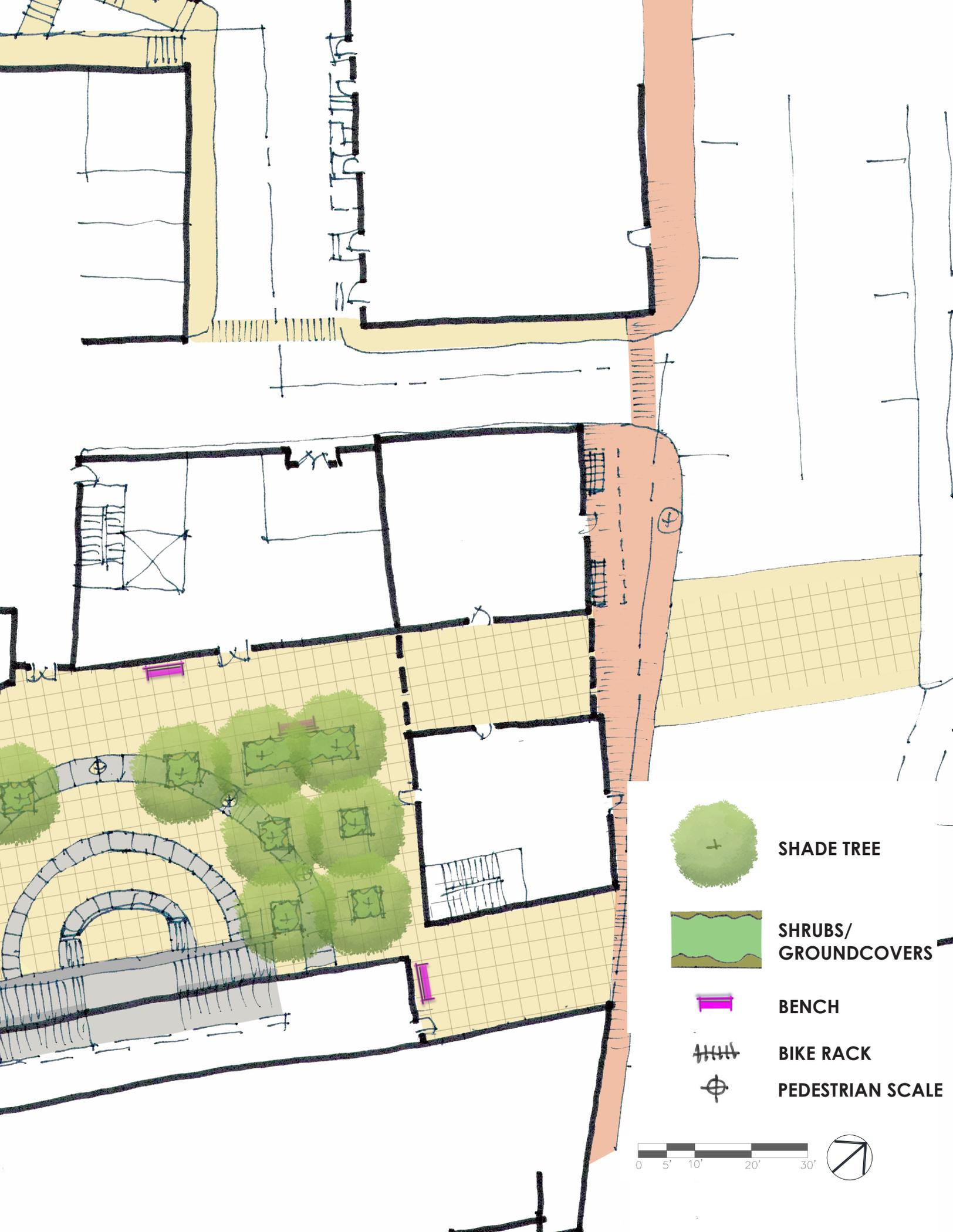
The space will have planting beds for trees and shrubs that will screen the view of the units from those in the Communal Spaces. On the upper levels, the tree canopies will provide some privacy for the units that overlook the Roof Garden. The main space will be furnished with tables and chairs so that residents can use the space under the trees both individually or in groups. The Garden will also be connected to the Plaza via a stairway along the eastern edge of the garage.

4th Floor Rooftop Community Gardens

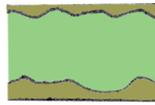
Above the Retail Spaces and Residential Units facing Waterfield Road will be a working garden. This garden will have up to 50 individual garden plots, a trellis for growing grapes and hardy kiwis as well as annual vines. The garden will also feature worktables, compost bins, a water barrel to recycle roof water for the gardens and communal tool storage area. There will be tables and chairs for socially distant socializing and eating meals in the garden overlooking the Common.







SHADE TREE



**SHRUBS/
GROUNDCOVERS**



BENCH



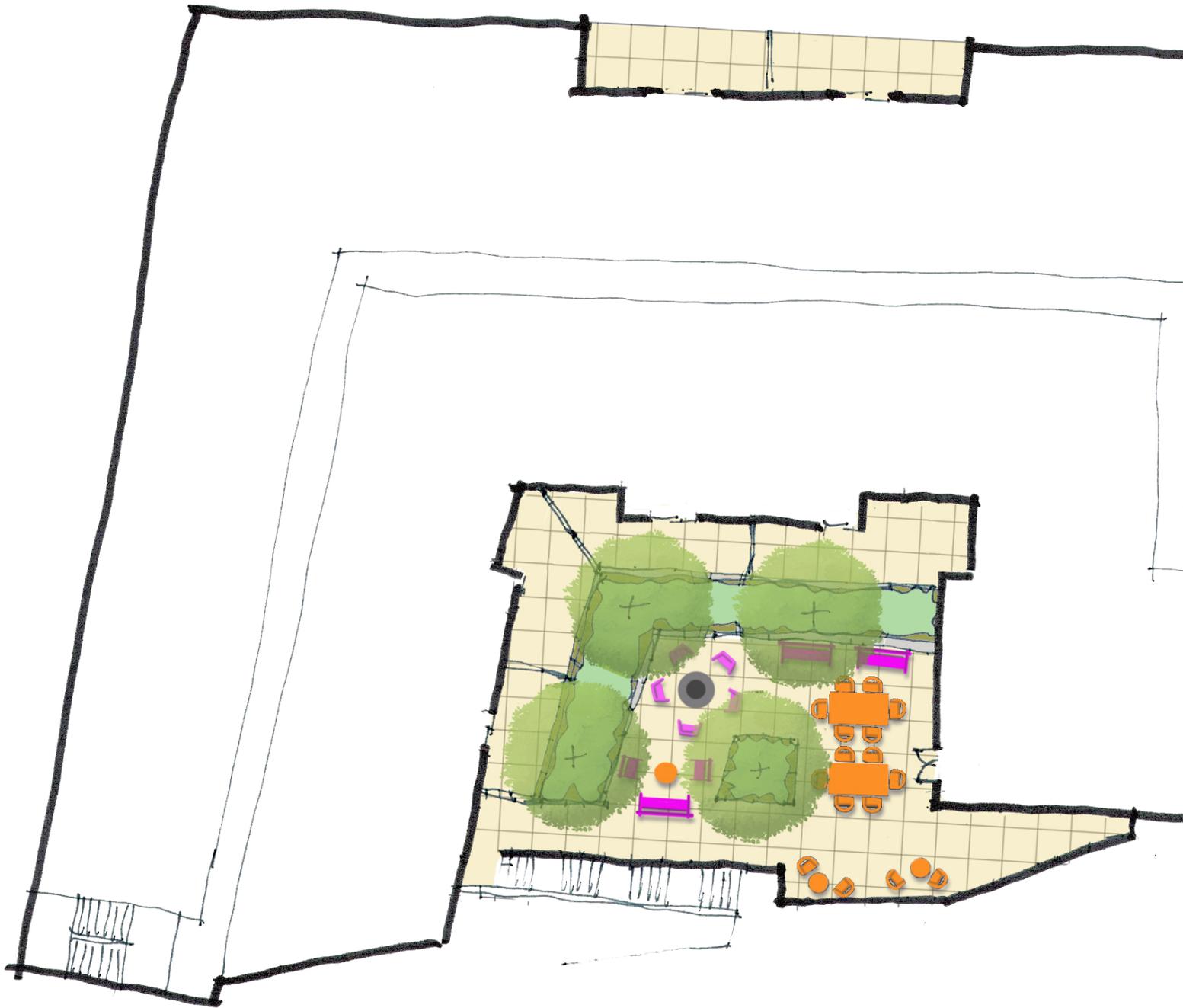
BIKE RACK



PEDESTRIAN SCALE



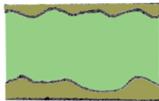
2ND FLOOR ROOF GARDEN



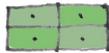
4TH FLOOR ROOFTOP COMMUNITY GARDENS



FLOWERING TREE



SHRUBS/
GROUNDCOVERS



GARDEN BEDS



WALKWAY

BIKE ROOM

RAMP DOWN
LOWER LEVEL

PUBLIC PARKING
40 SPACES +/-
AT GRADE

COWORKING
SPACE

PEDESTRIAN
ACCESS

INTERIOR PLANTING

COMMUNITY SPACE





SITE/FIRST FLOOR PLAN

DOWN TO LEVEL

BIKE ROOM

SERVICE ALLEY

PARKING ACCESS

TRASH

RETAIL

PEDESTRIAN ACCESS

RESIDENTIAL LOBBY

CONNECTION TO PARK

PLAZA
[See Landscape Plans]

RETAIL

DROP-OFF & LOADING

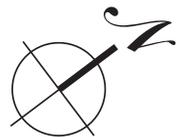
WINCHESTER CENTER
MBTA STATION



SCALE: 1"=20'-0"
0 10 20 30 40 50



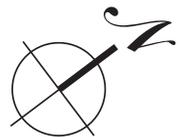
SECOND FLOOR PLAN



SCALE: 1"=20'-0"
0 10 20 30 40 50'



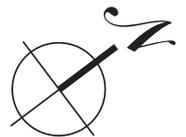
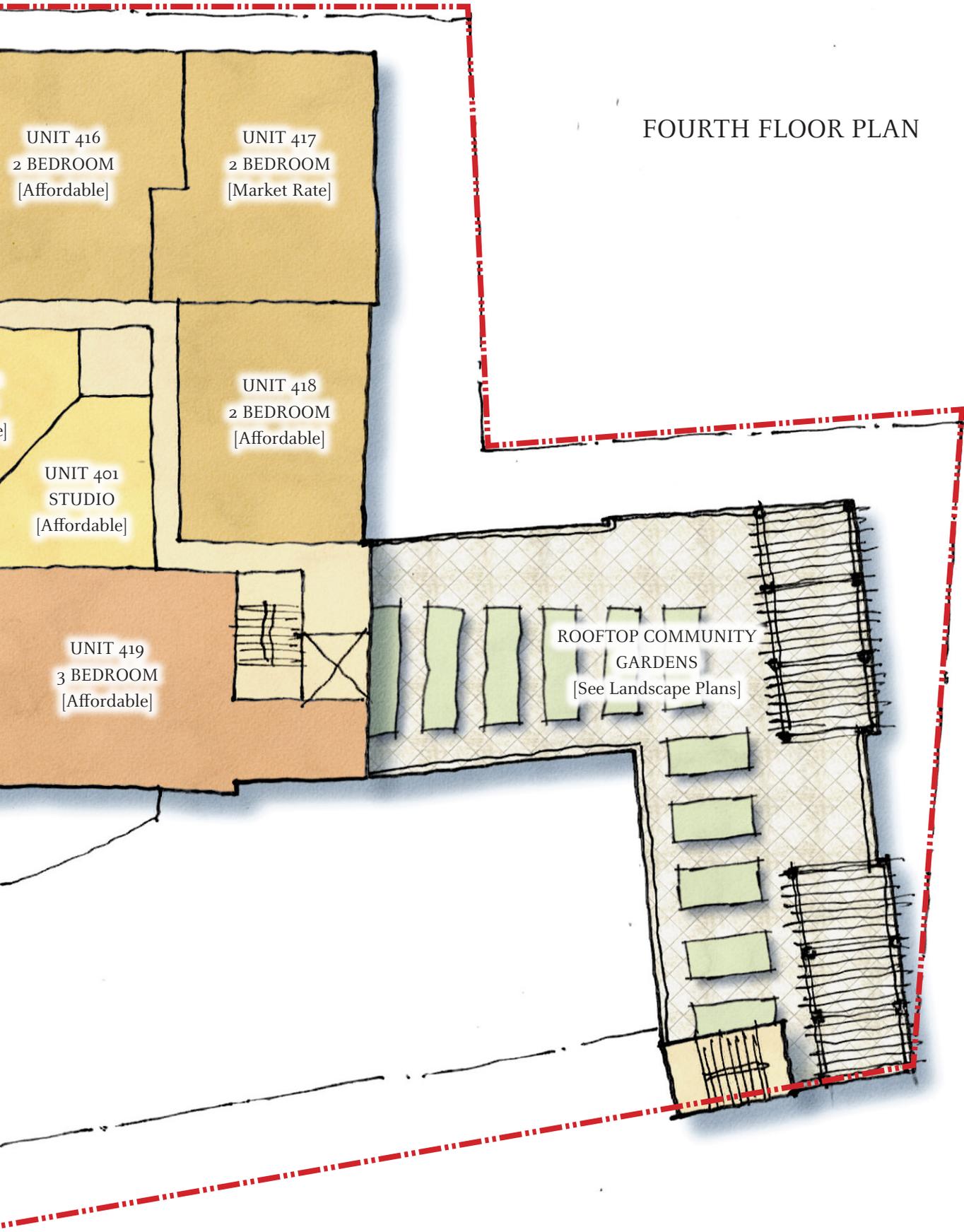
THIRD FLOOR PLAN



SCALE: 1"=20'-0"
0 10 20 30 40 50'

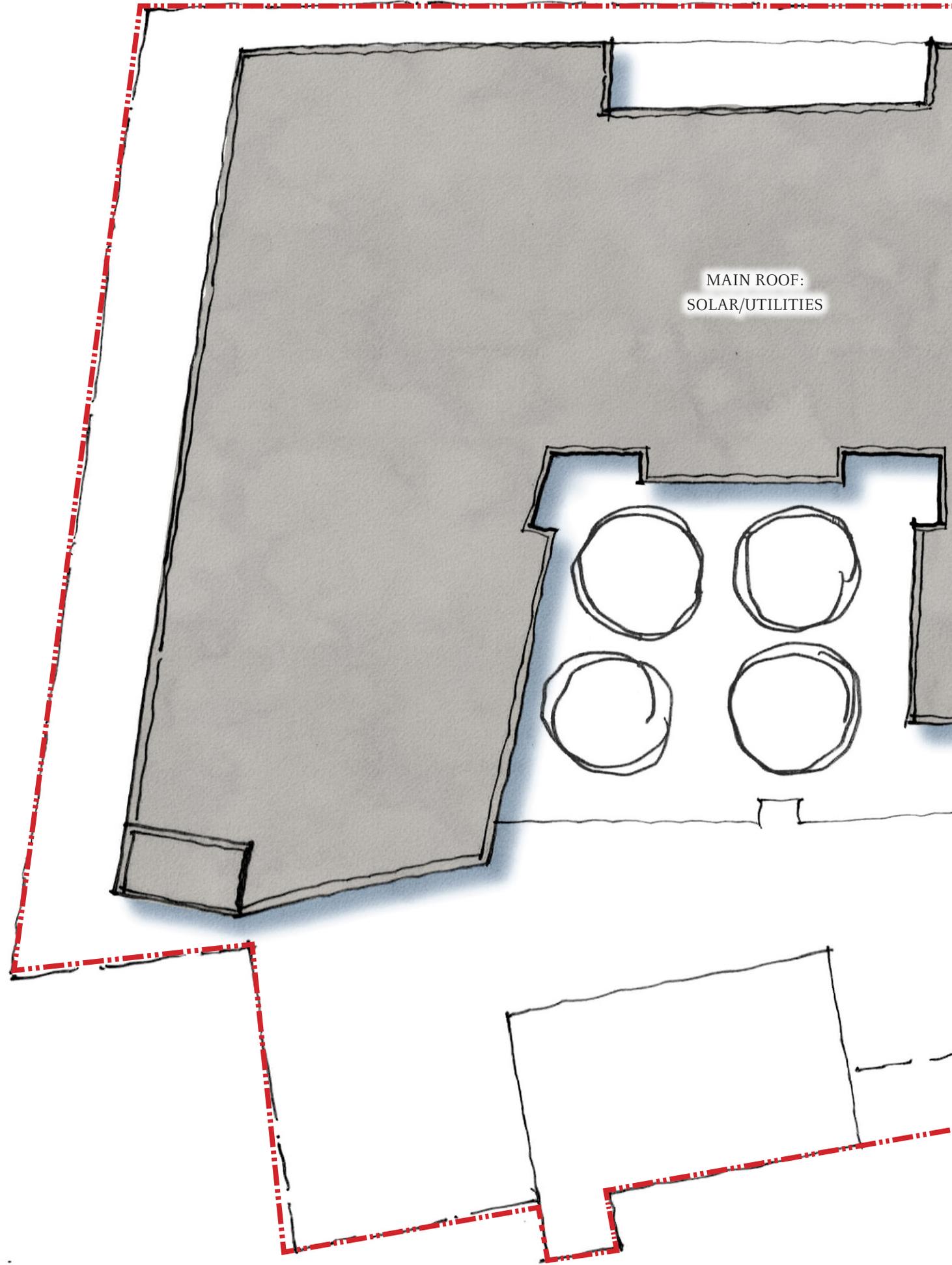


FOURTH FLOOR PLAN

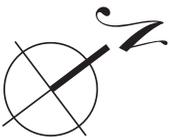
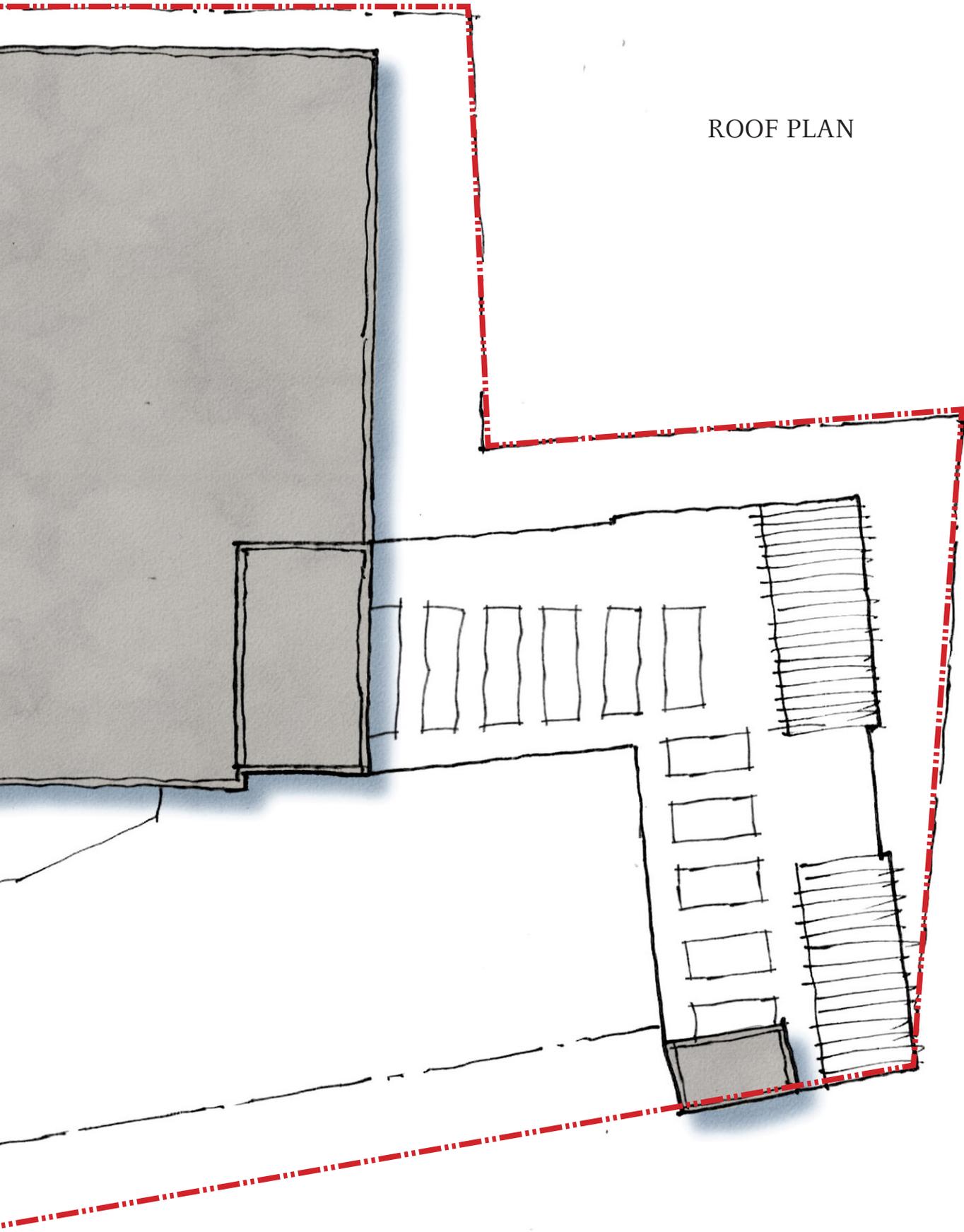


SCALE: 1"=20'-0"
0 10 20 30 40 50'

MAIN ROOF:
SOLAR/UTILITIES



ROOF PLAN



SCALE: 1"=20'-0"
0 10 20 30 40 50'

A hand-drawn site plan of a residential building and parking area. The building is an L-shaped structure with a ramp on the top right side. The parking area is located below the building and is divided into two rows of spaces. A red dashed line indicates the property boundary, and a blue dashed line indicates a diagonal boundary. A yellow shaded area is located at the bottom left corner of the building.

RAMP UP TO
MAIN LEVEL

RESIDENTIAL PARKING
45 SPACES +/-
BELOW GRADE

LOWER LEVEL PLAN



SCALE: 1"=20'-0"

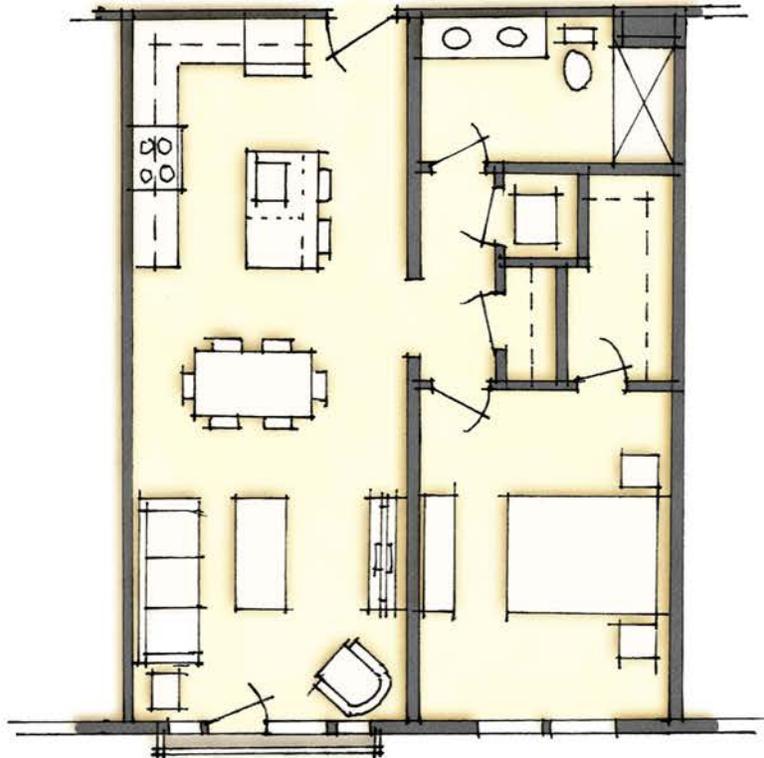
0 10 20 30 40 50'

“These are a representative example of how we will spread the units throughout the building, but final choices of affordable unit location will happen at a later date with the involvement of DHCD.”

