

# Women's Institute

for Housing and Economic Development



## 6 Fairgrounds Road Nantucket Housing Proposal

Submitted to:  
Town of Nantucket  
May 2017

*Development Entity: Women's Institute Realty, Inc.*

### **Betsy Crum**

Executive Director  
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*Affordable and Supportive Housing*



*Renovation and New Construction*



*Building Community*



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May 22, 2017

Town of Nantucket  
Attn: Procurement Officer  
Town & County Building  
16 Broad Street  
Nantucket, MA 02554

Dear Sir or Madam:

On behalf of the Women's Institute for Housing and Economic Development (Women's Institute), a certified minority/women-owned enterprise and mission-driven non-profit, it is my pleasure to submit our organization's proposal to develop the 6 Fairgrounds Road site in Nantucket. We are very interested in the opportunity to create a sustainable, high-quality development of affordable work force housing for individuals and families on Nantucket Island. While we are new to working on Nantucket, we have extensive experience in the nearby communities of New Bedford, Fall River and Dartmouth and as you will see in the proposal, we have carefully selected a development consulting team that has broad and successful experience both in Nantucket and throughout the Cape and Islands.

Our organization is strong and growing. Since 2006, we have grown from \$5.7M in assets to over \$83M. For our own portfolio and with our clients, we have created over 1,500 units of housing across 75+ properties in our region, expanding our reputation by completing some of the most complicated deals in the most difficult-to-develop communities, and succeeding in the multi-faceted projects we undertake. We are often the "go-to" organization in both Massachusetts and Connecticut to envision creative properties and programs that meet local need, and to solve development crises when others have failed, including being called upon by public and private agencies to bring our resourcefulness and expertise to troubled assets.

We have dedicated our organization to building homes and opportunity in Massachusetts since 1981, with one of our two organization's offices fully staffed with a team of project managers based in Boston. We have raised over \$135M for the development and preservation of Massachusetts projects in that time, with over 90% of that funding from competitive State funding rounds. We are highly adept at layering public and private financing to make these projects a reality. To date, we have over 1,000 housing units completed or in construction in Massachusetts for ourselves and for our clients.

We remain successful in our work because we continue to evolve our team as the regulatory and funding landscape becomes ever more complex. Our diversified business lines include both full-service developments consulting as well as direct development and acquisition fees, which have afforded us the strategic opportunity to grow over the last five years when so many other consulting, development firms and non-profits have had to reduce or suspend their efforts during recent difficult economic times.

With our savvy staff and board of directors, the opportunity to work to develop affordable senior housing in a rural community falls right within our wheelhouse and at an opportune time in our project pipeline. We are ready to move ahead quickly to get the project into the next appropriate funding cycle.

The Women's Institute's affordable housing development work is led by the Executive Director Betsy Crum, with our Director of Real Estate Development, Delbe Spath, who leads our Massachusetts real estate work. For purposes of this proposal, the contact person shall be:

Ms. Kristin Anderson, Development Manager  
Women's Institute for Housing and Economic Development, Inc.  
15 Court Square, Suite 200  
Telephone: (800) 720-1195, ext. 205  
Email: [kanderson@wihed.org](mailto:kanderson@wihed.org)

In the following pages you will find the information you have requested in your RFP. We extend our deepest appreciation to you for this opportunity to share how our organization's commitment to Massachusetts workforce housing, and community-building and growth, can carry forward the mission and vision to create an affordable community for families and individuals in Nantucket.

Sincerely,

  
Betsy Crum  
Executive Director

The Women's Institute is very pleased to submit this proposal to develop the property at 6 Fairgrounds Road in Nantucket, Massachusetts. We believe that this property presents an excellent opportunity to provide new, high quality affordable housing in a true mixed-income community designed to serve the Nantucket workforce. It also offers the opportunity to build in a strong sense of community among the residents, and to meet the affordable housing goals of the Town. This development, with its local focus and strong emphasis on design and market need, fits squarely within our organizational mission to "promote economic resilience and stable homes by developing and preserving high quality affordable and supportive housing, with an emphasis on under-served populations." The site is extremely attractive as a location to develop a new housing community for families and individuals needing affordable housing who wish to live in close proximity to the many employment, community and recreational amenities available on the Island.

We seek to work with the Town of Nantucket and the greater community to create a quality, sustainable and mixed-income community that will provide opportunity for Nantucket families and individuals to achieve housing affordability in a beautifully planned neighborhood. We also seek to enhance the neighborhood and the opportunities available to residents by offering a housing community designed to increase the livability of the development and build a sense of community within it. The Fairgrounds Road community will be built to Enterprise Green Communities standards, and will be mindful in every way to maximize efficiencies and minimize the impact on non-renewable energy sources. The on-site community building will be the focal point of the development, with the building itself situated at the center of the Fairgrounds Road neighborhood. The building will offer a community space that will be available for residents' use, available for both formal and informal social programming. This space will also house the management offices, mailboxes and additional resident storage spaces, making it in every way a focal point of the new housing development.

The project's design also maximizes outdoor common green areas to further this idea of a true neighborhood. The site layout takes full advantage of Fairgrounds' extraordinary access to the bike path. The greenspace adjacent to the community building enhances the idea of a "common", in the fashion of a traditional New England "town green", historically the hub of resident activity. The common area playground will also be located here, as well as a community gardening area and passive greenspace, providing opportunities for children to play together safely and residents to enjoy picnics and other social programming occasions. Additional green space and small patios are scattered throughout the site to encourage additional outdoor activity. The Women's Institute development team was carefully selected to bring together professionals who share this vision of a supportive and well-designed community, and who understand how good housing design can help to improve lives.

## 1. The Developer and Development Team:

### Developer/Owner:

Women's Institute for Housing & Economic Development, Inc.  
dba Women's Institute Realty, Inc.  
15 Court Square, Suite 210  
Boston, Massachusetts 02108  
Executive Director: Betsy Crum  
800-720-1195  
bcrum@wihed.org

Lead Project Manager: Kristin Anderson – Kristin will assume all day-to-day project management duties.

Additional Key Staff: Betsy Crum, Executive Director – Betsy will provide oversight and guidance on major project decisions.

Delbe Spath, Director of Real Estate – Delbe will provide oversight and guidance along with Betsy.

Loni Willey, Chief Operation Officer – Loni will provide oversight on all financial and operational matters.

Proposed Partners/Sub-Partners: Not applicable

The Women's Institute is a national award-winning regional affordable housing development agency that brings an extensive record of experience in the development of affordable housing. Our strategic focus is to bring the strength of our organization in offering collaborative development approaches that work *within* and *for* communities, and create and sustain partnerships that address the housing needs of local residents, neighborhoods, and towns. Founded in 1981, our organization has provided direct development, consulting services or served as a turnkey developer on more than 80 affordable properties, resulting in the creation of over 1,600 units. Our staff is deeply experienced in real estate development, program design, affordable housing finance, project management, and asset management. We work with local partners that complement our skills and expertise and share our commitment to creating housing communities that foster resident success and economic security.

If selected to develop the Fairgrounds Road property, the project will be developed through Women's Institute Realty, Inc. (WIR), a commonly-controlled 501(c)(3) organization associated with the Women's Institute for Housing and Economic Development (WIHED, our lead organization). WIR serves as the development arm of the Women's Institute in Massachusetts. The corporation was established in 1994 with its federal tax-exempt status approved in 1995. WIR currently serves as the managing member/partner in four properties in Massachusetts, and has been utilized for turnkey development in the past. WIR and WIHED are registered to do business in the Commonwealth of Massachusetts.

WIR will enter into a long-term lease agreement with the Town of Nantucket, to be inclusive of an approval of assignment rights to a single-purpose entity (SPE). This will enable WIR to apply for the funding sources identified, which will require an entity structure of this nature. We expect that WIR will seek Low Income Housing Tax Credits for the project, which would necessitate an SPE for subsequent admittance of an investor for the life cycle of the tax credits. WIR would be the managing member of any such entity, and would be the anticipated replacement member at the conclusion of the tax credit period.

The Women’s Institute has an active Board of Directors that is both dedicated to our core mission and is highly skilled to serve as a resource to our work that has played a critical role in our successful record of accomplishment. Information on both staff and board members is attached.

The Women’s Institute offers 35 years of experience in affordable and supportive housing development across Massachusetts and Connecticut. In its early years, the Women’s Institute primarily focused on smaller housing projects with local service organizations, often including shelters and transitional housing. However, in the past decade we have significantly increased our scale and reach, and are now a strong, nimble regional consultant and developer. The following summarizes our development activity to date, categorized by state and development role:

<b>SUMMARY</b>	<b>Completed through 2016</b>	<b>In Progress for 2017-2020</b>	<b>TOTAL</b>
Direct Dev - MA (includes turn-key)	97	58	155
Direct Dev - CT	242	528	770
<i>Sub-total - Direct Dev</i>	<i>339</i>	<i>586</i>	<i>925</i>
Consulting - MA	795	930	1,725
Consulting - CT	536	446	982
<i>Sub-total - Consulting</i>	<i>1,331</i>	<i>1,376</i>	<i>2,707</i>
<b>TOTAL UNITS</b>	<b>1,670</b>	<b>1,962</b>	<b>3,632</b>
<b>TOTAL PROJECTS</b>	<b>80</b>	<b>42</b>	<b>122</b>

Each of these projects has had its unique complexities, challenges, and successes; examples from these projects in include:

- **Mixed-finance packaging** – In today’s funding environment, mixed financing is an intricate reality. All of the Women’s Institute’s projects have included a blend of public and private financing, and our staff is highly adept at weaving together complex federal, state, local, and private funding requirements. For example, our 19-unit, Ingraham Place project in New Bedford, MA necessitated nine funding sources, including LIHTC, federal and state historic credits, ARRA TCAP funds, state financing programs, local HOME funds, and sponsor equity, in addition to compliance with Section 8 vouchers.

- **Energy efficiency and green technologies** – Our organization offers strong experience in implementing plans and technology in the construction and renovation phases that offer efficiencies for our properties once in operation. Green technologies often employed include Energy-star appliances, triple-paned windows, efficient heating and cooling systems, low-VOC paints, high-durability and sustainable flooring, and a myriad of other straightforward construction decisions. In recent projects, we have also had the opportunity to implement more broad-reaching technologies, including photovoltaic panels for CHOICE Center and use of demolished materials as fill for Park City Apartments. Our Victory Gardens project in Newington, CT, is LEED Silver certified. For our client in Williamstown, MA, the Highland Woods affordable senior project is designed to operate at zero-net energy.
- **Sustaining property value and strong asset management** – The Women’s Institute is dedicated to the stable operations of an affordable housing property as much as to its financing and construction. We work closely with our project partners and clients to employ strong decision-making during pre-development that will have positive effects many years down the road. We also work with project sponsors and partners to create viable asset management plans, including preventative maintenance schedules, adequate replacement reserve sizing, etc. As owners of mixed use, affordable and supportive housing, we fully understand the importance of planning for the success of long-term operations.
- **Zoning approvals** – Nineteen of our projects in the last five years have required zoning variances, ranging from simple curb-cut approvals to complex design, height, density and parking variances and/or abutter objections. All projects have been successful in their applications for zoning consideration.
- **Service-enriched communities** – People prosper in neighborhoods and communities where they have the opportunity to receive the services and supports they need, and where those services are designed to address diverse and sometimes complicated issues. For many seniors, people with disabilities and families, housing and health care are not tangentially related, but are integral to successful living in the greater community. The Women’s Institute is deeply committed to creating service-enriched housing, where residents not only live, but thrive. We work with local partners to build person- and family-centered services into all of the housing communities that we develop.

The Women’s Institute is unique among housing and community development organizations. Working regionally by partnering locally, the organization is a mission-driven developer deeply committed to creating affordable housing that also prioritizes supportive programs and community space. On every project, Women’s Institute staff works collaboratively with community members and local stakeholders, ensuring that local needs are identified and solutions are incorporated into the projects. Committed to supportive housing models where appropriate, the Women’s Institute often partners with non-profit service organizations to ensure that services and resources are available to residents and surrounding. Having coordinated scores of projects from early conception through design, zoning, financing assembly, construction and lease-up, the Women’s Institute brings an unusual breadth of experience to the development process. Our staff is experienced in real estate development, program design, affordable housing finance and project management, and we engage partners and organizations that complement our skills, expertise, and values. Every development project that we work on consists of:

- Assessing the demographics and needs of the population and designing housing, commercial and community space, and resident supports that meet their goals;
- Making linkages that will enhance the project design and operation;
- Building community support by identifying key local stakeholders (government officials, area residents, nearby businesses, non-profits) at key stages of the process and incorporating their ideas and concerns into the overall project development;
- A comprehensive due diligence approach;
- Incorporating high-quality, cost-effective design that includes smart growth and energy efficiencies while fitting in with the historic and cultural nature of the surrounding neighborhood;
- Analyzing the advantages, restrictions and opportunities presented by various funding sources, and developing a comprehensive plan to fund capital development and ongoing operating costs; and
- Negotiations with potential LIHTC and historic credit investors to achieve the highest and best investment.

The Women’s Institute has developed housing projects that are showcased by public funders in both Connecticut and Massachusetts, and have attracted national acclaim. We have received numerous awards including:

- Two awards from the Fannie Mae Maxwell Award for Excellence for *GrandFamilies House* in Boston, MA, and *Acushnet Commons*, in New Bedford, MA;
- The J. Timothy Anderson Award for Excellence in Historic Renovation for *Acushnet Commons*, as well as for the Cambridge YWCA in Cambridge, MA;
- The Novogradac Developments of Distinction Award for *The Franklin* and *The Eleanor* in Bridgeport, CT, and an Honorable Mention for *Victory Gardens* in Newington, CT; and
- Enterprise Innovative Ventures Award for *Soromundi Commons* in Hartford, CT.

The Women’s Institute brings experience in the development of different housing types (permanent affordable for families and individuals, work force housing, shelter, transitional and mixed income communities) along with first-hand experience in accessing the various public and private financing sources based on the project type. Over the last three decades, the Women’s Institute has successfully completed 80 properties ranging in size from 6 to 110 units and offering a combined finance packaging of over \$265M. Our staff brings expertise in developing projects utilizing multiple public and private funding sources. We have worked with numerous public and private lenders and funders to expand their commitment to funding commercial and program space and supportive services as part of residential projects.

Included in the Attachments is additional information on our development experience, including a detailed listing of our developments that are similar in size, scope or location. The Women’s Institute for Housing and Economic Development has no legal or administrative actions past or pending that could relate to conduct of proposer, its affiliates or principals. Our development team has no outstanding local, state or federal taxes due.

## References:

- 1) Mr. Patrick Sullivan  
Director of Planning, Housing & Community Development  
City of New Bedford, MA  
133 William Street  
New Bedford, MA 02740  
(508) 979-1581  
[Patrick.Sullivan@newbedford-ma.gov](mailto:Patrick.Sullivan@newbedford-ma.gov)
- 2) Connie Desbiens  
Executive Director  
Dartmouth Housing Authority  
4 Anderson Way  
Dartmouth, MA 02747  
(508) 994-1424  
[connie\\_desbiens@yahoo.com](mailto:connie_desbiens@yahoo.com)
- 3) John Salomone  
City Manager (formerly Town Manager, Newington)  
City of Norwich  
City Hall, Room 219  
100 Broadway  
Norwich, CT 06360-4431  
(860) 823-3747  
[cmoffice@cityofnorwich.org](mailto:cmoffice@cityofnorwich.org)
- 4) Mary Bromm  
Community Development Administrator  
Town of Killingly  
172 Main Street  
Killingly, CT 06239  
(860) 779-5300  
[MBromm@killingly.org](mailto:MBromm@killingly.org)

## Our Development Team:

A common thread through all of the Women's Institute's projects, both those we develop on our own as well as those for our clients, is assembling a high quality team early on to create strategic partnerships that evoke a sense that the success of the project is a team effort. To that end, we engaged in a competitive selection process for Architect and Construction Manager as these are the crucial roles in ensuring not only that the design evokes a sense of home but also that the design has a strong construction team to realize that vision.

Our design team at Brown, Lindquist, Fenuccio and Raber brings nearly 5 decades of expertise in creating quality affordable housing communities on Cape Cod and the Islands. They bring a passion and dedication to the idea that quality housing can also be a social good that can become a bridge to

economic stability and opportunity. This is illustrative in the beautiful designs they've created in communities such as Sandwich, Barnstable and Yarmouth to name but a few. They have tremendous experience in bringing projects through the 40 B process and understand very clearly the landscape and the concerns that come with developing in an environmentally sensitive area. TBLFR is a firm that understands the complications of developing on Cape Cod and the Islands; the quality of their design is top-notch and they take true ownership of their role as the team that needs to create the vision of community.

Our contractor, Dellbrook|JKS, also has an excellent reputation as a quality builder with extensive experience building on Cape Cod and on Nantucket in particular. Like BLFR, they understand the complexities of managing construction projects in these areas and how to troubleshoot potential pitfalls so that they deliver a finished product. They are consistently seen as a true asset to the immediate communities in which they work. Likewise, Blackwell Associates is a Nantucket-based firm that specializes in projects of this nature where there are sensitive habitats, land constraints and regulations that require skilled expertise in civil engineering that provides for the needs of the development and the larger community.

Information on each member of the Development Team is attached for your further information.

Project Architect:

**Brown, Lindquist, Fenuccio and Raber Architects, Inc.**

Brown, Lindquist, Fenuccio and Raber was established in 1969 and in its 47-year history, has been a major presence in design on Cape Cod for 40 years. Their extremely qualified team has years of design experience with affordable housing communities and have received awards for their work in Cape Cod communities from the National Association of Home Builders and Remodelers of Cape Cod.

Project Civil Engineer:

**Blackwell & Associates**

Blackwell & Associates, Inc. offers a complete range of professional surveying & civil engineering services required by municipal and private clients. They have provided survey and civil related services over the past 19 years to various Architectural & Engineering firms doing work on Nantucket. The firm employees highly skilled land surveyors and computer technicians using state of the art equipment including fully automated robotic total stations and a precision Leica RTK GPS system. OSHA certified field technicians are closely supervised by registered personnel so that all projects meet standards that can be only met by many years of hands-on experience.

Construction Manager/General Contractor:

**Dellbrook|JKS**

Dellbrook is one of the Northeast's largest and fastest growing construction companies. They have been dedicated to excellence in building for more than 30 years. They have extensive experience in building affordable multi-family housing communities on Cape Cod, Southeastern Massachusetts and the Islands with a local office in Falmouth.

Property Management Company:

**Housing Nantucket**

Established in 1994, Housing Nantucket is the only non-profit solely dedicated to creating affordable housing solutions for island residents. Housing Nantucket has developed thirty units of

affordable rental housing, including two LEED certified units, and currently has an additional six rental units under construction. They manage their own inventory as well as twelve Nantucket Education Trust rental units and, at times, residential properties for the Town of Nantucket, and have functioned as a lottery agent from Mass Housing Partnership in May 2017. A certified affordability Monitoring Agent by Mass Housing Finance Agency and monitoring agent for local 40B developments, Housing Nantucket also oversees the Nantucket Housing Needs Covenant Program of seventy deed-restricted homeownership units in scattered sites around the Island.

#### Proposed Project Financing:

The Women's Institute team will seek to develop 64 units of workforce housing within a true mixed-income community, with a strong focus on creating opportunities for a diverse workforce work force to live and thrive. This housing will be developed in a mix of studio, one, two and three bedroom apartments in multiple low-density detached buildings, designed to be consistent with abutters and in keeping with the scale and look of Nantucket residential property. Eighteen (18) of the 64 units, or 28%, will be affordable to households earning no more than 80% of Area Median Income (AMI). The development is, therefore, qualified for inclusion in the state Department of Housing & Community Development's Subsidized Housing Inventory (SHI). Further, in keeping with MassHousing and the Governor's priorities for work force housing development, 50 of the 64 units (78%) will be rented to households with incomes between 61% and 120% AMI. One unit will be set-aside for a live-in property manager. The development concept is presented in detail in Section 2.

While very preliminary, we have estimated a financing structure for this project that includes a detailed sources and uses and 20-year operating Proforma, which is included in Attachment 7. Current estimates of total development costs, inclusive of all fees and reserves, is approximately \$26 million, or just over \$400,000/unit. This preliminary number is driven, in part, by the "Island premium" for labor and materials, and the requirements of various local and state reviews. The financing plan has been structured to achieve the following additional goals:

- Creating a true mix of incomes and units sizes that can address the range of housing needs facing the Nantucket workforce;
- Maximizing MassHousing incentive and capital subsidies for Workforce Housing;
- Utilizing 9% Low Income Housing Tax Credits (available through DHCD) and other state capital grants for units below 60% AMI;
- Ensuring that the range of incomes can be accommodated with a rental structure that does not rely on scarce rental subsidies;
- Incorporating design elements that meet the desires and requirements of the community, including the Town's design standards;
- Incorporation design elements that meet Enterprise Green Communities standards, including extensive solar power elements;
- Ensuring a well-funded operating budget to maintain and manage the property as a high quality long-term rental property;
- Ensuring the development is well-funded through its useful lifespan, as evidence by a healthy debt service coverage and 20-year cash flow projections; and

- Including developer “skin in the game” by deferring a significant portion of fee to make the project work.

The proposed Fairgrounds Road development will be financed primarily by an array of public and private sources that will include, but will not necessarily be limited to, private debt, equity through the Federal Low Income Housing Tax Credit (LIHTC) Program, soft debt available through DHCD, and deferred developer fee. A full development spreadsheet, including an operating Proforma and cash flow projections, is in Attachment 7. Preliminary sources and uses identified are as follows:

<b>FINANCING SOURCES</b>			
Source	% TDC	Per Unit	Total
Owner's Equity	20%	84,410	\$5,402,805
Perm First Mortgage	50%	206,098	\$13,190,280
MassHousing	19%	78,125	\$5,000,000
State - AHT	4%	15,625	\$1,000,000
HOME/HIF/CBH	4%	15,625	\$1,000,000
Deferred Dev Fee	3%	13,184	\$843,763
<b>Total Sources</b>	<b>100%</b>	<b>413,076</b>	<b>26,436,847</b>

<b>DEVELOPMENT BUDGET</b>			
Description	%TDC	Per Unit	Estimate
Land SF:	124,872	1,000	64,000
Acquisition Costs		8	500
Total Acquisition	0.2%	1,008	64,500
Construction / Rehabilitation	72.2%	298,152	19,081,740
Hard Cost Contingency	5.4%	22,361	1,431,131
Architecture and Engineering	5.7%	23,355	1,494,722
Survey & Permits	0.2%	984	62,000
Financing Costs	2.6%	10,768	689,158
General Development Costs	2.2%	9,157	586,020
Other Costs	0.3%	1,094	70,000
Soft Cost Contingency	0.5%	2,267	145,095
Reserves	2.5%	10,397	665,412
Developer Fee & Costs	4.0%	16,540	1,058,535
Developer Overhead	4.0%	16,540	1,058,535
Syndication Costs	0.1%	469	30,000
<b>TOTAL DEV COSTS</b>	<b>100%</b>	<b>413,076</b>	<b>26,436,847</b>

The Women’s Institute boasts a strong track record in these funding sources to cover the pre-development, construction, and permanent financing needed to bring a Fairgrounds Road from

inception through lease-up and operations. We have an unparalleled history of securing the ‘soft’ funds – funds with no direct repayment provision or minimal repayment terms – which are necessary to create economically viable housing that serves lower income and workforce households. Our success with this funding allows us to create projects that operate as successfully financial and viable communities. The Women’s Institute is also a leader in both Massachusetts and Connecticut in securing permanent financing. To date, our organization has secured over \$265M in federal, state, local and private equity and loans for our projects, and has fostered effective relationships with the myriad of lenders and funders involved in residential and mixed-use projects. See Attachments 2 and 3 for examples of developments that include these funding sources.

The Women’s Institute has also developed strong and flexible relationships with an array of predevelopment lenders. Most are willing to lend with “patient” capital that will be repaid with proceeds from construction/permanent financing. If successful with this proposal, we would move ahead quickly to obtain immediate predevelopment financing from one or more predevelopment lenders with whom we have long-standing borrowing relationships. The lenders expected to be interested in participating in the Fairgrounds Road project include, but may not be limited to:

- Community Economic Development Assistance Corporation (CEDAC) – funding for early stage predevelopment expenses up to \$400,000;
- The Life Initiative – flexible financing of up to \$500,000 for predevelopment and related expenses;
- Housing Ministries of New England – low interest and deferred predevelopment loans ranging from \$50,000-\$300,000;
- Citibank – up to \$300,000 in flexible predevelopment financing.

Based on experience with developments of similar size, scope and complexity, we anticipate the following predevelopment budget:

<b>PRE-DEVELOPMENT BUDGET</b>	
Description	Estimate
Acquisition - Initial	64,000
Architectural/design	900,000
Engineering	129,000
Legal Fees	60,000
Appraisal	10,000
Environmental	28,000
Surveys	7,000
Consultants	65,000
Applications/Fees	20,000
Contingency/misc.	17,000
<b>TOTAL COSTS</b>	<b>1,300,000</b>

**2. Development Concept:**

Nantucket, by all accounts, is a very special place in this country and especially within the coastal region of southern New England; so special that the National Park Service, U.S. Department of the Interior, designated the town a National Historic Landmark in 1966, following up shortly thereafter by its listing in the National Register of Historic Places. The Island has consistently worked hard to maintain and preserve its cultural identity, architectural character and national landscapes amidst rising development pressures, all the while struggling to provide adequate and affordable housing for its seasonal and year-round residents.

The need for well-designed and constructed affordable workforce housing has been well-documented on Nantucket, and the Town has been proactively working to identify appropriate sites to help address this growing demand. The 6 Fairgrounds Road site provides a unique opportunity to provide up to the requested 64 units of such affordable, workforce housing. As stated in the Request for Development Proposals, the overall goals are to:

“Achieve an overall bedroom mix, including the maximum number of studio and one bedroom units which will be permitted based on the sites capacity, good site planning, storage, landscaping and recreational considerations, and the market and financial feasibility of a mixed-income affordable rental project.”

To meet the varying needs of the Town, its residents and the demands of the residential workforce market, the Women’s Institute proposes to develop a mix of studio, one, two and three bedroom apartments that are designed to meet the range of workforce housing needs. The proposed unit mix is designed to meet the strong demand for smaller units, as follows:

	<b>Unit Mix</b>	
Studio	8	13%
1 Br	24	38%
2 BR	24	39%
3 Br	7	9%
4 Br	0	0%
MGR 2 br	1	2%

The income mix creates a diverse community that has the capability to meet the needs of families and individuals with incomes ranging from very low to median income and higher. We have also included a two-bedroom apartment for a live-in property manager:

Affordability	# of Units	% of Units
30% AMI	2	3%
50% AMI	11	17%
80%AMI	5	8%
100% AMI	11	17%
110% AMI	34	53%
Property Mgr	1	0%
Total	64	

As further defined in “Building with Nantucket in Mind” – Guidelines for Protecting the Historic Architecture and Landscape of Nantucket Island, the general development “Goals for Construction outside the Town of Nantucket are:

- To protect the character of existing, small settlements on the island... and to ensure that all new construction in or adjacent to them is harmonious with their intrinsic unity.
- To foster a relatedness of character and “sense of place” among all new buildings, based on traditional forms, so that they share a common identity and express their common heritage.
- To preserve and protect the spacious character of the natural landscape outside of high-density settlements through the sensitive design of buildings, including their siting, to encourage clustering of houses, to minimize the visual impact on the landscape and to make sure new buildings are designed as partners with the land.
- To encourage new constructions that are of the highest design quality and that represent careful response to specific site features, year round climate and the needs and desires of the occupants”

The guidelines further clarify that the “overriding principle for building on Nantucket is that no new construction be considered as an isolated object, either in time or space.” In other words, all development on the island must contribute to and enhance its unique “sense of place”.

Our development team is committed to designing and constructing an intentional, appropriately scaled, residential neighborhood that adheres and responds to these overall goals and principles, while achieving the highest level of rental affordability. Specifically, we believe our development proposal reflects the best qualities of a high-density Nantucket neighborhood by providing:

- Appropriately scaled two story buildings which have pedestrian walkways and public space connections to one another;
- Clear separation between pedestrian and vehicular circulation and buildings which have a close proximity to the interior street edge; a pattern which is common on Nantucket;
- Integrated common area amenities which enhance the sense of community among the residents; and
- The intentional integration of environmentally responsible site development strategies and green building/ high performance building techniques, including the siting of buildings to maximize the potential for Solar PV collection and production.

The Conceptual Site Development Plan included within our proposal incorporates the following site and building design elements which we believe will yield an efficient, well designed, and appropriately scaled neighborhood:

- Clustering of sixteen (16) residential buildings which are all two stories in height and contain 4 units in each, for 64 total units with a mix of studio, 1 Bedroom, 2 Bedroom and 3 Bedroom units (See Development Data Table for Building-by- Building Unit Allocation);

- A centrally located 1660 SF, single story Community Building containing a Property Management Office, Community/ Multi-Purpose Room, shared Laundry, a 24-hour Vestibule with Mailbox Kiosk, multiple Out of Unit Storage Rooms for ADA dedicated units, and a covered rear Sitting Porch which fronts on a common green space;
- Separate basement storage for each of the 64 units;
- 71 On-Site parking spaces (1.1 per unit, .68 spaces per Bedroom);
- Site amenities including dedicated fenced Community Gardens distributed through the neighborhood, a 84' X 64' central Common Green space for passive recreation, a Playground area, multiple shared Grilling/ Gathering patios adjacent to, or within the spaces created by the various building, and a Bike Path connection to the existing Fairgrounds Road Bike Path;
- Open Air but covered Bike Storage “Lean- to” structures at many of the buildings;
- A Maintenance Shed, two solid waste enclosed dumpster areas.

Access to the Site is anticipated to be provided through two access drives; one through the adjacent lot # 67, and one at the south corner of the site onto Waitt Drive, allowing for easy ingress and egress for residents and emergency vehicles. The primary vehicular circulation is provided by an efficient North-East and South-East interior “street” with parking spaces located on each side. Street trees are located along the edges and corners to enhance the streetscape and provide shaded areas along the pedestrian sidewalks. Low scale, fully shielded LED site lights are also located along the street and sidewalk edges.

It should be noted that, in order to meet the 64 unit goal, maintain the desired small scale quality of the neighborhood, provide the requested site amenities, and provide a reasonable parking allocation, the amount of available open, green space is rather limited. We have explored the feasibility of providing several larger 3-story buildings which would reduce the overall number of buildings and increase the amount of green space. If our team is selected as the Developer, we can discuss the pros and cons of this alternate approach and if necessary, modify our conceptual design submission. Potential Green Building / Sustainable Design Strategies.

The Women’s Institute and its Development Team, have incorporated Green Building and Sustainable Design principles into the planning and construction of many recent multi-unit affordable housing developments. BLF&R Architects recently won two design/green building awards for their recently completed “Net Zero” Melpet Farm Community Housing in Dennis, MA. For The Fairgrounds Road Housing Community, we would propose to utilize the following principles and strategies as feasible and as funding sources are further identified and committed to the project:

- The 2015 Enterprise Green Communities criteria will be used during the design and construction process, the Women’s Institute will pursue actual certification through Enterprise Green Communities;
- Integration of low-impact site development techniques;
- Use of on-site infiltration and recharge of storm water runoff with bio-retention drainage systems, if space is available;
- Use of locally appropriate low water consumption landscape plantings;

- Tier 2 or potentially Tier 3 Energy-Star rated buildings including third party energy raters and building envelope testing;
- Maximum retention of natural land features, and site grades at the perimeter of the site;
- Incorporation of community garden space, shared courtyard spaces and play areas;
- Maximum use of east-west oriented buildings to maximize passive solar heat gain and natural day-lighting within residential units;
- Long south and south-west oriented roofs to allow immediate or future solar PVA (photovoltaic array) system implementation (see Drawing L-1.3 for preliminary layout);
- Energy modeling and the use of high-performance exterior wall and roof assemblies to reduce heating and cooling loads, and power consumption including:
  - Supplemental rigid insulation beyond the face of the exterior sheathing or High R-value blown-in foam or cellulose insulation systems which exceed code minimums
  - High R-value argon-filled / Low-E windows
  - Extensive use of joint sealants and air-sealing details to minimize air leakage;
- Energy-Star rated windows, appliances and electrical fixtures;
- High-efficiency gas-fired boilers ( $\pm$  92% fuel utilization efficiency) for hot water heating system and tankless hot water heaters or high efficiency, ductless electric heat pumps;
- Automatic mechanical ventilation systems in each unit to provide highly controlled fresh air intake and exhaust;
- Low consumption plumbing fixtures;
- Building materials with high degree of recycled content and durability;
- Use of Low VOC paint systems, sealants and floor materials;
- Use of fully cut-off exterior LED type light fixtures to reduce operating costs, light pollution and improve night sky visibility.

The Buildings will be designed to meet the general guidelines “Building with Nantucket in Mind” specifically, and as indicated on the Drawings for two of the Building Types (Type ‘A’ & ‘B’), each building will be designed using simple and appropriate traditional forms, fenestration, materials and colors while incorporating passive solar design and daylighting strategies. Long south, southwest facing roofs allow for the potential integration of solar photovoltaic panels to help offset ongoing electrical loads on each building and reduce residents’ utility expenses. Each unit will have an automatic fire suppression system as required by State Building Code for four unit multi-family buildings.

A full basement will be provided under several of the buildings for shared out-of-unit storage within segregated and lockable storage areas. The basic building and unit types will be further modified to meet State and Federal Accessibility Regulations as outlined below.

#### Handicapped Accessible Units

Four units are required to be fully handicapped accessible based upon the total number of units. The Massachusetts Architectural Access Board further requires that at least one of each different unit type be accessible. Therefore, the development will include four handicapped accessible units including 1 studio, 1-one bedroom, 1-two bedroom and 1-three bedroom unit. The dedicated accessible units will have washers and dryers provided in each unit, whereas the standard units will have access to laundry facilities at the Community Building.

In addition, one unit will be designed for sensory-impaired individuals that will include various visual and audible notification devices as part of the life safety systems (i.e. visual horn/strobe on the smoke detection and fire alarm system, visual notification for door chime etc.).

The conceptual building drawings included do not yet specifically show the HC-accessible units but they will be designed as variations of the prototype designs included and will be in conformance with the Massachusetts Architectural Access Board (AAB), Americans with Disabilities Act (ADA) and the Federal Fair Housing Act.

The Women's Institute is committed to providing the maximum number of units possible that meet the "visitability" recommendations of the state funding agencies. To the maximum extent feasible by grading, all first floor units will have "zero-step" entries and allow for complete first floor access including use of "visitable" first floor toilet rooms.

#### Construction Plan, Timeline and Permitting:

We will begin the permitting process within 90 days of selection, and anticipate seeking approval through the Comprehensive Permit Act (Chapter 40 B). The site plan has been designed to be generally compliant with the zoning requirements with respect to setbacks to property lines, required parking, and allowable lot coverage; however, as we further refine the plans, some waivers may be necessary. The Women's Institute and its team will coordinate all design in partnership with key stakeholders in the Town of Nantucket.

Attached are a Construction Management Plan and Proposed Development Schedule.

### **3. Conceptual Design Drawings:**

Attachment 12 includes the following design documents:

- Site Plan
  - Conceptual Site & Landscape Plan
  - Enlarged Conceptual Site & Landscape Plan
  - Preliminary Solar Study
- Architectural
  - Building Type "A" Plans
  - Building Type "A" Elevations
  - Building Type "B" Plans
  - Building Type "B" Elevations
  - Building Type "C" Plans
  - Building Type "D" Plans
  - Building Type "E" Plans
  - Typical Basement Floor Plans
  - Community Building Floor Plan
  - Typical Unit Plans Studio & One Bedroom
  - Typical Unit Plans Two Bedroom

#### **4. Management Plan:**

The Women's Institute owns and operate 13 affordable rental properties in Massachusetts and Connecticut and is dedicated to excellence, sustainability and resident engagement in all of our developments. We recognize that strategic asset management is necessary for the successful long-term operation of our housing projects, especially since they are geographically diverse.

In a departure from the practice of most developers, the Women's Institute has made asset management a priority. We employ a full-time Asset Manager to coordinate asset management and relationship functions across the two states. While centralized under the Asset Manager, quality asset management incorporates an interdisciplinary approach with the Chief Operating Officer, Director of Real Estate Development and the Asset Manager. The goal is to ensure that our portfolio provides affordable housing over the long-term to its target population, while fostering our organization's financial health and community reputation. To do so, the Women's Institute strives to balance the needs of our tenants, funders, property managers, and the community, and to keep the development in good repair over its useful life.

The purpose of Asset Management is to assure that established standards and expectations regarding financial, social, physical condition, regulatory and statutory compliance, and reporting requirements are met. A key focus in our developments is adherence with the myriad federal requirements under the Low Income Housing Tax Credit (LIHTC) program and ensuring full compliance with all Fair Housing and Affirmative Marketing laws and regulations. In contrast but equally critical, property management is the day-to-day management of the project. The Women's Institute engages professional third-party property management on all of our properties. For purposes of this proposal, we have approached Housing Nantucket to undertake this responsibility. Housing Nantucket and the Women's Institute will work together to coordinate the marketing and lottery, lease-up and qualifications, compliance and on-site management.

Established in 1994, Housing Nantucket is the only non-profit solely dedicated to creating affordable housing solutions for Island residents. The organization has developed thirty units of affordable rental housing, including two LEED certified units, and currently has an additional six rental units under construction. They manage their own inventory as well as twelve Nantucket Education Trust rental units and, at times, residential properties for the Town of Nantucket. Housing Nantucket has conducted lotteries to fill its own rental units and completed formal certification as a lottery agent from Mass Housing Partnership in May 2017.

Housing Nantucket is certified as a Community Development Corporation by the Department of Housing and Economic Development and is authorized to distribute State of Massachusetts tax credits through the Community Investment Tax Credit program. They are also certified as an affordability Monitoring Agent by Mass Housing Finance Agency and are the monitoring agent for local 40B developments Abrem Quarry and Sachem's Path. Housing Nantucket is certified by the Massachusetts Homeownership Collaborative to conduct First Time Home Buyer Education courses. The organization oversees the Nantucket Housing Needs Covenant Program of seventy deed-restricted homeownership units in scattered sites around the island.

### Fairgrounds Road Property Management:

The Women's Institute and Housing Nantucket will collaborate to ensure that the property is well managed and complies with all applicable requirements. The operating budget includes both ongoing expenses and contributions to operating and replacement reserves. A schedule will be developed to systematically monitor the condition of all apartments on an annual basis. A written record of inspections will be maintained. Prior to a move-out, a unit will be inspected to identify any damages for which a tenant should be billed. As a regular part of the preventative maintenance program, a maintenance inspection will be done on a routine basis to review for undiscovered problems. Prior to re-rental, the property manager will check the unit to be sure all problems are corrected and adequate redecorating has occurred.

Exterior painting will occur on an as-needed basis to assure building soundness. Interior painting/redecoration of both common areas and living units will be done on an as-needed basis to provide a clean and neat appearance for the tenants. Tenants will be requested to cooperate with the Project trash program by depositing in the trash disposal areas, and to comply with any recycling program that may be in effect from time to time. Trash will be removed from the Project at least once weekly, and the custodial staff will keep the trash areas clean and disinfected.

Maintenance and grounds staff will be hired with appropriate skills to facilitate maintenance of routine and repetitive tasks. Tenants will be requested to report all maintenance problems using a written work request system or by reporting to on-site staff. A work record will be kept for each unit.

### Marketing and Outreach:

Affirmative marketing will be established in an Affirmative Fair Housing Marketing Plan for the development. Tenant selection and leasing activities will conform to DHCD and LIHTC required procedures. Housing Nantucket will keep a list of all applicant inquiries and will respond to each advising the applicant as to the exact dates, hours, and place of rent-up.

Applications will be processed according to the tenant selection plan. The property manager will verify income, check present and former landlords, run credit checks, run criminal background checks, and interview each applicant and his/her entire family, where possible, prior to acceptance. In the processing of applications, LIHTC verification requirements will be followed, primarily by use of written third party verifications. All applicants who are over income or whose family composition is unsuitable for the unit(s) available will be duly notified.

It is acknowledged and affirmed that, in carrying out its marketing program and tenant selection process, neither the Owner, nor its Agents, will discriminate based on race, color, creed, religion, sex, sexual orientation, national or ethnic origin, age, disability, handicap, ancestry, class or marital status, or any other basis prohibited by law. This applies to accepting and processing applications, selecting tenants from among eligible applicants of the waiting list, assigning units, and certifying and recertifying eligibility for assistance. All marketing staff and all other persons involved in processing and/or handling applications will be trained in (1) procedures and policy matters, mindful of relevant federal, state and municipal orders, laws, and statutes dealing with civil rights and fair housing, (2) The Marketing and Tenant Selection Plans, (3) applicable regulations governing the

selection of applicants for this housing, including, but not limited to, Title VIII of the Civil Rights Act of 1968; Title VI of the Civil Rights Act of 1974; Executive Order 11063, November 29, 1962; M.G.L. Chapter 151B; Executive Order 11246, September 9, 1965, the Fair Housing Amendments Act of 1988 and the Americans with Disabilities Act.

#### Local Preferences:

To the extent permitted by federal and state law and DHCD regulations, the Women's Institute will ensure that:

- Seventy (70%) percent of all affordable units are rented pursuant to a local preference (which shall include current Town residents, employees of local businesses and nonprofits located in the Town, households whose children attend Town schools and municipal employees) in a proposed lottery.
- Twenty-five percent (25%) of the affordable units and ten (10%) percent of the market rate units are rented pursuant to a municipal employee preference

#### Lottery for Affordable Units:

As part of the rent up of the property, the management agent will conduct a lottery in accordance with the approved Affirmative Fair Marketing Plan. The management agent will offer informational meetings for potential applicants to educate them about the lottery process and the development. The date, time and location of the meeting will be published in ads and flyers that publicize the availability of lottery applications. The meeting will be held in a public meeting space that is accessible. At least one meeting will be held in the evening or on a weekend day in order to reach as many potential applicants as possible. However, attendance at the meeting will not be mandatory for participation in a lottery. The purpose of the meeting is to answer questions that are commonly asked by lottery applicants. Application materials will be distributed at the meeting to potential applicants.

Prior to the lottery, the management agent will create an applicant log that contains the date each person picked up, or was mailed, an application, each person's name and address and also the date the application was returned. Each applicant's rank order from the lottery will determine where his/her application fits in the appropriate pool.

- The agent shall screen the applications at the top of the lowest income pool first;
- In the event that an applicant does not meet the lowest income eligibility requirements for the pool in which the applicant has been placed, his/her application is then transferred to the pool for which the applicant qualifies. The application is placed in the appropriate pool in rank order;
- If the selected applicant does not pass final screening or decides not to rent a unit, the developer/agent shall move to the next ranked applicant for that specific pool.
- When the developer/agent conducts final screening and rejects an applicant, the applicant will be notified of the reason and given at least ten (10) days to appeal the determination. Applicants must also be notified of their right to contact HUD, or the MCAD, if they believe discrimination took place.

# ATTACHMENTS

- 1 Real Estate Staff Resumes, Bios and Board of Directors list (with areas of expertise)
- 2 Women's Institute Qualifications
- 3 Summary of Women's Institute's Experience with Similar Projects
- 4 BLFR Team Qualifications, References and Experience with Similar Projects
- 5 Dellbrook|JKS Qualifications
- 6 Housing Nantucket Information, Lottery Process, Resumes
- 7 Development Pro forma and 20 Year Operating Cash Flow
- 8 Letters of Interest – Financial Institutions
- 9 Required Disclosures
  - a. Certificate of Non-Collusion
  - b. Tax Compliance Certificate
  - c. Disclosure of Beneficial Interest
- 10 Construction Management Plan
- 11 Proposed Development Schedule
- 12 Conceptual Design Drawings
- 13 Signed Acknowledgement Forms

# ATTACHMENT 1

Real Estate Staff Resumes

Women's Institute Staff Bios

Board of Directors list (with areas of expertise)

# BETSY CRUM

## EXECUTIVE DIRECTOR



Betsy directs all aspects of our mission-driven non-profit housing development corporation focused on creating and preserving affordable and supportive housing for low-income families and individuals. She offers over thirty-five years of experience in housing and community development, having most recently served as Executive Director of the Connecticut Housing Coalition. She is skilled in housing development, financial packaging and management, and is an effective supervisor. A strong advocate with outcome-orientation, she brings an excellent track record in working with public, nonprofit and private sector partners. Ms. Crum previously served as Director of Real Estate Development and oversaw the startup of our Connecticut office, where she created or preserved over 500 units of affordable and supportive housing across eleven developments.

### SPECIALIZATIONS

LAYERED FINANCIAL  
PACKAGING

AFFORDABLE  
HOUSING POLICY &  
ADVOCACY

REAL ESTATE  
DEVELOPMENT

TRAINING &  
TECHNICAL  
ASSISTANCE

STRATEGIC  
PLANNING

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### SELECTED EXPERIENCE

#### Direct developments:

- Victory Gardens, *Newington, CT*
- Ferry Crossing, *Old Saybrook, CT*
- The Eleanor and The Franklin, *Bridgeport, CT*
- Indian Field Apartments, *New Milford, CT*

#### Consulting developments:

- Sharon Ridge (expansion), *Sharon, CT*
- Jarvis Court Homes, *Fairfield, CT*
- Areyto Apartments, *Bridgeport, CT*
- Soromundi Commons, *Hartford, CT*

#### Technical assistance:

Lead Trainer for Affordable Housing Academy through the Connecticut Housing Coalition

### SELECTED EMPLOYMENT HISTORY

#### Women's Institute for Housing & Economic Development

Hartford, CT

*Director of Real Estate - CT:* Provided direction, oversight, new client development and project management for start-up of our Connecticut office.

#### Connecticut Housing Coalition

Connecticut

*Executive Director:* Directed all aspects of statewide membership organization working to increase affordable housing through policy, advocacy, technical assistance, and collaboration.

#### Corporation for Supportive Housing

New Haven, CT

*Associate Director:* Responsible for oversight and implementation of Connecticut-based policy, advocacy, lending, and technical assistance related to developing and operating supportive housing for homeless and at-risk populations.

#### Connecticut Housing Finance Authority

Rocky Hill, CT

*Program Development Officer:* Lead staff person for strategic planning, program development and evaluation for new and existing single family and multifamily loan products.

### SELECTED PROFESSIONAL & COMMUNITY AFFILIATIONS

- **Connecticut Green Bank**, Board of Directors: 2017 to present
- **Federal Home Loan Bank of Boston**, Advisory Council: 2009 to 2014; *Chair & Vice Chair*
- **National Alliance of Community Economic Development Associations**: 2012 to present
- **National Housing Trust Fund**, Steering Committee: 2012 to 2015; *Co-Chair*
- **CT Opening Doors** Steering and Coordinating Committees: 2011 to present; *Housing Chair*
- **CT Interagency Council on Affordable Housing**: 2012 to present
- **CT Housing Coalition** Steering Committee: 1998 to 2004; *President & Treasurer*
- **CT Community Development Association**, Board of Directors: 1985 to 1998; *President*
- **CT Balance of State**, Scoring Committee: 2011 to present

### EDUCATION & TRAINING

University of Connecticut, Storrs, CT  
Bachelor of Arts in Urban Studies

Massachusetts Institute of Technology, Cambridge, MA  
Fundamentals of Real Estate Finance

University of St. Thomas, Minneapolis, MA  
Mini MBA in Non-profit Management

# LONI WILLEY

## CHIEF OPERATING OFFICER



Loni offers over twenty-five years of experience in human services and non-profit leadership. She currently leads the financial and operational activities of the organization and its subsidiaries, oversees the organization's real estate portfolio, and assists with legal structuring on tax credit developments. Loni offers particular strength in the financial and legal interactions of real estate development in relation to non-profit sponsor considerations, and also leverages her past experience in human services programming to support the Women's Institute's supportive housing priorities. Loni joined the Women's Institute in June 2001 as its Chief Financial Officer and also served as its Executive Director from 2007 to 2015.

### SPECIALIZATIONS

LOW-INCOME  
HOUSING TAX  
CREDITS & HISTORIC  
TAX CREDITS

REAL ESTATE LEGAL  
STRUCTURING

FISCAL  
ADMINISTRATION

OPERATIONS  
MANAGEMENT

HUMAN SERVICES  
PROGRAMMING &  
INTEGRATION

### SELECTED EXPERIENCE

#### LIHTC and Historic Tax Credit Developments:

Tax credit and legal structuring, investor relations, cost certifications, lease-up, & compliance:

- Victory Gardens, *Newington, CT*
- Cambridge YWCA, *Cambridge, MA*
- Ingraham Place, *New Bedford, MA*
- The Eleanor, *Bridgeport, CT*
- CHOICE Center, *Chelmsford, MA*
- Indian Field Apartments, *New Milford, CT*
- Capernaum Place, *Lawrence, MA*
- Acushnet Commons, *New Bedford, MA*

Additional experience with multiple mixed-finance, non-tax credit real estate properties.

#### Fiscal and Organizational Oversight:

- 501(c)(3), A-133, and consolidated audits
- Form 990, LP, and LLC returns
- Investor partnership entry and exit
- Treatment of charitable funding in projects

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75 Charter Oak Ave.  
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Hartford, CT 06106

### SELECTED EMPLOYMENT HISTORY

#### Women's Institute for Housing & Economic Development Boston, MA & Hartford, CT

*Executive Director:* Led organization and its affiliated entities, including revenue generation, fiscal oversight, and program and general operations. Developed strategic and business plans for organization. Managed financial growth from \$6M in assets (2006) to \$85M in assets (2015).

*Chief Financial Officer:* Managed all fiscal and general operations of organization, including real estate finance support on LIHTC projects. Served as part of leadership team in regard to strategic planning and resource planning.

#### REACH

Waltham, MA

*Executive Director:* Led human services organization dedicated to providing resources to survivors of domestic violence, including programs, partnerships, and general operations across 27 communities.

### EDUCATION & TRAINING

#### California Polytechnic State University

San Luis Obispo, CA

Bachelor of Science in Human Development  
Master's level coursework in education



# DELBE SPATH

## DIRECTOR OF REAL ESTATE DEVELOPMENT



Delbe offers over 25 years of experience in the real estate finance industry. His work includes positions performing real estate loan analysis and workouts, overseeing the development of multifamily affordable housing properties, and managing the allocation of over \$100 million in equity of tax credits annually for affordable housing development and rehabilitation. In his current role, he oversees the real estate development team across Massachusetts and Connecticut; collaborates with other senior members of the organization to create and sustain a pipeline of projects, both consulting and direct development; and provides assistance to the team on underwriting, finance structuring and negotiating with lenders and stakeholders.

### SELECTED DEVELOPMENT EXPERIENCE

#### The Mill at Killingly Apartments

Killingly, CT

Manages the finance packaging for the \$14 million redevelopment of a former mill, which will offer 32 units of affordable, supportive and market rate housing and community space. Coordinated the Low-Income Housing Tax Credit investor selection, negotiation and closing processes. Oversee construction and requisitioning of funds during environmental remediation and construction.

### SELECTED EMPLOYMENT HISTORY

#### Connecticut Housing Finance Authority

Rocky Hill, CT

*Manager, Tax Credit Programs & Multifamily Housing Underwriting:* Administered the Low-Income Housing Tax Credit, State Housing Tax Credit and multifamily mortgage underwriting programs for CHFA. Responsible for allocating housing tax credits for affordable housing development and rehabilitation. Management duties included fiscal oversight, authoring State Qualified Allocation Plan, developing policy and procedure changes, conducting trainings, as well as Board of Directors presentations and recommendations.

*Asset Manager II:* Oversight of mortgage loans and foreclosed properties totaling over \$150 million. Responsibilities included property valuation reviews, pro-forma analysis, budget and financial statement review for developments with multiple financing structures. Prepare loan workout and restructuring analysis. Monitored owner and agent compliance relative to CHFA policies, HUD guidelines, Low-Income Housing Tax Credit regulations and Affirmative Fair Housing Laws.

#### Webster Bank

Waterbury, CT

*Commercial Banking Officer:* Managed portfolio of 30 classified loans totaling in excess of \$29 million. Property types included residential, commercial and light industrial. Responsible for negotiating loan restructuring, implementing exit strategies and managing litigation. Broad exposure to complex business and legal issues relating to loan workout negotiation and collection. Developed resolution action strategies utilizing financial analysis and discounted cash flows on classified multi-tenant commercial properties.

#### Shawmut Bank Connecticut, N.A.

Hartford, CT

*Real Estate Workout Specialist:* Responsible for portfolio of 60 loans in excess of \$24 million. Developed problem loan resolution strategies, negotiated debt restructures, managed litigation and prepared underwriting presentations to facilitate reducing non-performing assets and bringing loans into compliance with bank policy. Performed underwriting for sale of bank owned real estate acquired through foreclosure.

*Real Estate Analyst II:* Performed comprehensive analytical support for Workout Group managing 361 loans totaling in excess of \$200 million. Created and maintained income and cash flow analysis models utilizing various software packages. Used Argus for internal property valuation assessments, reviewed third party appraisals, created Lotus spreadsheets used by loan officers to analyze Restructure vs. Foreclosure scenarios, maximizing bank's return on loan investments.

### EDUCATION AND TRAINING

#### State University of New York at Fredonia, Fredonia, NY

Bachelor of Science in Business Administration:  
Management and Organizational Behavior concentration

Bachelor of Science: Sociology

### SPECIALIZATIONS

REAL ESTATE  
UNDERWRITING

LOW-INCOME  
HOUSING TAX  
CREDITS

FINANCIAL  
WORKOUTS

LENDER  
NEGOTIATIONS

FINANCIAL  
MODELING

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Boston, MA 02108



# KRISTIN ANDERSON

## DEVELOPMENT MANAGER



Kristin offers seven years of experience in the affordable housing and community development field, and over ten years of experience working in and with nonprofit organizations. She joined the Women's Institute in 2015 and works within our Real Estate Development Team, guiding affordable housing developments from conception to completion. She works closely with clients and partners to develop competitive project concepts, secure public and private financing, and oversee closings with State funders. Kristin has also worked on community development projects across the country and abroad, yielding awards from the American Planning Association MA for community planning projects, conference presentations on community civic engagement, and securing highly competitive federal funds to implement nationally recognized youth programs.

### SELECTED DEVELOPMENT EXPERIENCE

#### West Woods Place Hamden, CT

Developed project concept with for-profit developer for 50 unit mixed-income, new construction property close to State park and bike path. Led financial packaging to secure private debt and public gap funding for \$13 million project. Coordinated development team from pre-development through funding application. Maintain compliance with 8-30g requirements for overlay district.

#### Limited-equity Cooperatives

Managed multiple rehabilitation projects for low-to moderate-income families in shared ownership model. Led membership board to develop project scope, secured competitive public funding, and coordinated development team.

<i>Common Thread</i>	Manchester, CT	16 units	\$1.5 million TDC
<i>Pleasant Street Co-Op</i>	Enfield, CT	12 units	\$1.5 million TDC
<i>Rose Garden Cooperative</i>	Hartford, CT	8 units	\$1.2 million TDC

#### Supportive housing for youth

Lead project manager on supportive housing projects to address youth homelessness. Translate affordable housing development and financing to social service providers. Collaborate with providers to design program and space. Manage development team, environmental due diligence, and financial packaging.

<i>W.Y.S.H.</i>	Meriden, CT	12 units	\$4 million TDC
<i>Promise House</i>	Manchester, CT	13 units	\$3.5 million TDC

### SELECTED EMPLOYMENT HISTORY

#### North Shore Community Development Corporation Salem, MA

**Chief Program Officer:** Managed all elements of community engagement, program development, and partnerships. Worked closely with real estate team to implement award winning planning initiatives, create and secure federal funding for a new YouthBuild program, and coordinate supportive programs for families. Managed a team of 5 program staff.

#### Bike & Build, Inc. Philadelphia, PA

**Trip Leader:** Led cross-country bike trip from Portland, ME to Santa Barbara, CA and regional trip from Bar Harbor, ME to NYC. Fostered community service among 57 young adults ages 18-25. Distributed \$39,500 in competitive grant funding to affordable housing organizations over two years. Assisted in the supervision of riders, managed affordable housing curriculum, secured hosts and construction sites for volunteering.