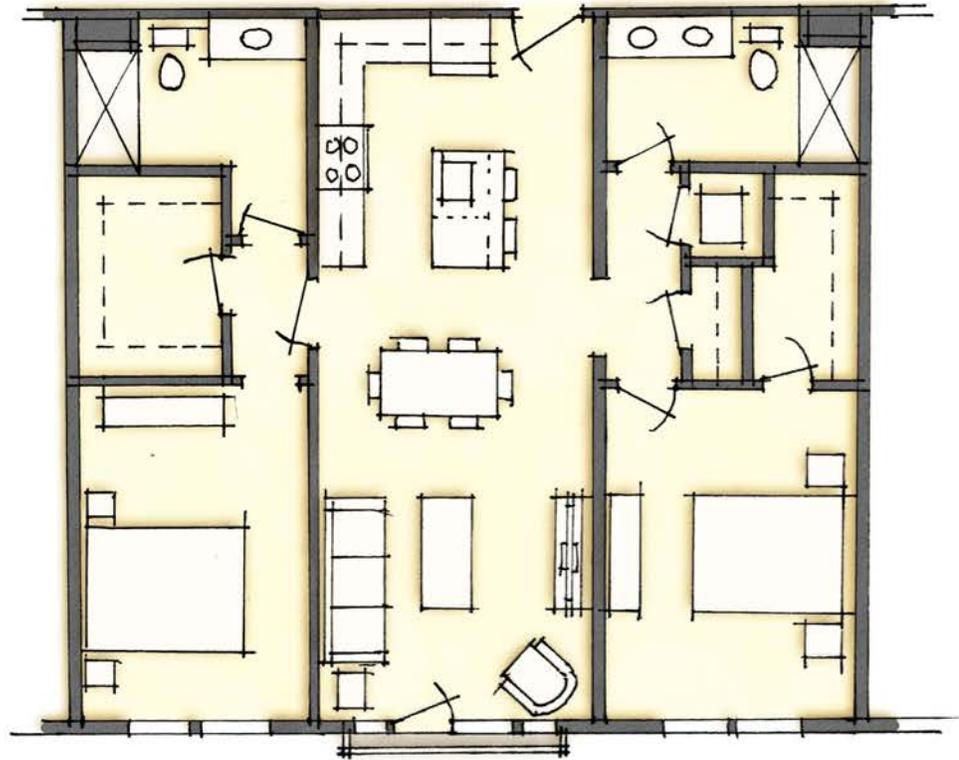


Typical Studio Unit
500 - 550 sf +/-

Typical 1BR Unit
700 - 750 sf +/-



Typical 2BR Unit
900 - 1,000 sf +/-



Typical 3BR Unit
1,100 - 1,200 sf +/-





SIGNAGE



SIGNAGE

LARAWAY RD

P
LARAWAY ROAD
PUBLIC PARKING

THANK YOU
TO THE
COMMUNITY

ANDERSON

WALKWAY



SIGNAGE

SIGNAGE



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FREYA SURABIAN DESIGN ASSOCIATE

INTERIOR ARCHITECTURE & DECORATION

NO PICK UP ONLY

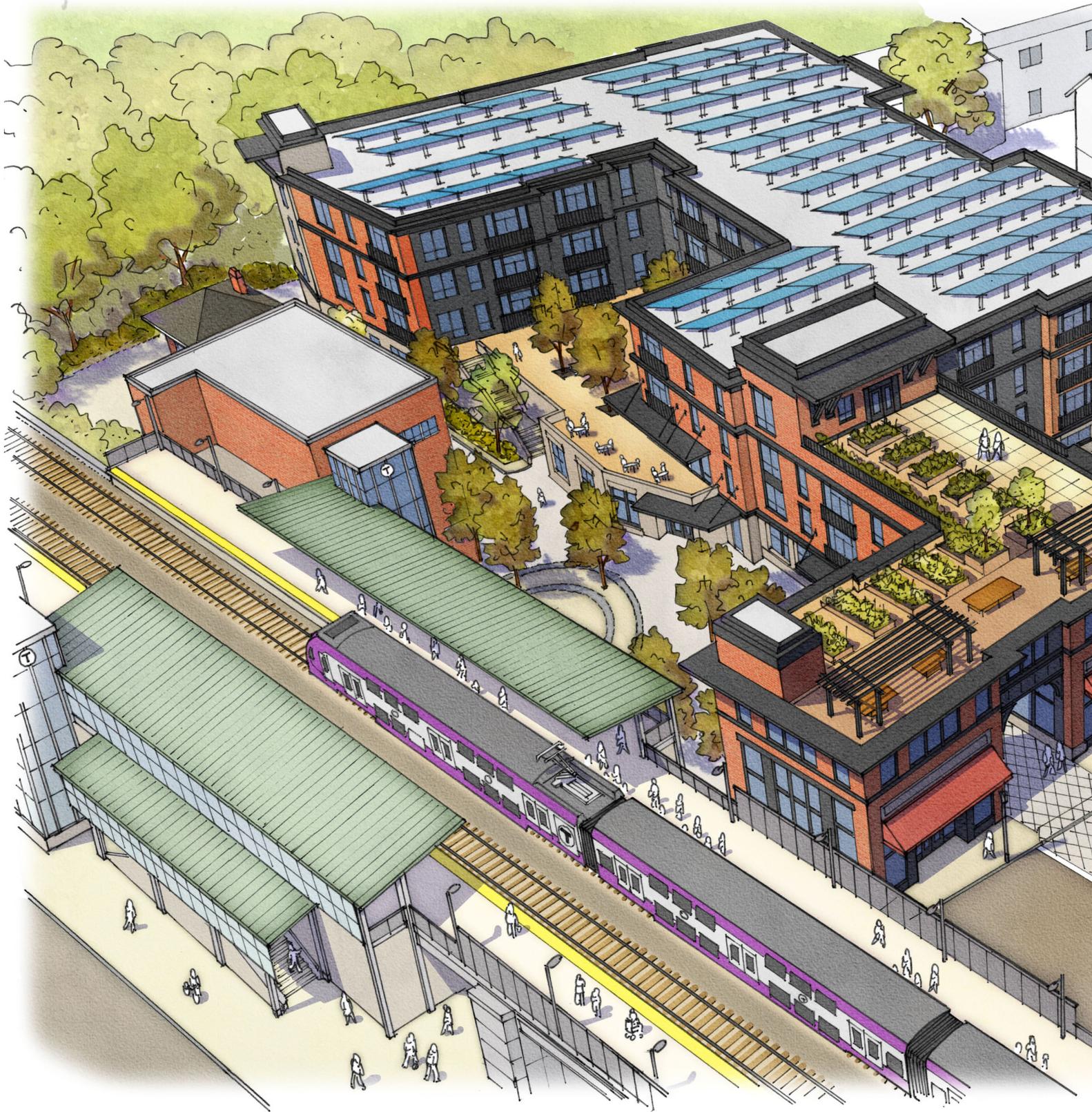
NO PICK UP ONLY



S

21ST CENTURY COUTURE

BUICK









04

SECTION 4 MARKETING | MANAGEMENT

Wingate Companies

Corporate Profile



WINGATE COMPANIES | 100 Wells Ave, Newton, MA 02459

THE RIGHT PEOPLE. THE RIGHT REAL ESTATE. THE RIGHT RESULTS.

About Us

Wingate is differentiated by its experienced team of professionals who implement effective management practices to maximize opportunity and value for property owners and investors.

- 57 years of demonstrated success
- Experienced professionals that focus on the financial objectives of ownership
- Strives to enhance the quality of living for residents

Our Experience

Wingate manages over 16,000 multifamily apartment homes in 18 states. These 187 properties are both owned by affiliates and on behalf of our clients.

- Demonstrated success in managing apartment homes for individuals, families and the elderly
- Portfolio includes both urban and suburban properties including high rise, low rise, garden and townhouses
- Affordable programs administered by state and federal agencies including HUD, Mass Housing and Rhode Island Housing. This includes 52 LIHTC Properties. And 90 HUD subsidized properties.
- Over 114 properties in the Wingate portfolio are financed, insured or subsidized by HUD.
- Affordable programs include Project Based Section 8, Section 8 Vouchers (enhanced), Project Based Vouchers, Section 236, Home Funds, Section 13-A, NSP, Section 42 LIHTC, MassHousing, MRVP, Section 202, SHARP, 40B and Workforce Housing Properties.
- Over 3,000 apartment homes in the Wingate portfolio are market rate (17 properties) or include market rate homes (16 properties).



Management Services

Wingate has experience in all phases of the development and construction process as well as the transition to routine management operations.

- An understanding of the owner's objectives, which are then reflected in the budget process and onsite operations
- Exceptional on-site management policies and procedures including compliance, routine and preventive maintenance programs
- Tailored reporting packages for owners, agencies and lenders
- Exceptional financial budgeting and multi-year forecasting
- Multi-year capital improvement programs with reserve replacement analysis
- Efficiencies in purchasing supplies, utilities and insurances
- Quality accounting practices with internal controls
- Resident Service Programs
- Proactive REAC procedures to ensure optimum scores
- Rental and leasing initiatives to maintain highest occupancy levels
- Energy efficient auditing and mechanical system enhancements
- Effective strategies to maximize the efficiency of operating costs
- Tax-assessment analysis in partnership with tax professionals; aimed at minimizing property tax liability
- Risk-management analysis and competitive property insurance resources
- Development of specifications for capital improvements, property renovation and construction
- Strategic marketing programs designed to attract qualified residents and increase occupancy levels

Focus

Wingate's experienced real estate professionals are uniquely qualified to achieve short- and long-term objectives of ownership.

- Specifically designed management plan to meet the owner's objectives
- Enhancing revenues by maximizing rental rates through the various state and federal programs
- Maximizing revenues through laundry agreements, resident service charges and other ancillary income
- Reduce operating expenses through effective bidding processes, energy purchasing and efficient personnel management
- Compliant with the Low Income Housing Tax Credit Program (LIHTC Section 42)
- Aggressive marketing and occupancy programs specifically designed for each properties' needs

Social Awareness

Wingate is dedicated to bringing positive changes to the communities it serves through the promotion of health, wellness and educational programs. This is accomplished through the support of many organizations. Two of the organizations are:

- *Operation P.E.A.C.E. (Positive Education Always Creates Elevation)* is a program that promotes academic achievement, computer literacy, as well as social, vocational and technical skills. Operation P.E.A.C.E was founded in 1995 in Wingate's Bedford Pines Community in Atlanta, GA. In 2001, Wingate opened a second location in Boston, MA.
- *Hospitality Homes* provides short-term housing for out-of-town families who have loved ones undergoing medical treatment in the Boston area. In 2003, Wingate donated the use of an apartment at Reservoir Towers in Brighton, MA, which has since hosted more than 70 families.



Mark S. Schuster*Principal*

Mark Schuster, Principal, is responsible for the overall investment strategy of Wingate and its affiliates—a group that has been involved in the successful acquisition, development, ownership and management of real estate for 50 years.

The company and its affiliates currently own and operate approximately 12 million sq. ft. of multifamily homes and commercial office properties in the eastern United States and Texas, and have acquired, developed, financed and sold approximately \$1.5 billion of commercial office and multifamily real estate. The current portfolio includes over 16,000 apartment units and 500,000 sq. ft. of office properties that are either owned by affiliates or managed on behalf of both private and institutional clients.

Prior to forming Wingate/Bluestone Holdings, Mark held various executive positions with Continental Wingate Company. He served as President of Continental Wingate Capital Corp., Executive Vice President of Wingate Development, and President of Wingate Management Company from 1978 through 1990.

Mark has served or currently serves on the Boards of Continental Wingate Company, the National Housing Rehabilitation Association, the Hebrew Rehabilitation Center, the Recuperative Center, The Rivers School (Weston, MA), Tufts University Board of Overseers, Tufts University Entrepreneurial Leadership Committee, and the President's Council of Wheaton College. He has continuing involvement with the National Kidney Foundation, Brigham & Women's Hospital, and Dana Farber.

Mark graduated from Tufts University in 1978.

Michael Martin
President



Michael Martin, President of Wingate Management Companies, has over 35 years' experience in the management of mixed income, assisted family, and senior housing in a variety of urban and suburban settings. At Wingate, he oversees all property operations throughout the entire Wingate portfolio.

Prior to joining Wingate, Michael was the Senior Vice President at WinnResidential where he worked for 20 years. Michael has extensive experience working with HUD and state housing finance agencies. He has managed market-rate housing, student housing and is well-versed in HUD Section 8, Section 236, Public Housing, HOME and LIHTC programs. Michael was involved on the property management side working with Trinity Financial, the development partner selected by the Housing Authority of the City of New Haven for the HOPE VI redevelopment of Quinipiac Terrace. The redevelopment occurred in three phases from 2005 and completed in 2011 transforming a severely distressed public housing development into a vibrant new mixed-income community providing 193 new units of affordable and mixed income rental housing. Michael also worked directly with the New Haven Housing Authority now known as Elm City Communities on the William T. Rowe apartments where the housing authority completed a land swap with Yale-New Haven Hospital. The development plan allowed for the new construction of high-quality housing units on an underutilized parcel of land for mixed-income residents. Michael was also directly involved in the redevelopment of Elm City Communities West Rock Apartments, 495 new units comprised of two neighborhoods, Rockview and Brookside, in the city of New Haven. Of those units, 80 homeownership including 60 market-rate units and 415 rental units including 70 elderly units provide a safe, viable mixed-income neighborhood. He was also responsible for the management of 12 affordable senior living communities for the Diocese of Bridgeport. In the past Michael has had a strong working relationship with CHFA and the Hartford HUD office. Over the course of 12 years he managed in excess of 40 affordable communities in the State of Connecticut.

Approximately 30 years ago, Wingate redeveloped the original community known as the Bedford Pines in Atlanta Georgia which consisted of 733 units of Section 8 housing spread across 75 buildings. In December 2016 City Lights I, a senior apartment community celebrated its grand opening. The 80 one-bedroom affordable apartment community was one of the beginning steps of the revitalization of the Old Fourth Ward, and the first step of a multiphase redevelopment of the Village of Bedford Pine in the Old Historic Fourth Ward of Atlanta, Georgia. Wingate Companies developed this affordable senior housing community in partnership with HUD, Invest Atlanta, the City of Atlanta, the Community Affordable Housing Equity Corporation, Sugar Creek Capital, and Georgia Department of Community Affairs.

City Lights II is the second phase of the multi-phase, multi-year redevelopment plan. This master planned redevelopment consists of new construction, substantial renovation and historic preservation. The goal is to convert the 733 units of Section 8 across 75 buildings into approximately 1,200+ units of mixed income across roughly 15 buildings and is expected to take 5-7 years.

In 2019 Wingate assumed management of 808 Memorial Drive, an expiring use Section 236 property in Cambridge Massachusetts. Through the RAD program and working with HUD, MHFA & CHA to restructure the property, 808 Memorial Drive continues to provide long-term rent protection to 212 units through project based and enhanced vouchers.



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Throughout his career, Michael has developed expertise in many areas of property management, most notably: budgeting; personnel development; training; maintenance/capital planning; compliance; administrative procedures; agency reporting and relationship building.

Michael's commitment to affordable housing is evidence by his tenure of over 30 years on the Board of The Neighborhood Developers in Chelsea, Massachusetts. At various times, he has served as President, Treasurer and currently chairs the development and finance committees. Michael attended Boston University, where he earned his BA and Northeastern University where he earned his Masters in Business Administration.

David Blumberg

Executive Vice President



David J. Blumberg, Executive Vice President of Wingate Management Company, has over twenty years' experience in the property management industry. In addition to corporate responsibilities, he oversees market-rate and affordable housing portfolios. His expertise spans numerous areas of property management including annual budgeting, cost control, financial planning and recommendations for capital improvements. David is driven to obtaining maximum rent levels and reducing operating costs in order to meet the financial objectives of owners.

Prior to Wingate, David oversaw the portfolio of residential and commercial properties for Homeowner's Rehab, Inc. in Cambridge, Massachusetts. Before HRI, he served as Senior Vice President at WinnResidential where he managed a portfolio of over 175 mixed-use and market rate properties for several Community Development Corporations with numerous ownership entities in Massachusetts, Rhode Island, New York and New Jersey.

David is a graduate of The American University of Washington, DC where he earned his Bachelor of Arts in Communications.

Lindsay Stathos
Regional Manager



Lindsay Stathos joined Wingate Management in October 2011. She is the Regional Manager of a diverse portfolio including Market Rate and Mixed Use Properties in Maryland, Massachusetts and New Hampshire, managing 1340 apartment homes and 9 communities. In this role, Lindsay oversees all aspects of the portfolio’s operations; including property operations, personnel and human resources, staff training, risk management, administrative, financial oversight, and capital improvements. In addition to the oversight of these standard property operations, Lindsay has managed multi-million dollar add-value rehabs to reposition assets in their market as well as the branding, onboarding and lease up of new developments.

Prior to joining Wingate, Lindsay worked at Equity Residential for 6 years. As Leasing Director, she was responsible for stabilizing occupancy through occupied renovations and driving market rents at Equity’s largest asset at the time, Skyline Towers (949 apartments).

Prior to that, she was a Leasing Director in Virginia for a garden style apartment community, consisting of 599 apartments. There, she increased rental rates, maintained an occupancy of 95% and above and kept delinquency consistently under 1%. Prior to that Lindsay was an Assistant Manager at a luxury mid-rise where she worked closely with high-end clientele in Massachusetts. Lindsay was known at Equity, and continues to be known today, for her excellence in customer service resulting in high levels of resident retention and ensuring rent grown, even in challenged economies and markets.

Mike Worrick
Senior Vice President of Facilities



Mike Worrick, Senior Vice President of Facilities has nearly 35 years’ experience with maintenance, facilities, and construction management. He currently oversees Wingate’s facilities operation for 14,000+ apartments.

Mike provides leadership that sets and sustains Wingate’s routine and preventive maintenance standards by ensuring value for all capital expenditures and by monitoring the physical condition of each property in the portfolio. This focus on facilities management satisfies ownership, management, lender and agency objectives. Due to his longevity in the industry, Mike’s responsibilities are wide-ranging and comprehensive.

They include oversight of all maintenance and capital improvement projects; management of Wingate’s contract bidding procedure; as well as development and training of procedures for agency inspection protocols. Mike has cultivated a high level of expertise in his maintenance routines such as landscaping, plumbing, painting, HVAC and exterior improvements, etc.

At Wingate, Mike directly oversees all Regional Facilities Managers throughout the organization. Through a maintenance committee, he develops programs and provides training to maintenance and management personnel in order to ensure his teams are knowledgeable and licensed in all required areas of proficiencies.

Prior to joining Wingate in 2014, Mike worked at WinnResidential for most of his career. As the Vice President of Maintenance for Winn, he was responsible for a portfolio of over 35,000 apartments.

Mike is a Certified Manager of Maintenance (NCHM), Advanced Instructor of Maintenance Operations (NAAEI) and he has a Credential for Green Property Management (NAAEI & NAHMA).



Amberin Khan*Vice President of Administration*

Amberin Khan, Vice President of Administration, is responsible for increasing administrative efficiency and performing organizational assessments at Wingate Companies. Much of this endeavor is accomplished through planning, developing and implementing company policy independently or via committee. Amberin works with all departments and regions on varied projects to carry out the following functions: assess operational efficiency; identify issues; make recommendations for improvement; and propose new and novel solutions. She is also heavily involved with the Human Resources and Training operations, and is responsible for new business proposals and special projects. In addition, she manages a wealth of corporate information for the company.

Prior to joining Wingate in 2013, Amberin gained nearly 10 years of experience in the Real Estate industry at WinnResidential in Boston. As Executive Assistant, she worked for the Executive Vice President on myriad matters throughout all departments and regions, and the cornerstone of her role was managing client relations. As Training Coordinator, she developed expertise in Learning Management System administration and general training support. Then as Special Projects Coordinator, she developed a comprehensive repository of Requests for Proposals—a major function of acquiring new business. She has served a variety of roles within her previous positions; therefore, offers her wide-ranging experience as a generalist to improve Wingate’s administration and organization.

Joy Agnelli*Affordable Programs Administrator*

Joy Agnelli, Affordable Programs Administrator, is a dedicated professional with thirty-one years of experience in the affordable housing industry. Joy started her career with Wingate 31 years ago and meritoriously worked her way up from Property Manager, to Supervisor of 1000 units in the Northeast Region, to supervising a staff of 25 people. Joy’s broad perspective has enabled her to facilitate interdepartmental success.

Joy’s expertise in the various aspects of subsidy management and compliance are an asset to Wingate’s operations. She ensures the accurate and timely execution of subsidy processing, in accordance with the Department of HUD regulations. In addition, she provides on-going guidance, while instructing and supporting company-wide personnel to meet the complex demands of the affordable housing industry. Her specific responsibilities include oversight of occupancy maximization, rent and subsidy collection, processing rent increases and special claims, and minimizing vacancy loss. Joy is highly regarded within Wingate for her ability to interpret industry regulations and troubleshoot complicated scenarios in order to meet agency audits and expectations.

Joy possesses extensive knowledge in Section 8, LIHTC and HOME programs. She holds numerous industry designations, including Advanced Certified Occupancy Specialist, Tax Credit Specialist, and Certified Fair Housing Coordinator.

Peter A. Nowak

Senior Vice President, Corporate Controller



Peter A. Nowak, Senior Vice President and Corporate Controller of Wingate Companies, is responsible for all financial and tax reporting as well as financial compliance with HUD, state housing and finance agencies, and other lenders. He is also involved in mortgage financing and rental assistance payment contract renewals. Peter has more than 25 years of experience in the real estate industry, including management, acquisition, development, construction, rehabilitation and operation of commercial, retail, residential and multifamily housing properties.

Prior to joining Wingate in 2002, Peter served as Corporate Controller from 1996 to 2002 at Towermarc Corporation, a real estate development and management company with property in Massachusetts, Florida and Tennessee. Before working with Towermarc Corporation, Peter was employed in the public accounting industry where he held various supervisory and management positions.

Peter is a CPA and a member of the American Institute of Certified Public Accountants and the Massachusetts Society of CPAs. He received a BS degree from Bentley University in 1987.

Reza Mahban

Senior Portfolio Controller



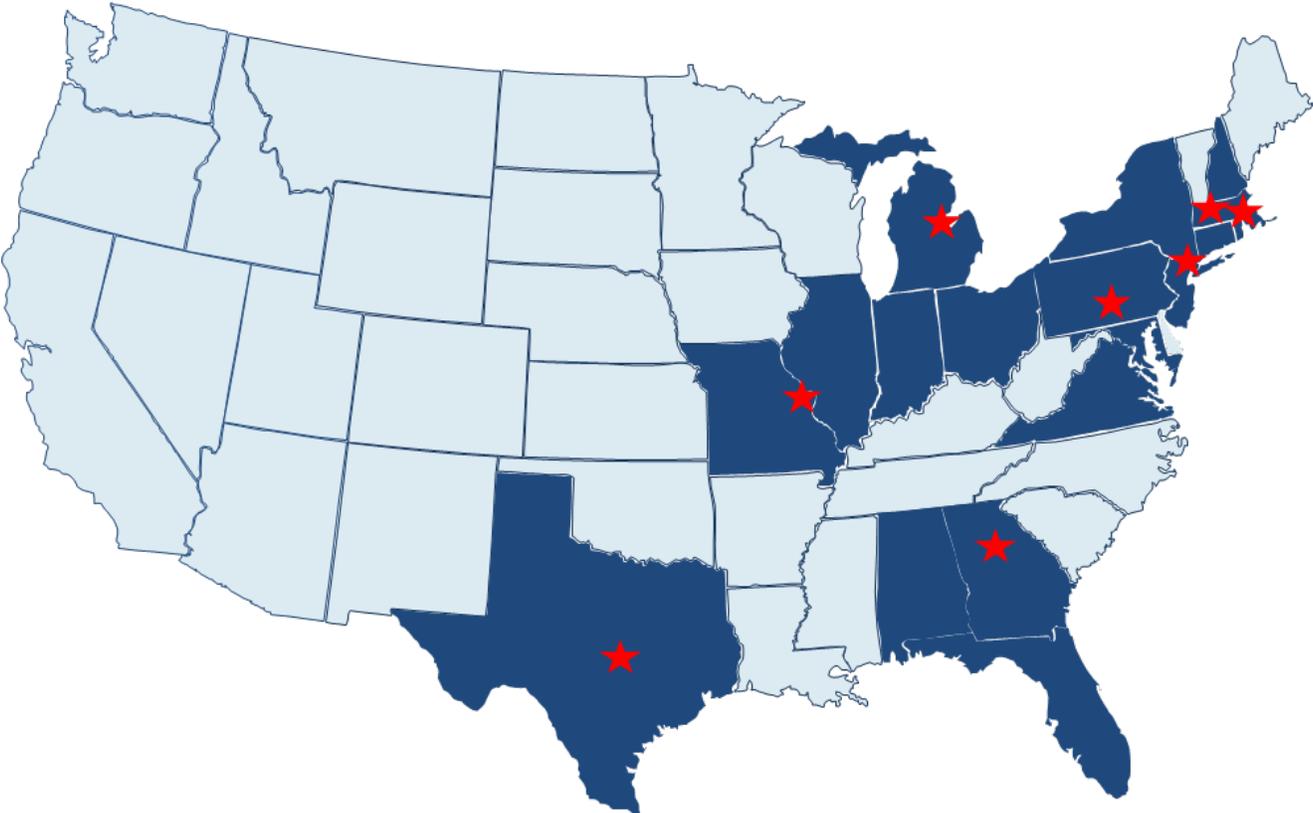
Reza Mahban, CPA has been with Wingate Management Company since August of 2011 in the capacity of third-party controller. Reza is currently managing a portfolio of over two thousand units of regulated residential and commercial real estate in New England and Michigan. Reza has more than twenty years of experience in public accounting, of which the past sixteen years have been concentrated in properties regulated by low income housing tax credit and other local and governmental agency regulated real estate development.

Reza is a member of the American Institute of Certified Public Accountants and is licensed to practice in Massachusetts. He is a Bachelor of Arts graduate of Boston College with a concentration in Accounting.



Wingate Portfolio Nationwide

★ = Regional Offices



Corporate Office:

100 Wells Ave
Newton, MA

RUSH/NYC:

747 Riverside Drive
New York, NY

PA/NJ/NY:

101 South 18th Street
Harrisburg, PA

Regional Offices:

MO/IL:

11333 Sugarpine Drive
Florissant, MO

Southeast:

496 Boulevard NE
Atlanta, GA

TX:

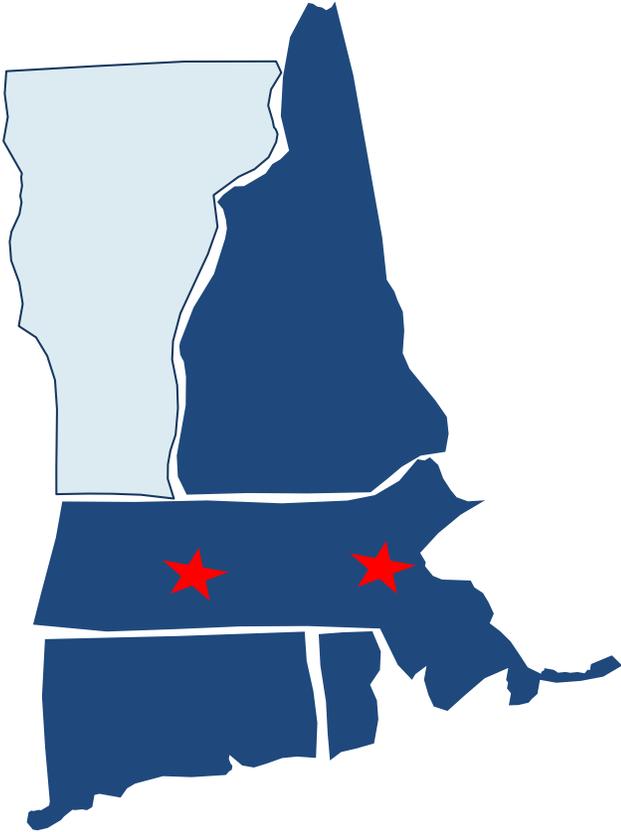
1500 E Riverside Dr
Austin, TX

MI

1114 N. Jackson Street
Bay City, MI 48708

Western MA/Upstate NY:

75 Commercial St
Adams, MA



Massachusetts:

Properties: 98
Units: 5233
Programs: Market & Affordable

Rhode Island:

Properties: 24
Units: 1514
Programs: Affordable

New Hampshire:

Properties: 7
Units: 1042
Programs: Market & Affordable

Connecticut:

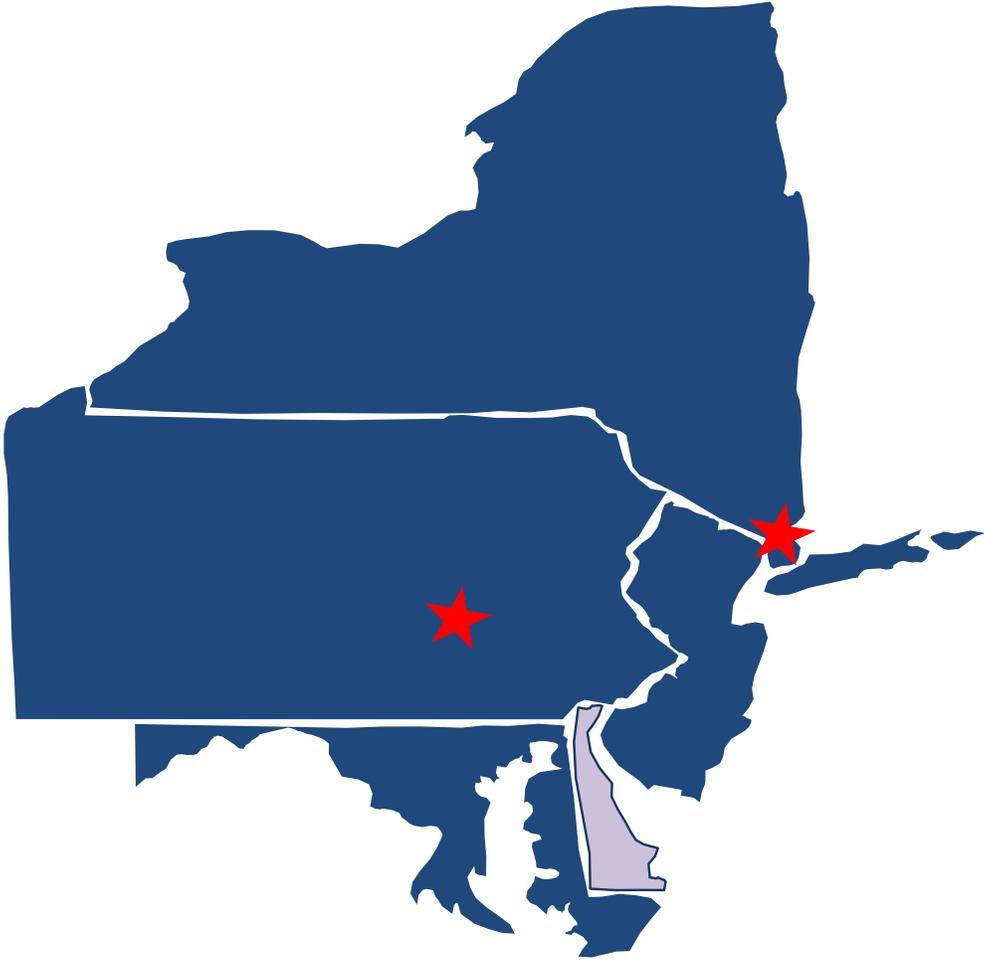
Properties: 2
Units: 122
Programs: Affordable

Property	# of	Town	State	Program
12 Summer Street Apts	21	Manchester-by-the-Sea	MA	Affordable & Market
24 Merrimack	47	Lowell	MA	Market
30 Haven	53	Reading	MA	Affordable & Market
402 Rindge Apartments	273	Cambridge	MA	Affordable
470 Main Street	31	Fitchburg	MA	Affordable & Market
808 Memorial Drive	300	Cambridge	MA	Affordable & Market
Alewife Condominiums	12	Cambridge	MA	Affordable
Amiff Housing	96	Dorchester	MA	Affordable
Bowdoin School	35	Boston	MA	Affordable & Market
Brown School	61	Peabody	MA	Affordable
Canton Estates	65	Canton	MA	Market
Carter School	39	Leominster	MA	Affordable
Cascap - Somerville Place	9	Somerville	MA	Affordable
Cascap - Broadway Residence	8	Somerville	MA	Affordable
Cascap - Harvard Place	22	Cambridge	MA	Affordable
Cascap - Three Gems	8	Lowell	MA	Affordable
Cascap - Magazine House	10	Cambridge	MA	Affordable
Cascap - Pearl Street	10	Somerville	MA	Affordable
Cascap - Marshall Place	11	Watertown	MA	Affordable
Cascap - MET State	10	Various	MA	Affordable
Cascap - Nonantum Village Place	35	Newton	MA	Affordable
Cascap - Center House	9	Somerville	MA	Affordable
Cascap - 411 Cambridge Street	6	Cambridge	MA	Affordable
Cascap - 803 Cambridge Street	14	Cambridge	MA	Affordable
Cascap - 196 Auburn Street	7	Cambridge	MA	Affordable
Cascap - 8 Bigelow Street	10	Cambridge	MA	Affordable
Cascap - Condos	3	Cambridge	MA	Affordable
Cascap - 205-207 Green Street	10	Cambridge	MA	Affordable
Cascap - 35 Harvey Street	16	Cambridge	MA	Affordable
Cascap - 47 Lee Street	10	Cambridge	MA	Affordable
Cascap - 57 Merriam Street/227 Somerville Ave	10	Cambridge	MA	Affordable
Cascap - 193 Norfolk Street	9	Cambridge	MA	Affordable
Cascap - 396 Putnam Ave.	8	Cambridge	MA	Affordable
Cascap - 165 Western Ave.	9	Cambridge	MA	Affordable
Cedar Glen	114	Reading	MA	Affordable
CHA – Ashton	12	Cambridge	MA	Affordable
CHA – Condos	27	Cambridge	MA	Affordable
CHA – Essex Street Condo	14	Cambridge	MA	Affordable
CHA – Lancaster	65	Cambridge	MA	Affordable
CHA – Porter Road	26	Cambridge	MA	Affordable
CHA – Prospect	20	Cambridge	MA	Affordable

Property	# of	Town	State	Program
Chestnut Glen	130	Abington	MA	Affordable
Claffin House	40	Framingham	MA	Affordable
Clarendon Street	6	Fitchburg	MA	Affordable
Clinton Apartments	25	Cambridge	MA	Market
Comaven Apartments	89	Brighton	MA	Affordable
Dorchester Housing	47	Mattapan	MA	Affordable
Fairmount Street	9	Fitchburg	MA	Affordable
First Lowell Rehab	47	Lowell	MA	Affordable
Garand Court Apartments	115	Springfield	MA	Affordable
Glen Grove	125	Wellesley	MA	Affordable
Gosnold Grove	33	East Falmouth	MA	Affordable
Governor Apartments	87	Allston	MA	Affordable
Grant Manor	175	Roxbury	MA	Affordable & Market
Hastings Village	52	Wellesley	MA	Affordable & Market
Heritage Green	130	Fiskdale	MA	Affordable
Leighton Street	16	Fitchburg	MA	Affordable
Longfellow Glen	120	Sudbury	MA	Affordable
Lower Prichard	7	Fitchburg	MA	Affordable
Main Street Condo Trust	10	Cambridge	MA	Affordable
Marshall Street	3	Fitchburg	MA	Affordable
Millhouses of Adams	98	Adams	MA	Affordable
Nehoiden Glen	61	Needham	MA	Affordable
Noonan Glen	18	Winchester	MA	Affordable
Noral Housing	57	Dorchester	MA	Affordable
Norton Glen	150	Norton	MA	Affordable
Norway Housing	136	Boston	MA	Affordable & Market
Old Mill Glen	50	Maynard	MA	Affordable
Olympia Square	44	Lynn	MA	Affordable
Peterborough Housing	220	Boston	MA	Affordable
Plymouth Street	12	Fitchburg	MA	Affordable
Prichard/Academy	14	Fitchburg	MA	Affordable
Prospect Apartments	32	Cambridge	MA	Market
Reservoir Towers	244	Brighton	MA	Affordable & Market
Rockmere Gardens	72	Lynn	MA	Affordable

Property	# of	Town	State	Program
SCC - Bow Street	18	Somerville	MA	Affordable
SCC - Sewall Place	14	Somerville	MA	Market
SCC - Linden Street	42	Somerville	MA	Affordable
SCC - Walnut Apartments	12	Somerville	MA	Affordable
SCC - Gilman Street	6	Somerville	MA	Affordable
SCC - Saint Polycarp Village I	24	Somerville	MA	Affordable
SCC - Saint Polycarp Village II	29	Somerville	MA	Affordable
SCC - Saint Polycarp Village III	31	Somerville	MA	Affordable
SCC - 75 Cross Street	8	Somerville	MA	Affordable
SCC - Union Square	35	Somerville	MA	Affordable
Silver Lake Homes	50	Kingston	MA	Affordable
Southwick Block	28	Lowell	MA	Affordable
Summer Street	3	Fitchburg	MA	Affordable
The Hills at Paxton Village	50	Paxton	MA	Affordable
The Longwood	147	Boston	MA	Market
The Residences at the YMCA	106	Cambridge	MA	Affordable
The Village at 815 Main Street	49	Wareham	MA	Affordable
Townhouse of Lowell	96	Lowell	MA	Affordable
The Tremont	66	Boston	MA	Market
Upton Inn	34	Upton	MA	Affordable
Warren Gardens	227	Roxbury	MA	Affordable
Watermill Apartments	40	Leominster	MA	Affordable
Waterway Apartments	89	Leominster	MA	Affordable

Property	# of	Town	State	Program
315 Park Avenue	71	Cranston	RI	Affordable
Bear Hill Village	126	Cumberland	RI	Affordable
Chateau Clare Apartments	88	Woonsocket	RI	Affordable
Churchwoods	24	Charlestown	RI	Affordable
Etta Apartments	36	Providence	RI	Affordable
Gatewood Apartments	60	North Smithfield	RI	Affordable
Hardig Brook Village	100	Warwick	RI	Affordable
Indian Run Village	115	Wakefield	RI	Affordable
Metcalf Courts I	60	Providence	RI	Affordable
Metcalf Courts II	52	Providence	RI	Affordable
OMNI - Cornplanter Row	36	Providence	RI	Affordable
OMNI - Four Sisters: 1890 House	53	Providence	RI	Affordable
OMNI - Four Sisters: Harvard	9	Providence	RI	Affordable
OMNI - Four Sisters: Niagra Place	18	Providence	RI	Affordable
OMNI - Four Sisters: The	16	Providence	RI	Affordable
OMNI - HDC	43	Providence	RI	Affordable
OMNI - Maple Gardens	90	Providence	RI	Affordable
OMNI - Omni Point	51	Providence	RI	Affordable
OMNI - Pheonix Renaissance	38	Providence	RI	Affordable
OMNI - Spring Villa	100	North Providence	RI	Affordable
OMNI - The Governor	57	Providence	RI	Affordable
OMNI - Turning Point	17	Providence	RI	Affordable
OMNI - Valley	154	Providence	RI	Affordable
OMNI - Waterview	100	Woonsocket	RI	Affordable
OMNI - Davis Gardens I	58	Waterbury	CT	Affordable
OMNI - Davis Gardens II	64	Waterbury	CT	Affordable
Bedford Green	83	Bedford	NH	Affordable & Market
Clocktower Place I	143	Nashua	NH	Affordable & Market
Clocktower Place II	183	Nashua	NH	Affordable & Market
Cotton Mill	109	Nashua	NH	Affordable & Market
Royal Gardens	300	Concord	NH	Affordable & Market
Somerset	128	Nashua	NH	Market
Wallace Farms	96	Londonderry	NH	Affordable & Market



New York

Properties: 9
Units: 967
Programs: Affordable

New Jersey

Properties: 3
Units: 296
Programs: Market & Affordable

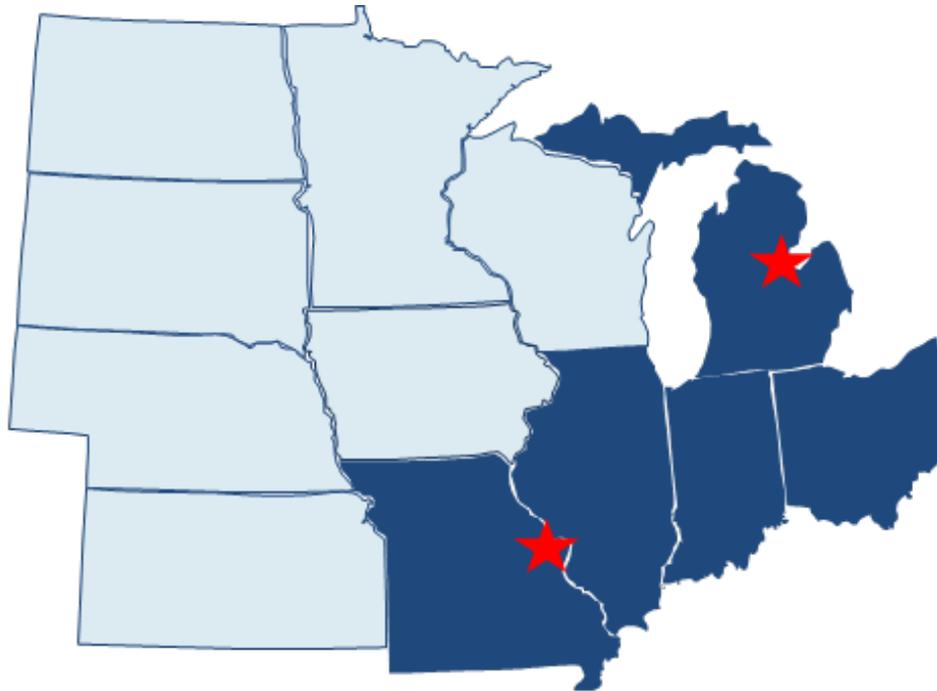
Pennsylvania

Properties: 6
Units: 525
Programs: Affordable

Maryland

Properties: 1
Units: 597
Programs: Market

Property	# of	Town	State	Program
Norfolk Square	65	Newark	NJ	Affordable
Spruce Park Apartments	98	Newark	NJ	Affordable
St. Mary's Apartments	133	New Brunswick	NJ	Affordable
Birches of Schoharie	72	Schoharie	NY	Affordable
Buffalo Housing	188	Buffalo	NY	Affordable
Colonial Manor	83	Ilion	NY	Affordable
Lansingburgh Apartments	96	Troy	NY	Affordable
Rivlin Houses	159	New York	NY	Affordable
State Hulett/Albany	105	Schenectady	NY	Affordable
Sunset Park Apartments	65	Brooklyn	NY	Affordable
University Housing	50	Bronx	NY	Affordable
Woodburn Court Apartments	149	Binghamton	NY	Affordable
Cable House	83	York	PA	Affordable
Edison Village	125	Harrisburg	PA	Affordable
Monte Vista	159	Philadelphia	PA	Affordable
South Sixth Street I	36	Allentown	PA	Affordable
South Sixth Street II	49	Allentown	PA	Affordable
Village of York	73	York	PA	Affordable
Carleton East	597	Seabrook	MD	Market



Michigan

Properties: 4
Units: 630
Programs: Market & Affordable

Illinois

Properties: 1
Units: 64
Programs: Affordable

Ohio

Properties: 1
Units: 232
Programs: Affordable

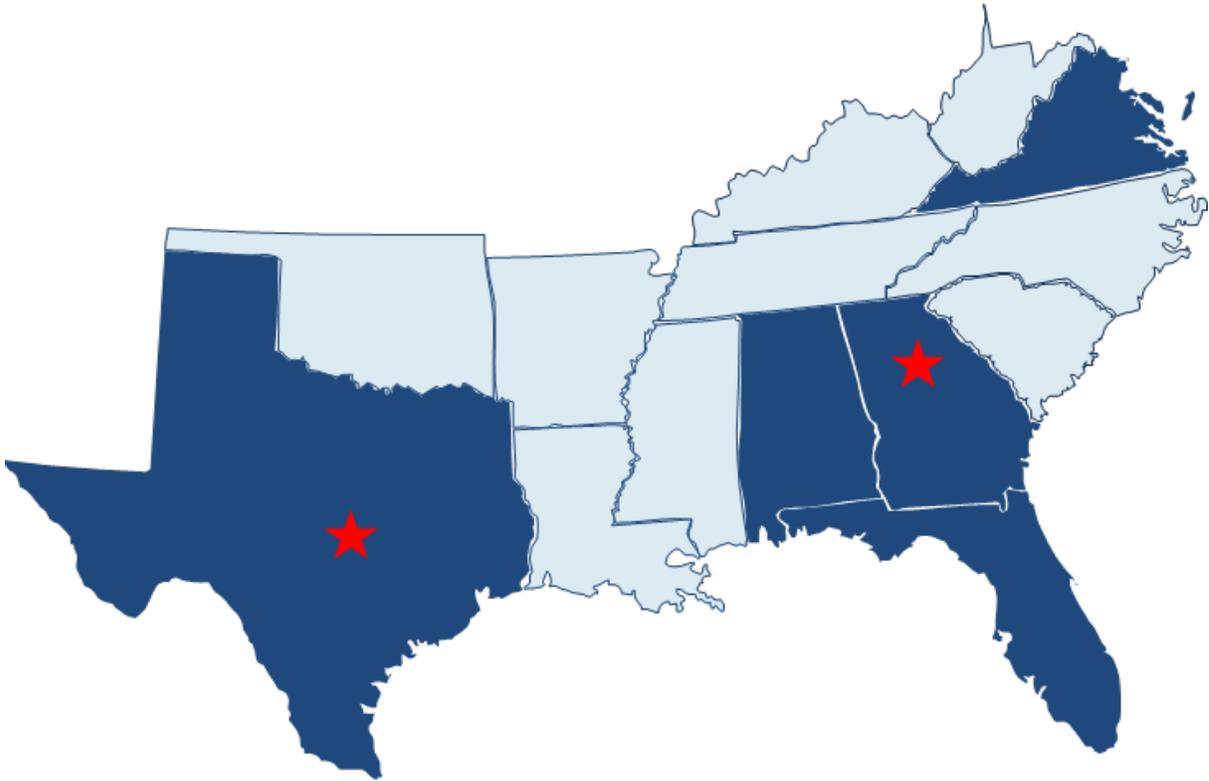
Missouri

Properties: 3
Units: 398
Programs: Market & Affordable

Indiana

Properties: 2
Units: 821
Programs: Market

Property	# of Units	Address	State	Program
Parkside Apartments	64	Granite City	IL	Affordable
Meridian Court	289	Indianapolis	IN	Market
Spinnaker Court	532	Indianapolis	IN	Market
Baytown	150	Bay City	MI	Affordable
Bradley House	180	Bay City	MI	Affordable
Camelot Woods I	200	SE Grand Rapids	MI	Affordable
Camelot Woods II	100	SE Grand Rapids	MI	Affordable
Wellington Arms I	224	Florissant	MO	Affordable
Wellington Arms II	98	Florissant	MO	Affordable
Wellington Arms III	76	Florissant	MO	Affordable
Northgate Apartments	232	Toledo	OH	Affordable



Georgia

Properties: 18
Units: 1940
Programs: Market & Affordable

Florida

Properties: 4
Units: 483
Programs: Affordable

Texas

Properties: 2
Units: 552
Programs: Market

Virginia

Properties: 1
Units: 278
Programs: Market

Alabama

Properties: 1
Units: 152
Programs: Affordable

Property	# of	Town	State	Program
Bedford Pines I	134	Atlanta	GA	Affordable
Bedford Pines II	151	Atlanta	GA	Affordable
Bedford Pines III	84	Atlanta	GA	Affordable
Bedford Pines IV	77	Atlanta	GA	Affordable
Bedford Pines V	146	Atlanta	GA	Affordable
Bedford Pines VI	61	Atlanta	GA	Affordable
Capitol Ave School	48	Atlanta	GA	Affordable
Capitol Towers	39	Atlanta	GA	Affordable
City Lights	80	Atlanta	GA	Affordable
Gustavia	36	Atlanta	GA	Affordable
Hampton Woods	140	Norcross	GA	Market
Heatherwood	68	Rome	GA	Affordable
LNJ Properties, LLC	4	Atlanta	GA	Market
Northside Hills Apartments	264	Griffin	GA	Affordable
Pleasantdale	210	Doraville	GA	Affordable & Market
Station 464	96	Atlanta	GA	Affordable
Valley Brook	170	Decatur	GA	Market
Villa North	132	Thomasville	GA	Affordable
College Trace Apts	112	Pensacola	FL	Affordable
Mandarin Trace Apts	120	Jacksonville	FL	Affordable
Oak Hammock Apts	155	Jacksonville	FL	Affordable
Woodwinds	96	Bradenton	FL	Affordable
The Breakers	204	Austin	TX	Market
The Enclave at Arlington	348	Arlington	TX	Market
Sentinel of Landmark	278	Alexandria	VA	Market
Forest Hills Village Apts	152	Birmingham	AL	Affordable

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SECTION 5 ZONING & PERMITTING



Provide an overview of the expected approach to seeking zoning and permitting approvals, including land use, zoning, development, and environmental permits.

The project team anticipates engaging in a full permitting analysis and strategy effort in consultation with the Town that will commence upon designation and proceed through the due diligence period under the LDA, with the permitting process beginning in earnest at the close of that due diligence period.

At this point, the project team intends to make use of the extensive planning and rezoning effort that the Town has conducted over the last decade and proceed with the project under the Center Business District/Town Center PUD 1/Special Permit process under Section 7.3 of the Town's Zoning Bylaw.

Concurrent with the start of the zoning process, the project team will also initiate the wetlands permitting process with the Winchester Conservation Commission. Once these principal local processes are underway, the project team will commence the parallel state and federal land use and environmental permitting applicable to the project, with the principal intent of clearing key reviews such as Massachusetts Historical Commission/Massachusetts Environmental Policy Act and Section 106/National Environmental Policy Act simultaneous within a few months after completion of the local zoning and wetlands permitting, which will then allow the project team to concentrate on financing of the project with all discretionary approvals in hand.

EXPECTED PERMITS AND APPROVALS

Local

- Zoning Special Permit/Site Plan/PUD Approval
- Building Permit
- Garage Fuel Storage Permit
- Wetlands Order of Conditions
- Local sewer connection

State

- MBTA Access Agreement (signal building)
- MHC Review
- MEPA Review (if necessary)
- G.L. Chapter 40, Section 54A Review (if necessary)
- MWRA Sewer Connection Permit

Federal

- Notice of Intent under Stormwater Construction General Permit (EPA)
- NEPA Review (if necessary)
- Section 106 Review (if necessary)

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SECTION 6

IMPLEMENTATION PLAN & TIMETABLE

IMPLEMENTATION PLAN & TIMETABLE

ZONING NARRATIVE

The project team intends to make use of the extensive planning and rezoning effort that the Town has conducted over the last decade and to proceed with the project under the Center Business District/Town Center PUD 1/ Special Permit process under Section 7.3 of the Town’s Zoning Bylaw.

The following table outlines the key zoning considerations for the proposed Waterfield | Winchester development.