### PROFESSIONAL & COMMUNITY AFFILIATIONS

- **Emerging Leaders Network:** CT Housing Coalition, Steering Committee Member, 2015 to Present
- **Bike & Build:** Board Chair, 2013 to 2017; Current Board Member
- **Leadership Development Roundtable:** Participant, 2017 to Present
- **Connecticut Green Bank Peer-to-Peer Network:** Member, 2017 to Present

### EDUCATION

#### University of Toronto, Toronto, ON, Canada

MSc in Planning: Urban Planning and Development concentration

#### San Francisco State University, San Francisco, CA

Bachelor of Arts in Liberal Studies: Social Policy and Multiculturalism concentration; *Magna Cum Laude*

### CERTIFICATIONS

#### Boston University, Boston, MA

Certificate in Nonprofit Management and Leadership

#### Universiteit Van Amsterdam, Amsterdam, Netherlands

Certificate in Social Studies: studies in policy and multiculturalism

### SPECIALIZATIONS

HOUSING  
COOPERATIVES

MIXED-INCOME  
HOUSING

COMMUNITY  
ENGAGEMENT

PUBLIC AND  
PRIVATE GRANTS  
MANAGEMENT

NEIGHBORHOOD  
LEVEL PLANNING

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## Board of Directors

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### Women's Institute for Housing and Economic Development, Inc.

#### Corporate Officers:

Christine Traczyk– President

Community Development Manager

Farmington Bank

Areas of expertise: affordable housing development, neighborhood strategic planning, loan fund management

Tracy McDermott - Clerk

Managing Director of Portfolio Services

Tax Credit Asset Management, LLC

Areas of expertise: investment/asset management, tax credit underwriting, fund and portfolio management

Melissa Sheeler - Treasurer

Deputy Director of Asset Management

Massachusetts Housing Investment Corporation

Areas of expertise: asset and property management, real estate finance, resident services coordination

Elizabeth Crum, WIHED Chief Executive Officer/Executive Director (*non-voting*)

Areas of expertise: real estate development, layered financial packaging, affordable housing policy and advocacy, training and technical assistance

Loni Willey, WIHED Chief Operating Officer (*non-voting*)

Areas of expertise: fiscal administration, real estate legal structuring, human services programming and integration, LIHTC and Historic Tax Credits

#### Directors:

Karen Edlund

Chief Financial Officer

Jewish Community Housing for the Elderly

Areas of expertise: real estate and tax-advantaged investing, fund and partnership investment structuring, valuations and due diligence

John Gibbons

Managing Director of Investment Group

Origen Ventures

Areas of expertise: real estate investment, financial workouts for commercial debt and real estate, valuations and due diligence

Patricia Spring

Retired

Areas of expertise: training and technical assistance, community and economic development policy and advocacy, limited equity cooperative management



## Board of Directors

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### Women's Institute Realty, Inc.

#### Corporate Officers:

Christine Traczyk– President

Community Development Manager,  
Farmington Bank

Areas of expertise: affordable housing development, neighborhood strategic planning, loan fund management

Tracy McDermott - Clerk

Managing Director of Portfolio Services  
Tax Credit Asset Management, LLC

Areas of expertise: investment/asset management, tax credit underwriting, fund and portfolio management

Melissa Sheeler - Treasurer

Deputy Director of Asset Management  
Massachusetts Housing Investment Corporation

Areas of expertise: asset and property management, real estate finance, resident services coordination

Elizabeth Crum, WIR-MA Chief Executive Officer/Executive Director (*non-voting*)

Areas of expertise: real estate development, layered financial packaging, affordable housing policy and advocacy, training and technical assistance

Loni Willey, WIR-MA Chief Operating Officer (*non-voting*)

Areas of expertise: fiscal administration, real estate legal structuring, human services programming and integration, LIHTC and Historic Tax Credits



## Staff Biographies

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### Leadership Team:

**Betsy Crum**, *Executive Director*, offers thirty-five years of experience in affordable housing, having most recently served as Executive Director of the Connecticut Housing Coalition, a statewide advocacy and technical assistance member organization. Ms. Crum previously served as Director of Real Estate Development at the Women's Institute for six years, creating over 500 units of affordable and supportive housing across eleven developments. She was also the Associate Director at the Connecticut office of the Corporation for Supportive Housing; Executive Director of Co-op Initiatives, worked for the Connecticut Housing Finance Authority and the Connecticut Department of Housing; and headed up several municipal community development departments. She has served on the Federal Home Loan Bank of Boston's Advisory Council, the Connecticut Interagency Council on Affordable Housing and Reaching Home Steering Committee, the Connecticut Community Development Association, the Connecticut Coalition to End Homelessness and the Community Economic Development Fund. Ms. Crum holds a BA with Distinction in Urban Studies from the University of Connecticut, and training from the Massachusetts Institute of Technology in Real Estate Finance.

**Loni Willey**, *Chief Operating Officer*, offers over twenty-five years of experience in human services and non-profit administration. Joining the Women's Institute in June 2001 as its Chief Financial Officer and serving as its Executive Director from 2007 to 2015, she currently manages the financial operations and infrastructure of the organization. Prior to the Women's Institute, Ms. Willey served as Executive Director of REACH, a domestic violence agency serving 27 communities, and worked in domestic violence prevention and intervention services for ten years. Ms. Willey holds a Bachelor of Science degree in Human Development from Cal Poly State University.

### Real Estate Team:

**Delbe Spath**, *Director of Real Estate Development*, works within the real estate development programs of the Women's Institute, and offers over 27 years of real estate finance experience. Most recently Mr. Spath worked at the Connecticut Housing Finance Authority as the Manager of Tax Credit Programs and Multifamily Underwriting where his primary responsibilities centered on administration of the Low-Income Housing Tax Credit and State housing tax credit programs. He is a graduate of the State University of New York at Fredonia, majoring in Business Administration and Sociology.

**Ellen Flanagan**, *Senior Development Finance Manager*, offers over thirty years of experience in affordable housing development. At the Women's Institute, she provides oversight for all Connecticut projects, and brings particular expertise around project financing. Before joining the Women's Institute in 2010, Ms. Flanagan worked for the Connecticut House Finance Authority for twenty years as a Tax Credit Program Officer and Senior Mortgage Underwriter. Ms. Flanagan holds a Bachelors' degree in Business from Trinity College/University of Vermont.

**Cheryl Good**, *Senior Asset Manager*, joined the Women's Institute in 2015 and oversees our asset portfolio across Connecticut and Massachusetts. Ms. Good has over 33 years of experience in the affordable housing industry. Ms. Good worked at the Connecticut Housing Finance Authority for 20 years as well as in the private sector as a Compliance Director. Ms. Good attended the MIT Center for Real Estate program and holds designations as a Certified Fair Housing Coordinator (ADA and 504,) C4P, Specialist of Housing Tax Credits and various other housing accreditations.

**Anne Reitmayer**, *Senior Development Manager*, joined the Women's Institute in 2017 with over thirty years of expertise in housing, nonprofit development and finance. Ms. Reitmayer has her J.D. from Northeastern University School of Law and her Bachelors' Degree from Boston University. Ms. Reitmayer came to the Women's Institute after having served as a housing and community development consultant for the past 20 years in Massachusetts. Prior to being a consultant, she was the Executive Director of Boston Citywide Land Trust and also worked as a lawyer prior to her housing career. She has particular experience in assisting clients in the planning of housing and commercial development and childcare facilities.

**Gabby Geller**, *Development Manager*, worked for the NYC Department of Housing Preservation and Development as a Deputy Director before joining the Women's Institute in 2013. Mrs. Geller offers over fifteen years of experience in the community development field. Mrs. Geller received her Bachelor of Arts degree in Political Science from Loyola College in Baltimore, MD. She also holds a Masters' degree in City Planning from the University of Pennsylvania.

**Brock Williams**, *Development Manager*, joined the Women's Institute in 2014 and works within our real estate development team. Mr. Williams has experience writing grant proposals, monitoring project and organization finances, securing public and private financing, as well as coordinating with subcontractors and monitoring the construction process. Prior to joining the Women's Institute, he worked with NeighborWorks New Horizons in a variety of roles to provide affordable housing for Connecticut residents. Mr. Williams holds a Master of Science in Urban Studies from Southern Connecticut State University and a Bachelor of Science degree from the University of Pittsburg in Business Administration with a focus on Finance.

**Kristin Anderson**, *Development Manager*, joined the Women's Institute in 2015 and works within our real estate development team. Ms. Anderson comes to the organization with a background in affordable housing and community development, specializing in neighborhood level planning, public and private grants management, and community engagement. She previously held the position of Chief Program Officer at North Shore Community Development Coalition in Salem, MA, where she focused on developing and managing key neighborhood revitalization initiatives in low-income communities. Ms. Anderson holds a Master of Science in Planning from the University of Toronto and a Bachelors' degree in Liberal Studies from San Francisco State University.

**Lisa Thordén**, *Development Associate*, joined the Women's Institute in 2015 and assists the real estate team in the Connecticut office. Her responsibilities include assisting staff with project management including funder reporting, budgeting, and day-to-day office operations. Ms.

Thordén has previously worked in business administration and marketing for a manufacturing company in Sweden. She graduated from the University of Linköping in Sweden, with a Bachelors' of Science in Nursing.

**Operations Team:**

**Dana Mead**, *Senior Business Manager*, joined the Women's Institute in 2011. Ms. Mead maintains systems to track financial progress of real estate projects, prepares requisitions for funders, as well as coordinates billing and tracking related to the organization's consulting business, manages Human Resources and assists with organizational operations. Ms. Mead brings three years of experience as a consultant with IBM Global Business Services. She is a graduate of St. Mary's College in Maryland with a Bachelors' degree in Economics.

**Tyler Campbell**, *Operations Manager*, joined the Women's Institute in 2014 and assists with organizational operations, including general office management, information technology and computer support. Mr. Campbell's essential functions include coordination of day-to-day office operations, responsive administrative support, and serving as a proactive bridge between the CT and MA offices. Mr. Campbell graduated from the University of Oklahoma with a Bachelors' degree in Economics and International Business.

# ATTACHMENT 2

Women's Institute Qualifications



# Women's Institute for Housing and Economic Development

*Building Homes and Opportunity*

The **Women's Institute for Housing and Economic Development (Women's Institute)** is a national award-winning nonprofit affordable and supportive housing developer, owner, and consultancy working in Southern New England. The Women's Institute's core mission is to promote economic resilience and stable homes by developing and preserving high quality affordable and supportive housing, with an emphasis on under-served populations.



**Development Experience** Since 1981 we have **developed 73 affordable housing properties** and **preserved 21 existing affordable properties**, all with the intent to **serve the most vulnerable populations** in our communities, including homeless and at-risk families, seniors, Veterans, and individuals and families in need of affordable housing interwoven with key services.

**Strategic Focus** We bring the strength of our organization to collaborative development initiatives with locally-based organizations, and create and sustain partnerships that address the housing and programmatic needs of residents, neighborhoods, and larger communities.

**Achieving Our Mission** By working in partnership with community groups, local leaders and service providers, the Women's Institute creates affordable housing that enhances the quality of life for at-risk families and individuals, increasing their opportunity for economic stability. We achieve our mission by:

- 1. Developing affordable and supportive housing** by bringing our development expertise and project management capacity while working in partnership with local organizations;
- 2. Promoting economic opportunity** by building housing that is affordable, decreasing the too often disproportionate amount of income that many individuals and families currently budget for their housing;
- 3. Building strong communities** by creating enduring partnerships that provide support to residents, neighborhoods, and communities.





## Development Services

With offices in Massachusetts and Connecticut, the Women's Institute serves as the developer or development consultant of affordable housing projects, bringing development expertise and management capacity to communities across the region, while working in partnership with local organizations to create quality housing.

### Pre-Development

- Develop project concept
- Analyze potential sites
- Identify design priorities
- Navigate zoning and community processes
- Analyze financial feasibility

### Pre-Construction

- Advance construction documents
- Negotiate with lenders
- Determine property operations
- Provide relocation services
- Prepare for finance closing



### Construction

- Provide construction monitoring
- Prepare requisitions
- Coordinate permanent loan closings
- Assist with close-out and audit preparation

### Operations and Asset Management

- Assist with lease-up and marketing
- Oversee loan compliance and reporting
- Train staff in financial oversight

### General Project Management

- Provide owner representation and support
- Monitor schedules
- Select & coordinate development team
- Provide financial management
- Provide strategic advice



## Achievements

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### In our 36 years, the Women's Institute has:

- Created or preserved 73 affordable housing properties across Massachusetts and Connecticut, which include housing for over 1,360 families and individuals
- Provided technical assistance services to an additional 50 organizations and groups
- Worked with over 100 service providers and community partners
- Partnered with Housing Authorities, Veterans groups, organizations supporting seniors, human service organizations, and local community groups
- Developed housing under federal, state, local, and private financing, including Low-Income Housing Tax Credits, Historic Tax Credits, HOME funds, Bond funds, community preservation funds, and a variety of other sources

### The Women's Institute has received the following awards:

- Novogradac Developments of Distinction Honorable Mention for *Victory Gardens*
- J. Timothy Anderson Award for Excellence in Historic Preservation through the National Housing and Rehabilitation Association for *YWCA Cambridge*
- CT Housing Coalition award for Best Practices in Collective Impact for *Ferry Crossing*
- Novogradac Development of Distinction Award for *The Eleanor and The Franklin*
- CT Mortgage Bankers Association Affordable Housing Committee Award For Providing Affordable Housing Opportunities to CT Residents
- Twice awarded the Fannie Mae Maxwell Award for Excellence for *GrandFamilies House* and *Acushnet Commons*
- J. Timothy Anderson Award for Excellence in Historic Renovation through the National Housing and Rehabilitation Association for *Acushnet Commons*
- Enterprise Innovative Ventures Award for *Soromundi Commons*





## Affordable Housing

Housing affordability is defined as spending no more than 30% of household income on housing. We create affordable housing for a variety of income levels, including a priority for those individuals and families at 25% to 80% of the area median income, to ensure that residents are not overburdened by their housing costs. Indian Field Apartments is comprised of 40 units of affordable housing for individuals and families located in rural New Milford, CT.



## Permanent Supportive Housing

These homes combine affordable housing with human services for very low income individuals, allowing residents to live independently. As opposed to shelters, prisons, and hospitals, supportive housing provides the most cost-effective housing option for those for whom housing is most challenging. Residents may be at-risk or chronically homeless, requiring case management services, including job training, life skills training, alcohol/drug abuse recovery programs and mental health services. Ingraham Place offers 19 supportive housing apartments with on-site services in coastal New Bedford, MA.



## Supportive Housing for Veterans

Supportive housing for Veterans includes services that are tailored to serve the complex needs of Veterans, many of whom may be displaced, suffering from the lingering effects of Post Traumatic Stress Disorder (PTSD) and/or compounded by a lack of family and social support networks. Victory Gardens includes 50 townhomes and 24 apartments for Veterans in central Connecticut.



## Congregate Housing

Congregate housing is designated for seniors 62 years of age or older and provides community space and on-site services, such as prepared meals and health services. The Eleanor offers 62 affordable apartments for seniors in Bridgeport, CT with a variety of congregate and independent living services.



### Workforce Housing

Residents of workforce housing earn between 80% to 100% of area median income, often attracting young professionals, working families, retirees and people in critical professions such as firefighters, police officers, teachers and nurses. Ferry Crossing, which includes sixteen townhouse-style rental apartments, was developed to address the needs of families, young adults and seniors who wish to reside near work and transit options in coastal Old Saybrook, CT.



### Mixed Use Development

Mixed use development provides commercial, retail and program space, in addition to residential apartments, creating vibrant neighborhoods with a variety of uses. Capernaum Place, located in Lawrence, MA, includes 20 apartments as well as program space for education, job training, children's programs, counseling, and administrative offices which provides residents and the community with an array of supportive programs.



### Redevelopment and Repurposing

In addition to Acushnet Commons, originally a school, the Women's Institute has redeveloped a former hospital, an American Legion Hall, and a State Police Barrack into housing. Acushnet Commons includes 12 apartments as well as program/commercial space and a community center in New Bedford, MA.



### Preservation and Stabilization

The Women's Institute's expertise can assist those affordable properties that are either nearing the end of their required affordability periods, are at risk of being lost to the open market, and/or require debt restructuring and recapitalization. The Women's Institute acquired the Grinnell Mansion property in 2011. By doing so, we were able to preserve the housing affordability that might otherwise have been lost to the market, thus reverting to dramatically higher rents for families, and/or deteriorate into unlivable conditions. Grinnell Mansion consists of 17 affordable apartments for seniors in the coastal New Bedford, MA.



## Our Completed Projects: 1981 - Present

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### 1981 - 1989

Women, Inc. - Treatment Center - Boston, MA  
Horizons I (Women's Union) - Mattapan, MA  
Transition House - Fitchburg, MA  
Elizabeth Stone House - Boston, MA  
Casa Myrna Vazquez - Shelter, Boston, MA  
Casa Myrna Vazquez - Transitional Living Program  
Frances Perkins House - Worcester, MA  
Lasell Junior College - Newton, MA  
Neil Houston House - Westborough, MA

### 1990 - 1999

Brookview House - Dorchester, MA  
Project Family Independence - Boston, MA  
Revision House - Shelter - Boston, MA  
The Second Step - Newtonville, MA  
Portis House (Women, Inc.) - Boston, MA  
Bostonian Chambers - Dorchester, MA  
Lifehouse - Boston, MA  
Bishop House - Boston, MA  
Casa Myrna Vazquez - Teen Program - Boston, MA  
Ruah - Cambridge, MA  
Sojourner House - Roxbury, MA  
Ellington Street Cooperative - Boston, MA  
Newburyport YWCA - Newburyport, MA  
Winchester Interfaith Housing - Winchester, MA  
WINGS - Boston, MA  
ASAP - Boston, MA  
Moreland House - Roxbury, MA  
Victory Programs - Boston, MA  
SPIN - Lynn, MA  
KAFANM - Boston, MA  
Revision House - Transitional Housing - Boston, MA  
Casa Nueva Vida - Roxbury, MA  
GrandFamilies House - Boston, MA  
KAFANM - Phase II - Boston, MA  
Ellington Street Cooperative - Phase II - Boston, MA

### 2000 - 2009

Crescent Field Townhomes - Newton, MA  
Transition House - Cambridge, MA  
Safe Passage - Northampton, MA  
Dunmore Place (Casa Esperanza) - Roxbury, MA  
Casa Maribel (HarborCOV) - Chelsea, MA

Womanshelter/Companeras - Holyoke, MA  
Acushnet Commons \* - New Bedford, MA  
Horizons I - Rehab (Women's Union) - Mattapan, MA  
Soromundi Commons (Hartford YWCA) - Hartford, CT  
Areyto Apartments (CCC YMCA) - Bridgeport, CT  
Jarvis Court Homes (Operation HOPE) - Fairfield, CT  
Familias Unidas (Casa Esperanza) - Roxbury, MA  
Capernaum Place (Lazarus House) - Lawrence, MA  
Inn Transition (Citizens for Adequate Hsg) - Peabody, MA  
RESPOND - Somerville, MA  
Indian Field Apartments \* - New Milford, CT  
Jessica Tandy Apartments - Bridgeport, Ct  
Phineas Park Apartments - Bethel, CT

### 2010 - Present

Nueva Esperanza (Casa Esperanza) - Roxbury, MA  
CHOICE Center (CHOICE) - Chelmsford, MA  
Devon & Bellevue (Heading Home) - Boston, MA  
Ingraham Place \* - New Bedford, MA  
Lynn Marcella Residences (CHOICE) - Chelmsford, MA  
Eagle Street Homes (Community Care Svcs) - Fall River, MA  
Revere Street (Housing Families, Inc) - Revere, MA  
The American Legion Veterans' Housing - Jewett City, CT  
Mary Townsend Seymour Apts (MSP) - Hartford, CT  
Ferry Crossing \* - Old Saybrook, CT  
Sudbury Duplexes (Sudbury Hsg Authority) - Sudbury, MA  
Cambridge YWCA - Cambridge, MA  
Victory Gardens \* - Newington, CT  
CHOICE Veteran's Housing - Chelmsford/Westford, MA  
Rindge Avenue - Cambridge, MA  
Sharon Ridge - Sharon, CT  
Marion Villages - Marion, MA  
Highland Woods - Williamstown, MA  
O'Connor-Sisson House for Veterans - Dartmouth, MA  
Harborlight House - Beverly, MA  
New England Center and Home for Veterans - Boston, MA

### Preservation/Stabilization of Affordable Housing

Grinnell Mansion \* - New Bedford, MA  
Lakeview Apartments \* - Salisbury, CT  
40 South Main Street - Norwalk, CT  
Housing Families, Inc. - Malden/Medford, MA  
State of CT Supportive Housing Demonstration Program  
Prospect Estates\* - Webster, MA



## Staff and Board of Directors

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### Staff:

#### Management

**Betsy Crum**, Executive Director  
800-720-1195 x203      bcrum@wihed.org

**Loni Willey**, Chief Operating Officer  
800-720-1195 x104      lwilley@wihed.org

**Delbe Spath**, Director of Real Estate Development  
800-720-1195, x206      dspath@wihed.org

#### Real Estate

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**Ellen Flanagan**, Senior Finance Development Manager  
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**Gabby Geller**, Development Manager  
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**Cheryl Good**, Senior Asset Manager  
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**Anne Reitmayer**, Senior Development Manager  
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**Brock Williams**, Development Manager  
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**Lisa Thordén**, Development Associate  
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#### Operations

**Dana Mead**, Senior Business Manager  
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**Tyler Campbell**, Operations Manager  
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### Board of Directors:

**Christine Traczyk**, President  
Community Development Manager  
Farmington Bank

**Tracy McDermott**, Clerk  
Managing Director  
Tax Credit Asset Management

**Melissa J. Sheeler**, Treasurer  
Deputy Director of Asset Management  
Massachusetts Housing Investment Corporation

**Karen Edlund**  
Chief Financial Officer  
Jewish Community Housing for the Elderly

**John Gibbons**  
Managing Director – Investment Group  
Origen Ventures

**Pat Spring**  
Connecticut Housing Coalition (retired)

# **ATTACHMENT 3**

Summary of Women's Institute's Experience with  
Similar Projects

## Relevant Experience

The Women's Institute brings experience in the development of different housing types: shelter, transitional, and permanent affordable, work force and mixed income. We have a strong track record in securing pre-development, construction, and permanent financing from a variety of local, state, federal, and private sources. We are skilled in layering conventional and non-conventional debt, particularly the 'soft' funds – funds with no direct repayment provision or minimal repayment terms - which are necessary to create economically viable housing that serves low- and moderate-income households. Our success with this array of funding streams allows us to create projects that operate as successfully financial and viable communities. To date, our organization has secured over \$265M in federal, state, local and private equity and loans for our projects, and has fostered effective relationships with the myriad of lenders and funders involved in residential and mixed-use projects.

The Women's Institute has extensive experience with all typical funding sources for successful housing development projects in Massachusetts, including securing and layering the following types of funding:

- Permanent mortgage financing
- Low Income Housing Tax Credit (LIHTC) equity
- Commonwealth of Massachusetts deferred loan programs, including:
  - HOME Funds
  - Affordable Housing Trust Fund
  - Housing Innovation Funds
  - Housing Stabilization Funds
- Federal Home Loan Bank Affordable Housing Program grant and loan funds
- Municipal funding, including:
  - Community Preservation Act Funds
  - City HOME Funds
- Foundation and Private charitable dollars

A selected listing of our relevant Current and Completed Projects is included in the following pages.

## Ferry Crossing Old Saybrook, CT



<b>Type and description</b>	<p>New construction. Ferry Crossing was the first project developed under HOME Connecticut's Incentive Housing Zone, which encourages towns to create opportunities for affordable housing. The project was co-developed with HOPE Partnership, a local affordable housing group, in the picturesque town of Old Saybrook at the confluence of the Connecticut River and the Long Island Sound. Ferry Crossing was developed when a group of teachers working in an afterschool program realized some of their students were living in motels during the school year and in tents during the summer due to skyrocketing seasonal rents. The 16-unit community includes homes for families below 25% Area Median Income, including four units of supportive housing for Veterans.</p> <p>National LISC highlights on Ferry Crossing:  <a href="http://www.lisc.org/our-stories/story/coming-home-small-town-connecticut">http://www.lisc.org/our-stories/story/coming-home-small-town-connecticut</a></p>
<b>Scope</b>	<p>Leadership of full project design, development, construction, and operations in association with our local partner.</p>
<b>Start date</b>	<p>2009</p>
<b>Completion date</b>	<p>June 2012</p>
<b>TDC</b>	<p>\$4 million</p>
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Connecticut Department of Economic and Community Development</li> <li>2. Federal Home Loan Bank of Boston, AHP grant and permanent mortgage</li> <li>3. Liberty Bank, construction and permanent loans</li> <li>4. Town of Old Saybrook</li> </ol>
<b>Units and bedroom sizes</b>	<p>16 apartments, including 4 one-bedroom flats and 12 two- and three-bedroom townhouses.</p>

## Essex Place

Essex, CT



<b>Type and description</b>	New construction. This development, co-developed with Essex Elderly and Affordable Housing, Inc., will offer permanent affordable housing for lower income seniors. The infill development is located near downtown Centerbrook and adjacent to an existing property owned and managed by the Essex Housing Authority. The property will include community space and common areas for the residents.
<b>Scope</b>	Leadership of full project design, development, construction, and operations in association with our local partner.
<b>Start date</b>	2013
<b>Completion date</b>	Anticipated June 2017
<b>TDC</b>	\$4 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Connecticut Department of Housing</li> <li>2. Connecticut Housing Tax Credit Contribution Program</li> <li>3. Federal Home Loan Bank of Boston, AHP grant and permanent mortgage</li> <li>4. Essex Savings Bank, construction and permanent loans</li> <li>5. Town of Essex</li> </ol>
<b>Units and bedroom sizes</b>	22 apartments, including 18 one- and 4 two-bedroom apartments.

## Highland Woods

Williamstown, MA



<b>Type and description</b>	New construction. Highland Woods was conceived as replacement housing for residents from The Spruces, a mobile home park which was destroyed as a result of flooding from Tropical Storm Irene in 2011. The Women’s Institute served as the development consultant for Berkshire Housing Development Corporation. Local funds contributed in the amount of \$2,850,000. The property, situated on land donated by Williams College, is adjacent to an existing Berkshire Housing property for seniors, affording the opportunity to leverage and scale financial and managerial resources as well as supportive services.
<b>Scope</b>	Full range of development consulting services, including acquisition, zoning, financial packaging, construction oversight, and lease-up.
<b>Start date</b>	2013
<b>Completion date</b>	September 2016
<b>TDC</b>	\$12.3 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal Low-Income Housing Tax Credits (investor: Boston Capital)</li> <li>2. Massachusetts Department of Housing and Community Development, including Housing Innovation Funds, Affordable Housing Trust Funds, and Housing Stabilization Funds</li> <li>3. Williamstown Affordable Housing Trust and Community Preservations Commission Funds</li> <li>4. Boston Community Loan Fund, construction and permanent loans</li> </ol>
<b>Units and bedroom sizes</b>	40 apartments, including 32 studio and one-bedroom apartments, and 8 two-bedroom apartments.

## Victory Gardens Newington, CT



<b>Type and description</b>	New construction of townhouses and rehabilitation of existing building. Victory Gardens has created a cohesive community of affordable housing with supportive services for our Veterans and their families. Located on surplus land within the Veterans' Administration campus, the development was one of four national demonstration projects under the newly-created U.S. Department of Veterans' Affairs Extended Use Lease Program. The design created 74 apartments by restoring and renovating an existing vacant building into 24 housing units and constructing seven low-scale townhouse complexes, adding 50 additional units. The site includes spacious common gardens, playground and community building. Meets "LEED Silver" standards.
<b>Scope</b>	Leadership of full project design, development, construction, and operations.
<b>Start date</b>	2010
<b>Completion date</b>	December 2013
<b>TDC</b>	\$30.7 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal Low-Income Housing Tax Credits (investor: Morgan Stanley, through National Equity Fund as syndicator)</li> <li>2. State of CT Department of Economic and Community Development</li> <li>3. Federal Home Loan Bank of Boston, AHP grant and permanent mortgage</li> <li>4. Webster Bank, construction and permanent loans</li> <li>5. Federal Military Construction Funds</li> <li>6. Private foundation grants</li> </ol>
<b>Units and bedroom sizes</b>	74 apartments, including 40 one-bedroom, 22 two-bedroom, and 12 three-bedroom apartments and townhouses.