SECTION	REQUIRED/ALLOWED	PROPOSED	REFERENCE
Uses	Commercial parking - Special Permit (allowed per PUD)	Some combination of uses listed in this table	7.3.11.1 and 7.3.14. Uses that are special permit are allowed within the Waterfiled Street PUD
	Temporary public event - Allowed		
	Artist studio - Allowed		
	General ground floor retail - Allowed		
	Outside dining - Special Permit (allowed per PUD)		
Ground Floor Windows	Minimum 70% glazing	Designing for 70% glazing for coworking and retail spaces	
Height	40 by right, 48' with Special Permit, 59' with Open Space Special Permit, chimney's elevator penthouses/ etc can exceed but not by more than 15' [SPGA may require additional height outside of the Special Permit standards of underlying zoning if meets objectives]	Designing for 40' maximum height for section with frontage on Waterfield Road, and 48' maximum height for rear section	See Map 7.3.2 for parcel/by/parcel heights, See 7.3.13.2 for measurement of building height
Floor to Area Ratio	1.5 by right, 2.5 by special permit [SPGA may authorize up to additional .5 FAR if meets the goals of PUD]	Current scheme is 66,800 sf of program (not counting parking) which would equate to an FAR of 1.54	See 7.3.14.6 Section 3
Minimum Lot Size	25,000 to be PUD Eligible	Lot is 43,389sf per page 4 of RFQ - I don't think this includes the addition of lot in front, or reduction of parcel for MBTA	7.3.14.6
Minimum Frontage	50' per PUD	Existing lot dimensions meet this requirement	7.3.14.6
Entrance Points	Limited to one, but SPGA may grant addition, encourage common drives	Single primary access point to garage and adjacent alley, secondary access over easement limited to service/emergency access only	7.3.14.7
Front Setback	0', up to 10' with a special permit for entry way to main commuter rail egress	Varies from 0' to 15' +/-	7.3.12.2
Minimum Side Setback	Party wall unless bordering a free standing historic structure in which it is 5'	5' shown	7.3.12.2
Minimum Rear Setback	20'; 15' with special permit	15' shown	7.3.12.2
Minimum Open Space	10%	7.3.12.2	7.3.12.2
Parking	Only in rear of site or within footprint of building, or contribution to parking fund	All parking to rear and within building footprint	7.3.12.2
	The SPGA may allow for a reduction in the parking requirement, See 7.3.20.4 for options	Could make case lower level parking (45 spaces) serves both residential and on-site commercial needs if we want to make case for first level parking (40 spaces) as all "public"	7.3.20.4 Options for reduction in parking: proximity to transit is a reduction by 30%, Car Sharing, Parent in lieu
	Residential - Min .75, Max 1.5, any minimum may be reduced by Special Permit	45 spaces for 59 units (0.76)	7.3.20.2
	Commercial - Min .75/1000 to Max 1.25/1000	6,600 sf combined CoC, Retail and Coworking Space would only require 5-8 spaces	Residential - Min .75, Max 1.5, any minimum may be reduced by Special Permit
	Place of Public Assembly - 1 per 4 seats	Not applicable	10%
Bike Parking	1 two-bike rack per 10 units for residents (indoor), per 25 units for visitors, per 10,000 sf commercial area for employees, per 25,000 sf of commercial area for visitors	6 indoor two-bike racks for 59 units and 4-5 outdoor two-bike racks for visitors/commercial areas	7.3.20.6
Off Street Loading	See table below, if we want widest latitude of uses at ground floor, may need one loaded space, SPGA can waiver the requirements by Special Permit	Could we consider using the existing alley? Or drop off/loading zone on Waterfield Road?	Section 5.2

IMPLEMENTATION TIMETABLE

The project team anticipates engaging in a full permitting analysis and strategy effort in consultation with the Town that will commence upon designation and proceed through the due diligence period under the Land Disposition Agreement (LDA), with the permitting process beginning in earnest at the close of the due diligence period.

Concurrent with the start of the zoning process, the project team will also initiate the wetlands permitting process with the Winchester Conservation Commission. Once these principal local processes are underway, the project team will commence the parallel state and federal land use and environmental permitting applicable to the project, with the principal intent of clearing key reviews such as Massachusetts Historical Commission/Massachusetts Environmental Policy Act and Section 106/National Environmental Policy Act simultaneous within a few months after completion of the local zoning and wetlands permitting, which will then allow the project team to concentrate on financing of the project with all discretionary approvals in hand.

TASK	START	END
Town of Winchester awards RFP to qualified developer	November 2020	
MBTA construction/temporary easement occupancy	November 2020	November 2023
Negotiate and execute LDA with form of Ground Lease	November 2020	February 2021
Due diligence	November 2020	April 2021
Local permitting (Special Permit/site plan, Conservation Commission)	April 2021	January 2022
Obtain applicable state and federal approvals	June 2021	June 2022
Secure financing	July 2022	April 2023
Pre-construction	Pre-construction	Pre-construction
Final closing, permits secured	November 2023	
Execute Ground Lease	November 2023	
Construction begins	November 2023	March 2025
Lease Up	March 2025	July 2025

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SECTION 7 REQUIRED FORMS

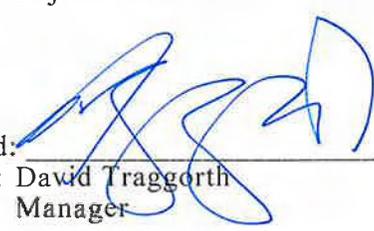
**NON-COLLUSION AFFIDAVIT OF BIDDER
(Traggorth Companies LLC)**

Commonwealth of Massachusetts

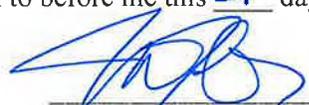
County of Suffolk, ss.

David Traggorth, being duly sworn, deposes and says that:

- (1) He is the Manager of Traggorth Companies LLC, the Bidder that has submitted the attached bid;
- (2) He is fully informed respecting the preparation and contents of the attached bid and of all pertinent circumstances respecting such bid;
- (3) Such bid is genuine and is not a collusive or sham bid;
- (4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affidavit, has in any way colluded, conspired connived or agreed directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham bid in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or communication or conference with any other Bidder, firm or person to fix any overhead, profit or cost element of the bid price, or the bid price of any other Bidder; or to secure through any collusion, conspiracy, connivance or unlawful agreement any against the Town of Winchester or any other person interested in the proposed Contract;
- (5) The price or prices quoted in the attached are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affidavit.
- (6) The foregoing statements are qualified to the extent that Bidder is offering the same as part of a joint venture bid with Civico Development LLC.

Signed: 
Name: David Traggorth
Title: Manager

Subscribed and sworn to before me this 27th day of August, 2020.


Title: Notary Public
My Commission Expires: _____



MATTHEW LAWLOR
NOTARY PUBLIC
COMMONWEALTH OF MASSACHUSETTS
MY COMMISSION EXPIRES
DECEMBER 3, 2021

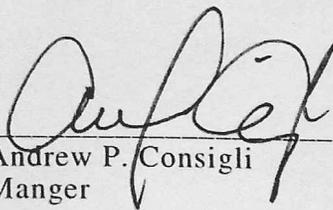
NON-COLLUSION AFFIDAVIT OF BIDDER
(Civico Development LLC)

Commonwealth of Massachusetts

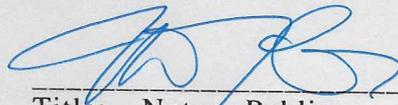
County of Worcester, ss.

Andrew P. Consigli, being duly sworn, deposes and says that:

- (1) He is the Manager of Civico Development LLC, the Bidder that has submitted the attached bid;
- (2) He is fully informed respecting the preparation and contents of the attached bid and of all pertinent circumstances respecting such bid;
- (3) Such bid is genuine and is not a collusive or sham bid;
- (4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affidavit, has in any way colluded, conspired connived or agreed directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham bid in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or communication or conference with any other Bidder, firm or person to fix any overhead, profit or cost element of the bid price, or the bid price of any other Bidder; or to secure through any collusion, conspiracy, connivance or unlawful agreement any against the Town of Winchester or any other person interested in the proposed Contract;
- (5) The price or prices quoted in the attached are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affidavit.
- (6) The foregoing statements are qualified to the extent that Bidder is offering the same as part of a joint venture bid with Traggorth Companies LLC.

Signed: 
Name: Andrew P. Consigli
Title: Manger

Subscribed and sworn to before me this 30th day of August, 2020.


Title: Notary Public
My Commission Expires: _____



MATTHEW LAWLOR
NOTARY PUBLIC
COMMONWEALTH OF MASSACHUSETTS
MY COMMISSION EXPIRES
DECEMBER 3, 2021

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)
[Traggorth Companies LLC]**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

- (1) REAL PROPERTY: The Waterfield Lot, Winchester, MA.
- (2) TYPE OF TRANSACTION, AGEEMENT, or DOCUMENT: Long-term ground lease.
- (3) PUBLIC AGENCY PARTICIPATING in TRANSACTION: Town of Winchester.
- (4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY: Traggorth Companies LLC, a Massachusetts limited liability company.
- (5) ROLE OF DISCLOSING PARTY (Check appropriate role):

Lessor/Landlord Lessee/Tenant
 Seller/Grantor Buyer/Grantee
 Other (Please describe):

- (6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

<u>NAME</u>	<u>RESIDENCE</u>
David Traggorth	159 Broadway, Hanover, MA 02339
Daniel Hubbard	78 W. Concord St., Unit 7, Boston, MA 02118

- (7) None of the above- named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (Check "NONE" if NONE):

NONE

<u>NAME</u>	<u>POSITION</u>
_____	_____
_____	_____

- (8) The individual signing this statement on behalf of the above-named party acknowledges that he has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seller or purchaser, and in the case of a

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)
[Civico Development LLC]**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

- (1) REAL PROPERTY: The Waterfield Lot, Winchester, MA.
- (2) TYPE OF TRANSACTION, AGEEMENT, or DOCUMENT: Long-term ground lease.
- (3) PUBLIC AGENCY PARTICIPATING in TRANSACTION: Town of Winchester.
- (4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY: Civico Development LLC, a Massachusetts limited liability company.
- (5) ROLE OF DISCLOSING PARTY (Check appropriate role):

Lessor/Landlord Lessee/Tenant
 Seller/Grantor Buyer/Grantee
 Other (Please describe):

- (6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

<u>NAME</u>	<u>RESIDENCE</u>
Andrew P. Consigli	2 Tammie Road, Hopedale, MA 01747

- (7) None of the above- named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (Check "NONE" if NONE):

NONE

<u>NAME</u>	<u>POSITION</u>
_____	_____
_____	_____

- (8) The individual signing this statement on behalf of the above-named party acknowledges that he has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said

property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arms length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.

The commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.

(9) This Disclosure Statement is hereby signed under penalties of perjury.

CIVICO DEVELOPMENT LLC

By: 
Name: Andrew P. Consigli
Title: Manager

Dated: August ____, 2020.

**CERTIFICATION OF COMPLIANCE WITH TAX LAWS
COMMONWEALTH OF MASSACHUSETTS
(Traggorth Companies LLC)**

The undersigned certifies, to my best knowledge and belief, under the penalties of perjury, that Traggorth Companies LLC, a Massachusetts limited liability company, has filed all state tax returns and paid all state taxes required under law.

TRAGGORTH COMPANIES LLC

By:  _____
Name: David Traggorth
Title: Manager

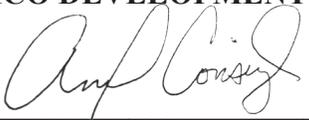
Dated: August 26, 2020.

Federal Identification Number: 45-4853357

**CERTIFICATION OF COMPLIANCE WITH TAX LAWS
COMMONWEALTH OF MASSACHUSETTS
(Civico Development LLC)**

The undersigned certifies, to my best knowledge and belief, under the penalties of perjury, that Civico Development LLC, a Massachusetts limited liability company, has filed all state tax returns and paid all state taxes required under law.

CIVICO DEVELOPMENT LLC

By: 
Name: Andrew P. Consigli
Title: Manager

Dated: August __, 2020.

Federal Identification Number: _____



The Commonwealth of Massachusetts
Secretary of the Commonwealth
State House, Boston, Massachusetts 02133

William Francis Galvin
Secretary of the
Commonwealth

August 25, 2020

TO WHOM IT MAY CONCERN:

I hereby certify that a certificate of organization of a Limited Liability Company was filed in this office by

TRAGGORTH COMPANIES LLC

in accordance with the provisions of Massachusetts General Laws Chapter 156C on **March 22, 2012.**

I further certify that said Limited Liability Company has filed all annual reports due and paid all fees with respect to such reports; that said Limited Liability Company has not filed a certificate of cancellation; that there are no proceedings presently pending under the Massachusetts General Laws Chapter 156C, § 70 for said Limited Liability Company's dissolution; and that said Limited Liability Company is in good standing with this office.

I also certify that the names of all managers listed in the most recent filing are: **DAVID TRAGGORTH**

I further certify, the names of all persons authorized to execute documents filed with this office and listed in the most recent filing are: **DAVID TRAGGORTH, DAVID TRAGGORTH**

The names of all persons authorized to act with respect to real property listed in the most recent filing are: **DAVID TRAGGORTH**



In testimony of which,
I have hereunto affixed the
Great Seal of the Commonwealth
on the date first above written.

William Francis Galvin

Secretary of the Commonwealth

Processed By:TAA



The Commonwealth of Massachusetts
Secretary of the Commonwealth
State House, Boston, Massachusetts 02133

William Francis Galvin
Secretary of the
Commonwealth

August 26, 2020

TO WHOM IT MAY CONCERN:

I hereby certify that a certificate of organization of a Limited Liability Company was filed in this office by

CIVICO DEVELOPMENT, LLC

in accordance with the provisions of Massachusetts General Laws Chapter 156C on **September 15, 2015**.

I further certify that said Limited Liability Company has filed all annual reports due and paid all fees with respect to such reports; that said Limited Liability Company has not filed a certificate of cancellation; that there are no proceedings presently pending under the Massachusetts General Laws Chapter 156C, § 70 for said Limited Liability Company's dissolution; and that said Limited Liability Company is in good standing with this office.

I also certify that the names of all managers listed in the most recent filing are:
ANDREW P. CONSIGLI

I further certify, the names of all persons authorized to execute documents filed with this office and listed in the most recent filing are: **ANDREW P. CONSIGLI**

The names of all persons authorized to act with respect to real property listed in the most recent filing are: **ANDREW P. CONSIGLI**



In testimony of which,

I have hereunto affixed the
Great Seal of the Commonwealth
on the date first above written.

William Francis Galvin

Secretary of the Commonwealth

TRAGGORTH COMPANIES LLC

Manager's Certificate

As of August 31, 2020

The undersigned hereby certifies that he is the duly appointed, qualified, and acting sole Manager of Traggorth Companies LLC, a Massachusetts limited liability company (the “**Company**”), and that, as such, he is authorized to execute and deliver this Certificate in the name of and on behalf of the Company. The undersigned, on behalf of the Company, hereby further certifies that, as of the date hereof, David Traggorth is authorized by the Company’s operating agreement to execute any and all documents, certificates, affidavits, and other instruments for and on behalf of the Company including, without limitation, the Bid Certification Sheet with respect to response to a request for proposals to redevelop the Waterfield Lot in Winchester, Massachusetts.

IN WITNESS WHEREOF, the undersigned has executed this Manager’s Certificate as of the date first written above.

TRAGGORTH COMPANIES LLC

By:  _____
Name: David Traggorth
Title: Manager

Traggorth Companies LLC – Manager’s Certificate

CIVICO DEVELOPMENT LLC

Manager's Certificate

As of August 31, 2020

The undersigned hereby certifies that he is the duly appointed, qualified, and acting sole Manager of Civico Development LLC, a Massachusetts limited liability company (the “**Company**”), and that, as such, he is authorized to execute and deliver this Certificate in the name of and on behalf of the Company. The undersigned, on behalf of the Company, hereby further certifies that, as of the date hereof, Andrew P. Consigli is authorized by the Company’s operating agreement to execute any and all documents, certificates, affidavits, and other instruments for and on behalf of the Company including, without limitation, the Bid Certification Sheet with respect to response to a request for proposals to redevelop the Waterfield Lot in Winchester, Massachusetts.

IN WITNESS WHEREOF, the undersigned has executed this Manager’s Certificate as of the date first written above.

CIVICO DEVELOPMENT LLC

By:  _____

Name: Andrew P. Consigli

Title: Manager

Civico Development LLC – Manager’s Certificate

08

SECTION 8

APPENDIX

WATERFIELD APARTMENTS
SAMPLE
AFFIRMATIVE FAIR HOUSING
MARKETING
&
TENANT SELECTION PLAN

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SAMPLE

**WATERFIELD LOT APARTMENTS' AFFIRMATIVE FAIR HOUSING MARKETING
AND TENANT SELECTION PLAN**

I. AFFIRMATIVE FAIR HOUSING MARKETING PLAN

A. PROJECT INFORMATION

1. Project Waterfield Apartments
 Street, City, State, Zip Winchester, MA
 Type/ Description Family, Mixed Income

2. Developer Traggorth Companies, LLC
 Street, City, State, Zip 50 Summer Street, Boston, MA 02110
 Phone 617-542-6500 Fax
 E-mail dan@traggorthcompanies.com

3. Co-Developer
 Street, City, State, Zip
 Phone Fax
 E-mail

4. Agent/Officer authorized and responsible for carrying out the AFHMP

Name Michael Martin, Wingate Management Company, LLC
 Street, City, State, Zip 100 Wells Ave, Newton, MA 02459
 Phone 781-707-9100 Fax 781-707-9199
 E-mail mmartin@wingatecompanies.com

5. Number of Units and Projected Rent or Sales Price

Total Units: 60

Total Affordable: 40

TYPE	1 - BR	2 - BR	3 - BR
80% AMI (8 units)	TBD	TBD	TBD
60% AMI (24 units)	TBD	TBD	TBD
50% AMI (2 Units)	TBD	TBD	TBD
30% AMI (8 units)	TBD	TBD	TBD
Unit Totals			

- All rent limits will be updated as published by HUD and DHCD at time of lease-up.

6. Construction Type: New Rehabilitation Combination

7. Unit Affordability and Household Income Guidelines

Maximum Income Limit by Median Income*

HH Size	80%	60%	50%	30%
1	67,400	53,760	44,800	26,850
2	77,000	61,440	51,200	30,700
3	86,650	69,120	57,600	34,550
4	96,250	76,740	63,950	38,350
5	103,950	82,920	69,100	41,450
6	111,650	89,040	74,200	44,500

*Income limits will be updated as published by HUD at the time of lease-up.

8. Requirement and Preference Categories

In the tenant/buyer selection process, will there be preference categories? Note all that apply.

Urban Renewal	Preference _____	Required _____
Handicap/Disabled Household*	Preference _____	Required _____
Minimum household size 1 per BR	Preference _____	Required _____
First Time Homebuyer	Preference _____	Required _____
Artist Certification	Preference _____	Required _____
Elderly (62 at occupancy)	Preference _____	Required _____
Displaced households	Preference _____	Required _____
Homeless households	Preference _____	Required _____
PHA Priority One eligible households	Preference _____	Required _____
CBH eligible households	Preference _____	Required _____
DMH/FCF eligible households	Preference _____	Required _____

*Apartments have ___ units accessible for mobility handicapped households and 1 unit accessible for a sensory handicapped household.

B. MARKETING AND OUTREACH

The census data for the parcel shows the Asian population at 4.2 % (as compared to the County-wide average 9.3%), the African American population is at .8% (as compared to the County-wide average 4.7%), the Hispanic population is at 1.5% (as compared to the County-wide average 6.5%) the White population at 93.5% (as compared to the County-wide average 80%). Given this data, our Affirmative Marketing Plan will target the Asian, African American and Hispanic populations. Notices will also be sent to community organizations located throughout the City & Metro area. (see section II, B of this plan).

1. Media Resources (See list of recommended sources in Attachments)

- List the media to be used to advertise the availability of the units:

Name of Newspaper, Radio or TV Station

Racial/Ethnic Market

1. El Planeta	General - Hispanic
2. El Mundo	General - Hispanic
3. Baystate Banner	General- African American
4. Sampan	General- Asian

5. Dorchester Reporter	General – African American/Hispanic
------------------------	-------------------------------------

2. Organizations and Agencies

- Please list the organizations and agencies you will notify about the housing:

Community Agency/Organization	Racial/Ethnic Constituency(ies)
Metrolist Boston City Hall Rm 966 Boston, MA 02201 Tel: 617-635-4408	General and Minority Population
Winchester Housing Authority 13 Westley Street Winchester, MA 01890 Tel: 781-721-5718	General & Minority Population
Mass Access 18 Tremont St. Suite 401 Boston, MA 02108 Tel: 617-742-0820 www.chapa.org	General /Disabled
MBHP 125 Lincoln St. Boston, MA 02111 Attn: Theresa DiPietro	General & Minority Population
Citizens Housing and Planning Association 18 Tremont Street, Suite 401 Boston, MA 02108 Tel: (617) 742-0820 Attention: Brenda Clement	General & Minority Population
TBD	General & Minority Population
TBD	General Population

Additional agencies for marketing

Churches, Temples & Mosques in 5 mile radius	General & Minority Population
--	-------------------------------

These will be identified prior to the start of marketing and submitted to DHCD for approval.

3. Affirmative and General Marketing Schedule

- The HUD Equal Housing Opportunity logo and slogan must appear on all marketing materials (including brochures, newspaper advertisements, and stationary). The “universal symbol of accessibility” must also appear, as appropriate, on all related materials.
- Placement of ads and flyer distribution will be done a minimum of two (2) times over a 60-day period.

A. Timeline: Attach a completed Affirmative Marketing Timeline

AFFIRMATIVE MARKETING TIMELINE (Dates subject to change)

Affordable Rental Unit

Date TBD

Project Waterfield Lot
Contact Person Michael Martin

Phone 781-707-9100

Please complete the following timeline with projected dates:

	START	END
CONSTRUCTION:	July 1, 2019	January 1, 2021
AFFIRMATIVE MARKETING:	First week of June, 2020	
GENERAL MARKETING	First week of July, 2020	
TWO (2) INFORMATIONAL MEETINGS	First week of July, 2020	
APPLICATION TAKING:	August 1, 2020	August 31, 2020
APPLICATION DEADLINE:	August 31, 2020 *postmarked by	
LOTTERY DATE:	September 15, 2020	
SELECTION COMPLETE:	November 30, 2020	
OCCUPANCY:	January 1, 2021	

B. Affirmative and General Marketing Requirements

Advertising and Outreach

Marketing should begin no more than six months before expected occupancy. Affirmative marketing should begin one (1) month before general marketing and outreach. Applications should not be distributed before general marketing begins.

Newspaper Ads and flyer distribution will be done a minimum of two (2) times over 60-day period.

All advertising and marketing materials portraying persons should depict members of classes of persons protected under fair housing laws, including majority and minority groups as well as persons with disabilities

Affordable units will be listed with the Boston Fair Housing Commission’s Metrolist (Metropolitan Housing Opportunity Clearing House).

Affordable and accessible units will be listed with Mass Accessible Housing Registry (MassAccess)

Informational Meetings

Following General Marketing, the Agent will hold two (2) informational meetings for prospective applicants. The meetings will be held either on a weekend or evening in an accessible location.

Outreach to households least likely to apply and linguistic minorities

Direct mailings, emails, and personal phone calls will be made to the community organizations and outreach agencies as indicated in Section II.B.

All advertising should offer reasonable accommodations in the application process. The project will provide accessibility to disabled households, make reasonable accommodations, and access to limited English proficiency persons.

Staff training

Staff is trained, at minimum, annually in Federal, State and local fair housing laws. This Plan will be reviewed with staff handling the marketing and applications, within the 120 days prior.

Conclusion of AFHMP

II. TENANT SELECTION PLAN

INTRODUCTION

This Tenant Selection Plan (the "Plan") for Waterfield Apartments (the "Development"), a 60-unit family housing development located at _____, Winchester, MA has been prepared by Wingate Management Company, LLC (the "Agent"), as the management agent for _____ (the "Owner").

The Development is currently the recipient of support from the Department of Housing and Community Development (DHCD) under the Low Income Housing Tax Credit Program. The Development is also receiving _____ and is subject to applicable laws, regulations and guidelines under these programs.

The objective of the Plan is to consolidate relevant policies and procedures affecting the selection of tenants for housing, pursuant to applicable federal and state laws. The Plan sets out a procedure for processing and selecting applicants, including the establishment of preferences and priorities, occupancy standards, rejection standards, reviews and appeals of rejection decisions, and notice requirements. The Plan may not, however, include all of the policies and procedures affecting the selection of tenants. The Agent is responsible for understanding and following all relevant requirements applicable to the Development. Where, however, a specific affordable program contains rules or regulations that conflict with the provisions herein, the program's rules and regulations shall govern.

The Plan is designed to promote fairness and uniformity in the selection of tenants and to promote efficiency in the application process. One of the principal elements of the Plan is that it allows the Agent to make a preliminary determination of eligibility based on the applicant's self-certification of income and priority status. Initial acceptance of the applicant's self-certification allows the Agent to focus on other administrative duties, rather than investing significant staff time in verifying such information at initial application and once again when the applicant is accepted from the waiting list.

Upon determination of initial eligibility for the restricted units, based on an applicant's self-certification of income, the application shall be placed in a Lottery pool which will be applicable to the initial rent up of this development. (See Lottery description, page 19 of this document.) The

Lottery results will determine placement on the Waiting List for processing of applications. Placement on the waiting list does not guarantee acceptance for housing, however dictates the order in which applications shall be reviewed and analyzed by the Agent. The Agent shall verify all aspects of eligibility reported on the application during the analysis of each application.

A. Right to Apply and Referrals from Public Housing Authorities

No person may be refused the right to apply for housing. The Agent will offer aid to applicants in completing the application for admission if needed. The application interview will be done in person.

In fulfilling its requirements to rent affordable units within the Development to low income persons, the Agent will accept referrals of tenants from the Public Housing Authority and will not unreasonably refuse occupancy to any prospective tenants so referred who are otherwise determined to be eligible and suitable for tenancy under this Plan.

Applications for affordable units shall be processed in the same manner as applications for market units.

B. Statement of Non-discrimination

It is the policy of the Owner and Agent to promote equal opportunity and non-discrimination in compliance with, but not limited to, the federal and state constitutions and legislative enactments addressing discrimination in housing. These enactments include: The Fair Housing Amendments Act of 1988, 42 U.S.C.A. §§3601-3620, as modified by the Housing for Older Americans Act of 1995, 42 U.S.C.A §3607(b)(2)(C), Section 504 of the Rehabilitation Act of 1973, 29 U.S.C.A §794 et seq., The Americans with Disabilities Act of 1990, 42 U.S.C.A. §§12101-12213, Title VI of the Civil Rights Act of 1964, 42 U.S.C.A §2000d, the Age Discrimination Act of 1975, 42 U.S.C.A. §§6101-6107, Executive Order 11,063, Chapter 151B of the Massachusetts General Laws, and the Massachusetts Equal Rights Law, M.G.L. c 93, §103. In furtherance of this policy:

In carrying out the Plan, the Agent shall not discriminate on the basis of race, color, creed, religion, national or ethnic origin, citizenship, ancestry, class, sex, sexual orientation, familial status, disability, military/veteran status, source of income, marital status, age or other basis prohibited by local, state or federal law in any aspect of tenant selection or matters related to continued occupancy. The Agent shall affirmatively market to minorities and persons with disabilities as specified in its approved DHCD Affirmative Fair Housing Marketing Plan.

Applicants with Disabilities and Reasonable Accommodations: The Agent shall make reasonable accommodations in policies or reasonable modifications of common areas or unit premises for all applicants with disabilities (as defined in the above listed Acts or any subsequent legislation) who require such changes to have equal access to any aspect of the application process or to the Development and its programs and services. The Agent shall, for example, arrange for sign language interpreters or other communication aides for interviews during the application process.

Appointments for an application or for reasonable accommodations, including materials in alternate formats, may be made by contacting the site office:

SITE: TBD
ADDRESS: TBD
PHONE: TBD

TDD:
EMAIL:

C. Eligibility and Selection Criteria

1. Eligibility for Tenancy. To be considered for selection, applicants must submit a completed application and relevant consent forms. To determine threshold eligibility, the application may be accepted by a self-certifying statement. Third party verification shall not be required until final screening for occupancy. The Agent must verify the information needed to determine an applicant's eligibility within 120 days prior to the Agent's approval of the tenancy.

Note: Eligibility does not constitute acceptance and further screening is required to determine an applicant's ability to maintain a successful tenancy.

Eligibility shall be determined on the following basis:

- a. **Project-Specific Requirements.** Units designated within the Development for occupancy by households at or below 80%, 60%, 50%, 30% of AMI or a special population, such as elderly or disabled, may only be occupied by those households meeting the criteria for such designations. The number of designated units and the terms of their designation is set forth in Attachment 1 (Eligibility Criteria and Occupancy Standards).
- b. Affordable units within the Development may only be occupied by those households meeting the criteria of the subsidizing program as set forth in Attachment 1 (Eligibility Requirements and Occupancy Standards).
- c. Units designated within the Development as “market” units shall require similar requirements to any other unit, as outlined in Attachment 1, other than maximum income eligibility and student status.

Requirements may include:

- i. **Maximum Income.** Household annual income for the affordable units must not exceed current income limits for the program to which application is made. Annual income may be below program limits but not so low as to make payment of basic rent obligations impractical. Annual certification for households receiving an affordable unit shall be required. No annual income certification shall be required for households in market units.
- ii. However, a household does not need to have income to be eligible for assisted housing programs that provide assistance to meet basic rent obligations through a subsidy (i.e. Section 8 Mobile Voucher). Household characteristics, such as the number, age, relationship and gender of family members, must be appropriate to the size of the unit and adaptations made therein, pursuant to the subsidy program guidelines.

2. Eligible Subsidy Programs

- (a) Individuals who have a financial interest in the development and their families are not eligible for affordable units. Therefore, affordable units leased or sold to

individuals who have a financial interest in the development or a Related Party, or to their families, shall not be eligible. For the purposes of this Section II.A.2, “financial interest” shall mean anything that has a monetary value, the amount of which is or will be determined by the outcome of the Project, including but not limited to ownership and equity interests in the Developer or in the subject real estate, and contingent or percentage fee arrangements; but shall not include third party vendors and contractors.

Subsidizing Agencies periodically modify existing programs and create new low- or moderate-income housing programs. Please contact DHCD at 617-573-1533 if you are aware of changes that should be reflected on this list.

- (b) **Affordability – Household Income**
The restricted units at this property have income eligibility criteria at 80% AMI, 60% AMI, 50% AMI and 30% AMI. In order for a household to be eligible to rent a restricted unit, the household’s income shall not exceed the maximum AMI for that unit’s eligibility criteria. A Subsidizing Agency may establish lower thresholds for its programs.
- (c) **Affordability - Household Assets**
The Subsidizing Agency may establish, for its housing programs, asset limitations for eligible households. In the absence of such provisions, eligible households shall be subject to the following asset limitations:

(Enter asset limitations here)

Calculation of income and assets and the treatment of such in determining eligibility, please refer to HUD’s Handbook 4350.3, Chapter 5.

3. Housing Cost

The monthly housing costs (inclusive of utilities) shall not exceed 30% of the maximum allowable AMI for each unit’s eligibility criteria. If there is no city trash collection, a trash removal allowance shall be included. If the utilities are separately metered, they may be paid by the tenant and the maximum allowable rent will be reduced to reflect the tenants’ payment of utilities, based on the area’s utility allowance. Developers should secure the amount of the current Section 8 utility allowance for the specific unit size and type from the local/regional housing authority

- 4. Screening for Suitability. In selecting tenants under the Plan, the Agent shall consider the essential requirements of tenancy and determine whether an applicant should be rejected for failing to meet such requirements. Rejection of an applicant is appropriate where the Agent has a reasonable basis to believe that the applicant cannot meet the essential requirements of tenancy, which may be summarized as:
 - (a) To pay rent and other charges under the lease in a timely manner;
 - (b) To care for and avoid damaging the unit and common areas, to use facilities and

equipment in a reasonable way, and to not create health or safety hazards;

- (c) Not to interfere with the rights and enjoyment of others and not to damage the property of others;
- (d) Not to engage in any activity that threatens the health, safety or right to peaceful enjoyment of other residents or staff, not to engage in activity on or near the premises that involves illegal use of controlled substances or weapons, and not to engage in any criminal activity on or off the premises that would be detrimental to the housing should it occur on the premises; and to comply with necessary and reasonable rules and program requirements of the housing provider.

Attachment 2 (Rejection Standards) lists circumstances which create the presumption that an applicant is not suitable for tenancy. Attachment 2 to the Plan is the criteria by which applicants shall be screened (the "Screening Criteria"). Under the circumstances identified therein, there is a reasonable risk that the applicant shall not be able to meet the essential requirements of tenancy.

The Agent shall apply the Screening Criteria uniformly to all applicants to prevent discrimination and avoid fair housing violations. The costs of screening shall not be charged to the applicant, but shall be borne by the Development as an operating expense.

In carrying out the selection of tenants under the Plan, the Agent must consider mitigating factors that rebut the presumption that an applicant shall be unable to meet the requirements of tenancy. Mitigating factors may include a showing of rehabilitation or rehabilitating efforts and must be balanced against the potentially disqualifying behavior or circumstances. In considering both the disqualifying behavior and mitigating factors, the Agent shall determine if there is a reasonable risk that the applicant shall be unable to meet the essential requirements of tenancy. Among the factors that should be considered are:

- the severity of the potentially disqualifying conduct;
- the amount of time that has elapsed since the occurrence of such conduct;
- the degree of danger, if any, to the health, safety and security of others or to the security of the property of others or to the physical conditions of the Development and its common areas if the conduct recurred;
- the disruption, inconvenience, or financial impact that recurrence would cause the housing provider; and
- the likelihood that the applicant's behavior will be substantially improved in the future.

In general, the greater degree of danger to the health, safety and security of others or to the security of property of others or the physical condition of the housing,

The greater must be the strength of showing that a recurrence of the behavior which led to an initial determination that the applicant would not be able to meet the essential requirements of tenancy will not occur in the future.

Note: Pursuant to the Violence against Women Act (42 U.S.C.1437f and 42 U.S.C. 1437d) and regulations in accordance therewith at 24 CFR Part 5, Subpart L, admission to the development shall not be denied on the basis that the applicant or household member is or has been a victim of domestic violence, dating violence or stalking, as defined in the aforementioned regulations, if the applicant or household member otherwise qualifies for admission.

5. Screening Procedures. To obtain information about an applicant's ability to meet the essential requirements of tenancy under the Screening Criteria, the Agent shall secure background information as follows:
 - (a) Record of Prior Criminal History. In gathering such record of prior criminal history, the Agent or its agent(s) may obtain Criminal Offender Record Information (CORI) reports as part of the tenant selection process. The Agent or its agent(s) should ensure that none of the information obtained is collected or disseminated in violation of state or federal law.
 - (b) Sex Offender Registration Status. The Agent or its agent(s) shall obtain information necessary to determine if the applicant or any household member is subject to registration with a State or Federal Sex Offender Registry Board, or a lifetime registration requirement under any state sex offender registration program. (See Attachment 2A) The Agent or its agent(s) may verify the information provided by the applicant by searching the National Sex Offender Database (located at <http://www.nsopw.gov>) as recommended and in the manner set forth in HUD Notice H 2009-11.

Note: In completing background checks for (a) and (b) above for units receiving Section 8 assistance, the Agent may request the "PHA" entity to obtain such information in the manner contemplated by 24 CFR Part 5, Subpart J and HUD Handbook 4350.3 REV-1, Section 4-27.E.

6. References from landlords. References from landlords in the last five years or from the last two successive tenancies, whichever is more inclusive.
7. Credit references. Credit references furnished by a credit bureau. Information considered will not be more than five years old.

Credit checks will be performed on all adult household members.

Credit checks will be used to verify Social Security Numbers, addresses and credit history. Agent uses an internet-based system to determine credit worthiness based on the following criteria:

If credit check reveals severe and consistent late payments in the past five years, the applicant's rent to income ratio is between 30% and 40% and all other criteria are met, the applicant is acceptable only if a qualified guarantor is used.

Any open judgment over 36 months old, resolved court collection case over 24 months old, or bankruptcy over 24 months old will allow the applicant to be accepted only if all other criteria are met.

Any open judgment less than 36 months old or bankruptcy less than 24 months old in conjunction with meeting all other criteria will allow for a written explanation for the consideration of the applicant. If the judgment or bankruptcy is unlikely to affect the applicant's financial obligation and is not indicative of a problem in meeting future financial obligations, then the applicant can be accepted on the basis of extenuating circumstances.

Any current bankruptcy or foreclosure (less than 12 months old) is not acceptable although if all other criteria are met the applicant is acceptable with a guarantor.

8. Personal References. Personal references provided by the applicant.
9. Verified Income. Verification of income either from a present employer, appropriate agency, financial institution or other appropriate party.
10. Verified Disability. Verification of a disability to determine whether a family or person meets the definition of disability used to determine eligibility for occupancy at the Development or for preferences, or to identify applicant needs for features of accessible units or reasonable accommodations. The Agent may not specifically ask for or verify the nature and extent of the disability.

Verification of disability may be obtained through a third-party verification form sent by the Agent to an appropriate source of information, including but not limited to the individual's physician, care worker of the elderly, social worker, psychiatrist, or the Veterans Administration. If third-party form is used, it must be signed by the Applicant authorizing the release of such information to the Agent. The form should provide the definitions of disability used to determine eligibility and rent, and should request that the source completing the form identify whether the Applicant meets the definition. In this way the Agent is not required to make any judgments about whether a condition is considered a disability, and shall not have prohibited information. For examples and further guidance, see Appendix 15 to HUD Handbook 4350.3 REV-1.

Receipt of social security disability payments may be adequate verification of an individual's disability status for housing subsidy programs using the Social Security's definition for a person with disabilities (See HUD Handbook 4350.3 REV-1).

If an applicant claims past tenancy-related problems were the result of a disability and some condition has changed making such behavior unlikely to recur, the Agent shall consider evidence supporting such claims. All applicants are responsible for providing verification for such claims. In instances where the applicant claims some services or treatment shall be available to enable the applicant to correct the problem behavior, the Agent shall require verification that such services are available and that the applicant is likely to continue to use such services or treatment.

11. Mitigating Circumstances. Mitigating circumstances shall be verified. The individual performing the verification must corroborate the reason given by the applicant for unacceptable tenancy-related behavior and indicate the good prospect for lease compliance in the future because the reason for the unacceptable behavior is either no longer in effect or is otherwise controlled.
 - (a) Alcohol or Substance Abuse. Where an applicant claims that prior unacceptable tenancy-related behavior resulted from alcohol abuse or use of illegal drugs, acceptable verification of mitigating circumstances would have to establish that:
 - (i) (As applicable) There is no current illegal use, which includes activity within the last year, of controlled substances. If such use is documented, applicant must present evidence that such use has stopped and is unlikely to recur.
 - (ii) (As applicable) There is no current abuse of alcohol, which includes abuse within

the last year, and abuse is unlikely to recur.

- (iii) During the period for which the applicant has claimed no current use, the applicant's behavior as a tenant must have been acceptable.

In any case of confirmed, continued, unacceptable tenancy-related behavior, despite the cessation of drugs or alcohol use, an applicant may be rejected.

(b) Where bad credit is the basis for rejection, mitigating circumstances may include:

- (i) a representative payer or other reliable third party who would take written responsibility for payment;
- (ii) evidence that such poor credit was the result of a disability that is now under control; or
- (iii) Evidence that credit problems were the result of other circumstances that no longer exist and there is reason to believe that applicant will now pay rent promptly and in full.

An applicant's ability and willingness to pay rent must be demonstrated through an identifiable source of sufficient income to pay rent and prior rental history. The lack of credit history, as opposed to poor credit history, is not sufficient justification to reject an applicant. An Agent must also take into account rent burden if an applicant can demonstrate a history of satisfying a higher rent burden than the Agent normally employs. (See Rejection Standards)

The Agent shall have the right to request information reasonably needed to verify the mitigating circumstances, even if such information is of a confidential nature (e.g. verifications from medical professionals that provide confidential information.). If the applicant refuses to provide or give access to such further information the Agent may choose not to give further consideration to the mitigating circumstance.

12. Prohibited Screening Criteria. The Agent may not screen applicants for eligibility on the basis of the following:

- (a) **Physical Examinations.** The Agent shall not require physical examinations or medical testing as a condition of admission.
- (b) **Meals and Other Services.** The Agent shall not require tenants to participate in a meals program.
- (c) **Donations or Contributions.** The Agent shall not require a donation, contribution or membership fee as a condition of admission. Owners may not require any payments not provided in the lease.
- (d) **Disability Status.** Except as provided in Section C3(i), it is unlawful to make an inquiry to determine if an applicant for a dwelling unit, a person intending to reside in that unit after it is rented or made available, or any persons associated with the applicant, has a disability or handicap, or to make inquiry as to the nature or severity of an identified disability or handicap.

D. Application for Housing

1. Application Forms. Application forms (See Attachment 3) shall be distributed and accepted in the manner(s) indicated below:

- In Person
- By Mail
- By Electronic Submission

NOTE: The electronic transmittal and receipt of applications shall be subject to any applicable federal and state requirements concerning secure data transmission. If applications are accepted electronically, they must be printed and received in accordance with Section D.2(a) below.

Every application must be completed and signed by the head of the household and all adult members 18 years of age or older.

The application form shall at a minimum request the information contained in the sample application form in Attachment 3 and shall:

- solicit all the necessary information to determine program and project eligibility;
- provide the opportunity to state the need or desire for an accessible unit;
- provide notice of the right to a reasonable accommodation of a disability;
- include the Equal Opportunity logo and slogan, as well as the Accessibility logo, if required;
- include the non-discrimination statement;
- provide the opportunity to indicate eligibility for a preference; and
- Include a notice that the Agent shall communicate with the applicant in the manner or format requested by the applicant if necessary because of a disability.

All members of the household must be listed on the application form. In addition to the application form, the Agent shall also obtain the Applicant's consent to obtain third-party verifications or references. Household members eighteen (18) years or older, including any personal care attendant (PCA) (or Live-in Aide), must sign a release to conduct criminal and landlord history references.

Note: Credit information for PCAs (or Live-in Aide) is not required since their income is not included in the household income calculation.

A PCA is defined as a person who resides with a household member with a disability and who (a) provides necessary assistance in activities of daily living to such household member insofar as he or she requires such assistance on account of his or her disability; (b) is not obligated for support of the disabled household member; (c) would not be residing in the unit except to provide such necessary assistance to the household member; and (d) would otherwise move out of the unit upon termination of his or her employment as a personal care attendant or termination of the lease by the disabled client, whichever comes first. (The definition and requirements for a Live-in Aide are found in 24 CFR 5.403 and HUD Handbook 4350.3 REV-1, Section 3-6(E) (3) (a).)

The following additional requirements shall apply:

- Proof of Social Security Numbers for Household Members. The Agent will require that the Applicant provide social security numbers (SSN) for all household members. The policies and procedures for implementing this requirement are found in Attachment 4A (Disclosure of Social Security Numbers).
- Failure to respond within ten (10) days to the Agent's requests for documentation or information to process the application shall result in rejection of the application.
- The Agent may make exceptions to the procedures described herein to take into account circumstances beyond the applicant's control, including medical problems or extreme weather conditions.
- The Agent shall offer assistance to the applicant in completing the application, explain the tenant selection process, define preferences, and explain the verification process with respect to preferences.
- It is the policy of the Agent to guard the privacy of individuals in accordance with the Federal Privacy Act of 1974 and to ensure the protection of records maintained by the property concerning the applicants or tenants.
- The Agent shall not disclose any personal information contained in its records to any persons or agencies other than authorized government agencies unless the individual about whom information is requested has given written consent to such disclosure, or unless disclosure is otherwise in accordance with provisions of the state or federal privacy acts.
- This privacy policy in no way limits the Agent's ability to collect such information as it may need to determine eligibility, compute rent, determine an applicant's suitability for tenancy, or to gather information to process reasonable accommodations requests under Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act, the Fair Housing Act, and state law.
- The above policies in no way limit the right or duty of the Agent to make abuse, neglect or other protective service or emergency reports. Additionally, such policies do not forbid management from sharing information in the public domain with relevant service or government agencies.

2. Processing of Applications - Market Units

In general, applications for market units shall be processed with the following steps:

- (a) Receiving and recording – Upon receipt of an application to housing, the Agent shall indicate on the application the date and time received, either by using a date and time stamp, or by writing and initialing the date and time received.
- (b) Review for completeness - Applications shall first be reviewed for completeness. Incomplete applications shall be rejected and returned to the applicant. Applications shall not be evaluated until all of the required information has been provided.
- (c) Preliminary determination of program ineligibility - Completed applications shall be reviewed for income eligibility and compliance with any categorical eligibility requirements for the program, such as age or disability. Applications determined

ineligible shall be rejected in accordance with procedures outlined herein.

- (d) Preliminary determination of program eligibility - When there are more applicants on the waiting list than units currently available, and the anticipated duration of the waiting list exceeds ninety days, the Agent shall make a preliminary determination of eligibility, based on the applicant's self-certified statement as to his or her income, assets, age, disability status, and preference or priority status. Applicant shall be notified of the status of his/her application in accordance with procedures outlined herein.

3. Processing of Applications - Affordable Units

- (a) Applications shall be made available to any interested parties for 60 days (dates to be determined) before the end date. Public notification of availability of applications shall be made in newspapers, social media, flyers to community groups and advertising as detailed in the affirmative fair housing marketing plan.
- (b) Receiving and recording – Upon receipt of an application to housing, the Agent shall indicate on the application the date and time received, either by using a date and time stamp, or by writing and initialing the date and time received.
- (c) Review for completeness - Applications shall first be reviewed for completeness. Incomplete applications shall be rejected and returned to the applicant. Applications shall not be evaluated until all of the required information has been provided.

4. Lottery Process

The Waterfield Apartments Lottery for the 40 affordable units will be conducted by a Wingate staff member TBD that has experience with similar rent up and lottery structures and under the supervision of Wingate's Compliance Team led by Joy Agnelli. The Lottery will take place approximately 2 weeks after the application deadline at a location to be determined. Applicants do not have to be present. Staff from Wingate Management will conduct and oversee administration of the Lottery in accordance with DHCD approved guidelines.

Applications will be available starting TBD via email, mail and at local locations. Applicants will have until TBD to return applications, via email, mail or in person to designated locations. Only fully completed, signed forms will be considered for eligibility. Ineligible applicants will be notified and provided an opportunity to appeal prior to the Lottery and in accordance with the Rejection Standard Timeline. Eligible applicants will be placed in the Lottery.

An applicant's placement in the Lottery does not ensure that housing will be offered, rather the lottery will dictate the order in which applications will be processed and successful applicants offered an available unit.

Before the lottery takes place, all applicants information will be listed on a computer program. At the start of the lottery, a control number will be assigned to each application. Each control number will also be deposited into one lottery receptacle.

Staff will draw the aforementioned tickets one at a time until lottery numbers have been

assigned to all applications.

As each card is drawn, the number of the draw will be announced and written on a master list contained in a bound book with columns indicating preferences, the control “ticket” and also entered into a laptop computer.

The managing agent for Waterfield Apartments will use the master list in assigning each application to its appropriate pool. The applications will be pooled as applicants for each bedroom size and income category, and applicants needing accessible units, then sorted lottery number preferences. Each applicant’s rank order from the master list will determine where his/her application fits in the appropriate pool.

Applications for housing will be processed in the order in which the lottery process dictated for each unit and preference size/type. Should an applicant NOT respond in reasonable time, the next applicant will be contacted for processing. During the entire process, 7 days will be considered “reasonable” timing for an applicant to respond to requests for information and verifications.

Units will not be assigned at the lottery. Applicants will be notified of their lottery ranking as soon as practical following the public lottery.

Lottery Selection Process – TBD Local Preference Applied as required by 40R (for initial rent-up only).

- Each qualified applicant is assigned a ballot with a registration number. Eligible applicants will receive notification of their eligibility for the lottery, their registration number and the date, time and location of the lottery.
- Applicants who are determined to be ineligible for the lottery will receive a rejection letter. The rejection letter will inform them of their right to appeal, in accordance with Paragraph 6 below.
- Ballots with the registration numbers for applicant households are placed into all pools for which they are qualified.
- Those not qualified under the local preference will be placed in the Open Pool only.
- Those qualified under the local preference will be placed in both the Preference Pool and the Open Pool. Ballots should be drawn randomly from the Preference Pool and placed on the Preference list in the order in which they were drawn.
- Ballots will be drawn randomly from the Open Pool and placed on the Open list in the order in which they were drawn.
- In the final lottery (with preference), distribution will come from the selection pools, the Preference Pool and the Open Pool. This distribution of the available units must be:
 - Awarded according to the appropriate household size for the unit available that was established for the lottery.
 - Distributed first from the Preference Pool until the percentage of units set aside for local preference has been reached or the Preference Pool has been exhausted.
 - Distributed from the Open Pool until all affordable units have been awarded

5. Notification of Decision on Application. Upon completion of the Lottery, the Agent shall send a written response to applicants included in the Lottery advising such applicants of their Lottery-pick status. The notifications shall be mailed not more than thirty days from the date of completion of the Lottery. Alternate formats for responding to an applicant with a disability shall be provided upon an applicant's request. If the Agent has not made a determination to reject the applicant, the written response shall include the status of the application with respect to:
- result of the preliminary determination of eligibility;
 - position on the waiting list;
 - SSN disclosure and verification requirements;
 - estimate of the time it may take before the applicant will be offered assistance;
 - notice that the applicant is responsible for reporting changes in address, phone number, and preference status;
 - where applicable, the applicant's qualification for a preference(s) for admission; and
 - a statement that the applicant has the right to meet with the Agent to discuss the determination made with respect to the application.
6. Provisions Relating to Rejection of an Application. If the applicant is not accepted, or is not placed on the waiting list for admission, the Agent shall follow the procedures outlined in section 5 above, and shall include the following in its written response (See Attachments 6 and 6A) to the applicant:
- The reason(s) for the rejection;
 - Notice that the applicant or his or her representative, prior to or at the conference with the Agent, has the right to inspect the documentation on the basis of which the rejection was made and any other documentation pertinent to the applicant's eligibility, suitability, qualification or entitlement to priority or preference status. The Agent shall make reasonable arrangements for photocopying any such documentation as the applicant may specify with sufficient advance notice, except that in the case of a credit report, the applicant shall obtain the report from the credit reporting agency;
 - Notice that the applicant has fourteen days to respond in writing or request a meeting with the Agent to dispute the rejection;
 - Notice that the applicant for a affordable unit may request that the Governing agency review the Owner's denial to verify that the denial is in compliance with the approved Tenant Selection Plan;
 - Notice that the applicant has the right to request a reasonable accommodation if the applicant believes that, with such an accommodation, the applicant would be suitable for admission and that the applicant was rejected for a reason arising from the applicant's disability.