## CHOICE Center at North Village Chelmsford, MA



<b>Type and description</b>	New construction. CHOICE Center at North Village was designed as a part of the Chelmsford Housing Authority's larger campus which includes affordable housing and the Chelmsford Senior Center. The project includes both traditional one-bedroom apartments for seniors to enjoy independent living, as well as two-bedroom units that recognize the changing definition of senior housing, which can include an elderly person or couple assisted by an in-home care provider, older parents caring for a disabled child, or elderly relatives living together to support each other. CHOICE Center offers program space for on-site case management services and support, and meeting space for use by residents. Incorporated green features include a solar panel system, reflective roofing to reduce heating and cooling costs, and other EnergyStar features.
<b>Scope</b>	Full range of development consulting services, including acquisition, zoning, financial packaging, construction oversight, and lease-up.
<b>Start date</b>	2008
<b>Completion date</b>	May 2011
<b>TDC</b>	\$9.3 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal American Recovery and Reinvestment Act (ARRA)</li> <li>2. Massachusetts Department of Housing and Community Development, including Affordable Housing Trust Fund and HOME Funds</li> <li>3. MassDevelopment</li> <li>4. Federal Home Loan Bank of Boston, AHP grant and permanent mortgage</li> <li>5. Chelmsford Community Preservation Act Fund</li> <li>6. Private foundation support and sponsor investment</li> </ol>
<b>Units and bedroom sizes</b>	37 apartments, including 32 one-bedroom and 5 two-bedroom apartments.

## Marion Villages

Marion, MA



<b>Type and description</b>	New construction. Marion Village was developed by Baywatch Realty and is the town's first affordable multi-family housing development for families. Near Marion Village and major transportation routes, the development abuts conservation land and includes a planned town-sponsored bike path that will connect the towns of Marion, Mattapoisett, Wareham and Fairhaven. The rental development was created within a larger planned residential community of 34 acres permitted under Chapter 40B. Groundbreaking to full occupancy: 16 months.
<b>Scope</b>	Development consulting services, including financial packaging/closings, construction oversight, and lease-up.
<b>Start date</b>	2013
<b>Completion date</b>	April 2015
<b>TDC</b>	\$16 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal Low-Income Housing Tax Credits (investor: Citizens Bank, through Boston Financial Investment Management as syndicator)</li> <li>2. Massachusetts Department of Housing and Community Development, including HOME Funds and Housing Stabilization Funds</li> <li>3. Massachusetts Housing Partnership, permanent loan</li> <li>4. Citizens Bank, construction loan</li> </ol>
<b>Units and bedroom sizes</b>	60 apartments, including 8 one-bedroom, 46 two-bedroom, and 6 three-bedroom apartments.

## Harborlight House

Beverly, MA



<b>Type and description</b>	Rehabilitation. Harborlight House, an existing assisted-living facility originally funded with low income housing tax credits, was recapitalized, rehabilitated and preserved for frail, low income seniors in the North Shore community of Beverly. Through this restructuring, Harborlight House is better serve its residents by deeping the affordability restriction so that a majority of the units (73%) are targeted to residents at or below 30% of the area median income. The preservation increases access and choice to a variety of supportive services and partnerships, funded by a new annual supportive service funding stream. The rehabilitation addressed critical physical needs throughout the building, including improvements to make the units more accessible for residents and visitors in wheelchairs and improving energy efficiencies.
<b>Scope</b>	Development consulting services, including financial packaging and closings.
<b>Start date</b>	2013
<b>Completion date</b>	April 2015
<b>TDC</b>	\$7.3 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal Low-Income Housing Tax Credits (investor: Massachusetts Housing Investment Corporation)</li> <li>2. Massachusetts Department of Housing and Community Development, including Housing Preservation and Stabilization Trust Fund (HPSTF), Housing Stabilization Fund, Affordable Housing Trust</li> <li>3. Town of Beverly Community Preservation Act (CPA) Funds</li> <li>4. Federal Home Loan Bank of Boston, AHP grant</li> <li>5. Sponsor loans and equity</li> </ol>
<b>Units and bedroom sizes</b>	30 studio apartments.

## Shirley Commons

Devens, MA



<b>Type and description</b>	In early 2016, the Women’s Institute was awarded the right to develop up to 120 units of senior supportive housing over two phases on the site of the former Fort Devens military base. The first phase of development will consist of 58 units of supportive rental housing for seniors in a single three-story building, offering an opportunity for independent senior living. The housing will be designed to address the housing and service needs of seniors with incomes ranging from moderate (60% Area Median Income) to extremely low (30% AMI). A minimum of eight (8) of these units will be set-aside for homeless or at-risk seniors, providing a safe, permanent and service-enriched environment for this most vulnerable population.
<b>Scope</b>	Leadership of full project design, development, construction, and operations.
<b>Start date</b>	2016
<b>Completion date</b>	In pre-development – finance application stage
<b>TDC</b>	\$17 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal and State Low-Income Housing Tax Credits (investors: TBD)</li> <li>2. Massachusetts Department of Housing and Community Development</li> <li>3. Federal Home Loan Bank of Boston, AHP grant and permanent mortgage</li> <li>4. Private foundation support and sponsor investment</li> </ol>
<b>Units and bedroom sizes</b>	58 apartments, including 48 one-bedroom and 6 two-bedroom apartments for seniors.

## Settlers' Ridge

Sandwich, MA



<b>Type and description</b>	In early 2017, the Women's Institute was awarded the right to develop vacant land currently owned by the Sandwich Housing Authority. The eight-building circular design incorporates a New England "town green" feel, and includes a community building for resident use and activity, a shared gardening area, and a playground. A portion of the site contains a sensitive box turtle habitat which will continue to be protected. The project envisions a quality, environmentally and economically sustainable community that will provide opportunity for Sandwich and Upper Cape Cod families and individuals to achieve housing stability in a beautifully planned neighborhood.
<b>Scope</b>	Leadership of full project design, development, construction, and operations.
<b>Start date</b>	2017
<b>Completion date</b>	In pre-development – finance application stage
<b>TDC</b>	\$12 million
<b>Sources of financing</b>	<ol style="list-style-type: none"> <li>1. Federal Low-Income Housing Tax Credits (investors: TBD)</li> <li>2. Massachusetts Department of Housing and Community Development</li> <li>3. Federal Home Loan Bank of Boston, AHP grant and permanent mortgage</li> <li>4. Private foundation support and sponsor investment</li> </ol>
<b>Units and bedroom sizes</b>	29 apartments, including 5 one-bedroom, 20 two-bedroom, and 4 three-bedroom apartments and townhouses.

## Completed Projects: 1981 to Present

### 1981 - 1989

Women, Inc. - Treatment Center - Boston, MA  
Horizons I (Women's Union) - Mattapan, MA  
Transition House - Fitchburg, MA  
Elizabeth Stone House - Boston, MA  
Casa Myrna Vazquez - Shelter, Boston, MA  
Casa Myrna Vazquez - Transitional Living Program  
Frances Perkins House - Worcester, MA  
Lasell Junior College - Newton, MA  
Neil Houston House - Westborough, MA

### 1990 - 1999

Brookview House - Dorchester, MA  
Project Family Independence - Boston, MA  
Revision House - Shelter - Boston, MA  
The Second Step - Newtonville, MA  
Portis House (Women, Inc.) - Boston, MA  
Bostonian Chambers - Dorchester, MA  
Lifehouse - Boston, MA  
Bishop House - Boston, MA  
Casa Myrna Vazquez - Teen Program - Boston, MA  
Ruah - Cambridge, MA  
Sojourner House - Roxbury, MA  
Ellington Street Cooperative - Boston, MA  
Newburyport YWCA - Newburyport, MA  
Winchester Interfaith Housing - Winchester, MA  
WINGS - Boston, MA  
ASAP - Boston, MA  
Moreland House - Roxbury, MA  
Victory Programs - Boston, MA  
SPIN - Lynn, MA  
KAFANM - Boston, MA  
Revision House - Transitional Housing - Boston, MA  
Casa Nueva Vida - Roxbury, MA  
GrandFamilies House - Boston, MA  
KAFANM - Phase II - Boston, MA  
Ellington Street Cooperative - Phase II - Boston, MA

### 2000 - 2009

Crescent Field Townhomes - Newton, MA  
Transition House - Cambridge, MA  
Safe Passage - Northampton, MA  
Dunmore Place (Casa Esperanza) - Roxbury, MA  
Casa Maribel (HarborCOV) - Chelsea, MA

Womanshelter/Companeras - Holyoke, MA  
Acushnet Commons \* - New Bedford, MA  
Horizons I - Rehab (Women's Union) - Mattapan, MA  
Soromundi Commons (Hartford YWCA) - Hartford, CT  
Areyto Apartments (CCC YMCA) - Bridgeport, CT  
Jarvis Court Homes (Operation HOPE) - Fairfield, CT  
Familias Unidas (Casa Esperanza) - Roxbury, MA  
Capernaum Place (Lazarus House) - Lawrence, MA  
Inn Transition (Citizens for Adequate Hsg) - Peabody, MA  
RESPOND - Somerville, MA  
Indian Field Apartments \* - New Milford, CT  
Jessica Tandy Apartments - Bridgeport, CT  
Phineas Park Apartments - Bethel, CT

### 2010 - Present

Nueva Esperanza (Casa Esperanza) - Roxbury, MA  
CHOICE Center (CHOICE) - Chelmsford, MA  
Devon & Bellevue (Heading Home) - Boston, MA  
Ingraham Place \* - New Bedford, MA  
Lynn Marcella Residences (CHOICE) - Chelmsford, MA  
Eagle Street Homes (Community Care Svcs) - Fall River, MA  
Revere Street (Housing Families, Inc) - Revere, MA  
The American Legion Veterans' Housing - Jewett City, CT  
Mary Townsend Seymour Apts (MSP) - Hartford, CT  
Ferry Crossing \* - Old Saybrook, CT  
Sudbury Duplexes (Sudbury Hsg Authority) - Sudbury, MA  
Cambridge YWCA - Cambridge, MA  
Victory Gardens \* - Newington, CT  
CHOICE Veteran's Housing - Chelmsford/Westford, MA  
Rindge Avenue - Cambridge, MA  
Sharon Ridge - Sharon, CT  
Marion Villages - Marion, MA  
Highland Woods - Williamstown, MA  
O'Connor-Sisson House for Veterans - Dartmouth, MA  
Harborlight House - Beverly, MA  
New England Center and Home for Veterans - Boston, MA

### Preservation/Stabilization of Affordable Housing

Grinnell Mansion \* - New Bedford, MA  
Lakeview Apartments \* - Salisbury, CT  
40 South Main Street - Norwalk, CT  
Housing Families, Inc. - Malden/Medford, MA  
State of CT Supportive Housing Demonstration Program  
Prospect Estates\* - Webster, MA

\*Women's Institute owned property

# **ATTACHMENT 4**

BLFR Team Qualifications

References

Experience with Similar Projects



# EXECUTIVE SUMMARY

## ABOUT US

### FORTY EIGHT YEARS OF EXPERIENCE

**Brown Lindquist Fenuccio & Raber Architects, Inc.** is an S-Corporation formed in 1969 and has been continuously involved in the practice of Architecture for forty-eight years including forty years on Cape Cod. We are located at 203 Willow St. in historic Yarmouthport, MA and recently opened an office in downtown Plymouth, MA.

- Tax I.D. #04-3428243
- Phone # 508-362-8382

### STAFF OF 16

We have a highly trained and creative staff of 16 including: four Registered Architects, seven Project Managers & Architectural Drafters, one Interior Designer and three Administrative / Office Management Staff.

### STRONG FINANCIAL CONDITION

Brown Lindquist Fenuccio & Raber Architects, Inc. has an excellent credit rating; vendor references available upon request, and no outstanding corporate debts. Our firm has been, and continues to be, in strong financial condition. Our accounts receivable and payable are current to within 45 days. Bank Reference/Line of Credit: Mr. Rob Reisner, Cape Cod 5 Savings Bank (508) 775-4676



Melpet Farm Community Housing, Dennis MA  
27 Unit Affordable Housing Development



The Village at Marstons Mills. Marstons Mills MA  
30 Unit Home Ownership



Kimber Woods Housing, West Barnstable MA  
28 Unit Family Rental Housing



## **CURRENT FIRM CAPACITY**

BLF&R has a full time staff of 16 people. We organize our staff into project teams, each with a Project Manager, Draftsmen and Principal-in-Charge of the project. The firm manages approximately 30 projects annually, which includes active projects in design and construction, and inactive projects awaiting regulatory approvals or funding. The team assigned to this project will be working on the project approximately 10-20% of their available time during the Design and Permitting periods. BLF&R will commit the time and resources necessary to complete this project.

## **PROPOSED SCHEDULE**

We are experienced in the development and maintenance of demanding project schedules. If selected as the Project Architect, we will work closely with WIHED, and the Town of Nantucket to refine a more detailed project schedule.

## **BUDGET MANAGEMENT HISTORY**

All housing and public construction projects completed in the last 5 years were completed within our client's budget.

## **REFERENCES**

We strongly encourage the the Women's Institute to contact our municipal and commercial references to discuss our design and technical capabilities, overall project management, job cost performance, and ability to work successfully with diverse Boards and Building Committees.

## **AFFIRMATIVE ACTION PLAN**

Brown Lindquist Fenuccio & Raber Architects, Inc. promotes the principles and concepts of affirmative action for all persons. Opportunities for employment and advancement within the firm are based solely on individual merit, qualifications and competence. Brown Lindquist Fenuccio & Raber Architects, Inc. does not discriminate against any group and extends equal opportunities to all persons regardless of race, religion, age, sex, physical handicap, national origin, or political beliefs. All personnel decisions are based on this principle including selection for training, rates of pay or other compensation, transfer and layoff or termination.

In addition, it is also the policy of Brown Lindquist Fenuccio & Raber Architects, Inc. to encourage the inclusion of Disadvantaged Business Enterprises (DBE), including minority and woman-owned firms, as professional consultants on various project teams.



## OUR TEAM

### BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC. PROJECT STAFF

BLF&R Vice-President, Kurt Raber is a licensed Architect (#10563) in the Commonwealth of Massachusetts, and will be the Principal-In-Charge. Richard Fenuccio also a licensed architect (#7789) in the Commonwealth of Massachusetts, will be a Consulting Design Architect, and Kathryn Giardi, Project Manager/ Architectural Designer will manage this project on a day-to-day basis. BLF&R personnel assigned to this project are available immediately. Once the project proceeds beyond the preliminary design and local regulatory permitting phase, additional staff will be committed during the production period.

<b>Kurt Raber</b>	Principal-in-Charge/ Registered Architect	MA Reg No. 10563
<b>Richard P. Fenuccio</b>	Consulting Architect	MA Reg. No. 7789
<b>Kathryn Giardi</b>	Project Manager / Architectural Designer	Registration exams in process
<b>Stephen Williams</b>	Job Captain/ Lead CAD Technician	

### PROFESSIONAL CONSULTANTS

(Preliminary Selection Only)

<b>Blackwell Associates</b> Leo C. Asadoorian Nantucket MA	Survey/Civil Engineering Consultant
<b>Consulting Structural Engineering Inc.</b> Brian Walsh, P.E. Acton, MA	Structural Engineering Consultant
<b>Griffith &amp; Vary Inc.</b> Wayne Mattson, P.E. Wareham, MA	Mechanical/Electrical/Plumbing Engineering Consultant
<b>A.M. Fogarty &amp; Associates</b> Peter Timothy Hingham, MA	Cost Estimating Consultant (If Requested)
<b>Landscape Architect- (TBD)</b>	Landscape Design Architect



## PROJECT TEAM ORGANIZATION

### The Women's Institute for Housing and Economic Development

#### Architect

**Brown Lindquist Fenuccio  
& Raber Architects, Inc.**

*Kurt Raber, Vice- President  
Principal-In-Charge / Architect*

*Richard P. Fenuccio, President  
Consulting Design Architect*

*Kathryn Giardi  
Project Manager / Designer*

*Stephen Williams  
Job Captain/ CAD Technician*

M/E/P/FP Engineer  
**Griffith & Vary Inc.**

*Wayne Mattson*

Survey, Site, Civil Engineer  
**Blackwell & Associates**

*Leo Asadoorian  
Jeffrey Blackwell*

Structural Engineering  
**Consulting Structural  
Engineering Inc.**

*Brian Walsh*

Cost Estimating  
**A.M. Fogarty**

*Peter Timothy*

Landscape  
Architect

*To be determined*



## ARCHITECTURAL STAFF

### **Kurt E. Raber, Vice President**

Principal-in-Charge, Registered Architect  
Brown Lindquist Fenuccio & Raber Architects, Inc.

#### **EDUCATION**

Bachelor of Architecture  
Roger Williams University  
School of Architecture

#### **REGISTERED ARCHITECT**

Massachusetts #10563

#### **EXPERIENCE**

Vice President / Principal  
Brown Lindquist Fenuccio & Raber Architects, Inc.  
Yarmouthport, MA

Over 20 years of professional experience in Massachusetts including design and construction oversight for numerous public municipal, commercial and residential projects.

#### **SELECTED PROJECTS**

##### **Littleneck Village Housing**

48 Unit Affordable. Elderly Housing  
Milton, MA

##### **Sandwich Marina**

New Harbormaster Office, Bathhouse & Garage  
Sandwich, MA

##### **Bourne Archives Building**

Renovations (2009), Roof Replacement (2011)  
Bourne, MA

##### **Provincetown Marina**

Marina Building and Bathhouse Renovations  
Provincetown, MA

##### **Seamen's Bank**

New Bank Branch  
Wellfleet, MA

#### **COMMUNITY INVOLVEMENT**

Corporator- Cape Cod Five Cents Savings Bank, Member & Volunteer- FJC  
Coach- Falmouth Youth Lacrosse



#### **CURRENT PROJECTS**

##### **Miacomet Golf Course**

Employee Dormitory Housing  
Nantucket, MA

##### **Nobska Light - Lighthouse Restoration**

Conceptual Design Study  
Falmouth, MA

##### **Wannacomet Water Department**

New Office Building  
Nantucket, MA

##### **Carriage House Apartments**

29 Unit Market Rate Rental Apartments  
Hyannis, MA

##### **Eliot Street Affordable Housing**

Six Story, 72 Unit Market Rate Apartment Bldg  
Milton, MA



## ARCHITECTURAL STAFF

### **Richard P. Fenuccio, President**

Consulting Architect

Brown Lindquist Fenuccio & Raber Architects, Inc.

#### ***EDUCATION***

Bachelor of Architecture

Syracuse University, School of Architecture

#### ***REGISTERED ARCHITECT***

Massachusetts #7789

#### ***EXPERIENCE***

President / Principal, Brown Lindquist Fenuccio & Raber Architects, Inc., Yarmouthport, MA



Over 30 years of experience including work as project manager and project architect on numerous residential, commercial, institutional and municipal buildings for a wide range of public and private clients.

#### ***SELECTED PROJECTS***

**Melpet Farm Community Housing/ 27 Units**  
Dennis, MA

**Stagecoach Rd. Housing/ 12 Units**  
Barnstable Housing Authority, Barnstable, MA

**West Barnstable Communities**  
28 Unit Family Rental & 12 Unit Senior Rental  
Barnstable, MA

**North Andover Housing Authority**  
North Andover, MA

**The Village at Marstons Mills/ 30 Units**  
Marstons Mills, MA

#### ***CURRENT PROJECTS***

**George Fernandes Way Housing/ 30 Unit Family Rental**  
Sandwich, MA

**Brewster Woods Housing/ 30 Unit Family Rental**  
Brewster, MA

**Cape Cod Village/ Housing for Autistic Adults**  
Orleans, MA

**W. Barnstable Fire Station/ Expansion Study**  
W. Barnstable, MA

**Packet Landing Pavilion**  
Yarmouth, MA

#### ***COMMUNITY INVOLVEMENT***

Mr. Fenuccio serves as a Corporator for The Cooperative Bank of Cape Cod, is a trustee of the Oceanside Performing Arts Center, and has served on many local boards and committees including YMCA Cape Cod, YMCA Cape Cod Expansion Committee, St. Francis Xavier Preparatory School, Main St. Hyannis Historic District Study Committee and Housing for All Inc.

He is currently serving on a building committee for a new dormitory for the Latham School, Brewster.

Mr. Fenuccio is currently serving as a Massachusetts Housing Partnership Design reviewer, and served as a round table participant in the 2015 Cape Housing Summit.

He has also coached numerous local youth sports teams and has been a speaker at several housing and banking conferences.



## ARCHITECTURAL STAFF

### Kathryn Giardi

Project Manager & Architectural Designer/ Architect Intern  
Brown Lindquist Fenuccio & Raber Architects, Inc.

#### **EDUCATION**

Masters of Architecture  
Boston Architectural College  
Bachelor of Science in Architecture  
Catholic University, School of Architecture

#### **EXPERIENCE**

Project Manager & Architectural designer for over 8 years with a focus on single family residential, multi-family residential, commercial and institutional work performed for a variety of clients, including non-profit organizations, universities, state agencies and private companies.

#### **AWARDS**

**LEED Platinum** - Harvard Medical School Partners in Health Historic Renovation

#### **CERTIFICATIONS**

LEED A.P.

#### **SELECTED PROJECTS**

**Melpet Farm Community Housing/ 27 Units**  
Dennis, MA

**Eliot Street Affordable Housing Development**  
Milton, MA

**The Wianno Club Renovations/Tiffany Cottage Study**  
Osterville, MA

**Lewis Residence Additions & Renovations**  
Hyannisport, MA

**Harvard Medical School Partners in Health Historic Renovation, LEED Platinum\***

\*Denotes projects completed with other firms

#### **COMMUNITY INVOLVEMENT**

Ms. Giardi is a Gala Committee member at City on a Hill Charter School, Boston MA. This organization serves underprivileged high school students.



#### **CURRENT PROJECTS**

**George Fernandes Way Housing**  
**30 Unit Family Rental**  
Sandwich, MA

**Brewster Woods Housing/ 30 Unit Family Rental**  
Brewster, MA

**Miacomet Golf Course Employee Housing**  
Nantucket, MA

**Nobska Light Restoration and Reuse**  
Falmouth, MA

**Cape Cod Children's Place- Expansion**  
Eastham, MA

**Wianno Club Clubhouse Renovations**  
Osterville, MA



## ARCHITECTURAL STAFF

### Stephen Williams

Job Captain/ CAD Technician

Brown Lindquist Fenuccio & Raber Architects, Inc.

#### **EDUCATION**

Architectural Engineering Technology

Wentworth Institute of Technology

#### **EXPERIENCE**

Associate, Brown Lindquist Fenuccio & Raber Architects, Inc.

Former Associate, Polhemus, Savery, DaSilva Architects & Builders, Chatham MA

Former Associate, Peterson Associates, Consulting Engineers, Quincy MA

Former Associate, Gale Associates, Inc.

Over 27 years professional experience including designs of numerous multi-unit housing, (public and commercial) as well as municipal, commercial and residential projects.



#### **SELECTED PROJECTS**

**Melpet Farm Community Housing/ 27 Units**  
Dennis, MA

#### **West Barnstable Communities**

28 Unit Family Rental & 12 Unit Senior Rental  
Barnstable, MA

#### **Great Cove Community/ 11 Units**

Mashpee, MA

#### **Admiral's Landing, 3 Unit Inn**

Provincetown, MA

#### **CURRENT PROJECTS**

**Habitat for Humanity (Tubman Development)**  
**6 House Affordable Housing Development**  
Brewster, MA

#### **Wannacomet Water Company**

Nantucket, MA

#### **Ocean Mist Beach Hotel & Suites**

Yarmouth, MA

#### **West Falmouth Library Addition/ Renovation**

W. Falmouth, MA

#### **Habitat for Humanity (Tubman Development)**

Brewster, MA

#### **COMMUNITY INVOLVEMENT**

Mr. Williams volunteers at the Cape Cod Challenger Club, a group that provides athletic, recreational and social activities for children and young adults with disabilities. He has volunteered at fundraising events and has assisted the club with completing several construction projects at their facility in Osterville, MA. Mr. Williams has also volunteered for Habitat for Humanity and has participated in the construction of 6 houses in Yarmouth, MA.

## REFERENCES



**Kate Ferriera**  
former Director  
**Housing Assistance Corporation**  
**508-332-8958**  
[katemark@comcast.net](mailto:katemark@comcast.net)

August 14, 2016

*"I have worked on several affordable housing projects with Brown Lindquist Fenucco & Raber over the past 7+ years I was with the Housing Development Department at HAC. The three largest projects were all multi-family affordable developments ranging in size from 10 to 40 units.*

*The knowledge and professionalism of the BLFR team was always "above and beyond". Working from a small housing office, I often had questions, issues, and concerns and always appreciated the quick responsiveness and patience of the BLFR team. From the conceptual design process through project closeout, the attention to detail of the entire BLFR staff created projects that were well received by the local community, the many (and varied) funders, and most importantly, the residents who moved in"*



**Sandra Perry**  
(former) Executive Director  
**Barnstable Housing Authority**  
508-771-7222

February 27, 2014

*"...The services provided by Brown Lindquist Fenucco & Raber went over and above our expectations. ... Throughout the project BLF&R has always been sensitive to the strict budgetary constraints Barnstable Housing Authority was under and the fees charged were always reasonable."*

*"The project is beautiful, well designed ad a positive addition to the neighborhood. We particularly appreciate the sensitivity BLF&R showed with designing the buildings to fit aesthetically within the neighborhood. Affordable housing should always be a credit to the community and Stage Coach Residences has been an accomplishment we can all be proud of.*

*It has been a pleasure working with you on this project and the Barnstable Housing Authority would certainly be willing to recommend the services of BLF&R to other developers looking for a dedicated professional architectural group such as BLF&R."*



**Bob Jones**  
Board President  
**Cape Cod Village**  
**774-316-4640**

[bjones@capecodvillage.org](mailto:bjones@capecodvillage.org)

August 10, 2016

*"Creative, collegial, curious, and cooperative describe the qualities that have made working with BLFR a very positive and productive experience.*

*BLFR has successfully integrated the varied and complex needs of adults on the autism spectrum in designing a unique residential community for sixteen people in the town of Orleans on Cape Cod.*

*They have worked with a varied group of stakeholders that includes affordable housing advocates, autism professionals, and local permitting authorities. Their attention to timelines and budgetary issues has been exemplary."*



## REFERENCES



**Douglas Lapp**  
Assistant Town Manager  
**Town of Sandwich**  
508-888-5144  
dlapp@townofsandwich.net

June 16, 2015

*"...The Town of Sandwich selected BLFR, and was so pleased with the quality of their work during the feasibility study phase that we later continued our contract with them through the final design and construction document phases, and are now in the process of going out to bid for the construction project..."*

*"We have had a very positive experience, and hope to continue working with them in the future as we pursue other building projects in Sandwich..."*



**Patricia M. Armstrong, CPRP**  
Director of Parks and  
Recreation  
**Town of Yarmouth**  
508-790-9133  
recreation@yarmouth.ma.us

September 22, 2014

*"THANK YOU for everything BLF&R did to make Flax Pond Renovation Project such a great success. I do not think I have sufficiently acknowledged or relayed just how thrilled I am. From concept to Open House, you were there 100% in support of the project and steadying me as I went through my first major construction project."*

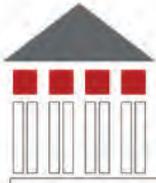
*"When BLF&R came to the table to discuss our project they were prepared to listen to our needs and acknowledge our concerns. Throughout the process they continued to listen and adjust as our dreams become a reality. We were confident that the finished product would meet our needs, come in on time and give us a good return on investment. We are thrilled with the end results."*

## **Centerville Public Library**

**Elizabeth Butler**  
Former Library Director  
**Centerville Public Library**  
508-790-6220  
bethbutler2001@gmail.com

April 30, 2013

*"the BLF&R staff are professional and easy to work with. Their design and management skills are extraordinary, and they keep a close eye on the project as it is in construction and they also understand the challenges faced by a non-profit trying to raise funds for a capital projects. They work well with committees, staff and trustees and are always available to answer questions or concerns."*



BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.