Upon rejection of an applicant, the Agent shall record and retain application and rejection information for 3 years. This record shall include:

- The application, eligibility verification received and all written communications
- The notice of decision on applicant
- Rejection notice and attachments

E. Preferences, Priorities and Targeting

This Section describes the preferences, priorities, and targeting that shall be applied in the selection of residents under the Plan. Applicants with preferences are selected from the waiting list and receive an opportunity for an available unit earlier than those who do not have a preference. Preferences affect only the order of applicants on the waiting list. They do not make anyone eligible who was not otherwise eligible, and they do not change the Agent's right to apply or modify the tenant selection criteria found elsewhere in this plan. Preferences Include:

Accessible Unit Preference:

- Accessible units that have adaptive features (also commonly referred to as “adaptable” units), for occupancy by persons with mobility impairments or hearing, vision or other sensory impairments, first preference (regardless of applicant pool) for those units shall be given to persons with disabilities who need such units, including single person households, in conformity with state and federal civil rights laws.
 - This preference also applies to units with adaptive features for persons with mobility impairments and/or hearing, vision or other sensory impairments.

F. Waiting Lists for AHR Units

The Agent shall establish and administer its Waiting Lists in accordance with the following policies.

1. Waiting lists shall be maintained in either a bound ledger or on a computer report. A printed copy of the waiting list shall be prepared, prior to the annual update, and maintained for three years.
2. The Initial wait list shall be determined by the Lottery and consist of the list of households who are not awarded a unit, in the order that they were drawn from the Open Pool. Should the wait list remain open after the initial lottery, completed applications received after the lottery will be placed on the Wait list by date and time received by the Agent—and behind the initial wait list.
3. Waiting lists must include the following data taken from the application:
 - (a) Date and time the applicant submitted the application, or if a lottery applicant lottery ranking;
 - (b) Name of the head of household;
 - (c) Annual income level (used to estimate levels for income-targeting, i.e. extremely low-income, very low-income, low-income and moderate income);
 - (d) Identification of the need for an accessible unit, including the need for accessible feature, i.e. visually or hearing impaired;
 - (e) Preference status; and
 - (f) Unit size.
4. Waiting lists shall be organized by type of unit (affordable, physically adapted unit, etc.). A separate list is required for every type of unit. "Type of unit" is defined in several ways, including:
 - (a) the number of bedrooms, as well as the number of bathrooms, or ancillary rooms, such as a den or dining room;
 - (b) the physical characteristics of the unit, such as accessible features;

5. Each applicant must be placed on the appropriate waiting list(s) chronologically according to the date and time of the completed application within the applicable preference categories. Non-preference applicants shall be placed on the waiting list per the date and time of the completed application.
6. If an applicant is eligible for tenancy, but no appropriately sized unit is available, the Agent shall place the family on a waiting list. Households that are eligible for more than one size of unit (by bedroom size) may choose to be placed on multiple waiting lists, as appropriate, and the Agent shall respect the bedroom size option chosen by the applicant unless such choice violates the state sanitary code, other applicable laws, or the Development's Occupancy Policy. Persons using a wheelchair or requiring similar accommodations may apply for a standard unit, as well as an accessible unit, in their discretion.
7. The Agent's records shall indicate the date the applicant is placed on the waiting list. Whenever a change is made in the waiting list, an action is taken, or an activity specific to an applicant occurs, a notation must be made on the waiting list. In instances where the applicant asks to be passed over until the next vacancy (for non-medical reasons), the Agent may allow applicant to retain his position on the waiting list. However, an applicant's failure to accept the next available vacancy shall result in the applicant being placed on the waiting list as if the application had been received on the date of the second refusal.
8. The Agent will contact applicants in writing annually to verify continued interest in remaining on the Development's waiting list. The Agent may require interested applicants to contact the Development in order to remain on the waiting list, and may remove from the waiting list those applicants who do not respond within thirty (30) days. A model letter to verify continued interest in remaining on the waiting list is attached to the Plan as Attachment 7 (Annual Waiting List Update).
9. The waiting list may be closed for a specific unit size or type if the projected turnover rate indicates that an applicant would be unable to obtain a unit within two years. Before closing a waiting list, the Agent must receive written approval from DHCD. Thereafter, the Agent shall post a notice at the Development that indicates: (a) the date the list will be closing and (b) DHCD's telephone number, fax number and TDD number for verification. Notice must be in 14 point (or larger) print and in an accessible location(s). The Agent shall further publish a notice in a publication likely to be read by potential applicants stating that the Development will no longer accept applications and the reasons therefore. The Agent shall notify the Governing agency of any closure of the waiting list.
10. When an applicant pool is not large enough to warrant the closure of the waiting list, the list shall be re-opened. DHCD must receive written notification of the list's reopening, and public notice shall be placed in area publications and as otherwise required by the Development's Affirmative Fair Marketing Plan. The public notice should include rules for applying and the order in which applications will be processed (unless otherwise approved by DHCD, a lottery process shall be conducted). The Agent shall notify the Governing agency of any action to re-open the waiting list.
11. Waiting lists shall be updated every twelve months. The Agent shall notify the Governing agency of its waiting list Annual Update.
 - (a) Formal verification - If, subsequent to the preliminary determination of eligibility, the Agent determines that the formal verification of income, assets, or claimed priority status differs from the applicant's self-certification, the applicant may be:

- (i) reassigned to another waiting list (i.e. smaller or larger bedroom size);
- (ii) reassigned to a different preference status; or
- (iii) determined ineligible.

NOTE: Prior to removing an applicant's name from the waiting list, the Agent shall send written notice of the action, or notice in requested alternate format, to the applicant, at the applicant's address of record, or to any person designated by the applicant to receive a copy of such notices as a form of reasonable accommodation. The Agent shall notify the Governing agency of its intent to remove an applicant from the waiting list. A copy of the standard notice of removal is attached to the Plan. (See Attachment 8)

G. Vacancies

1. Transfer of Existing Residents

In filling vacant units, the Agent shall first offer current residents the option to relocate to another unit in the Development, provided such residents meet one of the following transfer conditions:

Special Condition

- (a) Residents who require the features of an accessible unit, or require the features of another unit as necessary to provide a reasonable accommodation, provided that verification of the need has been made by the Agent; and
- (b) Residents who require a different size unit due to change in family composition.
- (c) In both cases the resident must:
 - Not be in default under the current leases;
 - Not have a rental balance, and;
 - Have maintained current unit in proper condition, reasonable wear and tear expected, with no damage, which would be chargeable to the resident.

The Agent shall maintain a formal waiting list for current residents seeking to relocate to other units pursuant to these conditions. When a vacancy occurs, the Agent shall determine if a transfer is warranted from the internal waiting list before proceeding to the external waiting list to select an applicant for the vacant unit.

2. Filling of Vacancies

In the event that there are no current residents of the Development to fill the vacant unit, the Agent shall offer the vacant unit to the next qualified applicant for that unit type found on the waiting list. If there are no qualified applicants for the unit type on the waiting list, the Agent shall advertise the unit for rent in accordance with the Development's AFHMP and/or offer the unit to a qualified applicant for the unit type not on the waiting list.

H. Record-Keeping

1. Agent must retain current applications as long as their status on the wait list is active.
2. Once the applicant is taken off the waiting list, the Agent must retain the application, initial rejection notice, applicant reply, copy of the Agent's final response, and all documentation

- supporting the reason for removal from the list for three years.
3. When an Applicant moves in, the Agent must retain the application, supporting documentation (including the Agent's verification efforts) for the duration of the tenancy and for three years after the tenant leaves the property.
 4. The Agent will maintain the applicant and tenant information in a way to ensure confidentiality. The confidentiality of records containing criminal background checks and other personal information will be maintained in order to comply with all state and federal laws and regulations.

I. Limited English Proficiency (LEP) Services

The Agent shall determine, as part of its obligation to take reasonable steps to ensure meaningful access to the Development and its programs by persons with Limited English Proficiency (LEP), those Oral Language Services (i.e. interpretation) and Written Language Services (i.e. translation) that may be required in connection with the implementation of this Plan.

J. Modification of Tenant Selection Regulations

The Agent acknowledges that DHCD may, from time to time, request modifications to the policies outlined in this Plan. The Agent agrees that, upon reasonable notice, the Agent shall amend the Plan to satisfy such changes.

K. Review and Modification of Tenant Selection Plan

The Agent shall review periodically, the Plan for compliance with DHCD regulations and all other affordable program requirements. The Agent may modify the Plan and the policies related to the selection of tenants at any time, subject to prior approval by DHCD. The Agent shall send notice of the modification and a description of the changes made to the Plan to applicants on the waiting list within thirty (30) calendar days of the effective date of the modification.

Any changes made in a Tenant Selection Plan shall be prospective unless otherwise required by DHCD, or applicable law.

L. Plan Available to Public Upon Request

The Agent shall make copies of the Plan available to the public, including Applicants and residents of the Development, upon request.

CERTIFICATION/REQUEST FOR APPROVAL

As authorized representatives of Waterfield Apartments and Wingate Management Company, LLC respectively, each of us has reviewed this plan and agrees to implement this AFHMP, which shall be made effective as of the approval date. Further, by signing this form, Waterfield Apartments agrees to review and update its AFHMP as necessary in order to comply with all applicable statutes, regulations, executive orders and other binding DHCD requirements pertaining to affirmative fair housing marketing and resident selection plans reasonably related to such statutes, regulations, executive orders, as same may be amended from time to time. We hereby certify that all the information stated herein, as well as any information provided herewith, is true and accurate.

DEVELOPER NAME: _____

By: _____

Name:
Title:

Date: _____

AGENT NAME: Wingate Management Company, LLC

By: _____

Name: Michael Martin
Title: President

Date: _____

ATTACHMENTS:

- Attachment 1: Required Justification for Local Preference
- Attachment 2: Eligibility Criteria and Occupancy Standards
- Attachment 3: Rejection Standards (Exhibit 2 to the Tenant Selection Regulations)
- Attachment 3A: Request for Sex Offender Registry Information
- Attachment 4: Model Application Form
- Attachment 5: Applicant's Consent for Release of information
- Attachment 5A: Disclosure of Social Security Numbers
- Attachment 6: Notification of Lottery Eligibility
- Attachment 7: Notification of Lottery Results
- Attachment 8: Rejection Notice
- Attachment 8A: Attachment to Rejection Notice
- Attachment 9: Annual Waiting List Update
- Attachment 10: Notice of Removal from Waiting List
- Attachment 11: Sample Ad
- Attachment 12: DHCD Tenant Selection Plan Rider
- Attachment 13: Conflict of Interest Policy

Required Justification for Local Preference

Metro North Regional Housing Services Office

Reading, North Reading, Wilmington, Saugus

Headquarters - Reading, Town Hall
16 Lowell Street, Reading MA 01867

Laurie Stanton
Administrator
Phone: (781) 942-6667
Fax: (781) 942-9071
lstanton@ci.reading.ma.us

The Case for Local Preference for 20-24 Gould Street

As of the 2010 US Census, the population of Reading is 24,747, an increase of 4.4% since 2000. The census also tells us that 35.9% of Reading's 9,305 households (a household being all those that occupy one housing unit) have children under 18 years old, and 26.3% have persons age 65+. According to www.housing.ma, the Massachusetts Housing Data Portal, 7.8% (750) of Reading households are extremely low income, 8.1% (778) are very low income, and 6.8% (654) are low income. This means that 22.7% (2,183), or almost one quarter of the households in Reading would qualify for federal and state affordable housing programs, based on household income.

The most common measure of housing affordability is the percent of income that households spend on housing costs. According to most federal and state agencies, households that spend more than 30% of income on housing costs are "cost burdened". Households that spend more than 50% of income on housing are "severely cost burdened". Areas where more than 30% of households are cost burdened face an affordable housing shortage. In Reading, 32% of households are cost burdened and 13% are severely cost burdened, compared to 29% and 14% of households statewide. Reading has a clear affordable housing shortage.

Cost burden rates are typically higher among renter households. Statewide, 47% of renters and 31% of owners are cost burdened, respectively. In Reading, 36% of renters and 31% of owners are cost burdened. According to the Reading Housing Authority, there are 272 local residents on their various waitlists (elder, non-elder, family, section 8).

Reading's median household income in 2015 was \$107,654, a 39.7% increase from 1999, and significantly more than the Boston-Cambridge-Quincy Metro Area (\$98,500), or the state as a whole (2011-2015 American Community Survey). However, an estimated 26.3% of Reading households have incomes at or below 80% of the AMI (2010-2014 Comprehensive Housing Affordability Strategy Data). Much of Reading's housing stock is out of reach for lower income households. There is a need for more affordable housing, especially rental housing and housing for seniors. On www.trulia.com, the median rent for a 1-3 bedroom in Reading, in December 2017, was \$2700, an increase of 8% from the same period last year.

20-24 Gould Street is a 4-story mixed-use 40R project with 55 rental housing units, 3500 sq. ft. of commercial space and 14-22 deed restricted affordable units (depending on financing). The project will have 27 one-bedroom, 22 two-bedroom, and 6-three-bedroom units.

For this project, Reading would like to reserve 70%, or 9 to 15 of the 14-22 affordable rental units for applicants who demonstrate a connection to Reading. Any person or household who qualifies under the local preference shall have equal consideration in the Local Pool, and will also be eligible in the General Pool. The local preferences include:

- **Current residents:** A household in which one or more members is living in the Town at the time of application. Documentation of residency should be provided, such as rent receipts, utility bills, street listing, or voter registration listing.
- **Municipal Employees:** Employees of the Town, such as teachers, janitors, firefighters, police officers, librarians, or town hall employees.

- Employees of Local Businesses: Employees of local businesses located in the Town.
- Households with children attending local schools, such as METCO students.

The Town is committed to providing equal access to all applicants. In the event that the pool of applicants with a local preference does not include at least 27% of households who have one or more member who is a minority as defined in the application, the other eligible minority applicants will be included in the lottery for the local preference units. The number of minority applicants needed in order to meet or exceed 27% will be determined, and then eligible minority applicants will be included from the general pool through a minority pre-lottery.

Given the shortage of rental housing affordable to low-income households in Reading, and the housing cost burden faced by many Reading residents, the Town of Reading would like to offer more affordable rental opportunities to Reading residents, and thus requests that 70% (9 -15) of the affordable units be reserved for local preference for the 20-24 Gould Street project.

SAMPLE

ELIGIBILITY CRITERIA AND OCCUPANCY STANDARDS

Income limits:

The income eligibility criteria for the 14 affordable units in this table will be updated as the federal income limits change.

Affordable Unit Mix

1 BR –

2BR –

3BR –

Income Limits Effective 4/1/2020

HH Size	80%	60%	50%	30%
1	67,400	53,760	44,800	26,850
2	77,000	61,440	51,200	30,700
3	86,650	69,120	57,600	34,550
4	96,250	76,740	63,950	38,350
5	103,950	82,920	69,100	41,450
6	111,650	89,040	74,200	44,500

The Agent will consider housing applicants for residency who, at the time of admission, meet all of the following conditions or conditions required by any applicable federal/state guidelines, and who have submitted an application for occupancy. The following criteria shall be used to determine an applicant's eligibility:

- A household is a family or single person who is eligible under applicable federal/state requirements.
- Household annual income does not exceed current program income limits.
- Household annual income is sufficient to pay rent and utilities.
- Household has provided verified social security numbers (SSN) for all family members who will be living in the apartment.
- Households who have not committed any fraud in connection with any Federal or State Housing Assistance Program, and owe no rent or other amounts in connection with housing assistance.
- The Agent will assign units based on waitlist placement and eligibility.

Occupancy Standards:

Occupancy is based on no more than two people per bedroom.

Other Occupancy Standards:

1. Applicant household size must be appropriate for the unit. Household must consist of at least one person per bedroom not to exceed two persons per bedroom. Within an applicant pool, first preference shall be given to households requiring the total number of bedrooms in the unit based on the following criteria:
 - There is at least one occupant and no more than two occupants per bedroom.
 - A husband and wife, or those in similar living arrangements, shall be required to share a bedroom. Other household members may share, but shall not be required to share a bedroom.
 - A husband and wife, or those in similar living arrangements, shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the agent receives reliable medical documentation as to such impact of sharing.

When there are no applicants who require the number of bedrooms for an available unit, second preference shall be given to households requiring the number of bedrooms in the unit, minus one (excludes Section 8 units).

REJECTION STANDARDS

An applicant and the applicant household shall be disqualified for a unit for any of the following reasons:

- a) The applicant or a household member has disturbed a neighbor or neighbors in a prior residence by behavior, which, if repeated by a tenant at **Waterfield Apartments**, would substantially interfere with the rights of other tenants to peaceful enjoyment of their units.
- b) The applicant or a household member has caused damage or destruction of property at a prior residence, and such damage or destruction of property, if repeated by a tenant at **Waterfield Apartments** would have a material adverse effect on the housing development or any unit in such development.
- c) The applicant or a household member has displayed living habits or poor housekeeping at a prior residence, and such living habits or poor housekeeping, if repeated by a tenant at **Waterfield Apartments** would pose a substantial threat to the health or safety of the tenant or other tenants or would adversely affect the decent, safe and sanitary condition of all or part of the housing.
- d) The applicant or a household member in the past has engaged in criminal activity or activity in violation of **Massachusetts** law, which, if repeated by a tenant at **Waterfield Apartments** would interfere with or threaten the rights of other tenants to be secure in their persons, or in their property, or with the rights of other tenants to the peaceful enjoyment of their units and the common areas of the housing development, or would threaten the health and safety of the owner, or any employee, contractor subcontractor or agent of the owner, or any employee who is involved in the housing development. Notwithstanding the foregoing, and pursuant the Violence Against Women Act (42 U.S.C. 1437f and 42 U.S.C. 1437d) and regulations promulgated in accordance therewith at 24 CFR Part 5, Subpart L, admission to the development shall not be denied on the basis that the applicant or household member is or has been a victim of domestic violence, dating violence or stalking, as defined in the aforementioned regulations, if the applicant or household member otherwise qualifies for admission.
- e) The applicant or any household member who will be assuming part of the rent obligation has a history of non-payment of rent and such non-payment, if repeated by a tenant at **Waterfield Apartments**, would cause monetary loss;. If the applicant or household members assuming part of the rent obligation are unable to provide a prior landlord reference, the credit report of the applicant or household member may be used to determine the applicant's ability to pay rent. In such circumstances, a bad credit history may be used

as the basis of rejection, but the applicant may provide evidence of mitigating circumstances, which may include (i) a representative payer or reliable third party who would take responsibility for payment; (ii) evidence that such poor credit was a result of a disability that is now under control; or (iii) evidence that credit problems were the result of other circumstances that no longer exist and there is reason to believe that the applicant will now pay the rent promptly and in full. Lack of credit history, as opposed to poor credit history, is not sufficient justification to reject an applicant.

- f) The applicant or a household member has a history of failure to meet material lease terms or the equivalent at one or more prior residences, and such failure if repeated by a tenant at **Waterfield Apartments** would be detrimental to the housing development or to the health, safety, security or peaceful enjoyment of other tenants.
- g) The applicant has failed to provide information reasonably necessary for the housing provider to process the applicant's application.
- h) The applicant has misrepresented or falsified any information submitted. As part of the applicant's application or a prior application submitted within the last three years, and the applicant fails to establish that the misrepresentation or falsification was unintentional.
- i) The applicant or a household member has directed abusive or threatening behavior which was unreasonable and unwarranted towards a management agent's employee during the application process or any prior application process within three (3) years.
- j) The applicant does not intend to occupy housing, if offered, as his/her primary residence.
- k) The applicant or household member has been evicted from previous housing for drug-related criminal activity, for five years from the date of eviction; provided, however, that if the evicted applicant or household member who engaged in drug-related criminal activity has successfully completed a supervised drug rehabilitation program and can evidence compliance with the program for a period of no less than 24 months or circumstances leading to the eviction no longer exist (for example, the criminal household member has died or is imprisoned), the owner may, but is not required to, admit the household.
- l) The applicant or household member is a current illegal user of one or more controlled substances. A person's illegal use or possession of a controlled substance within the preceding twenty-four months shall create a presumption that such person is a current illegal user of a controlled substance, but the presumption may be overcome by a convincing showing that the person has permanently ceased all illegal use of controlled substances.
- m) There is reasonable cause to believe that the applicant or household member's illegal use of a drug may interfere with the health, safety or right to peaceful

enjoyment of the premises by other residents. Examples of evidence of illegal activities may include a conviction record, former landlord references, etc.

- n) The applicant or household member is subject to a lifetime registration requirement under any state or federal sex offender registration program.
- o) There is reasonable cause to believe that the applicant or household member's abuse or pattern of abuse of alcohol may interfere with the health, safety or right to peaceful enjoyment of the premises by other residents.

SAMPLE

SEX OFFENDER REGISTRY VERIFICATION

The Agent will run all applicants and household members, fourteen (14) years of age or older through the National Sex Offender Public Website @ www.nspopw.gov/core/portal/.aspx

SAMPLE

MODEL APPLICATION FORM

THE AGENT WILL PROVIDE HELP IN REVIEWING THIS DOCUMENT. IF NECESSARY, PERSONS WITH DISABILITIES MAY ASK FOR THIS APPLICATION IN LARGE PRINT TYPE, OR OTHER ALTERNATE FORMATS.

SEE ATTACHED:

1. MODEL APPLICATION
2. HOUSEHOLD ELIGIBILITY QUESTIONAIRRE

SAMPLE

1. MODEL APPLICATION



APPLICATION FOR RENTA



PLEASE LIST YOUR FULL NAME AS IT APPEARS ON YOUR PHOTO ID

FIRST NAME		MIDDLE NAME		LAST NAME	
SOCIAL SECURITY # OR INDIVIDUAL TAXPAYER ID #		DRIVERS LICENSE OR OTHER GOVERNMENT ISSUED PHOTO ID #		TYPE OF ID	STATE OR GOVERNMENT THAT ISSUED THE ID
DATE OF BIRTH		OTHER NAMES USED IN LAST 10 YEARS		EMAIL ADDRESS (If required)	
PRESENT ADDRESS			COUNTY		WORK TELEPHONE #
CITY	STATE	ZIP	HOME TELEPHONE #		MOBILE TELEPHONE #
LIST ALL OTHER PERSONS, INCLUDING SPOUSES, TO OCCUPY THE PREMISES, INCLUDING DATE OF BIRTH (if 18 years or older, must fill out application as an applicant)					
NAME	DATE OF BIRTH	NAME	DATE OF BIRTH	NAME	DATE OF BIRTH
PRESENT ADDRESS IS (Check one): <input type="checkbox"/> OWNED HOME <input type="checkbox"/> RENTED HOME <input type="checkbox"/> RENTED APARTMENT <input type="checkbox"/> PARENTS HOME <input type="checkbox"/> STUDENT HOUSING <input type="checkbox"/> OTHER:					
IF RENTING or OWNED: PRESENT LANDLORD / APARTMENT COMMUNITY / MORTGAGE COMPANY					
ADDRESS OF PRESENT LANDLORD / APARTMENT COMMUNITY / MORTGAGE COMPANY					
CITY	STATE	ZIP	TELEPHONE #		
HOW LONG?	MONTHLY PAYMENT		ANTICIPATED MOVE-OUT DATE:		REASON FOR LEAVING:
PREVIOUS ADDRESS (IF LESS THAN THREE YEARS AT PRESENT ADDRESS)					
CITY	STATE	ZIP	TELEPHONE #		
PREVIOUS ADDRESS IS (Check one): <input type="checkbox"/> OWNED HOME <input type="checkbox"/> RENTED HOME <input type="checkbox"/> RENTED APARTMENT <input type="checkbox"/> PARENTS HOME <input type="checkbox"/> STUDENT HOUSING <input type="checkbox"/> OTHER:					
IF RENTING or OWNED: PREVIOUS LANDLORD / APARTMENT COMMUNITY / MORTGAGE COMPANY					
ADDRESS OF PREVIOUS LANDLORD / APARTMENT COMMUNITY / MORTGAGE COMPANY				COUNTY WHERE RESIDENCE LOCATED	
CITY	STATE	ZIP	TELEPHONE #		
HOW LONG?	MONTHLY PAYMENT		MOVE-OUT DATE:		REASON FOR LEAVING:
HAVE YOU LIVED IN AN WINGATE COMMUNITY BEFORE? <input type="checkbox"/> YES <input type="checkbox"/> NO		IF YES, WHICH ONE (Include city and/or state)?			FROM: TO:

Employment

EMPLOYER (COMPANY NAME)		HOW LONG?	MONTHLY GROSS INCOME		
ADDRESS		CITY	STATE	ZIP	
JOB TITLE		SUPERVISOR'S NAME			SUPERVISOR'S TELEPHONE #
OTHER SOURCE(S) OF VERIFIABLE INCOME		WHEN RECEIVED	AMOUNT	MONTHLY INCOME FROM OTHER SOURCES	
FORMER EMPLOYER (IF LESS THAN THREE YEARS AT CURRENT JOB)			HOW LONG?		
ADDRESS		CITY	STATE	ZIP	
JOB TITLE		SUPERVISOR'S NAME			SUPERVISOR'S TELEPHONE #

Motor Vehicles (including cars, trucks, boats, motorcycles - if permitted at property):

YEAR/MODEL	YEAR	COLOR	LICENSE/STATE #	STATE
1.				
2.				
3.				

Animals (animals require our consent)

TYPE	BREED	WEIGHT	HAIR	DESCRIPTION #
1.				
2.				

Person to Notify in Case of Emergency, Death or Incapacity** (cannot be someone who intends to reside in the premises)

NAME	RELATIONSHIP	PRIMARY TELEPHONE #	ALTERNATE TELEPHONE #	
ADDRESS		CITY	STATE	ZIP

Criminal Background Information

Do you or do any of your occupants have charges pending against you or against them for any criminal offense(s)?	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No	Occupants <input type="checkbox"/> Yes <input type="checkbox"/> No
Have you or have any of your occupants ever been convicted of, or pleaded guilty or no contest to, any criminal offense(s) or had any criminal offense(s) disposed of other than by acquittal or a finding of "not guilty"?	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No	Occupants <input type="checkbox"/> Yes <input type="checkbox"/> No
Any litigation, such as: evictions, suits, judgments, bankruptcies, foreclosures, etc.?	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No	Occupants <input type="checkbox"/> Yes <input type="checkbox"/> No
If "YES" to any of the above questions, give details and dates, including the county and state in which the incident occurred:		

How did you hear about our community?

Internet (which site?) _____ Resident (name?) _____

Drive-By Rental Publication (Which One?) _____ Rental Agency (Which One?) _____

Locator Service (Which One?) _____ Other _____

PLEASE READ CAREFULLY AND SIGN BELOW

Correct information. You represent that all of the above statements are true and complete. You authorize us to contact any references listed above and to obtain consumer reports, which may include credit, rental payment history and criminal background information about you and any occupants in the premises in order to verify the above information. You further authorize us to obtain subsequent consumer reports to ensure that you continue to satisfy the terms of your tenancy, for the collection and recovery of any financial obligations relating to your tenancy, or for any other permissible purpose. You understand that we may report all positive and negative rental payment history to consumer reporting agencies who track this information for landlords, mortgage companies and other creditors. You and all occupants hereby release from all liability or responsibility all persons and corporations requesting or supplying such information. You acknowledge that false, incomplete or misleading information herein may constitute grounds for rejection of this application, termination of right of occupancy of all residents and occupants under a lease and/or forfeiture of deposits and fees, and may constitute a criminal offense under the laws of this State. This application is preliminary only and does not obligate us to execute a Lease or to deliver possession of the premises to you. You also acknowledge that if any payment to us is returned or otherwise rejected by your financial institution for any reason, we will assess a returned item fee in accordance with local law.

I have read and agree to the provisions as stated.

Applicant Signature _____

Date _____

Non-Refundable Application Processing Fee required with each Application: \$ _____

Total Holding Deposit*** (Per Apartment, if any): \$ _____

Holding Deposit amount paid by this applicant: \$ _____

Address of Apartment/Premises being held: _____

OFFICE USE ONLY

Apartment Number _____

Apartment Size/Description _____

Anticipated Move In Date _____

Lease Start Date _____

Lease End Date _____

Quoted Monthly Apartment Rent _____

Property Staff Initials _____

* **Email Address & Electronic Signature.** Please provide the email address through which you prefer to receive communications from us. In particular, we may present our lease documents to you for signature electronically. If we do so, you will receive an email with a link to your lease. You can review the lease on your own time and sign it, electronically, anytime prior to your move-in date. Your electronic signature should match the name that is displayed in your lease. An electronic signature is enforceable and replaces traditional pen and paper signatures. If you will not be able to use this method of signature because you do not have an email address or access to internet, please let us know so we can prepare a paper lease for signature.

** **Authorization for Providing Access in the Event of Emergency, Death or Incapacity.** If your application is approved and you take possession of the apartment/premises, you authorize us, in the event of your death or incapacity, to grant access to the premises and the contents therein to the individual you named above. Once we grant access to such person, he/she may remove all personal property from the premises and dispose of it in accordance with applicable law. You hereby release and discharge us from any liabilities, claims or damages arising out of or in connection with our granting such access to the person you named.

*** **Holding Deposit Agreement.** You understand that the holding deposit is not a security deposit. By signing this application and paying the holding deposit, you are requesting us to reserve the apartment/premises for you. You understand that the premises will not be taken off the market until such time as you have submitted this fully-completed and signed application, as well as all of the necessary documentation we require in order to approve or deny your application. You further understand that the holding deposit does not obligate us to execute a lease or to deliver possession of the premises to you.

If your application is denied, we will refund the entire holding deposit to you. We may be required to deposit the holding deposit and issue a refund check to you.

If we notify you that your application has been approved and you notify us within 24 hours of that notification that you do not want to enter into a lease with us, we will refund the entire holding deposit to you. We may be required to deposit the holding deposit and issue a refund check to you.

If we notify you that your application has been approved and you do not notify us within 24 hours of that notification that you do not want to enter into a lease with us, your entire holding deposit will be forfeited. We both agree that your election to not enter into a lease with us, without providing the above mentioned notice within 24 hours of your approval notification, will cause us to incur costs that are difficult and impractical to fix. Such costs include, without limitation, lost rent on the premises, as well as marketing, advertising, office overhead and other costs incurred by us in preparing the premises for rental to other potential tenants. We both agree that the forfeiture of the holding deposit, in such instance, is not a penalty, but represents a fair and reasonable estimate of the costs that we will incur as a result of your failure to timely enter into a lease for the premises.

If your application is approved and you enter into a lease with us, the holding deposit will be applied, at our discretion, to one of the following: (i) any security deposit required under the lease; (ii) any rental amount required under the lease; or (iii) any other fees and charges required under the lease. If there is inconsistency between the terms of this application and the signed lease, the terms of the lease will control.

2. HOUSEHOLD ELIGIBILITY QUESTIONNAIRE

HOUSEHOLD ELIGIBILITY QUESTIONNAIRE

Property Name: _____ Unit: _____

<p>Certification Type:</p> <input type="checkbox"/> Move Initial Certification <input type="checkbox"/> Re-certification <input type="checkbox"/> Other: _____	<p>Housing Program:</p> <input type="checkbox"/> Low Income Housing Tax Credit <input type="checkbox"/> HOME <input type="checkbox"/> Other: _____
--	--

I. HOUSEHOLD COMPOSITION					
<ul style="list-style-type: none"> • Unless assistance is required, this form must be completed by the applicant/tenant. • List each person who will reside in the unit along with the relationship to the head of household, date of birth, and social security number. • Do not include minors who will be present less than 50% of the time. • List FT student status for any member who is currently enrolled, expects to become enrolled, or was previously enrolled for any part of 5 months in the calendar year. Include grades K-12; college; university; technical; trade; and mechanical schools. 					
HOUSEHOLD MEMBER NAME	RELATIONSHIP	DOB	SSN	FT STUDENT?	
1.	HEAD			<input type="checkbox"/> YES	<input type="checkbox"/> NO
2.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
3.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
4.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
5.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
6.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
7.				<input type="checkbox"/> YES	<input type="checkbox"/> NO
8.				<input type="checkbox"/> YES	<input type="checkbox"/> NO

Are any HH changes expected in next 12 months? YES NO

If YES explain: _____

Are any student changes expected in next 12 months? YES NO

If YES explain: _____

II. STUDENT STATUS	
Is every member of the household a FT student as defined above? <ul style="list-style-type: none"> • If NO continue to Section III • If YES please complete the following questions: 	<input type="checkbox"/> YES <input type="checkbox"/> NO
Does a student receive assistance under Title IV of the Social Security Act (i.e. TANF or AFDC but not SS or SSI)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Was a student previously a foster child?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Is a student enrolled in a program funded by the Workforce Investment Act or similar federal/state/local program?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Is a student married and eligible to file a joint tax return?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Is a student a single parent who is not claimed as a dependent by another individual?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Are the minors in the household claimed as a dependent by a parent?	<input type="checkbox"/> YES <input type="checkbox"/> NO

INCOME INSTRUCTIONS:

- List gross amounts anticipated to be received in the 12 month period following move in or recertification
- For minors include unearned income such as benefits, SSA, SSI, gifts, child support, income from assets
- For adults include both earned income from jobs and unearned income
- Answer each YES-NO question. For each YES include the gross amount and frequency
- Do not leave any unanswered questions

III. HOUSEHOLD INCOME

*Use an extra copy of pages 2 and 3 as needed if more than 2 adult members are included in the household.
All adults must sign the form.*

Type of Income	Head of Household			Co Head and/or Other Member		
	Check One	Amount	Frequency	Check One	Amount	Frequency
1. Salary or pay from job	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
2. Overtime or shift pay	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
3. Bonus/commission/etc.	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
4. Do you have a 2 nd job?	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
5. Seasonal/sporadic work	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
6. Tips	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
7. Cash pay	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
8. Self employment income	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
9. Periodic gift income	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
10. Non cash contributions	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
11. Formal child support	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
12. Is child support awarded but not paid?	<input type="checkbox"/> YES <input type="checkbox"/> NO			<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
13. Informal child support	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
14. Formal spousal support	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
15. Is spousal support awarded but not paid?	<input type="checkbox"/> YES <input type="checkbox"/> NO			<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
16. Informal spousal support	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
17. Social Security	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
18. SSI	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
19. TANF, AFDC, etc.	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
20. Unemployment benefits	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
21. Worker's compensation	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
22. Severance pay	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
23. Pension income	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
24. Retirement acct payments	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
25. Investment acct payments	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
26. Annuity acct payments	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
27. Trust acct payments	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
28. Disability/death benefits	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
29. Real estate rent income	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
30. Student financial aid	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
31. Military pay	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
32. Veterans/VA income	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
33. Other income:	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
34. Other income:	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$		<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	
35. Are any income changes expected in the next 12 months? <input type="checkbox"/> YES <input type="checkbox"/> NO If YES please describe:						

For each source of income checked YES above, please complete the following:

Income #	HH Member	Name of Source	Address/Phone/Email

IV. HOUSEHOLD ASSETS

- List assets for all household members including minors
- Cash value is market value minus any costs/penalties/fees required to convert to cash
- Do not list assets that are not accessible to the family

Type of Asset	Head of Household		Co Head and/or Other Member	
	Check One	Apprx Cash Value	Check One	Apprx Cash Value
1. Checking account	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
2. 2 nd checking account	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
3. Savings account	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
4. 2 nd savings account	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
5. Debit /direct deposit card	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
6. 2 nd debit card	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
7. Cash on hand	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
8. Certificate of Deposit	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
9. Other bank account	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
10. Mutual Fund	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
11. Stocks	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
12. Portfolio/brokerage	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
13. IRA/401K/etc.	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
14. 2 nd IRA/401K/etc.	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
15. Treasury bills/bonds	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
16. Company retirement acct	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
17. Annuity	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
18. Pension	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
19. Revocable trust	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
20. Life Insurance (not term)	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
21. Real estate equity	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
22. Other asset	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
23. Other asset	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$	<input type="checkbox"/> YES <input type="checkbox"/> NO	\$
24. Has anyone received any lump sum amounts in the past 2 years (i.e. lottery/gambling/inheritance)? <input type="checkbox"/> YES <input type="checkbox"/> NO				
25. Has anyone disposed of any assets for less than fair market value in the past 2 years? <input type="checkbox"/> YES <input type="checkbox"/> NO				
If yes, please list details such as the type of asset; the disposal date; the fair market value, and the amount received:				
For each asset checked YES above, please complete the following:				
Asset #	HH Member	Name of Source	Address/Phone/Email	

Under penalties of perjury, I/we certify that the information presented on this form is true and accurate to the best of my/our knowledge. False, misleading, or incomplete information may result in the termination of this application/lease.

_____	_____
Head of Household Signature	Printed Name
_____	_____
Co Head and/or Other Member Signature	Printed Name
_____	_____
Management Signature	Date

CONSENT FOR RELEASE OF INFORMATION

Date: _____

Wingate Management Company, LLC
As agent for Waterfield Apartments
24 Gould Street, Reading, Massachusetts

Name: _____ Address: _____

I, the above named individual, have authorized the above named Agent to verify the accuracy of the information which I have provided, from the following sources (specify):

I hereby give you my permission to release this information to the Agent, subject to the condition that it be kept confidential. I would appreciate your prompt attention in supplying the information requested on the attached page to the Agent within five (5) days of receipt of this request.

I understand that a photocopy of this authorization is as valid as the original. Thank you for your assistance and cooperation in this matter.

Signed under the pains and penalties of perjury.

Signature

Date

THIS CONSENT IS VALID FOR A PERIOD OF FIFTEEN MONTHS FROM THE DATE NOTED ABOVE.

DISCLOSURE OF SOCIAL SECURITY NUMBERS

Applicants must disclose social security numbers (SSNs) of all non-exempt applicant household members in order for the Agent to make an eligibility determination. This Attachment explains the requirements and responsibilities of applicants or residents to supply the Agent with this information.

1. Disclosure and Certification. The head of household/spouse/co-head must disclose SSNs for all non-exempt applicant household members.
2. Required Documentation. Applicants must provide documentation of SSNs. Adequate documentation means a Social Security card issued by the Social Security Administration (SSA) or other acceptable evidence of the SSN, which may include the following:
 - (i) Driver's license with SSN; (ii) Identification card issued by a federal, State, or local agency; a medical insurance provider, or an employer or trade union; (iii) Earnings statements on payroll stubs; (iv) Bank statement; (v) Form I 099; (vi) Benefit award letter; (vii) Retirement benefit letter; (viii) Life insurance policy; or (ix) Court records. Unless an original Social Security card is provided, the Applicant must certify that the document provided to evidence the SSN is complete and accurate.

NOTE: Individuals who have applied for legalization under the Immigration and Reform Control Act of 1986 will be able to disclose the SSNs, but are unable to supply the cards for documentation. SSNs are assigned to these persons when they apply for amnesty. The cards go to the Department of Homeland Security (DHS) until the persons are granted temporary lawful resident status. Until that time, their acceptable documentation is a letter from the DHS indicating SSNs have been assigned.

3. Timeframe for Providing Social Security Numbers.

- (a) Applicants currently on or applying to waiting list:

Applicants do not need to disclose or provide verification of a SSN for all non-exempt household members at the time of application and for placement on the waiting list. However, applicants must disclose and provide verification of a SSN for all non-exempt household members before they can be housed.

- (b) Housing applicants from the waiting list:

If all non-exempt household members have not disclosed and/or provided verification of their SSNs at the time a unit becomes available, the next eligible applicant must be offered the available unit.

The applicant who has not disclosed and/or provided verification of SSNs for all non-exempt household members has 90 days from the date they are first offered an available unit to disclose and/or verify the SSNs. During this 90-day period, the applicant may, at its discretion, retain its place on the waiting list. After 90 days, if the applicant is unable to disclose and/or verify the SSNs of all non-exempt household members, the applicant should be determined ineligible and removed from the waiting list.

NOTIFICATION OF LOTTERY ELIGIBILITY

Date: _____

RE: Application for Housing

Dear _____

Please be advised that we are in receipt of your application for housing at 24 Gould Apartments. We have reviewed your information and have placed you into the pool of applicants eligible for the Lottery.

Upon completion of the Lottery, you will receive a separate letter notifying you of your position on the list. If your name comes up for an available apartment you will receive a third letter inviting you to complete the full screening for eligibility. After confirming all eligibility criteria is met, apartments will be assigned to applicants based on Lottery position.

Sincerely,

Waterfield Apartments
Leasing Agent/Property Manager

NOTIFICATION OF LOTTERY RESULTS

Date: _____

RE: Application for Housing

Dear _____

Please be advised that we have conducted the Lottery for Waterfield Apartments. By random selection you are number ___ on the list for a ___ bedroom apartment.

If your application is drawn, you will receive a letter inviting you complete the full screening for eligibility. If all apartments are filled by applicants positioned in front of you, you will be placed on a wait list for future availability.

If you have any question, please feel free to contact us at XXX-XXX-XXXX.

Sincerely,

Waterfield Apartments
Leasing Agent/Property Manager

REJECTION NOTICE

Date: _____

RE: APPLICATION FOR HOUSING

Dear _____:

Your application for an apartment at Waterfield Apartments has been rejected for the reason(s) listed below.

- history of poor rental payment
- history of behavior as a tenant which if repeated at Waterfield Apartments would substantially interfere with the rights of other tenants
- providing false or inaccurate information in your application
- failure to provide information which we have requested in order to complete processing your application
- insufficient income to pay the cost of rent and utilities at the property
- history of criminal activity or activity in violation of Massachusetts law
- applicant and/or household member subject to a lifetime registration requirement under any state or federal sex offender registration program
- no favorable prior landlord reference was provided or was available, and a poor credit report, without mitigating circumstances, was received from:

Credit Agency: _____

Address: _____

You have the right to obtain a copy of your credit report from the credit reporting agency. You may contact them at the address and phone number listed above.

You or your representative also have the right to inspect the documentation on the basis of which your application was rejected and any other documentation related to your eligibility, qualification, or entitlement to priority or preference status. You may make arrangements to review the documentation in our office during normal business hours by contacting xxx xxx-xxxx, the Property Manager, at Waterfield Apartments. We will make reasonable arrangements for photocopying any such documentation as you may specify with sufficient advance notice.

If one or any of the unfavorable circumstances listed above is the result of your having a disability, you may request a reasonable accommodation. A reasonable accommodation is an adjustment to an apartment or a procedure by the Agent which will prevent the problem from reoccurring.

If you believe that the circumstances indicated above did not occur or can be satisfactorily explained, you have a right to respond in writing or request a meeting with the management agent within fourteen days of your receipt of this letter to dispute this rejection.

Sincerely,

Leasing Agent/Property Manager
Waterfield Apartments

cc. Applicant file

Attachment 6A: Requirements of Section 515b of the Fair Credit Reporting Act (used only if rejection is related to credit history)

SAMPLE

ATTACHMENT TO REJECTION NOTICE

Section 515b of the Fair Credit Reporting Act requires us to tell you where we obtained reports on you. We relied in whole or in part on the following:

- Information contained in a consumer credit report obtained from: (See list below)
- A Consumer credit report containing information insufficient to our needs. (See list below)
- The fact that the consumer reporting agency contact is unable to supply any information about you. That agency was: (See list below)
- Information was received from a person or company other than a consumer credit reporting agency. You have a right to make a written request to us within 60 days of receiving this letter for a disclosure of the nature of the information. Pursuant to federal law, we are prohibited from disclosing the sources of the report.
- Information received by applicant was not complete. The management agent was unable to complete application process. Items missing: _____

Sources of the Report

Rental History and Arrest/Conviction Records: _____

Retail Credit: _____

Other: _____

You have the right to obtain a copy of your credit file from a credit reporting agency. You may be charged a reasonable fee not to exceed \$8.00. There is no fee, however, if you have been turned down for credit, employment, insurance or rental dwelling within the previous 60 days. The credit reporting agency must provide someone to help you interpret the information in your credit file. Once each year, you are entitled to receive from national agencies, a copy of your consumer credit report free of charge. Regional credit bureaus can charge a fee of \$35.00 for that report.

You have a right to dispute inaccurate information by contacting the credit reporting agency directly. However, neither you nor any credit repair company or credit service agency has the right to have accurate, current and verifiable information removed from your credit report. In most cases, the consumer credit reporting agency must remove accurate, negative information from your report if it is over seven (7) years old and must remove bankruptcy information only if it is over ten (10) years old.

If you have notified a consumer credit reporting agency in writing that you dispute the accuracy of the information in our file, then consumer credit reporting agency must then, within 30 business days, reinvestigate and modify or remove inaccurate information. The consumer reporting agency may not charge a fee for this service. Any pertinent information and copies of all documents you have concerning a dispute should be given to the credit reporting agency.

If reinvestigation does not resolve the dispute to your satisfaction you may send a statement to the consumer reporting agency to keep in your file explaining why you think the record is inaccurate. The consumer credit reporting agency must include your statement about the disputed information in a report issued about you.

You have a right to receive a record of all inquiries relating to a credit transaction initiated in the six months preceding your request or two years in the case of a credit report used for employment purposes. This record will include the recipients of any consumer credit report.

If you have a disability and this rejection for housing is a result of that disability, you have the right to request a reasonable accommodation if it will remedy this situation. You may ask for a reasonable accommodation by contacting the Property Manager at xxx xxx-xxxx. (Phone, TDD, fax, email), within five business days.

ANNUAL WAITING LIST UPDATE

Date: _____

RE: WAITING LIST FOR Waterfield Apartments

Dear Applicant:

You are currently on the waiting list for an apartment at Waterfield Apartments. We are now in the process of updating the wait list. Enclosed you will find information regarding our current rents and income limits to help determine if you are still eligible for an apartment.

It is requested that you complete all relevant information requested on this form. Please return it to the address shown above.

If we do not receive your updated application within thirty (30) days from the date of this letter, your application will be placed in our inactive file and your name will be removed from the waiting list.

Change of address (complete only if your address is different from the one above):

What is your approximate total yearly income (include gross income and any income from assets)?

Number of people in family: _____

Family Composition (Please complete this section only if there has been a change in family members):

Notice of your position on our waiting list will be sent to you within 60 days of this letter. This is only an update of your current status. Additional information may be requested at a later date. Your signature below gives consent to Management to verify the information in this application.

I hereby certify that the information contained herein is true and correct:

Signed under the pains and penalties of perjury.

Signature of Applicant

Date

If you have a disability you have the right to request a reasonable accommodation in connection with your application for housing. All information is voluntary and will be treated as confidential.

NOTICE OF REMOVAL FROM WAITING LIST

Date: _____

RE: WAITING LIST FOR Waterfield Apartments

Dear Applicant:

On _____ this office sent a letter to your last known address to determine if you remain interested in the housing opportunities provided at this development. Thirty days have passed since that letter was sent and we have not received a response from you. As a result of your failure to reply, we must remove your name from our waiting list.

If there is a valid reason as to why you did not respond, we will take that into account in reconsidering the removal of your name from our waiting list. You must respond to this notice in writing within five (5) days. Otherwise, this determination is final.

You may file a new application at any time, provided the waiting list is open, or you may apply at any other affordable development you choose. The removal of your name does not impair your ability to apply elsewhere.

Please call me at xxx xxx-xxxx if you have any questions.

Sincerely,

Leasing Agent/Property Manager
Waterfield Apartments



_____ Apartments
, MA

40 Affordable One, Two & Three
Bedroom Apartments in a BRAND
NEW modern community!
Anticipated Move-in Date _____

Heat and Hot Water Included!
Off-street parking, fitness center,
community room, playground, central
laundry, on-site management & 24-hour emergency maintenance!

Monthly Rents:

1 Bedroom \$856-\$942 | 2 Bedroom \$1072 - \$1124 | 3 Bedroom \$1,294

Subject to change annually. Residents are responsible for electric cooking and other electricity

Maximum Gross Annual Income Limits Based on Household Size:

1p: \$37,020 | 2p: \$42,300 | 3p: \$47,580 | 4p: \$52,860 | 5p: \$57,120 | 6p: \$61,320

HUD published effective 12/18/2013, Revised FY 2014. Subject to change annually.

Minimum Gross Annual Income Limits Based on Bedroom Size:

1 Bedroom \$25,680 - \$28,260 | 2 Bedroom \$32,160 - \$33,720 | 3 Bedroom \$38,820

Section 8 Voucher Holders Encouraged to Apply.

(exempt from minimum income criteria)

There are _____ units set aside for incomes that are at or below 30% of area median incomes.
These units will be covered under a Project-Based Section 8 contract.

Applications may be picked up at _____ or by requesting
one by calling _____.

**Applicants for all affordable units will be chosen through a lottery which will be held
“TBD”**

All applicants must meet the property’s Resident Selection Plan criteria.

Applications will be taken from _____ - _____.

Applications must be fully completed and received by _____.

Attend our free informational session:

(date) | (place) | (time)

Applications will also be available at the information session.

To receive an application by mail:

CALL: _____ | TDD: CALL 7-1-1

*Este documento es importante, por favor tradúzcalo | Este documento é importante, por favor, tê-lo traduzido |
Questo documento é importante, si prega di farlo tradurre*



DHCD TENANT SELECTION PLAN RIDER

**REQUIRED PROVISIONS FOR
DHCD**

NOTE: This attachment is annexed to and made a part of the Tenant Selection Plan (the “Plan”) for Waterfield Apartments, (the “Development”), and evidences additional requirements governing the selection of tenants for affordable units at the Development under housing subsidy programs.

Lender Funds

The Development is the recipient of a Housing Stabilization Funds (HSF) loan and is subject to all program requirements of the HSF loan program, including applicable affordable housing restrictions.

The HSF program requires that income is to be calculated per 24 CFR Part 5, when not in conflict with other program requirements, and HUD’s “Technical Guide to Determining Income and Allowances for the HOME Program.”

Lender Review

As the Development is the recipient of funding from the Massachusetts Department of Housing and Community Development (“DHCD”), all revisions to the Development’s Tenant Selection Plan are subject to the review and approval of DHCD and the Town of Reading.

Conflict of Interest Policy

Conflicts Prohibited

(a) Traggorth Companies, LLC and Wingate Management Company, LLC, as its Agent, agree that no HSF or AHT assisted unit will be rented to an individual or immediate family member who is an employee, agent, developer, or sponsor of either Traggorth Companies, LLC or Wingate Management Company, LLC (when acting as the Agent).

This policy addresses HOME Rule at 24 CFR Part 92.356 provisions to provide guidelines and prevent conflict of interest when conducting management activities at properties with HOME funds. These provisions apply to any individual or any member of an individual's immediate family who may have decision making functions or responsibilities at properties with HOME and HSF funds.

POLICY

Management must implement the necessary procedures to ensure that no HSF and AHT assisted affordable housing units are leased to any individual or any member of an individual's immediate family including those by blood, marriage or adoption, the spouse, parent (including a stepparent), child (including stepchild), brother, sister (including a stepbrother or stepsister), grandparent, grandchild, or in-laws, who is an officer, employee, agent, elected or appointed official, or consultant of the owner, developer, or sponsor of a project assisted with HSF and AHT funds whether private for profit or non-profit.