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## **HOUSING REFERENCES**

Julie Creamer, Vice-President  
Preservation of Affordable Housing  
40 Court St., Suite 200  
Boston, MA 02108  
617-261-9898  
[jcreammer@poah.org](mailto:jcreammer@poah.org)

Rick Presbrey, CEO  
Housing Assistance Corp.  
460 West Main St.  
Hyannis, MA 02601  
508-771-5400  
[RPresbrey@haconcapecod.org](mailto:RPresbrey@haconcapecod.org)

Gisele Gauthier, Former Director of Housing  
Development/Housing Assistance Corp.  
Housing Consultant/ Cape Cod Village  
508-564-1414  
[Giselegauthier99@hotmail.com](mailto:Giselegauthier99@hotmail.com)

Doug Lapp, Assistant Town Administrator  
Town of Sandwich  
130 Main St.  
Sandwich, MA  
508-888-5144  
[dlapp@townofsandwich.net](mailto:dlapp@townofsandwich.net)

Lorri Finton, Executive Director  
Barnstable Housing Authority  
146 South Street  
Hyannis, MA 02601  
508-774-7222  
[Lorri\\_Finton@bha.barnstable.ma.us](mailto:Lorri_Finton@bha.barnstable.ma.us)

Jo Anne Miller Buntich, Former Director of Growth  
Town of Barnstable  
367 Main St., 3<sup>rd</sup> Floor  
Hyannis, MA 02601  
508-737-9435  
[Jmillerb@comcast.net](mailto:Jmillerb@comcast.net)

Laura Shufelt, Community Assistance Manager  
Massachusetts Housing Partnership  
160 Federal St.  
Boston, MA 02110  
Direct: 857-317-8582, Main: 617-330-9955  
[LShufelt@mhp.net](mailto:LShufelt@mhp.net)

Leila Botsford, Executive Director  
Brewster Housing Authority  
11 Frederick Ct.  
Brewster, MA 02631  
508-896-9800, ext. 302  
[Leila@brewsterhousing.comcastbiz.net](mailto:Leila@brewsterhousing.comcastbiz.net)

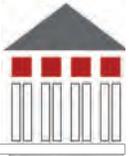
Dan DiPalma  
EDD Advisors, Inc.-Engineering Due Diligence Advisors  
Lending Inspector  
617-549-9484  
[dfd.eddadvisors@verizon.net](mailto:dfd.eddadvisors@verizon.net)

Leedara Zola, Land Acquisition and Permitting  
Habitat for Humanity of Cape Cod  
411 MA-6A Suite 6  
Yarmouth Port, MA 02675  
508-280-6144  
[lzola@habitatcapecod.org](mailto:lzola@habitatcapecod.org)

Robert Jones, President  
Cape Cod Village  
49 South Orleans Rd.  
Orleans, MA  
774-316-4640  
[bjones@capecodvillage.org](mailto:bjones@capecodvillage.org)

# MULTI-UNIT HOUSING PROJECTS

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



Melpet Farm Community Housing, Dennis MA  
27 Unit Family Rental



Lombard Farm Community, West Barnstable MA  
12 Unit Family Rental Housing



Stagecoach Residences, Centerville MA  
12 Unit Family Rental Housing



Scituate Special Needs Housing, Scituate MA  
5 Unit Special Needs Housing



Kimber Woods, West Barnstable MA  
28 Unit Family Rental Housing



Great Cove, Sandwich MA  
10 Unit Family Rental Housing

# LEED or High Performance Projects

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



We are committed to designing & constructing buildings and sites which incorporate a wide range of high performance, sustainable and environmentally responsible features. Several recent projects have achieved LEED Gold Certification.



Cape Cod Five - Nantucket  
LEED - Gold Certified



Melpet Community Housing, Dennis, MA  
Goal: Net Zero Energy Usage/ LEED Gold Level Design



Marion/Little Neck Village Housing  
LEED - Gold Certified



Dennis Union Church Renovation & Expansion  
National Energy Star Award Winner



Eastward Ho Golf Course  
Solar PV System Integration

## SUSTAINABLE/RENEWABLE ENERGY STRATEGIES UTILIZED:

- High R- value and air sealed building envelopes
- Use of Solar PV Systems for electricity generation
- High efficiency HVAC Systems
- Use of energy efficient LED lighting
- Heat recovery ventilation systems
- High performance windows
- Low water consumption landscaping
- Recharge of site drainage through bioretention gardens

# RECENT NANTUCKET PROJECTS

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



**Cape Cod Five- Pleasant St.**



**Miacomet Golf Site Study**

**Town Office Study/ Former Police Station**



'Partial Client List'

- Cape Cod Five Cent Savings Bank
- Shepley Wood Products
- Nantucket Land Bank
- Town of Nantucket- Water St.
- Town of Nantucket - Water District
- Sachem's Path Community Housing
- Miacomet Golf Course

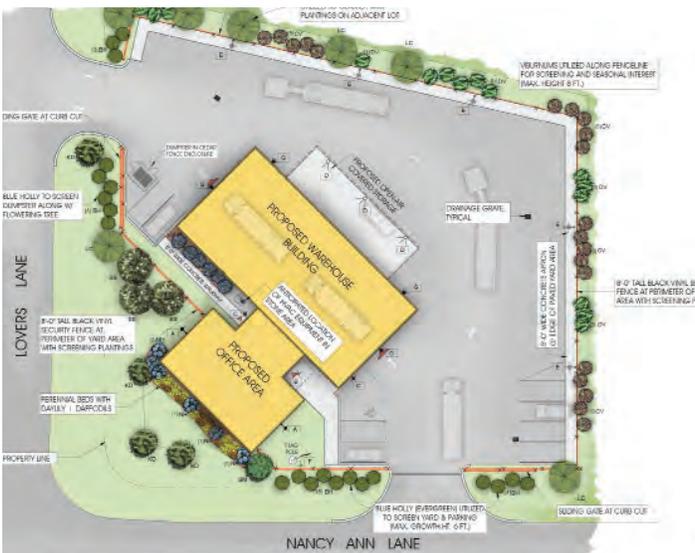
**Shepley Wood Products**



**Cape Cod Five- 0 Main**



**Sachem's Path Housing/ Master Plan Design**



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# RESIDENTIAL: MULTI-FAMILY

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



## Melpet Farm Community Housing Dennis, MA

- 27 unit family rental development
- Eight 3-4 unit small scale buildings plus Community Building with shared laundry
- Located in Historic District
- Low Income Housing Tax Credit Project
- Multiple Funding Sources including:
  - DHCD/ MA Affordable Housing Trust Fund
  - MA Housing Finance Agency
- Designed to be 70% more energy efficient than code requirements
- Early tests indicate HERS rating will be well below 50
- High performance building envelopes with independent energy modeling
- Project goal is to be "Net Zero Energy Use" once PV Solar system is added and online

# MELPET FARM COMMUNITY HOUSING, DENNIS, MA

## SUSTAINABLE DESIGN FEATURES

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



### Project Overview:

A total of 27 affordable family rental units ranging from one to three bedrooms on a 6.4 acre site in Dennis, MA.

### Goals:

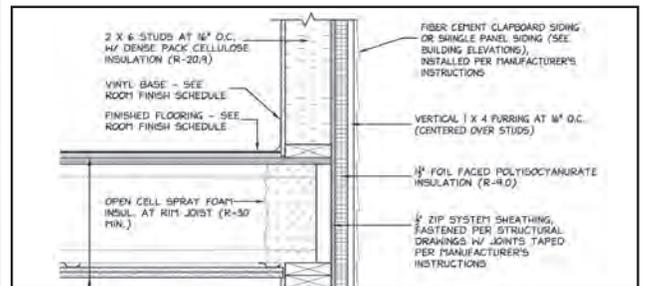
- Net Zero Energy Usage
- Buildings designed to utilize roof mounted solar photovoltaic system to offset electricity load
- High efficiency building envelopes based on independent energy modeling
- High efficiency heat pump HVAC systems and separate mechanical ventilation systems
- Utilize advanced air sealing techniques



**Lunos Ventilation** - Provides the necessary fresh air intake & ventilation through a tight building envelope.



**Foundation Edge** - R-value of R-18 achieved with 3" of rigid insulation along inside face of 8" thick concrete frost walls and below 4" concrete slabs



**Wall Assembly** - R-value of R-25 was achieved with dense pack cellulose insulation between 2"x6" wall studs and polyiso rigid foam insulation over a zip wall system



### Under Slab Insulated Piping

All MEP penetrations through the slab & vapor barrier were correctly sealed



**Testing Procedures** - Blower door tests were conducted at various stages of construction to verify the effectiveness of the air sealing measures. Current results demonstrate that the buildings are performing at 70% better than Code or .06 - .07 CFM 50/SSF.

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# MELPET FARM COMMUNITY HOUSING, DENNIS, MA

## SUSTAINABLE DESIGN FEATURES

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



**Solar panels** - The installation of roof mounted P-V panels on all south facing roofs helps to achieve Net Zero energy usage by offsetting electric demand



**Wall Unit** - High efficient heat pump wall units provide all heating and cooling for the units.



**Condenser** - A single condenser per building is located outside and serves multiple wall units.



**LED Lighting** - LED site lighting was selected over traditional metal halide fixtures to provide a higher efficiency site lighting approach



**Bioretenion Swales** - Bioswales are landscape elements designed to remove silt and pollution from surface runoff water. They consist of a swaled drainage course with gently sloped sides (less than six percent) and filled with vegetation and compost.



**Landscaping** - Lawns are seeded with a high drought tolerant low growth seed mix which also includes a Cape Cod native tufted hair grass and various types of fescue. The perimeter of the site will be left to grow naturally and only mowed twice annually.



# RESIDENTIAL: MULTI-FAMILY

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



## Stage Coach Residences / BHA Centerville, MA



- 12-Unit, three building low- and moderate-income rental housing development on a 7-acre parcel
- 6 One Bedroom and 6 Two Bedroom rental apartments
- Shared central Green space
- Typical units designed as "visitable" with one unit fully Handicapped Accessible
- Divided common area in basement of each building for tenant storage.
- Shared Laundry facilities on site
- Use of traditional Architectural forms and materials which blends well with the surrounding family neighborhood
- Partial List of Funding Sources & Programs:
  - DHCD/ MA Affordable Housing Trust Fund
  - MA Housing Partnership
  - Barnstable Community Preservation Funds

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508-927-4127

# RESIDENTIAL: MULTI-FAMILY

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



## WEST BARNSTABLE COMMUNITIES AT "Kimber Woods" for HOUSING ASSISTANCE CORP.

West Barnstable, MA

- ✦ 28 Units - 7 Buildings, Family Rental Housing on 4.1 Acres
- ✦ Two Prototype - 4 Unit Townhouse Type Buildings
- ✦ Combination of Two and Three Bedroom Units
- ✦ Two Bedroom Units = 1,038 sf
- ✦ Three Bedroom Units = 1,406 sf
- ✦ Typical Units designed as "Visitable" with 2 units Fully Handicapped Accessible
- ✦ Traditional Architectural Forms and Materials
- ✦ Partial List of Funding Sources & Programs:
  - DHCD / MA Affordable Housing Trust Fund
  - Low Income Housing Tax Credits
  - Barnstable CPC

### "Sustainable and Green Building Features":

- \*Clustered, Low Impact Development (LID) with Minimal Impervious Coverage
- \*Vegetated Bioretention Swales
- \*Energy Star Rated w/ High Efficiency Gas Boilers, Rated Electrical Fixtures, and Appliances
- \*High R-value Blown in Cellulose Insulation Systems
- \*High Performance Windows
- \*Low V.O.C. Paint Systems
- \*Low Flow Plumbing Fixtures



# RESIDENTIAL:

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



## "THE HOMESTEADS"

Sandwich, MA

developed by

HOUSING ASSISTANCE CORPORATION

Hyannis, MA

- + 16 Single Family, Affordable, Home Ownership Development
- + 10.7 Acre Lot Size w/ over 5 Acres of Preserved Undeveloped Space
- + 3 Prototypical House types, all 2 storys and (+/-) 1,300 sf
- + Many of the Homes were designed as "Visitable" w/ Accessible Entries and Lower Levels

### "Sustainable and Green Building Features":

- \*Minimization of Lot Clearing and Roadway Construction
- \*Energy-Star Rated Homes
- \*High Efficiency Blown-in Cellulose Insulation
- \*High Performance Windows & HVAC System
- \*Use of all "Energy Star" Rated Lighting Fixtures and Appliances
- \*Maximization of Natural Daylighting
- \*Bio-Retention Drainage Swales for Stormwater Management



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# RESIDENTIAL: MULTI-FAMILY/ MODULAR

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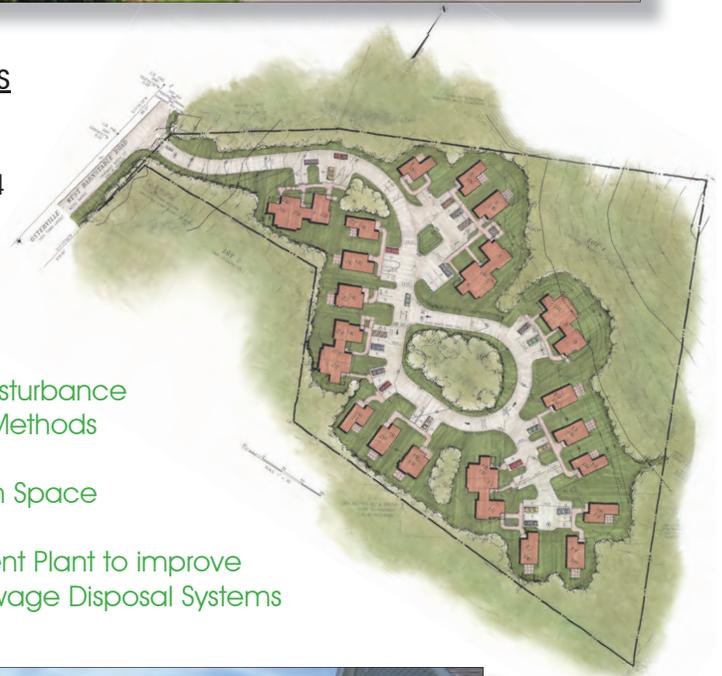


## The Village at Marstons Mills Marstons Mills, MA

- New 30 Unit Affordable Housing Development on 6.4 Acres for Housing Land Trust
- 15 Single Family Modular Houses
- 5 Three Family 'Triplex' Modular Buildings

### Sustainable and Green Building Features:

- Clustered Development and Minimization of Land Disturbance
- Use of Modular and Panelized Off-Site Construction Methods
- 93% High Efficiency Hot Water Boilers for Heating
- Retention of Perimeter Woodlands and Central Open Space for Passive Recreation
- Connection to Adjacent School Wastewater Treatment Plant to improve Performance and Eliminate the Need for On-Site Sewage Disposal Systems



# RESIDENTIAL:

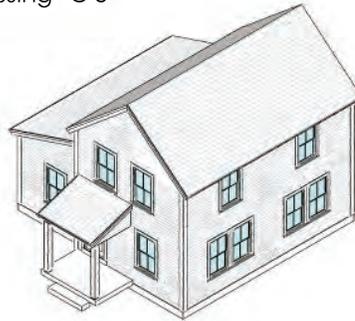
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Massing "A-2"



Massing "C-3"



Elevation "B-3"



Elevation "E-1"



## "Sachem's Path Housing"

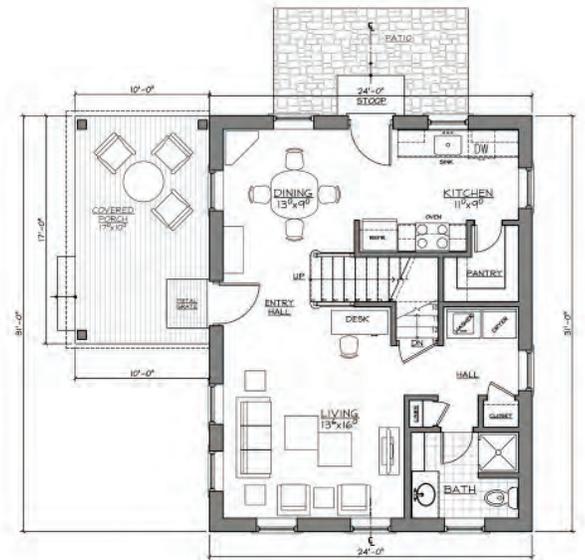
Nantucket, MA  
developed by

HOUSING ASSISTANCE CORPORATION

- ✦ 50 Single Family, Affordable Home Ownership Development
- ✦ 9.12 Acres w/ over 2.5 Acres Preserved
- ✦ Nine Prototype Houses with Various Design Options

### \*Sustainable and Green Building Features\*:

- \*Designed to meet Energy Star Tier III Certification
- \*Double Wall Construction w/ Advanced Air Sealing
- \*High R-Value Blown-in Cellulose Insulation
- \*Designed & Sited for Solar Photovoltaic Capability
- \*High Performance Windows & HVAC System
- \*Clustered Low Impact Development w/ Protection of Special Indigenous Plantings
- \*Bio-Retention Drainage Swales for Stormwater Management



Plan "A-2"



# ON THE BOARDS

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



## "MULTI-UNIT FAMILY RENTAL HOUSING" Milton, MA

- ✦ 57 Dwelling Units on 5 Floor Levels
- ✦ 71 Parking Spaces in grade level parking structure
- ✦ Tight urban site of only 0.815 Acres
- ✦ Reuse of distressed industrial site at busy intersection of commercial district and residential neighborhood
- ✦ Smart Growth Site next to commuter trolley stop
- ✦ Approved 40b Comprehensive Permit
- ✦ Wood framed construction above reinforced concrete structure

### "Sustainable and Green Building Features":

- ✦ Green Roof Planting Beds
- ✦ Bioretention Drainage Structures
- ✦ Energy Star Appliances



# RESIDENTIAL: SENIOR LIVING

BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.



## WEST BARNSTABLE COMMUNITIES AT "LOMBARD FARM"

for  
**HOUSING ASSISTANCE CORP.**  
WEST BARNSTABLE, MA

- ✦ 12 One Bedroom Rental Apartments for over 55
- ✦ 13,000 sf Senior Living Community on 7.5 Acres
- ✦ Shared Interior & Exterior Community Spaces
- ✦ The Design is Based on the Original Historic Lombard "Farmhouse" which once stood on the Site
- ✦ Partial List of Funding Sources & Programs:
  - DHCD / MA Affordable Housing Trust Fund
  - Low Income Housing Tax Credits
  - Barnstable CPC

### "Sustainable and Green Building Features":

- \*East-West Building Design & Site Orientation to Maximize Passive Solar Gain and Natural Day-lighting
- \*Energy-Star Rated Facility
- \*High Efficiency Blown in Cellulose Insulation
- \*High Performance Air Sourced Heat Pump HVAC System
- \*Energy Efficient Lighting
- \*Low V.O.C. Paint Systems
- \*Bio-Retention Drainage Swales for Stormwater Management
- \*Inclusion of Pedestrian Pathway @ Site Perimeter
- \*Retention of Original Mature Trees and Stone Walls



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## **RELEVANT PROJECT EXPERIENCE**

### **Multi-Unit & Special Needs Housing Projects**

---

Name: **George Fernandes Way Housing**  
Location: Sandwich, MA  
Description: New Multi-Unit (30 Units) Affordable Family Rental Housing  
Year Completed: Pre-Design and Conceptual Design in process  
Permitting Process: M.G.L. Ch. 40b anticipated  
Construction Cost: TBD  
Client/Contact Name: Betsy Crum, Women's Institute for Housing and Economic Development  
Contact Phone: 800-720-1195 x203

Name: **Brewster Woods Housing**  
Location: Brewster, MA  
Description: New Multi-Unit (30 Units) Affordable Family Rental Housing  
Year Completed: Pre-Design and Conceptual Design in process  
Permitting Process: M.G.L. Ch. 40b anticipated  
Construction Cost: TBD  
Client/Contact Name: Julie Creamer, Preservation of Affordable Housing  
Contact Phone: 617-261-9898

Name: **Eliot Street Housing**- See Attached Profile  
Location: Milton, MA  
Description: Construction of 57 Unit Affordable Rental Housing  
Year Completed: Design and Permitting in progress  
Scope of Services: Schematic Design & Regulatory Permitting (to date)  
Permitting Process: M.G.L. Ch. 40b  
Construction Cost: Proprietary  
Client/Contact Name: Steven Connolly, Connolly Construction  
Contact Phone: 617-436-3247

Name: **Melpet Farm Community Housing**- See Attached Profile  
Location: Dennis, MA  
Description: New Multi-Unit (27 Units) Family Rental Housing Development – 9 Buildings (one, two and three bedroom units plus community building)  
Year Completed: 2015  
Permitting Process: Local Affordable Housing By-Law  
Square Footage: ± 950-1200 sq. ft. per unit  
Construction Cost: ±\$ 7 M  
Client/Contact Name: Julie Creamer  
Contact Phone: 617-261-9898



## RECENT RELEVANT EXPERIENCE

- Name:** **Stage Coach Rd. Rental Housing Project for Barnstable Housing Authority-** See Attached Profile
- Location:** Centerville, MA
- Description:** Construction of 3 buildings including 12 units of multi-family housing and associated site work
- Year Completed:** 2014
- Permitting Process:** M.G.L. Ch. 40b
- Square Footage:** 3,723 sf per bldg.. = 11,169 sq. ft. total
- Construction Cost:** \$ 2,904,705
- Client/Contact Name:** Sandra Perry, BHA Executive Director (former)
- Contact Phone:** 508-771-7222
- 
- Name:** **Latham Centers- Group Home**
- Location:** 38-40 Headwaters Drive, Yarmouth, MA
- Description:** Site Feasibility/ Concept Design Study, 8 BR Congregate Group Home
- Year Completed:** 2015
- Scope of Services:** Site Surveying, Site Analysis & Feasibility Study for renovation vs. new construction option
- Construction Cost:** N/A
- Client/Contact Name:** Anne McManus, Ex. Director Latham Centers- Orleans
- Contact Phone:** 508-896-5776
- 
- Name:** **Sachem's Path Housing Development**
- Location:** Nantucket, MA
- Description:** 40 Lot Single Family Affordable Homeownership Development
- Year Completed:** 2014
- Permitting Process:** M.G.L. Ch. 40b
- Square Footage:** 950 – 1400 sq. ft. homes – 9 prototype designs
- Construction Cost:** \$ T.B.D.
- Client/Contact Name:** Tom Hartman (Coldham & Hartman Architects, Inc.)
- Contact Phone:** 413-549-3616
- 
- Name:** **Great Cove Community Housing-** See Attached Profile
- Location:** Mashpee, MA
- Description:** Ten-Unit Rental Housing Development
- Year Completed:** 2014
- Permitting Process:** M.G.L. Ch. 40b
- Square Footage:** 11,250
- Construction Cost:** \$ 2,215,349
- Client/Contact Name:** Kate Ferreira (formerly of Housing Assistance Corp.)
- Contact Email:** katemark@comcast.net



## RECENT RELEVANT EXPERIENCE

Name: **Housing Development at Community Green**  
Location: Sandwich, MA  
Description: Design & permitting of various multi-unit rental buildings (Studio, 1, 2 & 3 Bedrooms), a ten unit SPO building and a central Community/Business Enterprise Center (Study only)  
Year Completed: 2014  
Permitting Process: M.G.L. Ch. 40b  
Square Footage: Varies by building  
Construction Cost: ±\$ 18 M  
Client/Contact Name: Gisele Gauthier (former Housing Director, Housing Assistance Corp.)  
Contact Phone: 508-564-1414

Name: **Little Neck Village Expansion-** See Attached Profile  
Location: Marion, MA  
Description: 48 Unit Senior Rental Housing Development (Design, Permitting & Construction)  
Year Completed: 2011  
Permitting Process: M.G.L. Ch. 40b  
Construction Cost: \$5M  
Client/Contact Name: Dana Angelo (E.A. Fish Companies)  
Contact Phone: 781-380-1600

Name: **North Andover Housing Authority Modular Residence Buildings**  
Location: Ashland & May Streets, N. Andover, MA  
Description: Two Modular Buildings, 4-5 Units in N. Andover  
Year Completed: 2011  
Scope of Services: Design thru Construction Administration (CA)  
Cost: \$1M  
Client/Contact Name: Joanne Comerford  
Contact Phone: 978-682-3932

Name: **West Barnstable Communities-** See Attached Profile  
**A.) 28 Unit Family Housing (Seven 4 Units Buildings) Cluster Development "Kimber Woods"**  
**B.) 12 Unit Senior Independent Housing at "Lombard Farm"**  
Location: Rtes. 132 & Rte. 149 West Barnstable, MA  
Description: New Construction / Design, Permitting & Construction Administration  
Year Completed: 2009  
Permitting Process: M.G.L. Ch. 40b  
Square Footage: Varies  
Construction Cost: \$8,285,358  
Client/Contact Name: Gisele Gauthier (former Housing Director, Housing Assistance Corp.)  
Contact Phone: 508-564-1414



## RECENT RELEVANT EXPERIENCE

- Name: **Brockton Housing Authority**  
Location: Belair St., Brockton, MA  
Description: Design Two 4 Bedroom Housing Units for Special Needs Housing ±4000 sq. ft.  
Year Completed: 2009  
Scope of Services: Design thru Construction Administration (CA)  
Cost: \$1,482,148  
Client/Contact Name: Frank Hinds (Brockton Housing Authority)  
Contact Phone: 508-427-9111
- Name: **Special Needs Rental Housing Study for Brewster Housing Authority**  
Location: Brewster, MA  
Description: Schematic Design / Feasibility Study for ± 16 special needs residents  
Year Completed: 2009  
Construction Cost: \$ 1.5 M (est.)  
Client/Contact Name: Laura Shufelt  
Contact Phone: 617-330-9944
- Name: **Brush Hill Special Needs Housing**  
Location: Brush Hill Rd., Yarmouthport, MA  
Description: Design two new HUD funded 1,600 sq. ft. accessible homes for disabled residents  
Year Completed: 2007  
Scope of Services: Design thru Construction Administration (CA)  
Cost: \$764,000  
Client/Contact Name: Gisele Gauthier (Financial Housing Director, Housing Assistance Corp.)  
Contact Phone: 508-564-1414
- Name: **“The Homesteads” Affordable Housing Sub-Division (3 house models)**  
Location: Sandwich, MA  
Description: New Construction / 16 Lot Award-Winning Affordable Home-Ownership Development  
Permitting Process: Local Workplace Housing By-Law  
Year Completed: 2007  
Construction Cost: \$2,719,600  
Client/Contact Name: Gisele Gauthier (Financial Housing Director, Housing Assistance Corp.)  
Contact Phone: 508-564-1414
- Name: **Scituate Special Needs Housing 689-1**  
Location: First Parish Rd., Scituate, MA  
Description: New 8 Group Home for Special Needs Residents (±4000 sq. ft.)  
Year Completed: 2006  
Scope of Services: Design thru Construction Administration (CA)  
Cost: \$876,000  
Client/Contact Name: Barbara Papile (Scituate Housing Authority)  
Contact Phone: 781-545-3375



## RECENT RELEVANT EXPERIENCE

Name: **Housing Land Trust (Village at Marstons Mills)**  
Location: Osterville/W. Barnstable Rd. – Marstons Mills  
Description: New Construction – 30 Unit Affordable Housing Development (5 Triplexes & 15 Single Family Dwellings) Modular Project Delivery  
Permit Process: M.G.L. Ch. 40b  
Year Completed: 2005  
Square Footage: Varies  
Construction Cost: \$3M  
Client/Contact Name: Tim Williams (Williams Building Company)  
Contact Phone: 508-394-3644

Name: **Brush Hill Homes for Our First Home, Inc.**  
Location: Yarmouthport, MA  
Description: Six (6) Single Family Detached Affordable Homes and Associated Site Work for private Non-Profit housing developer, Our First Home Inc.  
Year Completed: 2008  
Square Footage: ± 1300 SF each  
Construction Cost: N/A  
Client/Contact Name: Pearl Wolfson  
Contact Phone: 508-375-0308

Name: **“Darby” Property Housing Study for Barnstable Growth Management Division**  
Location: Barnstable, MA  
Description: Multi-Site Affordable Housing Study (est. 12 units)  
Year Completed: 2007  
Square Footage: T.B.D.  
Construction Cost: T.B.D.  
Client/Contact Name: Mark Nelson (Horsley Witten Group)  
Contact Phone: 508-833-6600

Name: **Woods Hole Road Housing Study / Town of Falmouth**  
Location: Woods Hole, MA  
Description: Affordable Housing Study (est. 16-18 units)  
Year Completed: 2007  
Square Footage: N/A  
Construction Cost: T.B.D.  
Client/Contact Name: Rich Claytor (Horsely Witten Group)  
Contact Phone: 508-833-6600

Name: **Queen Anne Rd. Housing Study (36 Residential Units) for Harwich Ecumenical Council for the Homeless**  
Location: Harwich, MA  
Description: New Construction Cluster Development Study  
Year Completed: 2005  
Square Footage: 3 BR - 1546 SF 2 BR – 1067 SF  
Construction Cost: \$N/A  
Client/Contact Name: Laura Shufelt  
Contact Phone: 617-330-9944

# ATTACHMENT 5

Dellbrook | JKS Qualifications

## 1. Corporate Profile

### A CONSTRUCTION INDUSTRY LEADER FOR OVER 30 YEARS

**DELLBROOK | JKS** is one of the Northeast's largest and fastest growing construction companies. Our dedication to serving the needs of our clients has been the linchpin for our unprecedented success **for over 30 years**. Our mission is to put the industry's best talent in front of our clients' most challenging projects. Our business model is firmly grounded in tried-and-tested construction methods and organization processes complemented by innovative ways to deliver quality, savings and scheduling efficiencies to our clients.