Exceptions

This policy does not apply to property managers or a member of the maintenance staff who occupy an assisted unit as a function of their position.

Upon written request, the Department of Housing and Community Development (DHCD) and Middlesex County may grant exceptions and waive this provision on a case by case basis given the following circumstances:

- the individual is in the low-income category eligible for the HSF and AHT assisted programs;
- the individual no longer has responsibilities associated with the specific HSF and AHT assisted property;
- the affirmative marketing plan to lease available HSF and AHT units has been enforced.

PROCEDURE

All individuals applying for available HSF and AHT assisted units will be required to complete the Supplemental Applicant Questionnaire for the HSF and AHT Programs. Determination regarding eligibility for the HSF and AHT Programs and conformance with the Conflict of Interest Policy will be made for each applicant based upon the information provided.

MARKETING & MANAGEMENT PLAN

FOR

Waterfield Apartments

Winchester, MA



Prepared By:



WINGATE COMPANIES

Wingate Management Company

August 21, 2020

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Waterfield Apartments

STATISTICS

MANAGING AGENT:

Wingate Management Company
100 Wells Avenue
Newton, Massachusetts 02459

CONTACT PERSONS:

Michael Martin, President
David Blumberg, Executive Vice President
Lindsay Stathos, Regional Manager

PROPERTY INFORMATION:

Waterfield Apartments
Winchester, MA

60 Apartment Homes

Unit Size	Sq. Footage	Market	Adjusted Monthly Income			
			80%	60%	50%	30%
1 Bedroom		TBD	TBD	TBD	TBD	TBD
2 Bedroom		TBD	TBD	TBD	TBD	TBD
3 Bedroom		TBD	TBD	TBD	TBD	TBD
Total		20	8	24	2	8

WINGATE COMPANIES OVERVIEW

Wingate Companies is a group of interrelated real estate businesses, specializing in multifamily apartment homes, with a record of accomplishments in acquisitions, investments, property management, development and consulting for 50 years.

Wingate has managed, acquired, developed, financed and sold approximately \$1 billion of multifamily and office properties since inception. Currently, Wingate owns and manages over 15,000 apartment homes in 16 states held by more than 150 separate partnerships. Included in our portfolio of properties are urban luxury high rises, suburban garden properties as well as communities that benefit from tax credit and rental assistance programs.

Wingate offers acquisitions guidance, consulting services as well as asset and property management to clients in the real estate industry. Those clients have included institutional investors, lenders, family investment offices, private investors and non-profits.

Wingate operates 5 regional offices located in Atlanta, Austin, Boston, Grand Rapids and New York, with the corporate office located in Newton, Massachusetts.

Property Description: The property is a 60 unit residential apartment building with ground floor retail and covered parking, located adjacent to the T-station in Winchester, Massachusetts.

MANAGEMENT PLAN

As the Managing Agent for the Property, Wingate Management Company ("Wingate") will be responsible for the following tasks: rent-up and marketing, daily operations, maintenance and repairs, budgeting, accounting and resident relations. Michael Martin, President at Wingate, is responsible for all of Wingate's management activities. David Blumberg, reporting to Michael Martin, is the Executive Vice President. Regional Manager, Lindsay Stathos reporting to David Blumberg, supervises the Property Manager. Lindsay will work with the property staff and corporate Facilities Management team as needed to directly oversee the following, but not limited to:

- a. hiring, training and supervision of maintenance personnel and other staff members, if any;
- b. preparing and enforcing all rental procedures and reports;
- c. coordinating all community and resident relations including resident organization meetings;
- d. supervising all repairs, redecoration, and maintenance projects;
- e. preparing all accounting, occupancy, marketing, equal opportunity and operational reports and;
- f. preparing the annual budget.

All of the above functions will be performed in accordance with generally accepted professional standards, federal, state and local agency guidelines, and the Management Agreement.

STAFFING

Property Management Team: The Property Manager will work under the supervision of the Regional Manager. The staff will be marketing professionals, fully trained in all areas of property management: housing program rules and regulations, marketing, accounting, budgeting, reporting and maintenance (including preventive maintenance).

Maintenance Team: Working under the supervision of the Property Manager, the Maintenance Team will monitor the maintenance operation of the property. The Team will receive technical support from Wingate's Facilities Management team lead by Michael Worrick, the Senior Vice President of Facilities.

Cleaning services will be provided by a qualified contractor selected by the management agent.

Should other employees be required, the Property Manager will train and supervise them as needed.

Wingate conforms to all equal employment opportunity requirements in its hiring and promotional practices. All hiring will be conducted without regard to race, color, creed, national origin, religion, age, gender, sexual orientation, or disability

Full-time personnel will be eligible for benefits such as medical insurance, vacation and sick pay. All expenses relating to employment of the Property Management and Maintenance Teams will be paid for by the property.

MARKETING

Marketing Team

We are confident that the experienced professionals who make up our management team set us apart. At Wingate every employee takes part in The Wingate Way: a Wingate generated training program for exceptional customer services and sales/marketing. Wingate will utilize the strengths of the Marketing Team to ensure a successful rent-up:

- **Jackie Fischer, Marketing Director:** Jackie provides leadership and guidance as she initiates, prepares and executes leasing campaigns and marketing strategies for new and existing properties. Jackie is adept at implementing successful marketing and public relations strategies and managing their impact on the properties overall success while efficiently adhering to a pre-determined budget. Jackie will oversee all branding, website, budgeting, signage, advertising and public relations for Waterfield. She will work closely with the on-site team to encourage creativity while instilling them with the knowledge on how to uphold and enforce local and federal leasing and fair housing laws.

Our Marketing Department and Management Team will regularly shop comparable properties in the local market in order to learn how to best utilize Waterfield's competitive advantages and effectively convey our marketing messages to prospective residents. Our years of experience in the area provide us with the tools necessary to maximize the value of the property.

Market surveys are completed routinely and all leasing professionals will physically shop the competition regularly.

The marketing center will be open set hours in order to provide the most convenience for existing and prospective residents. Hours of operation may vary, depending upon the time of year and the traffic pattern. The schedule among the on-site team will be determined in such a manner that the office will have ample coverage to successfully lease apartments while maintaining a strong presence within the community through different outreach efforts.

Marketing Plan

The initial lease-up of the affordable units at Waterfield Apartments, including any local preferences, will be through a lottery, in accordance with regulations set forth by the Department of Housing and Community Development and more specifically outlined in our Affirmative Fair Housing Marketing Plan.

Prospects interested in leasing at Waterfield have a variety of ways of expressing interest. They can contact us directly through any of our ILS (Internet Listing Services) sites, via e-mail, by telephone or in person. All prospect contacts are filtered through our lead management software, Lead2Lease, which is integrated with our operating platform. The Leasing Team responds to each lead, typically within one business day to work with the prospect in determining if Waterfield would be a good fit for their needs. At this point, a tour is typically scheduled. During the property tour, a prospect is encouraged to apply for an available apartment home or for our Priority Waitlist, if we do not currently have an apartment available that suits them. Follow up continues regardless of whether a prospect applies until either the prospect completes an application/signs a lease, tells us they have found another home or have failed to respond to 4 attempts to establish follow up communication.

Through the marketing materials we will establish a public persona (brand promise) for Waterfield. All materials will be consistent with the brand promise and deliver the key messages within the context of the brand to our targeted audiences creating a loyal following. Included in the marketing objective is a strategy on how to introduce and reinforce the smart living/transit-friendly choice at Waterfield to the community and the marketplace.

The use of the internet, strategically placed public relations articles, signage, appropriately timed social events and proclamations of the buildings success as it happens are all methods of creating a market buzz.

Advertising:

Advertising sources are analyzed on a semi-annual bases by the Regional Manager to determine if they need to be adjusted.

Internet: Internet presence is crucial. We will create a website for Waterfield that is in line with the overall vision for the property. The website will utilize the connection with Wingate to attract more prospective residents from other Wingate managed properties in the area. This website will also offer information about the community, printable floor plans, applicable contact information, photographs, etc. We will monitor and manage website optimization as well as Search Engine Optimization to create the greatest visibility and overall conversion of leads to leases for the website. We will also place online ads to further cast our net of qualified prospective residents. Other websites worthy of consideration for Waterfield will include:

- Apartmentfinder.com
- Apartments.com
- ApartmentGuide.com
- Craigslist.com
- Facebook.com
- Zillow.com

Collateral: We will utilize our in-house design team to establish collateral consistent with the overall concept and feel of Waterfield. This will consist of flyers, floor plan flyers, letterhead, business cards, banners, a-frames, postcards, etc. This material will be used during our community outreach and direct mailings as well as distributed to visitors to the property.

The Marketing Team will host additional events by coordinating with local businesses throughout the year to encourage people from the community to view our property. While we would love for these events to result in immediate leases, the overall goal is to establish a network of people within the community who have a favorable impression of Waterfield and who will spread the word to prospective residents.

Community Outreach/Sponsorship: In order to make the greatest connection with the community, we will host and/or sponsor many community outreach events. There are many local businesses to connect with and build long lasting relationships. These events offer a low cost (often free) attraction and typically result in local media coverage. Sponsorships of events within the neighborhood will assist to further brand the community.

RENT/OCCUPANCY

Unless the lease agreement provides otherwise, rents are payable monthly on the first of the month. The Manager must pre-approve partial rent payments or payment on rental arrearages. Rent payments are received by the Property Manager who records the payment and enters the amount of the payment in OneSite. Online rent payment is highly encouraged. Residents who are in arrears will receive a late notice on or after the 6th of the month. The Manager will discuss late payments directly with the individual involved.

Inspections: Unit inspections will be performed by the Property Manager and the resident upon initial occupancy, and at least once annually in accordance with the building inspection schedule (or more frequently if required) and prior to move-out. The Unit Inspection Form will be used to record the results of the inspection. The Property Manager and the resident will sign and date the Inspection Report, indicating their agreement of the condition described.

The Property Manager will inspect the public areas of the building on a monthly basis. On an annual basis, a third-party contractor will be hired to inspect all fire and safety equipment.

Eviction Procedures: Evictions will be initiated only for non-payment of rent or repeated or substantial violations of the lease, including any approved Rules and Regulations, which may be attached as an addendum to the lease. The property's collection policy will be strictly enforced.

RENT COLLECTION

Lease Violations & Eviction Process Other Than Non-Payment of Rent: For lease violations other than non-payment of rent, management will take the following actions:

- Upon verification that a resident has violated a provision of his/her lease, management will send a letter to the resident stating each concern or issue. The resident will have the opportunity to respond in writing and/or meet with the manager to resolve and/or clarify the issue in question.
- Upon continued or repeated violations, a “for cause” legal action will be commenced.

Grievances: If an employee, applicant or resident feels that discrimination has affected a decision relating to job opportunities, performance or housing, the Affirmative Action Officer and Regional Vice President will review the facts. The Regional Vice President will discuss the situation with the affected party and supervisors and will recommend a solution. A written record of the incident will be maintained by the Agent.

PROFESSIONAL MANAGEMENT SERVICES

Wingate has 50 years of experience in managing several types of market and affordable state and federal housing.

All information used to evaluate applicants for Waterfield will be in writing. This includes application forms, verifications, credit checks, letters of support, interview notes, etc. All applicants, advertisements and management materials will include equal opportunity language and fair housing logo.

The Owner and the Management Agent are committed to a broad range of community outreach efforts and to marketing the property in an open, non-discriminatory and inclusive fashion. Apartment homes will be marketed according to Equal Opportunity/Fair Housing guidelines. Marketing vehicles will focus on mediums and agencies most likely to yield income-qualified individuals and families interested in the apartments.

MAINTENANCE/REPAIRS/PREVENTATIVE MAINTENANCE

The Property Manager and Maintenance Team will test and inspect the property's mechanical equipment and appliances. Improperly installed or inoperative equipment and appliances will be brought to the attention of the Owner.

The Property Manager will make an inventory of mechanical equipment, appliances, spare parts and cleaning materials along with a schedule of preventive maintenance in accordance with company procedures. Normal use and care of appliances by the residents will be reviewed during resident orientation and also detailed in the Resident Handbook.

The Property Manager will schedule daily and periodic building and grounds maintenance tasks which will be performed by the Superintendent: grounds will be policed for litter; entrance areas, sidewalk, and parking areas cleaned as required; trees and shrubs fed and pruned as required; snow and ice removed from sidewalks.

Trash: Residents will dispose of garbage and deposit trash in covered receptacles. If required, the Maintenance Team will bring the trash containers out to the street location and then return them back to the storage area.

Move-outs: Prior to move-out, the Property Manager will inspect the apartment with the current resident, listing cleaning, repairs, and painting to be performed. Turnover work will be performed immediately after the unit is vacated in order to minimize vacancy loss. All damages will be noted and reported for possible charges to the former resident. In accordance with Massachusetts law, the return of the security deposit, plus appropriate interest, will be refunded net of any charges.

Repair: Routine and/or minor repairs will be made by the Maintenance Team whenever possible. Electrical, plumbing and heating repairs, etc., which require the services of a licensed contractor, will be contracted for. Major repairs will be reviewed in advance with the Owner. All work will be inspected by both the Property Manager and someone from the Maintenance Team.

Repair and maintenance requests will be recorded on a work order form which will include the following information: the date of the request, work order number, name and apartment number of resident, description of work, date work is scheduled, date of work completion, and signature of resident signifying acceptance. The work orders will be entered in numerical order in a log for easy reference. Residents will report emergencies by calling the office. An answering service will be available to receive calls outside of business hours. Maintenance requests will be handled promptly during normal working hours; emergencies will be covered on a twenty-four (24) hour basis.

Purchases: The Maintenance Team will be authorized to make purchases or to order repairs up to \$100.00 (with exceptions for emergencies) unless such items have previously been scheduled as part of the preventive maintenance program. Purchase orders will be written in triplicate by the Property Manager: one copy to the vendor upon order of purchase, the second and third copies will be retained until the merchandise has been delivered or the repair completed and a bill received. Approval will be noted by the Property Manager on the form and one copy, along with the bill, will be sent to the Managing Agent for payment by its Accounting Department.

Unit Inspections: Unit inspections will take place at least annually by the Property Manager and someone from the Maintenance Team. The inspection will include all mechanical equipment and systems, plumbing fixtures, and electrical fixtures, as well as damage to walls, ceilings, windows, screens and flooring. Housekeeping practices by residents will also be noted on the inspection report. All items requiring corrective action will be completed by the manager and maintenance person.

Emergencies: All residents will be instructed on the proper procedures to follow in the event of a general maintenance, fire or medical emergency. Twenty-four (24) hour emergency response will be provided.

Preventive Maintenance: A detailed preventive maintenance (“PM”) schedule will be developed by Wingate’s Facilities Manager. Each task on the schedule will have written instructions for reference by the Maintenance Team. Each month the Property Manager will write work orders for each PM task scheduled for that particular month and will monitor their completion.

ACCOUNTING/REPORTING

Computerized accounting services will be performed in the Managing Agent's central office in Newton. Within fifteen (15) working days, after the end of each month, reports will be generated from the main office of the Managing Agent. These reports track monthly expenditures and income by account and compare monthly and year to date results with the annual budget. Computerized bookkeeping services are a Wingate corporate office function designed to aid and expedite the volume and flow of reporting, that otherwise would be performed by a field office staff member.

The Managing Agent will prepare, in a timely fashion, monthly and annual reports as required by the regulatory and management agreements, in conformance with federal, state and local agency requirements or the requirements of the property's lenders.

All books, records and accounts shall be maintained at the central office of the Managing Agent, currently located at 100 Wells Avenue, Newton MA 02459, and will be available for examination at all reasonable times by authorized representatives of the Owner. All project files and all resident information will be kept in the site management office.

ENERGY CONSERVATION

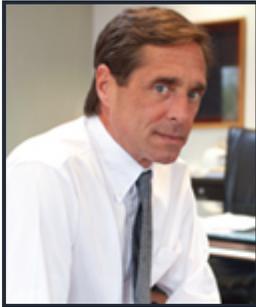
The conservation of energy will be an ongoing concern. A preventive maintenance program will be developed to keep operations at peak efficiency. Residents will be instructed on the proper use of all appliances and heating units to insure maximum comfort and efficiency.

Energy consumption will be closely monitored and compared to existing records and/or industry standards to determine if excessive energy is being used, and if so, what can be done to remedy the situation.

MANAGEMENT TEAM

Mark S. Schuster

Principal



Mark S. Schuster, Principal, is responsible for the overall investment strategy of Wingate and its affiliates—a group that has been involved in the successful acquisition, development, ownership and management of real estate for over 50 years.

The company and its affiliates currently own and operate approximately 15 million sq. ft. of multifamily homes and commercial office properties in the eastern United States and Texas, and have acquired, developed, financed and sold approximately \$1.5 billion of commercial office and multifamily real estate. The current portfolio includes over 14,500 apartment units and approximately 250,000 sq. ft. of office properties that are either owned by affiliates or managed on behalf of both private and institutional clients. Prior to forming Wingate, Mark held various executive positions with Continental Wingate Company. He served as President of Continental Wingate Capital Corp., Executive Vice President of Wingate Development, and President of Wingate Management Company from 1978 through 1990.

Mark has served or currently serves on the Boards of Continental Wingate Company, the National Housing Rehabilitation Association, the Hebrew Rehabilitation Center, the Recuperative Center, The Rivers School (Weston, MA), Tufts University Board of Advisors, Tufts University Entrepreneurial Leadership Committee, and the President's Council of Wheaton College. He has continuing involvement with the National Kidney Foundation, Brigham & Women's Hospital, and Dana Farber.

Mark graduated from Tufts University in 1978.

Michael Martin

President



Michael Martin, President of Wingate Management Companies, has over 30 years' experience in the management of mixed income, assisted family, and senior housing in a variety of urban and suburban settings. At Wingate, he oversees all property operations throughout the entire Wingate portfolio.

Prior to joining Wingate, Michael was the Senior Vice President at WinnResidential, where he worked for 20 years. Michael has extensive experience working with HUD and state housing finance agencies. He has managed market-rate housing, student housing and is well-versed in HUD Section 8, Section 236, Public Housing, HOME and LIHTC programs. Throughout his career, Michael has developed expertise in many areas of property management, most notably: budgeting; personnel development; training; maintenance/capital planning; compliance; administrative procedures; agency reporting and relationship building.

Michael's commitment to affordable housing is evidence by his tenure of over 25 years on the Board of The Neighborhood Developers in Chelsea, Massachusetts. At various times, he has served as President, Treasurer and currently chairs the development and finance committees. Michael attended Boston University, where he earned his BA and Northeastern University where he earned his Masters in Business Administration.

David Blumberg

Executive Vice President



David J. Blumberg, Executive Vice President of Wingate Management Company, has over twenty years' experience in the property management industry. In addition to corporate responsibilities, he oversees market-rate and affordable housing portfolios. His expertise spans numerous areas of property management including annual budgeting, cost control, financial planning and recommendations for capital improvements. David is driven to obtaining maximum rent levels and reducing operating costs in order to meet the financial objectives of owners.

Prior to Wingate, David oversaw the portfolio of residential and commercial properties for Homeowner's Rehab, Inc. in Cambridge, Massachusetts. Before HRI, he served as Senior Vice President at WinnResidential where he managed a portfolio of over 175 mixed-use and market rate properties for several Community Development Corporations with numerous ownership entities in Massachusetts, Rhode Island, New York and New Jersey.

David is a graduate of The American University of Washington, DC where he earned his Bachelor of Arts in Communications.

Lindsay Stathos

Regional Manager



Lindsay Stathos joined Wingate Management in October 2011. She is the Regional Manager of a diverse portfolio including Market Rate and Mixed Use Properties in Maryland, Massachusetts and New Hampshire, managing 1340 apartment homes and 9 communities. In this role, Lindsay oversees all aspects of the portfolio's operations; including property operations, personnel and human resources, staff training, risk management, administrative, financial oversight, and capital improvements. In addition to the oversight of these standard property operations, Lindsay has managed multi-million dollar add-value rehabs to reposition assets in their market as well as the branding, onboarding and lease up of new developments.

Prior to joining Wingate, Lindsay worked at Equity Residential for 6 years. As Leasing Director, she was responsible for stabilizing occupancy through occupied renovations and driving market rents at Equity's largest asset at the time, Skyline Towers (949 apartments). Prior to that, she was a Leasing Director in Virginia for a garden style apartment community, consisting of 599 apartments. There, she increased rental rates, maintained an occupancy of 95% and above and kept delinquency consistently under 1%. Prior to that Lindsay was an Assistant Manager at a luxury mid-rise where she worked closely with high-end clientele in Massachusetts. Lindsay was known at Equity, and continues to be known today, for her excellence in customer service resulting in high levels of resident retention and ensuring rent grown, even in challenged economies and markets.

Michael Worrick

Senior Vice President of Facilities



Michael Worrick, Senior Vice President of Facilities, has nearly 35 years' experience with maintenance, facilities, and construction management. He currently oversees Wingate's facilities operation for 14,500+ apartments.

Mike provides leadership that sets and sustains Wingate's routine and preventive maintenance standards by ensuring value for all capital expenditures and by monitoring the physical condition of each property in the portfolio. This focus on facilities management satisfies ownership, management, lender and agency objectives. Due to his longevity in the industry, Mike's responsibilities are wide-ranging and comprehensive. They include oversight of all maintenance and capital improvement projects; management of

Wingate's contract bidding procedure; as well as development and training of procedures for agency inspection protocols. Mike has cultivated a high level of expertise in his maintenance routines such as landscaping, plumbing, painting, HVAC and exterior improvements, etc.

At Wingate, Mike directly oversees all Regional Facilities Coordinators throughout the organization. Through a maintenance committee, he develops programs and provides training to maintenance and management personnel in order to ensure his teams are knowledgeable and licensed in all required areas of proficiencies.

Prior to joining Wingate in 2014, Mike worked at WinnResidential for most of his career. As the Vice President of Maintenance for Winn, he was responsible for a portfolio of over 35,000 apartments.

Mike is a Certified Manager of Maintenance (NCHM), Advanced Instructor of Maintenance Operations (NAAEI) and he has a Credential for Green Property Management (NAAEI & NAHMA).

Amberin Khan

Vice President of Administration



Amberin Khan, Vice President of Administration, is responsible for increasing administrative efficiency and performing organizational assessments at Wingate Companies. Much of this endeavor is accomplished through planning, developing and implementing company policy independently or via committee. Amberin works with all departments and regions on varied projects to carry out the following functions: assess operational efficiency; identify issues; make recommendations for improvement; and propose new and novel solutions. She is also heavily involved with the Human Resources and Training operations, and is responsible for new business proposals and special projects. In addition, she manages a wealth of corporate information for the company.

Prior to joining Wingate in 2013, Amberin gained nearly 10 years of experience in the Real Estate industry at WinnResidential in Boston. As Executive Assistant, she worked for the Executive Vice President on myriad matters throughout all departments and regions, and the cornerstone of her role was managing client relations. As Training Coordinator, she developed expertise in Learning Management System administration and general training support. Then as Special Projects Coordinator she developed a comprehensive repository of Requests for Proposals—a major function of acquiring new business. She has served a variety of roles within her previous positions; therefore, offers her wide-ranging experience as a generalist to improve Wingate's administration and organization.

Joy Agnelli

Affordable Programs Administrator

Joy Agnelli, Affordable Programs Administrator, is a dedicated professional with thirty-one years of experience in the affordable housing industry. Joy started her career with Wingate 31 years ago and meritoriously worked her way up from Property Manager, to Supervisor of 1000 units in the Northeast Region, to supervising a staff of 25 people. Joy's broad perspective has enabled her to facilitate interdepartmental success.

Joy's expertise in the various aspects of subsidy management and compliance are an asset to Wingate's operations. She ensures the accurate and timely execution of subsidy processing, in accordance with the Department of HUD regulations. In addition, she provides on-going guidance, while instructing and supporting company-wide personnel to meet the complex demands of the affordable housing industry. Her specific responsibilities include oversight of occupancy maximization, rent and subsidy collection, processing rent increases and special claims, and minimizing vacancy loss. Joy is highly regarded within Wingate for her ability to interpret industry regulations and troubleshoot complicated scenarios in order to meet agency audits and expectations.

Joy possesses extensive knowledge in Section 8, LIHTC and HOME programs. She holds numerous industry designations, including Advanced Certified Occupancy Specialist, Tax Credit Specialist, and Certified Fair Housing Coordinator.

Peter A. Nowak

Senior Vice President, Corporate Controller



Peter A. Nowak, Senior Vice President and Corporate Controller of Wingate Companies, is responsible for all financial and tax reporting as well as financial compliance with HUD, state housing and finance agencies, and other lenders. He is also involved in mortgage financing and rental assistance payment contract renewals. Peter has more than 25 years of experience in the real estate industry, including management, acquisition, development, construction, rehabilitation and operation of commercial, retail, residential and multifamily housing properties.

Prior to joining Wingate in 2002, Peter served as Corporate Controller from 1996 to 2002 at Towermarc Corporation, a real estate development and management company with property in Massachusetts, Florida and Tennessee. Before working with Towermarc Corporation, Peter was employed in the public accounting industry where he held various supervisory and management positions.

Peter is a CPA and a member of the American Institute of Certified Public Accountants and the Massachusetts Society of CPAs. He received a BS degree from Bentley University in 1987.