We have a long and proud history of working with housing authorities to construct affordable and multifamily housing in Southeastern Massachusetts, Cape Cod and the Islands. Whether it's multifamily, senior living, student housing, educational or athletic facilities or administration buildings, Dellbrook | JKS's construction teams have the experience needed to properly complete these projects.

**At Dellbrook | JKS we have over 170 construction professionals, including safety, operations, estimating, administrative, and experienced financial employees in a team environment.**

Our Firm has collaborative, long standing relationships with the region's most qualified subcontractors that effectively deliver a quality project on time and on budget with minimal disruption to projects with ongoing operations. Our projects maintain a very cooperative and team driven spirit fueled by our firm's philosophy and management style.

With offices in Quincy and Falmouth, our expertise and open book collaborative style provide high-quality, responsive service backed by a significant bonding capacity. Our clients from both the public and private educational sectors have embraced our Team Concept, recognizing the efficiency and superior results it delivers.

We build with the intention of exceeding our clients' expectations for safety, quality, aesthetics and functionality. Dellbrook | JKS delivers finished products that stand the test of time.



One Adams Place  
859 Willard Street  
Quincy, MA 02169



15 Research Road  
East Falmouth, MA  
02169

LEADING THROUGH EXCELLENCE.

## 2. LEADERSHIP RESUMES

**Michael W. Fish**

**President & Chief Executive Officer**



**Background:**

Mike is responsible for defining the company's mission, providing strategic direction, leading initiatives to identify new opportunities, and continuing to emphasize the key to Dellbrook | JK Scanlan's success – teamwork.

Under his leadership, Dellbrook | JKS has grown into one of the largest building contractors in New England with expertise in healthcare, hospitality, multi-

family housing, private education, historic renovation, and senior & assisted living construction.



Stagecoach Road - Barnstable Housing  
Hyannis, MA

In 2005, Mike co-founded the company with his father, the late Edward A. Fish. The elder Fish was a Boston builder and philanthropist who developed more than \$1 billion worth of real estate over five decades in New England and Florida.

In 2016, over 200 members of the legal, nonprofit and business communities gathered to support Mike for his generosity and contributions to the affordable housing community by presenting him with the Lawyers Clearinghouse Leadership Award.

Mike is a member of the board of Greater Boston, Habitat for Humanity and was previously a director of the Massachusetts Chapter of Associated Builders and Contractors (ABC). Mike is a member of the YPO Organization. A global community of top leaders committed to the shared mission of becoming better leaders through learning and idea exchanges.

Dellbrook | JKS has won numerous awards under Mike's leadership, awards for the company's work in historic preservation from Preservation Massachusetts, the statewide non-profit dedicated to preserving the historic and cultural heritage of the Commonwealth.

Dellbrook | JKS was recognized as one of the top philanthropic companies in the region by the Boston Business Journal and the BBJ named Mike to their 2010 list of "Forty Under Forty," the top business leaders under forty years old in Boston.

Dellbrook | JKS was ranked by the ENR as one of the Top 400 Contractors in the Country in both 2015 and 2016.

**Education:**

- 2005 Colgate University

## Andrew McDonnell Chief Financial Officer



### Background:

Andrew has over twenty years of experience in the construction industry. His construction experience is well diversified starting with a small firm completing a variety of tasks both financial and non-financial to a rapidly growing national construction management company helping implement controls and best practices, to a large union

signatory concrete subcontractor where he focused on upgrading systems and management.

At Dellbrook | JKS Andrew is responsible for daily financial operations. His role as CFO includes cash management, insurance renewals, banking and bonding relationships, financial reporting, project and financial controls and strategic planning. Andrew oversees the Controller and accounting staff for the firm.

### Education:

- University of Maine, 1992 - Bachelor of Science, Finance

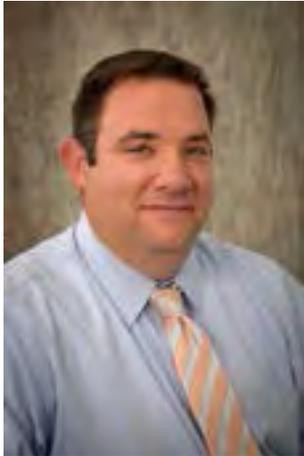
### Professional Affiliations & Certifications:

- CFMA - Construction Financial Management Association



## Andrew Baker

### Senior VP of Marketing & Development



#### Background:

Andrew has nearly 20 years experience in the construction industry and is a successful team leader with proven success on a variety of multi-million dollar projects. Andrew first joined our firm In 1997 and was promoted to the position of Project Executive in 2008. In 2016 Andrew was promoted to the position of Senior VP of Marketing & Development. Andrew understands the client's needs and takes a hands-on approach to problems. Andrew's daily responsibilities range from oversight of operations, office and project management staff to business development efforts for the company. Andrew utilizes personal relationships forged with clients, architects, engineers, etc. to provide new and exciting opportunities for the company.

#### Education:

- Cornell University, College of Engineering, BS in Civil Engineering

#### Professional Certification/Licenses:

- OSHA Certified

Project	Location	Description	Value
181 Washington Street Union Square Apts	Somerville, MA	A 46,718 square foot project over 5 floors including a ground floor commercial space with separate entryways.	\$9.3M
197 Washington Street	Somerville, MA	Ground up mixed construction with 30 luxury one and two bedroom condominium units as well as commercial space on the 1st floor, totaling 9,875 sq. ft.	\$7.6M
All American Assisted Living	Wareham, MA	Two story, wood framed community containing 58 assisted living apartments, 13 memory support rooms and associated common and service areas totaling approximately 56,000 SF. The community spaces will feature bistro style dining room, beauty salon, Library, Memory Garden and recreation areas for the residents.	\$8.7M
All American Assisted Living	Londonderry, NH	New construction of a 58,000-square-foot, two story, steel framed community containing 45 assisted living apartments, 13 memory support units as well as associated common spaces and a commercial kitchen.	\$9.2M
Bentley Commons Senior Living	Keene, NH	Renovation of the historic MacMillan Mill Building and new construction of a 4-story building. The two buildings are connected and house a full service commercial kitchen, formal dining areas as well as 99 apartment units for independent living. The exterior facade of the new building is constructed of the EIFS finishing system and new vinyl windows were installed throughout both buildings	\$14.7M
Paxton Senior Housing	Paxton, MA	A 48,000 SF Wood Framed Assisted Living/Senior Housing Facility with 50 Units in 3 Stories	\$6.9M
The Village at Fillmore Pond	Bennington, VT	The community consists of 30 independent living cottages as well as a large 45 unit assisted living building. The unique cottages are pre-fabricated modular buildings of two residences each with adjacent single car garages. The residential care apartment building includes 45 living units as well as a commercial kitchen and large dining hall, a beauty salon, arts & crafts room as well as a private dining area for small groups	\$5M
The Esplanade	Hudson, MA	A 55 and over residential community, consists of 140 condominium units and 10,000 square feet of retail space. The complex includes underground parking as well as an outdoor common patio featuring a trellis, natural stone walls and a barbecue grill	\$22.5M
Bentley Assisted Living at Northminster	Jefferson, GA	Renovation and new construction involving demolition of parts of the existing building and adding two new living wings as well as the large Activities Room with high ceilings. All of the unit kitchens were remodeled with updated cabinets, counter tops and appliances and an special Alzheimer's care unit was added to the existing building	\$2.4M

## Seth Adams, LEED AP, CPC Senior Vice President



### Background & Experience

Seth joined our firm in 2005 and was quickly promoted to Project Manager. In 2012 he was promoted to Project Executive and in 2016 he became Senior Vice President of our Falmouth Office. Seth has completed many projects of various sizes and complexity, with some over \$20M. He has extensive experience working on phased occupied renovations as well as DCAM projects using the CM at Risk delivery method. As Senior Vice President one of Seth's main focuses is the successful execution of projects from an executive level. Seth has a tremendous amount of experience in every market sector and has built invaluable client relationships over the past twelve years.

### Education:

- Rensselaer Polytechnic Institute B.S. Chemical Engineering
- B.S. Management/ Entrepreneurship
- Northeastern University - M.B.A

### Professional Affiliations & Certifications:

- American Institute of Constructors (AIC)
- LEED Accredited Professional

### Relevant Project Experience

Project	Location	Description	Value
Sachems Path Housing	Nantucket, MA	40 unit affordable housing community on Nantucket, MA	\$4.6M
Massachusetts National Cemetery Maintenance Building, Storage Building and Committal Shelter	Bourne, MA	New construction at the National Cemetery including new buildings including, Administration Building, Maintenance Building, Storage Building, and Committal Shelter	\$4M
Eastward Ho! Country Club Maintenance Facility	Chatham, MA	16,750 sf facility building for the Eastward Ho Country Club	\$2.4M
Woods Hole Golf Club	Woods Hole, MA	2 story, 24,000 square foot luxury Golf Clubhouse, located in close proximity to the position of the existing clubhouse in Falmouth, MA. The existing clubhouse will be razed and removed. Project features commercial kitchen, event space and wrap around decks for members.	\$9.3M
22 Federal Street (Nantucket Culinary Center)	Nantucket, MA	2 phase project included demolition and full renovation of existing 4604 sf three story structure. The new building included a 1547 square foot two story addition and new full basement.	\$6.4M
Oak Bluffs Fire Fighting Building	Oak Bluffs, MA	20,000 square foot facility. The project is a modular and steel framed two story building, with a full basement on a 1.1 acre Town owned parcel. Work also included demolition of the existing Fire/ EMS Station and associated site work.	\$6.6M
Nantucket Airport Fire Fighting Rescue Building	Nantucket MA	10,642 sf building house's the airport's firefighting and rescue apparatus and operations/ firefighting personnel	\$5.9M
Dartmouth State Police Barrack	Dartmouth MA	New Construction 14,300 gross square foot Dartmouth State Police Station .	\$6.2M
Hyannis Youth & Community Center	Hyannis, MA	105,000sf new youth and community center with 2 ice rinks, basketball courts, and seating for 500 spectators	\$24M
Cape Cod Hospital Emergency Center Addition/Renovation	Hyannis, MA	Phased construction and renovation for new Emergency Center Project.	\$20M
Falmouth Hospital Emergency Center Addition	Falmouth, MA	New emergency room addition with 2 phases. Phase 1 is a new addition with phase 2 renovating the old ER reception area	\$10M

## Chuck Mavrogeorge VP of Estimating & Purchasing



### Background & Experience

Chuck was promoted to the position of Vice President for Estimating and Purchasing in 1999 after having served as the Chief Estimator for Dellbrook / JKS since 1996. Chuck has more than thirty years of progressive management experience in association with high volume general contractors and real estate developers.

Chuck is responsible for estimating and purchasing functions at Dellbrook | JKS. As such, estimates and major subcontractor purchases are subject to his review and approval. In conjunction with the Vice President for Operations, Chuck ensures dynamic project management control at all levels.

Prior to assuming his position at Dellbrook | JKS Chuck gained extensive experience working as the Chief or Senior Estimator for several major firms including:

- Peabody Construction Co., LLC | Braintree, MA
- Corcoran Jennison Builders, LLC | Sandwich and Braintree, MA
- JAL, LLC | Bedford, MA

His responsibilities also include the utilization of computerized estimating software and hardware, preconstruction services, preparation of conceptual budgets, value engineering and project administrative management.



Veterans Park Housing  
Falmouth, MA



## Richard Scanlan, General Superintendent



### Background:

Richard Scanlan has served as General Superintendent of Dellbrook | JK since 1984.

Richard's extensive experience in the construction industry spans more than 25 years and covers market segments including healthcare, transportation, recreational, educational, housing, retail and commercial assignments in multiple states throughout the Northeast and Mid-Atlantic regions and stretching as far south as Georgia. Richard is well-versed in the hard bid, construction management and design-build delivery methods. As General Superintendent, Richard is responsible for overseeing the day-to-day operations of the company. His daily functions include coordination between office and field personnel, safety, project scheduling, quality control, resource management, and daily troubleshooting.

Richard ensures effective project management control at all levels. He communicates with all stake holders – subcontractors, architects, and owners and intervenes on issues when necessary to maintain schedule adherence or project compliance.

### Education:

- Springfield College, BA Degree
- Wentworth Institute
- Northeastern University
- Fitchburg State College

### Certifications:

- Unrestricted Construction Supervisor's License  
Commonwealth of Massachusetts and the City of  
Quincy



## Rob Carson

### Director of Safety & Risk Management



#### Background:

Rob Carson is an integral part of our team as Director of Safety and Risk Management. As Safety Director Rob is involved in preconstruction of all projects to ensure all design suggestions and construction management plans keep safety as a main priority. During construction, Rob will be making frequent visits to the site to instruct and encourage strict adherence to our safety plan.

At his previous company, Rob oversaw the successful development, implementation, and maintenance of the Institutional Division Safety Program for projects totaling over \$300 million on an annual basis. Projects ranged from small interior renovations to new 24-story mixed use buildings throughout New England and Virginia. Types of construction consisted of cast-in-place concrete, post-tensioned concrete, structural steel, precast concrete, and block-and-plank for the building industry. He has successfully defended all OSHA related matters resulting in ZERO regulatory citations being upheld in over 11 years. This achievement was through technical understanding of the applicable regulations, thorough documentation and excellent negotiation skills. Rob is a key team member in each and every project. Rob is a certified safety professional (CSP), a member of the OSHA Construction Roundtable of Eastern Massachusetts, an American Society of Safety Engineers Active Member and a National Safety Council Member. Robert is a key team member in each and every project.

#### Education:

- Keene State College, Keene, NH - Bachelor of Science, Safety Studies - Dec. 2002 Cum Laude
- Associate of Science, Computer Science - Dec. 2002 Cum Laude

#### Education

- Acquisition Due Diligence
- Behavioral based safety
- Integration of risk management into Prevention through Design (PtD)
- Regulatory Compliance
- Preconstruction Planning
- Risk Identification/Control
- Relationship building and sustainment
- Contractor safety management
- Program development and implementation
- Effective training delivery



257 Thayer Street, Providence, RI

- Project evaluation and auditing
- Technical knowledge
- Communication
- Fiscal planning
- Strategic planning
- Proposal support
- Metric analysis – lagging and leading indicators

#### Security Clearances:

- Currently hold DoD Top Secret clearance

#### Professional Certifications and Memberships:

- Certified Safety Professional (CSP), Board of Certified Safety Professionals - September 2010
- Member of the OSHA Construction Roundtable of Eastern Massachusetts

### 3. Affordable and Cape Cod Housing Projects

#### Stagecoach Road, Barnstable Housing

Hyannis, MA



**Project Description:**

The Stagecoach Road, Barnstable Housing project consists of 12 units of new construction located in Hyannis, MA on a 7 acre site. The project included 3 buildings each with two two-bedroom apartments and two one- bedroom apartments. Half of the units are available for individuals and families with incomes at or below 60 percent of the area’s median income. The remainder are available through the Section 8 voucher system to individuals or families with incomes between 30 percent and 50 percent of the area median income for a household of four. The project was completed in November, 2013.

**Architect:** Brown Lindquist Fenuccio & Raber Architects

**Contact:** Kurt Raber | 508.362.8382

**Owner:** Barnstable Housing Authority

**Contact:** Lorri Finton | 508.362.7222

**Location:** Hyannis, MA

**Value:** \$3M

#### 815 Main Street

Wareham, MA



**Project Description:**

The Village at 815 Main Street project was completed in October 2010. The development consists of 49 newly constructed affordable housing units including 8 townhome buildings and 1 three story mid-rise apartment building. An existing building on the 10 acre site was relocated to a new foundation and renovated to be utilized as a community building for the residents. The grounds are fully landscaped and furnished with a playground, picnic tables, BBQ stands, walking paths and other amenities. In addition to preserving open space, the project includes other green features such as energyconservation systems for heat, rain gardens and native plantings.

The Village at 815 Main Street offers one, two and three bedroom living units in townhouses and apartments on the ten acre site. All units are affordable to individuals or families whose income is 60% or less than the area’s median income. The development is situated close to Routes 195/495 and Route 25, making it convenient to schools, jobs and shopping.

**Architect:** CIVITAS Architects & Planners, LLP

**Contact:** Jane Gleason | 774.357.5353

**Owner:** 815 Main Street, LLC

**Contact:** John Scanlan | 508.889.7504

**Value:** \$7.4M

## 704 Main Street

### Falmouth, MA



#### Project Description:

704 Main Street project consists of 58 units of affordable rental housing and approximately 10,000 SF of commercial Space in a single building. Wood Framed Construction at the residential levels with structural steel at the first floor commercial level for a total of 73,000 SF.



**Architect:** CBT/Childs Bertman Tseckares, Inc.

**Contact:** Adrian LeBuffe/Bob Burnett | 617.262.4354

**Owner:** Main Realty Trust c/o Falmouth Housing Corporation

**Contact:** Steve McDermott | 508.457.0287

**Value:** \$8.3M

## Little Neck Village

### Marion, MA

#### Project Description:

Little Neck Village consists of 48 units of Senior Rental Housing 100% Affordable, financed with Housing Tax Credits. The project replaced 12 existing units on the 30+ year old town owned property. One (30) unit building, three (6) unit cottage style structures, and a community building on a completely accessible site. We achieved HERS scores of 50 to 56 (50% better than code).



**Architect:** Brown Lindquist Fenuccio and Raber

**Contact:** Kurt Raber | 508.362.8382

**Owner:** EA Fish Development

**Contact:** Dana Angelo | 781.380.1600

**Value:** \$5.7M

## 505 Revere

### Revere, MA



#### Project Description:

The project consists of facade repairs to existing 505 Revere Street building, demolition of a two story wood & concrete building located at 1111 North Shore Road and a one & two story addition to 505 Revere Street.



**Architect:** Davis Square Architect

**Contact:** Ross Speer, 617.628.5700

**Owner:** WIHED

**Contact:** Rose White, 617.250.8912

**Value:** \$700,000

## Sachems Path Phase 1

### Nantucket, MA

#### Project Description:

The new construction 15 single family homes in a mix of 1-3 bedroom units including one (1) handicap unit. Dwelling units have full basement foundations and one or two-story wood framed construction. The community is located on ten acres off Surfside Road, between Miacomet and South Shore roads. Each home has its own yard and private driveway and are designed to be energy efficient. The homes are priced to be affordable for mid-income islanders—those making under 150 percent of Nantucket County's median income. Dellbrook JKS will begin construction of Phase 2 in Late Winter 2017.



**Architect:** Rescom Architectural

**Contact:** Greg Siroonian, 508.759.9828

**Owner:** Sachem's Path Nantucket, LLC. c/o Oxom Partners, Owner Project Manager

**Contact:** Kevin Maguire, 917.340.3187

**Value:** \$5m

# Ashers Path Apartments

## Mashpee, MA



**Architect:** The Architectural Team

**Contact:** Michael Binette | 617.889.4402

**Owner:** Mashpee Housing Authority & EA Fish Development

**Contact:** Matt Mittelstadt | 781.380.1616

**Value:** \$6.3M

### Project Description:

Asher's Path is a shingled Cape Cod style building that provides 56 rental units for low to moderate income Adult 55+. Located on an attractive and convenient site on Route 28 in Mashpee, the building offers a Community Room, Laundry Facilities and an outdoor Putting Green. The construction provides for an on-site waste water treatment facility, storm water management systems and the maintenance of a natural vegetation buffer around the perimeter of the site to minimize the impact on the environment. This development was built in partnership with Mashpee Housing Authority.



# Veterans Park Housing

## Falmouth, MA

### Project Description:

Located along Route 28 in Falmouth, the Veterans Park Housing project consists of 39 one and two bedroom units across two new two-story buildings. Also included in the project was the renovation and rehabilitation of an existing historic school house for community use, a new community room, parking for public and residences and a new public park. The \$10 million project was designed and constructed to ensure that all units having a southern and northern exposure maximize the quality of natural daylighting. Every unit also enjoys a dedicated outdoor patio or balcony to promote natural ventilation. Recycled materials and indigenous plant species were used to promote water conservation.



**Architect:** Fennick McCredie Architecture, Ltd

**Contact:** Jonathan McCredie | 617.350.7900

**Owner:** Falmouth Community LLC c/o Affirmative Investments

**Contact:** David Ennis | 617.367.4300

**Value:** \$10M





# St. Polycarp Village Phase III

## Somerville, MA

### Project Description:

Dellbrook | JKS completed the 35,534 SF third & final phase of new construction of the St. Polycarp Village Phase III project. This project includes 31 affordable apartments in an elevator building around a courtyard. Eight units are affordable to very low income families with project-based Section 8 subsidies, including two apartments reserved for homeless households and three for people with disabilities. Dellbrook was able to successfully navigate unforeseen ledge and environmental issues. Phase III is LEED Gold certified.



The Phase II project included 29 affordable apartment units in three buildings around a courtyard. Five units are affordable to households earning less than 30% of the area Median Income and the remaining are affordable at 60% of AMI. Four units are reserved for homeless households and two are reserved for people with disabilities. Site amenities include open space, a playground and a community room. The building uses a complete array of the latest techniques to achieve cutting edge energy conservation, indoor air quality and water conservation; including on-site storm water infiltration through a rain-garden, high efficiency heating and cooling systems, as well as recycled content and low VOC building materials. The project is LEED Silver certified.

**Architect:** Davis Square Architects

**Contact:** Eric Rex | 617.628.5700

**Owner:** Somerville Community Corp.

**Contact:** Dan Leblanc | 617.776.5931

**Value:** \$6.4M

**LEED Silver Certified**



# Commons at Southfield II

## Weymouth, MA

### Project Description:

The Commons on The Green is the ultimate in sustainability and distinction in the South Shore. The project included two levels of finishes, 65 units of stylish apartment homes range from studios to three bedrooms and 7 new townhomes. Some of the “Commons” features are patios or balconies, private washers and dryers, lofts, walk-in closets, bay windows, cathedral ceilings, and clean steel appliances. Also featured is a salt water swimming pool with sundeck and pool side grilling area plus 24 hour fitness, Wi-Fi cafe, club and game room and a calendar of social events. In the newest apartment homes extras include bamboo wood flooring, granite countertops, double vanity sinks, a private outdoor roof deck with grilling and valet trash service. A commuter rail station is just walking distance away and only two stops to South Station.



**Architect:** Russell Scott Steedle & Capone Architects, Inc.

**Contact:** Hugh Russell | 617.661.5880

**Owner:** Southfield Commons, LLC

**Contact:** Peter Mahoney | 781.849.7111

**Value:** \$11.8M



# 625 McGrath Highway

## Somerville, MA

### Project Description:

The 625 McGrath Highway project in Somerville, MA consisted of demolition of an existing 1-story brick structure. The new walk up style buildings are 37,477 sf ground-up wood frame construction that resulted in two buildings containing 34 units of affordable and market rate studio, one, two & three bedroom apartment units. Work also included associated site infrastructure work, landscaping and hardscape



**Architect:** BH+A Architects

**Contact:** Rob Del Savio | 617.350.0450

**Owner:** Somerville McGrath Associates, LLP

**Contact:** Tony Tanery | 617.439.0088

**Value:** \$6.1M



# BENFIELD FARMS

## Carlisle, MA



### Project Description:

Our team completed the Benfield Farms project located in Carlisle MA on forty-five acres of conservation land. The 28,000 sf project is a 26 unit Senior Living Community for residents 62 years and older consisting of one and two bedroom apartment homes. Careful consideration was given to the landscape, project design, unit interiors and common space, incorporating green building, energy efficiency, sustainability and universal design. "As a result of the careful attention to energy and the environment in the siting, design, construction and management of Benfield Farms, the property has achieved ENERGYSTAR® for New Homes certification and is on track to receive the U.S. Green Building Council's LEED for Homes GOLD certification! These achievements recognize Benfield Farms' on-going commitment to being environmentally responsible while offering a wonderful place to call home." A state of the art waste water treatment system protects the land and vegetation from excess nitrogen and the community's water is supplied by its own well. For added comfort, a high-tech air ventilation system ensures the right airflow in each apartment<sup>†</sup>.

**Architect:** DiMella Shaffer

**Contact:** Rob Shearer | 617.778.0107

**Owner:** Benfield Farms Limited Partnership - The Neighborhood Corporation

**Contact:** Phil Giffie | 617.418.8240

**Value:** \$6.5M

**LEED Gold Certified**



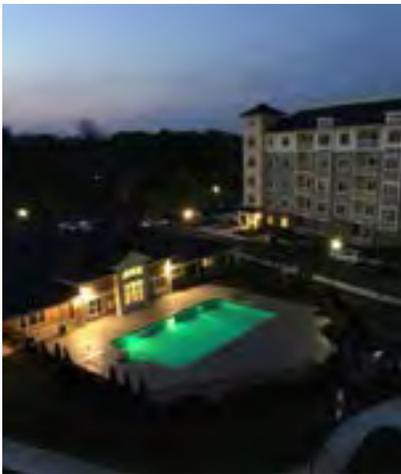
# AXIS AT LAKESHORE PHASE 1 AND 2

## Bridgewater, MA



### Project Description:

The Axis at Lakeshore in Bridgewater, MA consists of new construction of 3 - five story elevated buildings with a total of 289 one, two and three bedroom units. Construction also includes a maintenance building, state of the art clubhouse outfitted with fitness center, meeting space, swimming pool, and theater room. The 40B development encompasses 353,003 GSF, with 25% of the units reserved for households with an annual income not exceeding 80% of Area Median Income adjusted for family size, as determined by HUD.



**Architect:** The Architectural Team

**Contact:** Mark Rosenhein | 617.889.4402

**Owner:** Claremont Bridgewater II, LLC

**Contact:** Elias Patoucheas | 508.279.4300

**Value:** \$41.8M



## COMPANY PROFILE



Coastal Engineering Co., Inc. is a provider of land surveying, civil engineering, structural engineering, marine/waterfront engineering, land-use planning and permitting, and environmental permitting services.

### EXPERTISE IN ENVIRONMENTALLY SENSITIVE AREAS

*Based on Cape Cod, a region of significant environmental exposure and sensitivity, we are exceptionally experienced in:*

- Site planning
- Onsite wastewater treatment and disposal in environmentally sensitive areas
- Stormwater management using LID (Low Impact Development) techniques
- Building design
- Environmental permitting

### WORKING RELATIONSHIPS WITH REGULATORY AGENCIES

Since our founding in 1976, we have expanded our staff and broadened our expertise to keep abreast of the increasing environmental concerns and government regulations that affect our clients and the communities in which we practice. We understand the intricacies of the federal, state, and local regulations that affect our clients' projects, and have developed cooperative working relationships with the various regulatory agencies.

### SOLUTIONS FOR THE BENEFIT OF OUR CLIENTS AND COMMUNITY

We are committed to providing designs and solutions that are not only right for our clients, but are right for the community too. That may be the reason why so many of our clients have done business with us before.

***Our clients include:***

- Architects and design professionals
- Developers and contractors
- Realtors and attorneys
- Local, state, and federal agencies
- Property owners
- Non-profit agencies

At Coastal, we take pride in providing designs that are environmentally responsible, cost effective, and constructible. We know that our clients' projects are very important to them, no matter how small. Accordingly, every project is overseen by a project manager with many years of experience to guide a client through the planning, design, permitting, and construction phases of their project.

# **ATTACHMENT 6**

Housing Nantucket Information

Lottery Process

Resumes



75 Old South Road ● P.O. Box 3149 ● Nantucket, MA 02584 ● Phone: 508.228.4422

[www.housingnantucket.org](http://www.housingnantucket.org)

May 19, 2017

Ms. Betsy Crum, Executive Director and  
Ms. Kristin Anderson, Development Manager  
**Women's Institute** for Housing and Economic Development, Inc.  
75 Charter Oak Avenue, Suite 1-200  
Hartford, CT 06106

Re: Affordability Services and Property Management at 6 Fairgrounds Road

Dear Betsy and Kristin,

Housing Nantucket is pleased to respond to your request for affordability services and property management at the proposed 6 Fairgrounds Road rental development on Nantucket. With twenty-three **years' experience in affordable housing on Nantucket, Housing Nantucket is uniquely qualified** to fulfill this role. Attached are our proposals for lease-up services, including:

- affirmative marketing, income certification, lease up, and ongoing recertification services for fifty (50) units of income certified rental housing
- lease up services for thirteen (13) unrestricted units plus one (1) unit of staff housing

Based on the information you have provided to us, our estimate of longer-term property management for this development is 30-40% of rental income.

**This proposal assumes the Town of Nantucket will use the state's Local Initiative Program (LIP) to create Local Action Units (LAU) for the Subsidized Housing Inventory (SHI) list pursuant to Massachusetts General Law Chapter 40B. It also assumes local preference will be sought.**

We are excited for progress on the site and hope to work together on its development. See attached for more details about our affordability and lease up services, a record of comparable projects, and information on our officers. We've also included the full resumes of key staff persons.

Please let us know if you have any questions on this proposal and do not hesitate to contact us with any concerns.

Sincerely,

A handwritten signature in blue ink that reads "Anne Kuszpa".

Anne Kuszpa  
Executive Director



## Established Record of Comparable Projects

Established in 1994, Housing Nantucket is the only non-profit solely dedicated to creating affordable housing solutions for island residents. Housing Nantucket has developed thirty units of affordable rental housing, including two LEED certified units, and currently has an additional six rental units under construction. Housing Nantucket manages its own inventory as well as twelve Nantucket Education Trust rental units and, at times, residential properties for the Town of Nantucket. Housing Nantucket has conducted lotteries to fill its own rental units and completed formal certification as a lottery agent from Mass Housing Partnership in May 2017.

Housing Nantucket is certified as a Community Development Corporation by the Department of Housing and Economic Development and is authorized to distribute State of Massachusetts tax credits through the Community Investment Tax Credit program. Housing Nantucket has been certified as an affordability Monitoring Agent by Mass Housing Finance Agency and is the **monitoring agent for local 40B developments Abrem Quarry and Sachem's Path.** Housing Nantucket is certified by the Massachusetts Homeownership Collaborative to conduct First Time Home Buyer Education courses. Housing Nantucket oversees the Nantucket Housing Needs Covenant Program of seventy deed-restricted homeownership units in scattered sites around the island. Housing Nantucket is a member of the Nantucket Chamber of Commerce.



## **Officers' Resumes:**

President: Jennifer Cohen

B.A., Simmons College, Boston, MA, 1996

J.D., Tulane Law School, New Orleans, LA, 1999

Year round resident since 2005

Board Member – Parents Cooperative, Inc. (dba Nantucket New School)

Vice President: Bernadette Meyer

M.A., Boston College, Newton, MA, 1995

Real Estate Broker, **Maury People Sotheby's International Realty**, 2007 - Present

Real Estate Broker, County Village Real Estate, 2004 – 2007

Year round resident since 2004

Treasurer: Paul A. Wolf Jr.

M.A., B.B.A., University of Massachusetts, Amherst, MA, 1963

M.A., M.B.A., Clark University, Worcester, MA, 1972

Controller, Marine Home Center, 1994-Present

President, Pacific National Bank of Nantucket, 1989-1993

Year round resident since 1989

Board Member – Nantucket Historical Association, Sign Advisory Committee

Clerk: Robert J. Liddle

B.A. Economics, Beloit College, Beloit, WI, 1971

Wood Technics/Carpentry, Blackhawk Technical Institute, Rock County, WI, 1975

Vice President, Sibley & Liddle, 1979-Present

WoodTech/Construction Tech Teacher, Nantucket Public Schools, 2002 - 2016

Year round resident since 1984

Board Member – Nantucket Builders Association, Nantucket Education Trust



Housing the Nantucket Community Since 1994 [housingnantucket.org](http://housingnantucket.org)

## Price Proposal and Scope of Services

6 Fairgrounds Road -13 units of unrestricted housing and 1 unit of staff housing  
Lease Up

Housing Nantucket's fee is \$125/hour

<b>Initial Lease Up</b>	Create Outreach Strategy Ensuring Fair Housing Marketing	2 hours	\$ 250		
	Determine Eligibility Requirements	4 hours	\$ 500		
	Create Flyers in English and Spanish	2 hours	\$ 250		
	Design Tenant Lease (and License for property manager)	2 hours	\$ 250		
	Design Rental Application and Financial Forms	2 hours	\$ 250		
		12 hours	\$ 1,500	\$	1,500
	<b>Phase 2 – Outreach and Application Review</b>				
	Implement Community Outreach Strategy	2 hours	\$ 250		
	Design Digital Media and Print Advertisement	2 hours	\$ 250		
	Amend Website to Include Application	1 hour	\$ 125		
	Implement Advertising Strategy	1 hour	\$ 125		
	Hard costs advertising		\$ 300		
	Assist Applicants Obtain and Complete Applications	15 hours	\$ 1,875		
	Application Review and Qualifying <i>(based on 50 applications received)</i>	75 hours	\$ 9,375		
		96 hours	\$ 12,300	\$	12,300
	<b>Phase 3 – Tenant Selection and Lease Up</b>				
	Tenant Interview	14 hours	\$ 1,750		
	Credit and Criminal Background Checks	2 hours	\$ 250		
	Credit and Criminal Background Hard Costs		\$ 350		
	Execute Lease Agreements and Security Deposit Accounting	14 hours	\$ 1,750		
		30 hours	\$ 4,100	\$	4,100
<b>Total Initial Lease Up</b>		<b>138 hours</b>		<b>\$</b>	<b>17,900</b>



Housing the Nantucket Community Since 1994 [housingnantucket.org](http://housingnantucket.org)

Price Proposal and Scope of Services

6 Fairgrounds Road -50 units of income certified rental housing

Affordability Monitoring Services

Three tiers of affordability: up to 60%, up to 110%, and up to 140%

Housing Nantucket's fee is \$125/hour

<b>Initial Lease Up</b>	<b>Phase 1: Approval of DHCD Local Action Unit Application</b>			
	Complete Local Action Unit Application with cooperation from Developer and Town	30 hours	\$ 3,750	
	Establish Local Preference need	20 hours	\$ 2,500	
	Write Affirmative Fair Housing Marketing and Lottery Plan (AHFMP)	10 hours	\$ 1,250	
	Create Outreach Strategy which ensures affirmative fair marketing	2 hours	\$ 250	
	Determine Eligibility Requirements	4 hours	\$ 500	
	Create Flyers in English and Spanish	2 hours	\$ 250	
	Design Tenant Lease	6 hours	\$ 750	
	Design Lottery Application and Financial Forms	5 hours	\$ 625	
	Attendance at community/regulatory meetings (no travel included)	10 hours	\$ 1,250	
	Review of regulatory documentation	12 hours	\$ 1,500	
		<b>101 hours</b>	<b>\$ 12,625</b>	<b>\$ 12,625</b>
	<b>Phase 2 – Pre-Lottery Activities: Outreach, Information Meetings, Pre-Lottery Income Screening</b>			
	Implement Community Outreach Strategy	5 hours	\$ 625	
	Design Digital Media and Print Advertisement	11 hours	\$ 1,375	
	Amend Website to Include Application	2 hour	\$ 250	
	Implement Advertising Strategy	2 hours	\$ 250	
	Hard costs advertising (2 ads in local and Cape Cod paper, social media promotion)		\$ 3,500	
	Prepare for and Participate in Community Info Meetings	12 hours	\$ 1,500	
	Assist Applicants Obtain and Complete Applications	50 hours	\$ 6,250	
	Application Review and Qualifying ( <i>based on 150 applications received</i> )	75 hours	\$ 9,375	
		<b>157 hours</b>	<b>\$ 23,125</b>	<b>\$ 23,125</b>
	<b>Phase 3 – Formal Administration of Lottery and Establishment of Waiting List</b>			
	Lottery event – prepare for and hold	8 hours	\$ 1,000	
	Process lottery info/establish lottery results/communicate lottery results	16 hours	\$ 2,000	
	Create waiting lists for remaining applications	4 hours	\$ 500	
	Communicate with Developer	5 hours	\$ 625	
	Communicate with Regulatory Agents	10 hours	\$ 1,250	
		<b>43 hours</b>	<b>\$ 5,375</b>	<b>\$ 5,375</b>
	<b>Phase 4 – Income Verification/Certification in Accordance with the various Funding Sources</b>			
	Communication with Developer	2 hours	\$ 250	
	Necessary Reporting to Funding Sources	10 hours	\$ 1,250	
		<b>12 hours</b>	<b>\$ 1,500</b>	<b>\$ 1,500</b>
	<b>Phase 5 – Lease Execution</b>			
	Execute Lease Agreements with Tenants	50 hours	\$ 6,250	
		<b>50 hours</b>	<b>\$ 6,250</b>	<b>\$ 6,250</b>
<b>Total Initial Lease Up</b>		<b>363 hours</b>		<b>\$ 48,875</b>
<b>Annual monitoring</b>	<b>Phase 6 – Annual Verification and Reporting for Existing Tenants</b>			
	Obtain Income Information from Tenants	8 hours	\$ 1,000	
	Review Applicants and Certify Income	75 hours	\$ 9,375	
	Report to Town and Regulatory Agents	5 hours	\$ 625	
	Work with Developer to fulfill Income Requirements if Necessary (Floating Units)	8 hours	\$ 1,000	
		<b>96 hours</b>	<b>\$ 12,000</b>	<b>\$ 12,000</b>
	<b>Phase 7 – Continuous Marketing and Tenant Turnover</b>			
	Re-market four times per year	20 hours	\$ 2,500	
	Process applications (60/yr) and add to wait list "first come first served"	90 hours	\$ 11,250	
	Lease up two units per year	8 hours	\$ 1,000	
		<b>118 hours</b>	<b>\$ 14,750</b>	<b>\$ 14,750</b>
<b>Total Annual Monitoring</b>		<b>214 hours</b>		<b>\$ 26,750</b>
<b>Long term requirements: Phase 8 – Hold Another Lottery, if required (5+ years)</b>				
	Verify and/or update AHFMP	5 hours	\$ 625	
	Communicate with Regulatory Agent	5 hours	\$ 625	
	Repeat Phases 2-5 (based on 50 applications)	200 hours	\$ 25,000	
		<b>210 hours</b>	<b>\$ 26,250</b>	<b>\$ 26,250</b>
<b>Total Long Term Requirements</b>		<b>210 hours</b>		<b>\$ 26,250</b>

# ANNE MILLER KUSZPA

75 Old South Road • P.O. Box 3149 Nantucket, MA 02584 • ph.: (774) 333-3927 • anne@housingnantucket.org

## PROFESSIONAL EXPERIENCE

### **HOUSING NANTUCKET**

NANTUCKET, MA

Jan 2007 - present

A 501(c)3 non-profit dedicated to creating mixed-income housing opportunities for year-round Nantucket residents

#### *Executive Director*

Oct 2010- present

- Accountable for organization's \$10.6 million of total assets and yearly revenue of \$1.6 million. Responsible for board management, staffing, and grant administration. Crafted and implemented branding strategy including website overhaul, radio ad production, social media marketing, event planning and monthly newsletters.
- Significantly reduced organization's liabilities and introduced successful fundraising programs. Developed 8 units of affordable rental housing stock by recycling donated dwellings. Substantially improved the quality of existing rental inventory. Developed solar-powered office building, which is owned outright by the organization.
- Oversees management of thirty units of scattered site affordable rental housing, as well as housing for other island non-profits. Administers the Covenant Program, a local homeownership program of 71 units. Successfully responds to municipal disposition proposals. Instructs Homebuyer Education courses. Coordinates community stakeholder efforts to implement new housing opportunities.
- Works with the State of Massachusetts through Community Development Corporation (CDC) and Community Investment Tax Credit certification. Experienced with the State's Local Initiative Program (LIP) and Local Action Unit (LAU) programs. Acts as monitoring agent for Mass. General Law Chapter 40B developments. Writes and implements Affirmative Fair Housing Marketing Plans. Conducts affordable housing lotteries.

### **GOLDMAN SACHS & CO**

NEW YORK, NY

Sept 2002- Jan 2007

J. Aron (Commodities Division of Goldman Sachs)

#### *Energy Trader*

- Initiated and managed power positions in the North American electricity market. Exercised options and traded around resulting positions. Discovered and captured arbitrage opportunities.
- Worked with the firm's strategists, sales associates, and traders to evaluate structured power deals. Researched market conditions using both fundamental and technical analysis.
- Responsible for optimizing Goldman Sachs owned power plants in the North and Southeast United States.
- Assisted long-term traders in assessing & optimizing portfolio risk. Executed power and natural gas future trades via the NYMEX exchange, broker market, and directly with counterparties.

### **MORGAN STANLEY CAPITAL GROUP**

NEW YORK, NY

Sept 2000-Sept 2002

Morgan Stanley Fixed Income Division

#### *Commodity Analyst*

- Managed deadlines and concurrent tasks related to scheduling power within North America.
- Team lead in fulfilling qualification requirements to enable Morgan Stanley to do business in the Texas power market.
- Worked with IT department to create user interfaces.
- Trained colleagues on a regular basis.

### **CON EDISON ENERGY, INC**

WHITE PLAINS, NY

Aug 1998- Sept 2000

Wholesale Power Marketing Subsidiary of Consolidated Edison Company of New York

#### *Commodity Analyst*

- Key person for all aspects of scheduling electricity at the start-up of the deregulated power market in New York State (NYISO).
- Assisted in troubleshooting and implementing software products used to schedule power within the Northeast.
- Responsible for coordination and submittal of accounting accrual for electricity group.

## EDUCATION

State University of New York at Geneseo

B.A. Mathematics and Physics

Dec 1997

University of Brunel, Uxbridge England

Physics Study Abroad Program

Fall 1997

"Life is either a daring adventure or nothing at all." ~ Helen Keller

## Milen Tsvetkov

2 Clarendon Str., Nantucket, MA 02554 • Cell: (917) 224-5553 • Email: milen.tsvetkov@yahoo.com

### WORK HISTORY

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#### Housing Nantucket

*Financial Manager*

Nantucket, MA  
December 2010 – Present

- Develop and maintain all aspects of business accountancy and financial planning
- Organize and coordinate capital improvements and routine maintenance with subcontractors
- Process payroll, retirement plans, state and federal filings
- Manage twelve units for Nantucket Education Trust and report to the Board of Directors

#### Work Achievements

- Successfully refinanced portfolio of mortgages to reduce cost
- Achieved and maintained full occupancy of rental units in the first six months of employment
- Back populated over three years of data into QuickBooks and prepared financial statements for audit
- Reduced overhead expenses through detailed review of financial statements and successful negotiations with vendors

#### AGroup Real Estate

*Accountant/Assistant President - Internship*

New York, NY  
September 2009 – March 2010

- Handled accounts receivables, made deposits, performed data entry and some clerical duties
- Established and maintained client's files to include all invoices, receipts, and transactions

#### IRS (Internal Revenue Service)

*Tax Assistant, Internship*

St. Louis, MO  
January 2007 – April 2007

- Participated in one-month intensive Taxation Seminar focused on federal and state taxes, including the principles of income recognition, business and non-business expense deduction, and the concept of capital gains and losses
- Created, analyzed, and summarized over 100 individual tax return forms
- Calculated taxable income and net tax liability as well as determined the correct tax return form to user and complete the appropriate form

### EDUCATION

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#### Berkeley College

*Bachelor of Business Administration Degree*

Date of graduation: March 2010

Major: *Accounting. Graduated with honors*

New York, NY  
September 2007 – March 2010

#### St. Louis Community College at Meramec

Major: *Banking and Financial Services*

St. Louis, MO  
January 2006 – June 2007

#### South-West University of Blagoevgrad

Major: *Finance*

Bulgaria  
September 2002 – May 2005

### ADDITIONAL

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#### Achievements & Activities

- Recognized from IRS (Internal Revenue Service) for outstanding public service
- Earned six hours of CE credits for Project Manager
- Passed New York Real Estate Salesperson Exam

#### Skills

- Computer Proficiency: Microsoft Excel, Microsoft Word, Microsoft PowerPoint, QuickBooks

# **ATTACHMENT 7**

Development Pro Forma

20 Year Operating Cash Flow

## 6 Fairgrounds - Nantucket

Sponsor/Developer: Women's Institute

PROJECT DATA				UNIT MIX					
Total Number of Units			64	Affordability	# of Units	% of Units	Bedrooms	# of Units	
Residential Square Footage			61,554	30% AMI	2	3%	0	8	
Commercial Square Footage			-	50% AMI	11	17%	1	24	
Parcel Size				60% AMI	0	0%	2	24	
Number of Parking Spaces			71.00	80% AMI	5	8%	3	7	
Assessors Parcel Number			83+84	100% AMI	11	17%	4	0	
Number of Stories:	2	Zoning:		110% AMI	34	53%	Mgr 2	1	
Acresage:	2.87	Density:	22.33	140% AMI	0	0%			
				Mgr	1	0%			
DEVELOPMENT BUDGET				PROJECT INCOME					
Description	% TDC	Per Unit	Estimate	Unit Size	Population	Sq. Ft	of Units	Rent	Income
Land SF:	124,872	1,000	64,000	Studio					
Acquisition Costs		8	500	30% Median		500	0	569	0
Total Acquisition	0.2%	1,008	64,500	50% Median		500	2	831	19,944
Construction / Rehabilitation	72.2%	298,152	19,081,740	60% Median		500	0	996	0
Hard Cost Contingency	5.4%	22,361	1,431,131	80% Median		500	1	1,328	15,936
Architecture and Engineering	5.7%	23,355	1,494,722	100% Median		500	0	1,660	0
Survey & Permits	0.2%	969	62,000	110% Median		500	5	1,826	109,560
Financing Costs	2.6%	10,768	689,158	140% Median		500	0	1,992	0
General Development Costs	2.2%	9,157	586,020	<i>Subtotal Studio Units</i>			8		145,440
Other Costs	0.3%	1,094	70,000	1 Bedroom					
Soft Cost Contingency	0.5%	2,267	145,095	30% Median		600	1	569	6,828
Reserves	2.5%	10,397	665,412	50% Median		600	5	890	53,400
Developer Fee & Costs	4.0%	16,540	1,058,535	60% Median		600	0	1,138	0
Developer Overhead	4.0%	16,540	1,058,535	80% Median		600	1	1,518	18,216
Syndication Costs	0.1%	469	30,000	100% Median		600	5	1,897	113,820
<b>TOTAL DEV COSTS</b>	<b>100%</b>	<b>413,076</b>	<b>26,436,847</b>	110% Median		600	12	2,087	300,528
				140% Median		600	0	2,656	0
FINANCING SOURCES				<i>Subtotal 1 Bedroom Units</i>			24		492,792
Source	% TDC	Per Unit	Total	2 Bedroom					
Owner's Equity	20%	84,419	\$5,402,805	30% Median		825	1	640	7,680
Perm First Mortgage	50%	206,098	\$13,190,280	50% Median		825	3	1,068	38,448
Commercial Loan	0%	0	\$0	60% Median		825	0	1,281	0
MassHousing	19%	78,125	\$5,000,000	80% Median		825	1	1,708	20,496
Brownfields/MassWorks	0%	0	\$0	100% Median		825	6	2,135	153,720
State - HSF	0%	0	\$0	110% Median		825	13	2,348	366,288
State - AHT	4%	15,625	\$1,000,000	140% Median		825	0	2,989	0
FHLB	0%	0	\$0	<i>Subtotal 2 Bedroom Units</i>			24		586,632
State - HOME/HIF/CBH	4%	15,625	\$1,000,000	3 Bedroom					
Deferred Dev Fee	3%	13,184	\$843,763	30% Median		1,050	0	711	0
<b>Total Sources</b>	<b>100%</b>	<b>413,076</b>	<b>\$26,436,847</b>	50% Median		1,050	1	1,233	14,796
<b>GAP</b>			<b>0</b>	60% Median		1,050	0	1,423	0
OPERATING EXPENSES				80% Median		1,050	2	1,898	45,552
Item	% EGI	Per Unit	Annual	100% Median		1,050	0	2,372	0
Administration	32%	2,519	161,198	110% Median		1,050	4	2,609	125,232
Utilities	16%	1,278	81,800	140% Median		1,050	0	3,320	0
Operating & Maintenance	22%	1,764	112,880	<i>Subtotal 3 Bedroom Units</i>			7		185,580
Taxes & Insurance	30%	2,344	150,000	Manager's Unit		825	1		
Service Expenses	0%	0	0	Subtotal Net Rentable		36,775			
<b>Total Operating</b>	<b>100%</b>	<b>7,904</b>	<b>505,878</b>	Common / Commercial Area		0			
Per month		659	42,157	<b>TOTAL</b>		<b>36,775</b>	<b>64</b>		<b>1,410,444</b>
Total Reserve Deposits		350	22,400						

### TRENDING ASSUMPTIONS

Rent Increase Rate - Tenant	2.5%
Rent Increase Rate - Operating Subsidy	2.5%
Vacancy Rate	5.0%
Operating Expense Increase	3.5%

5. SOURCES OF FUNDS

Tax Credit Rate 0.98

I PERMANENT SOURCES

	Equity/Grants	Amount	Annual Credit	Total Credit	Price	% Interest
81	Developer Equity					100%
82	Tax Credit Equity	5,402,805	551,307	-		0
84						
Total Equity		5,402,805				

Calculation/Source

Credit Less than Basis?  
Yes

	Debt Financing	Amount	Rate	Term	Amort	Constant	Annual Payment	Max Perm Loan
	Perm First Mortgage	13,190,280	4.15%	40	40	5.128%	676369.6667	13,190,279.55
	Commercial Loan	0	6.00%	20	30	7.195%	0	
Total Debt		13,190,280						

	Soft Debt	Amount	Rate	Term	Amort
	MassHousing	5,000,000			
	Brownfields/MassWorks				
	HSF				
	MAHTF	1,000,000			
	FHLB				
	HIF/FCF/CATNHP	1,000,000			
	Deferred Dev Fee	843,763			
Total Soft Debt					

Per unit Basis  
84,419

828000

CBH Calc

TDC/unit 413,076  
50% TDC/unit 206,538  
3 units 619,614

Total Sources 26,436,847  
Total Uses \$26,436,847  
Surplus (Gap) (\$0)

FHLB  
Subsidy amount -  
13,141,325 Subsidy per unit -  
State  
Subsidy amount 2,000,000  
Subsidy per unit 31,250.00  
300 bp over LIBOR LIBOR 0.25 as of 4/7/11

II CONSTRUCTION/PREDEVELOPMENT SOURCES

	Construction Loan	Amount	Rate	Term (Months)	Avg % Outstanding
102	Construction Loan	12,500,000	4.15%	14	60%
Total Const					

	Predevelopment Loans	Amount	Rate	Term (Months)	Avg % Outstanding
103	Acquisition		4.00%	24	100%
	Predevelopment	1,300,000	4%	24	30%
Total Predevelopment		1,300,000			

State Funds  
Subsidy amount 2,000,000  
Subsidy per unit 31,250.00

3. DEVELOPMENT BUDGET

0

*Input to Shaded Cells Only!*

*Italics = One Stop Line Items*

		Predevel.	Acquisition	Construction	Permanent	ITEM	TOTAL PROJECT COST	Per Unit	% of Total	Assumptions
1						<b>ACQUISITION</b>				
2	161					<i>Acquisition: Land</i>	64,500	1,008	0%	
3						<b>Land Cost</b>	<b>64,000</b>	<b>1,000</b>	<b>0%</b>	
4						Legal Fees	500	8	0%	
5						Broker Fees		-	0%	
6						Option Costs		-	0%	
7						Holding Costs		-	0%	
8								-	0%	
9	162					<i>Acquisition: Building</i>	0	-	0%	
10	163					<b>Total Acquisition Cost</b>	<b>64,500</b>	<b>1,008</b>	<b>0%</b>	
11						<b>CONSTRUCTION / REHABILITATION</b>				
12	164					<i>Direct Construction Budget</i>	19,081,740	298,152	72%	
13						Site Improvements	0	-	0%	
14						Site prep		-	0%	
15						landscape		-	0%	
16						Off-Site improvements		-	0%	
17						Demolition		-	0%	
18						Residential	19,081,740	298,152	72%	
19						Residential Units	\$310 \$19,081,740	298,152	72%	
20						Common Areas		-	0%	
21						Escalation Factor		-	0%	
22						Commercial	0	-	0%	
23						Shell Construction		-	0%	
24						Tenant Improvements (only items we are paying for)		-	0%	
169						Environmental Mitigation	0	-	0%	
170						Haz mat mitigation - structures (asbestos, lead)		-	0%	
171						Haz mat mitigation - soil		-	0%	
172						Pest extermination		-	0%	
25						Parking	0	-	0%	
26						Structure		-	0%	
27						On-grade		-	0%	
28						Site Furnishings		-	0%	
29						General Requirements		-	0%	included in construction costs
30						Contractor Overhead		-	0%	included in construction costs
31						Contractor Profit		-	0%	included in construction costs
32	165					<i>Construction Contingency</i>	1,431,131	22,361	7.5%	5%
33	166					<b>Total Const. / Rehab. Costs</b>	<b>20,512,871</b>	<b>320,514</b>	<b>78%</b>	
34						<b>ARCHITECTURE AND ENGINEERING</b>				
35						Architecture		-	0%	
36						Feasibility studies		-	0%	
37						Design SD/DD/CD/Bid	7.0% 1,335,722	20,871	5%	
38						Printing/Reimbursables	5,000	78	0%	
39						Add'l services	25,000	391	0%	
40						Engineering	129,000	2,016	0%	
41						Mechanical (if not in arch contract)		-	0%	
42						Electrical (if not in arch contract)		-	0%	
43						Plumbing (if not in arch contract)		-	0%	
44						Structural (if not in arch contract)		-	0%	
45						Landscape (if not in arch contract)		-	0%	
46						Civil	40,000	625	0%	Estimate
47						Architect Peer Review Consultant		-	0%	
48						Green Building Consultant	64,000	1,000	0%	
49						Other Engineering (Specify)		-	0%	
50						Bldg. Assessment - Systems (incl. pests)		-	0%	







1. INCOME, RENTS & SQ. FT.  
0

RESIDENTIAL HOUSEHOLD INCOME			
Year	County	Area Median Income (4 person)	Income
2017	Nantucket	Area Median Income (4 person)	\$ 94,900

Note: This income table does not need to be filled in for the proforma to calculate. However, it is useful to have the income information easily available.

		Hshld Hrly		Hshld Hrly		Hshld Hrly		Hshld Hrly		Hshld Hrly		Hshld Hrly	
		30%	Wage	50%	Wage	60%	Wage	80%	Wage	100%	Wage	110%	Wage
1	Person	19,920	\$9.58	33,200	\$15.96	39,840	\$19.15	53,120	\$25.54	66,400	\$31.92	73,040	\$35.12
2	Person	22,770	\$10.95	37,950	\$18.25	45,540	\$21.89	60,720	\$29.19	75,900	\$36.49	83,490	\$40.14
3	Person	25,620	\$12.32	42,700	\$20.53	51,240	\$24.63	68,320	\$32.85	85,400	\$41.06	93,940	\$45.16
4	Person	28,470	\$13.69	47,450	\$22.81	56,940	\$27.38	75,920	\$36.50	94,900	\$45.63	104,390	\$50.19
5	Person	30,750	\$14.78	51,250	\$24.64	61,500	\$29.57	82,000	\$39.42	102,500	\$49.28	112,750	\$54.21
6	Person	33,050	\$15.89	55,050	\$26.47	66,060	\$31.76	88,080	\$42.35	110,100	\$52.93	121,110	\$58.23
7	Person	35,310	\$16.98	58,850	\$28.29	70,620	\$33.95	94,160	\$45.27	117,700	\$56.59	129,470	\$62.25
8	Person	37,590	\$18.07	62,650	\$30.12	75,180	\$36.14	100,240	\$48.19	125,300	\$60.24	137,830	\$66.26

MAX RENT (Gross per month; assume 1.5 persons/bdrm)

		30%	50%	60%	80%	100%	110%	120%	140%	PBV - FMR	Utility Allowance- PBV 10/1/09	Tax Credit Util Allowance- (source)
	SRO	498	831	996	1,328	1,660	1,826	1,992	2324		923	
	Studio	-	-	-	-	-	-	-	-			
1	Bdrm	569	890	1,138	1,518	1,897	2,087	2,277	2656		1261	
2	Bdrm	640	1,068	1,281	1,708	2,135	2,348	2,562	2989		1497	
3	Bdrm	711	1,233	1,423	1,898	2,372	2,609	2,847	3320		1905	
4	Bdrm	768	1,376	1,537	2,050	2,562	2,818	3,075	3587		2052	

APARTMENT MIX

	# of Apts	30%	50%	60%	80%	100%	110%	140%	% 3 & 4 Bdrms	Weighted Bdrm Units	Avg
Studio	8	-	2	-	1	0	5	-	-	-	-
1 Bdrm	24	1	5	0	1	5	12	0	-	-	6.192
2 Bdrm	24	1	3	0	1	6	13	0	-	-	7.381
3 Bdrm	7	-	1	0	2	0	4	0	0.109375	-	2.345
4 Bdrm	0	-	-	-	-	-	-	0	-	-	-
2 bdrm MGR	1	1	-	-	-	0	-	-	-	-	91
TOTAL	64	2	11	0	5	11	34	0	0.109375	10.9%	0.00% <- % FMR

RENT SCHEDULE

	# of Apts	Sq. Ft. Per Apt	Sq Ft Total	Gross Rent	Util Allow	Effective Rent	Net Mo. Rent	Total Ann'l Rent
30% Studio	-	500	-	-	0	-	-	-
1 Bdrm	1	600	600	569	-	569	569	6828
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	1	825	825	640	-	640	640	7680
2 Bdrm-PBV	-	825	-	1,497	-	1,497	-	0
3 Bdrm	-	1,050	-	711	-	711	-	0
3 Bdrm-PBV	-	1,050	-	1,905	-	1,905	-	0
4 Bdrm PBV	-	-	-	2,052	0	2,052	-	0
50% Studio	2	500	1,000	831	-	831	1,662	19944
1 Bdrm	5	600	3,000	890	-	890	4,450	53400
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	3	825	-	1,068	-	1,068	3,204	38448
2 Bdrm-PBV	-	825	825	1,497	-	1,497	-	0
3 Bdrm	1	1,050	1,050	1,233	-	1,233	1,233	14796
3 Bdrm-PBV	-	1,050	-	1,905	-	1,905	-	0
4 Bdrm	-	-	-	1,376	-	1,376	-	0
60% Studio	-	500	-	996	-	996	-	0
1 Bdrm	-	600	-	1,138	-	1,138	-	0
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	-	825	-	1,281	-	1,281	-	0
2 Bdrm-PBV	-	825	-	1,497	-	1,497	-	0
3 Bdrm	-	1,050.00	-	1,423	-	1,423	-	0
3 Bdrm-PBV	-	1,050.00	-	1,905	-	1,905	-	0
4 Bdrm	-	-	-	1,537	-	1,537	-	0
80% Studio	1	500	500	1,328	-	1,328	1,328	15936
1 Bdrm	1	600	600	1,518	-	1,518	1,518	18216
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	1	825	825	1,708	-	1,708	1,708	20496
2 Bdrm-PBV	-	825	-	1,497	-	1,497	-	0
3 Bdrm	2	1,050.00	2,100	1,898	-	1,898	3,796	45552
3 Bdrm-PBV	-	1,050.00	-	1,905	-	1,905	-	0
4 Bdrm	-	-	-	2,050	-	2,050	-	0
100% Studio	0	500	2,500	1,660	-	1,660	-	0
1 Bdrm	5	600	7,200	1,897	-	1,897	9,485	113820
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	6	825	10,725	2,135	-	2,135	12,810	153720
2 Bdrm-PBV	-	825	-	1,497	-	1,497	-	0
3 Bdrm	0	1,050.00	4,200	2,372	-	2,372	-	0
3 Bdrm-PBV	-	1,050.00	-	1,905	-	1,905	-	0
4 Bdrm	0	-	-	2,052	-	2,052	-	0
110% Studio	5	500	-	1,826	-	1,826	9,130	109560
1 Bdrm	12	600	-	2,087	-	2,087	25,044	300528
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	13	825	-	2,348	-	2,348	30,524	366288
2 Bdrm-PBV	-	825	-	1,497	-	1,497	-	0
3 Bdrm	4	1,050.00	-	2,609	-	2,609	10,436	125232
3 Bdrm-PBV	-	1,050.00	-	1,905	-	1,905	-	0
4 Bdrm	-	-	-	2,818	-	2,818	-	0
140% Studio	-	500	-	1,992	-	1,992	-	0
1 Bdrm	-	600	-	2,656	-	2,656	-	0
1 Bdrm-PBV	-	600	-	1,261	-	1,261	-	0
2 Bdrm	-	825	-	2,989	-	2,989	-	0
2 Bdrm-PBV	-	825	-	1,497	-	1,497	-	0
3 Bdrm	-	1,050.00	-	3,320	-	3,320	-	0
3 Bdrm-PBV	-	1,050.00	-	1,905	-	1,905	-	0
4 Bdrm	-	-	-	3,587	-	3,587	-	0
MGR 2 bdrm	1	825	825	-	-	-	-	-
TOTAL	64	-	36,775	-	\$0	\$0	-	\$1,410,444

Utility Allowance Assumptions*		
	Tenant	Owner
Heating		X
Electric		X

\*Current as of 2014

**OPERATING BUDGET**

Project Name:

Nantucket

Number of Units:

64
----

Prepared By:

Date:

EXPENSES	ANNUAL	MONTHLY	NOTES/COMMENTS
<b>ADMINISTRATIVE EXPENSES</b>			
Management Fee	\$70,522	\$5,877	5% of rental income
Manager Payroll	\$18,716	\$1,560	
Taxes-Payroll (9.5% of payroll)	\$3,228	\$269	
Legal	\$10,000	\$833	
Audit	\$15,000	\$1,250	
Advertising	\$1,792	\$149	
Telephone, Answ. Service, Fax & Computer Lines	\$2,400	\$200	
Office Supplies	\$2,800	\$233	
Bookkeeping/Accounting	\$7,500	\$625	
Bank Charges		\$0	
Postage		\$0	
Copier rental/Copying costs	\$2,100	\$175	
Books/Dues/Subscriptions		\$0	
Office Equipment-Maintenance, Repairs, Parts	\$1,400	\$117	
Computer Support/Software	\$700	\$58	
Fax Costs		\$0	
Bad Debts		\$0	
Concessions to Residents		\$0	
Credit Reports	\$500	\$42	
Other Renting Expenses		\$0	
Office Rent		\$0	
Office Salaries		\$0	
Manager Rent		\$0	
Travel (Mileage)		\$0	
Meetings		\$0	
Consulting		\$0	
Resident Services		\$0	
Other Professional Fees		\$0	
Data Processing		\$0	
Pagers		\$0	
DHCD Monitoring Fee	\$23,040	\$1,920	
Asset Management Fee		\$0	
Staff Development/Training/Conferences		\$0	
Misc. Administrative Expenses (specify)	\$1,500	\$125	
<b>TOTAL ADMINISTRATIVE EXPENSES</b>	<b>\$161,198</b>	<b>\$13,433</b>	
<b>UTILITIES EXPENSES</b>			
Electricity	\$28,800	\$2,400	
Natural Gas		\$0	
Water & Sewer	\$53,000	\$4,417	
<b>TOTAL UTILITIES EXPENSES</b>	<b>\$81,800</b>	<b>\$6,817</b>	
<b>OPERATING &amp; MAINT. EXPENSES</b>			
Maintenance Payroll	\$16,000	\$1,333	
Janitor/Cleaning Contract		\$0	
Janitor Payroll	\$16,000	\$1,333	
Janitor Rent		\$0	
Maint. Equip. & Tools-Purch. & Repair	\$6,500	\$542	
Grounds Supplies	\$3,500	\$292	
Security Repair/Supplies		\$0	
Maintenance Contract	\$11,760	\$980	
Janitor/Cleaning Supplies		\$0	
Interior Paint/Decor Payroll		\$0	
Garbage/Rubbish Removal	\$6,300	\$525	
Snow & Ice Removal	\$8,960	\$747	
Exterminating Contract	\$3,360	\$280	

**OPERATING BUDGET**

Project Name:

Nantucket

Number of Units:

64
----

Prepared By:

Date:

EXPENSES	ANNUAL	MONTHLY	NOTES/COMMENTS
Exterminating Supplies		\$0	
Security Payroll		\$0	
Security Contract		\$0	
Fire Protection		\$0	
Grounds Payroll		\$0	
Grounds Contract	\$8,400	\$700	
Maintenance Rent		\$0	
Maintenance Supplies		\$0	
Elevator Maintenance & Contracts		\$0	
HVAC Repairs & Contract	\$9,600	\$800	
Pool Maintenance		\$0	
Interior Paint/Decor Contract		\$0	
Interior Paint/Decor Supplies		\$0	
Painting Exterior		\$0	
Window Covering-Purchase & Cleaning		\$0	
Vehicles/Tractors Maint. & Repair, Gasoline		\$0	
Storage Rental		\$0	
Replacement Reserve Eligible Expenses	\$21,000	\$1,750	
Miscellaneous Operating & Maintenance	\$1,500	\$125	
<b>TOTAL OPERATING &amp; MAINT. EXPENSES</b>	<b>\$112,880</b>	<b>\$9,407</b>	
<b>TAXES &amp; INSURANCE</b>			
Taxes-Personal Property		\$0	
Taxes-Real Estate	\$85,000	\$7,083	
Taxes-Other		\$0	
Insurance/Property & Liability	\$65,000	\$5,417	
Insurance/Fidelity Bond		\$0	
Insurance/Workers Comp		\$0	
Insurance/Health & Dental		\$0	
Other Finance		\$0	
Insurance/Disability (3% of payroll)		\$0	
Retirement (4% of payroll)		\$0	
Other Insurance	\$0	\$0	
<b>TOTAL TAXES &amp; INSURANCE</b>	<b>\$150,000</b>	<b>\$12,500</b>	
<b>SERVICE EXPENSES</b>			
Registered Nurse Payroll		\$0	
Recreation & Rehab.		\$0	
Other Service Expense	\$0	\$0	
Resident Services Salary		\$0	
Resident Services Supplies		\$0	
Resident Services Misc. Expenses		\$0	
<b>TOTAL SERVICE EXPENSES</b>	<b>\$0</b>	<b>\$0</b>	
<b>TOTAL EXPENSES</b>	<b>\$505,878</b>	<b>\$42,157</b>	

**Operating Expense Per Unit**      \$7,904.35

Operating Expense excl mgmt fee      \$435,356

per unit/per year      \$6,802.44

**2. OPERATING INCOME, EXPENSE & CASH FLOW PROJECTION**

Project Name: Nantucket  
Total Units: 64

OPERATING INCOME	Inflation Factor	Initial Year		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
		Per Month	Per Unit																					
RENT																								
Resident	2.5%	117,537	22,038	1,410,444	1,445,705	1,481,848	1,518,894	1,556,866	1,595,788	1,635,683	1,676,575	1,718,489	1,761,451	1,805,488	1,850,625	1,896,890	1,944,313	1,992,920	2,042,743	2,093,812	2,146,157	2,199,811	2,254,807	2,311,177
Commercial 1	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Commercial 2	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gross Rental Income		117,537	22,038	1,410,444	1,445,705	1,481,848	1,518,894	1,556,866	1,595,788	1,635,683	1,676,575	1,718,489	1,761,451	1,805,488	1,850,625	1,896,890	1,944,313	1,992,920	2,042,743	2,093,812	2,146,157	2,199,811	2,254,807	2,311,177
OTHER INCOME: Laundry		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
OTHER INCOME:		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GROSS INCOME		117,537	22,038	1,410,444	1,445,705	1,481,848	1,518,894	1,556,866	1,595,788	1,635,683	1,676,575	1,718,489	1,761,451	1,805,488	1,850,625	1,896,890	1,944,313	1,992,920	2,042,743	2,093,812	2,146,157	2,199,811	2,254,807	2,311,177
VACANCY LOSS																								
Resident	5.0%	(5,877)	(1,102)	(70,522)	(72,285)	(74,092)	(75,945)	(77,843)	(79,789)	(81,784)	(83,829)	(85,924)	(88,073)	(90,274)	(92,531)	(94,845)	(97,216)	(99,646)	(102,137)	(104,691)	(107,308)	(109,991)	(112,740)	(115,559)
Commercial 1	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Commercial 2	50.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Vacancy Loss		(5,877)	(1,102)	(70,522)	(72,285)	(74,092)	(75,945)	(77,843)	(79,789)	(81,784)	(83,829)	(85,924)	(88,073)	(90,274)	(92,531)	(94,845)	(97,216)	(99,646)	(102,137)	(104,691)	(107,308)	(109,991)	(112,740)	(115,559)
EFFECTIVE GROSS INCOME		111,660	20,936	1,339,922	1,373,420	1,407,755	1,442,949	1,479,023	1,515,999	1,553,898	1,592,746	1,632,565	1,673,379	1,715,213	1,758,094	1,802,046	1,847,097	1,893,274	1,940,606	1,989,121	2,038,849	2,089,821	2,142,066	2,195,618
OPERATING EXPENSES																								
Administration	3.5%	13,433	2,519	161,198	166,840	172,680	178,723	184,979	191,453	198,154	205,089	212,267	219,697	227,386	235,344	243,582	252,107	260,931	270,063	279,515	289,298	299,424	309,904	320,750
Utilities	3.5%	6,817	1,278	81,800	84,663	87,626	90,693	93,867	97,153	100,553	104,072	107,715	111,485	115,387	119,426	123,605	127,932	132,409	137,044	141,840	146,804	151,943	157,261	162,765
Operating & Maintenance	3.5%	9,407	1,764	112,880	116,831	120,920	125,152	129,532	134,066	138,758	143,615	148,641	153,844	159,228	164,801	170,569	176,539	182,718	189,113	195,732	202,583	209,673	217,012	224,607
Taxes & Insurance	3.8%	12,500	2,344	150,000	155,625	161,461	167,516	173,798	180,315	187,077	194,092	201,371	208,922	216,757	224,885	233,318	242,068	251,145	260,563	270,334	280,472	290,989	301,901	313,223
Service Expenses	2.5%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL OPERATING EXPENSES		42,157	7,904	505,878	523,959	542,687	562,084	582,176	602,987	624,542	646,869	669,994	693,947	718,758	744,456	771,075	798,645	827,203	856,783	887,422	919,158	952,029	986,078	1,021,345
RESERVES																								
Replacement Reserve	2.2%	1,867	350	22,400	22,893	23,396	23,911	24,437	24,975	25,524	26,086	26,660	27,246	27,846	28,458	29,084	29,724	30,378	31,046	31,729	32,427	33,141	33,870	34,615
Operating Reserve	2.2%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Reserve Deposits		1,867	350	22,400	22,893	23,396	23,911	24,437	24,975	25,524	26,086	26,660	27,246	27,846	28,458	29,084	29,724	30,378	31,046	31,729	32,427	33,141	33,870	34,615
Interest On Reserves	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NET OPERATING INCOME				811,644	826,568	841,672	856,954	872,410	888,037	903,832	919,792	935,911	952,185	968,610	985,179	1,001,887	1,018,727	1,035,693	1,052,777	1,069,970	1,087,264	1,104,651	1,122,118	1,139,657
AVAILABLE FOR DEBT SERVICE W/DSC	1.20			676,370	688,807	701,394	714,128	727,008	740,031	753,194	766,493	779,926	793,488	807,175	820,982	834,906	848,939	863,078	877,314	891,642	906,054	920,542	935,099	949,715
DEBT SERVICE																								
Debt Service: First Mortgage		56,364	10,568	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370
Debt Service: Comm Loan		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service		56,364	10,568	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370	676,370
Debt Service Coverage, First				1.20	1.22	1.24	1.27	1.29	1.31	1.34	1.36	1.38	1.41	1.43	1.46	1.48	1.51	1.53	1.56	1.58	1.61	1.63	1.66	1.68
Debt Service Coverage, Overall				1.20	1.22	1.24	1.27	1.29	1.31	1.34	1.36	1.38	1.41	1.43	1.46	1.48	1.51	1.53	1.56	1.58	1.61	1.63	1.66	1.68
NET CASH FLOW		11,273	2,114	135,274	150,198	165,303	180,584	196,040	211,667	227,463	243,422	259,541	275,815	292,240	308,809	325,517	342,358	359,323	376,407	393,600	410,895	428,281	445,749	463,288

# **ATTACHMENT 8**

Letters of Interest – Financial Institutions

ROCKPORT  
MORTGAGE  
CORPORATION

May 22, 2017

Women's Institute for Housing and Economic Development  
75 Charter Oak Avenue, Suite 1-200  
Hartford, CT 06106

RE: 6 Fairgrounds Road – Nantucket, MA  
Letter of Intent for HUD 221(d)(4) Financing

Dear Women's Institute:

This letter is to inform you that Rockport Mortgage (the "Lender") intends to support the new construction of the property located at 6 Fairgrounds Road in Nantucket (the "Premises") with a funding commitment via the HUD 221(d)(4) loan program. The Lender would provide a construction and permanent loan in the estimated amount of \$13,000,000 to be secured by a first lien Mortgage and Regulatory Agreement on the Premises, subject to our full underwriting and availability of funding from other sources.

The 221(d)(4) program is a non-recourse construction loan that rolls into a 40 year, self-amortizing loan. The construction loan is interest only and converts to a permanent loan without performance requirements. The construction to permanent loan is rate locked with a fixed interest rate before construction commences. Profit motivated, nonprofit motivated and public owners are eligible.

This Letter of Intent is subject to the following terms and conditions:

1. Borrower: Women's Institute Realty, Inc.
2. Estimated Loan amount: \$13,000,000
3. Estimated Interest rate: 4.15% + 0.35% mortgage insurance premium ("MIP") assuming an affordable housing property that meets the HUD definition of a project meeting at least the minimum LIHTC restrictions of 20% of units at 50% of AMU or 40% of units at 60% of AMI.
4. Additional funding: This loan is subject to the availability of additional project funding to meet any equity requirements.

Very sincerely yours,



Ellen Guelfi  
Vice President



Massachusetts Housing Finance Agency  
One Beacon Street, Boston, MA 02108

TEL: 617.854.1000 | FAX: 617.854.1091  
VP: 866.758.1435 | [www.masshousing.com](http://www.masshousing.com)

May 22, 2017

Ms. Betsy Crum  
Women's Institute for Housing and Economic Development  
15 Court Square, Suite 210  
Boston, MA 02108

Re: Town of Nantucket Workforce Affordable Rental Housing Development RFP

Dear Ms. Crum:

I am writing to confirm MassHousing's strong interest in working with your team to finance the development of 64 units of rental housing in Nantucket.

It is our understanding that the proposal is to build a new 64-unit rental housing development, including 13 low-income tax credit units, 50 workforce units, and one unit for the on-site manager. In support of the State's efforts to produce workforce housing units, to the extent that resources are available, MassHousing would consider providing up to \$100,000 of soft debt per workforce housing unit that is included in this project. We understand that you are seeking approximately \$12.5 million in construction/permanent financing and would be interested in working with you to secure this financing either through MassHousing or one of our lending partners, once all applicable project funding awards and approvals have been obtained, subject to normal and customary underwriting by the Agency. This letter does not constitute, nor shall be construed as, a financing commitment for the Project.

This project includes many elements that are consistent with MassHousing's goals and Strategic Plan, including creating new units of affordable and workforce housing in a high cost market, and the opportunity for us to work with a new borrower. We look forward to working with you to structure a financing package that best meets the needs of the development, subject, of course, to the availability of funds, and MassHousing underwriting and Board approval. We wish you success in obtaining the developer designation for this project, and hope that we will have an opportunity to work with you on the financing for this property.

Sincerely,

Cynthia Lacasse

Director of Rental Business Development

# ATTACHMENT 9

## Required Disclosures:

- Certificate of Non-Collusion
- Tax Compliance Certificate
- Disclosure of Beneficial Interest

**ATTACHMENT N (REQUIRED)**  
**DISCLOSURE STATEMENT FOR TRANSACTION WITH**  
**A PUBLIC AGENCY CONCERNING REAL PROPERTY**

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

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

(1) Real Property:

A certain parcel of land in Nantucket, Massachusetts shown as Lots 83 and 84, located at 6 Fairgrounds Road, Nantucket, containing three acres, more or less, shown on a plan of land entitled " \_\_\_\_\_ ", recorded with Nantucket County Registry of Deeds as Plan No. \_\_\_\_\_

(2) Type of Transaction, Agreement, or Document:

Lease of property by Town of Nantucket

(3) Public Agency Participating in Transaction:

Town of Nantucket, acting by and through its Board of Selectmen, Town & County Building, 16 Broad Street, Nantucket, Massachusetts 02554

(4) Disclosing Party's Name and Type of Entity (if not an individual):

(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):

NAME

RESIDENCE

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

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

*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.

ELIZABETH B. CRUM

Print Name of Disclosing Party (from Section 4, above)

  
Authorized Signature of Disclosing Party

5-22-2017

Date :

ELIZABETH B. CRUM, EXECUTIVE DIRECTOR

Print Name & Title of Authorized Signer



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

ATTACHMENT L (REQUIRED)

CERTIFICATE OF NON-COLLUSION

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

  
Signature of person signing bid or proposal  
5-22-2017  
Date  
ELIZABETH B. CRUM  
Please Print Name

WOMEN'S INSTITUTE FOR HOUSING  
Name of Business  
AND ECONOMIC DEVELOPMENT, INC.

**ATTACHMENT M (REQUIRED)**  
**TAX COMPLIANCE CERTIFICATE**

**TAX COMPLIANCE CERTIFICATION**

Pursuant to M.G.L. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and Concessionaires, and withholding and remitting child support.

04-2733078  
Federal Employer ID Number

WOMEN'S INSTITUTE FOR HOUSING &  
Name of Corporation

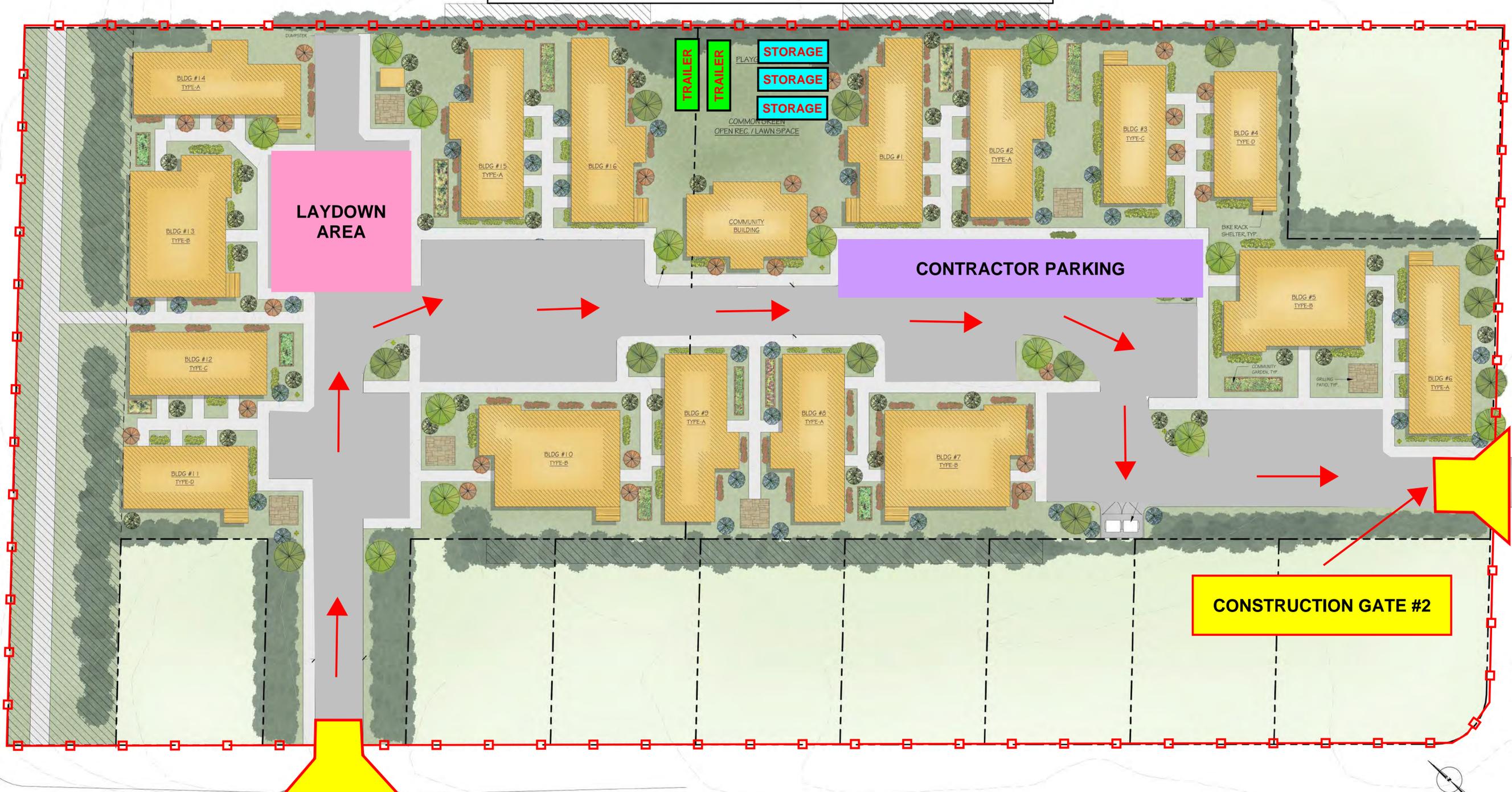
ECONOMIC DEVELOPMENT  
[Signature] 5-22-2017  
President's Signature Date

ELIZABETH B. CRUM  
Please Print Name

# **ATTACHMENT 10**

Construction Management Plan

# NANTUCKET FAIRGROUNDS LOGISTICS PLAN 05.22.17



1 SITE PLAN  
1" = 20'-0"

STAMP:  
**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
203 WILLOW STREET, SUITE A  
YARMOUTH, MA 02675  
PH 508-362-8882  
WWW.CFARCHITECTS.COM  
938 COURT STREET, UNIT #22  
PLYMOUTH, MA 02360  
PH 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
6 FAIRGROUNDS ROAD

TITLE:  
**CONCEPTUAL SITE PLAN**

DATE ISSUED: Issue Date  
REVISIONS:  
NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 1" = 20'-0"

DRAWING NO.:

**A0.1.0**

5/16/2017 2:16:07 PM  
Client: Fairgrounds Housing CF-41717-1802-V4

# **ATTACHMENT 11**

Proposed Development Schedule



# ATTACHMENT 12

Conceptual Design Drawings

**FAIRGROUNDS ROAD HOUSING  
6 FAIRGROUNDS ROAD  
NANTUCKET, MA**



**ARCHITECTS**

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**

203 WILLOW STREET SUITE A    93B COURT STREET, UNIT 22  
YARMOUTHPORT, MA. 02675    PLYMOUTH, MA. 02360  
TEL. (508) 362-8382  
WWW.CAPEARCHITECTS.COM

**CIVIL ENGINEERS & LAND SURVEYORS**

**Blackwell & Associates, Inc.**

20 Teasdale Circle, Nantucket, MA 02554  
TEL. (508) 228-9026  
WWW.Blackwellsurvey.COM

**HOUSING DEVELOPER/PROPOSER**

**Women's Institute for Housing and Economic Development**

15 Court Sq. Suite 210 Boston, MA 02108  
75 Charter Oak Ave. Suite 1-200 Hartford, CT 06106  
TEL. (860) 648-9000  
www.wihed.org

**CONSTRUCTION MANAGERS**

**Dellbrook/JKS**

15 Research Road, East Falmouth, MA 02536  
TEL. (508) 540-6226  
www.dellbrookjks.com

**SCHEDULE OF DRAWINGS**

**COVER SHEETS**

A-0.0	COVER SHEET
-------	-------------

**SITE PLAN**

L-1.1	CONCEPTUAL SITE # LANDSCAPE PLAN
L-1.2	ENLARGED CONCEPTUAL SITE # LANDSCAPE PLAN
L-1.3	PRELIMINARY SOLAR STUDY

**ARCHITECTURAL**

A-1.1	BUILDING TYPE "A" PLANS
A-1.2	BUILDING TYPE "A" ELEVATIONS
B-1.1	BUILDING TYPE "B" PLANS
B-1.2	BUILDING TYPE "B" ELEVATIONS
C-1.1	BUILDING TYPE "C" PLANS
D-1.1	BUILDING TYPE "D" PLANS
E-1.1	BUILDING TYPE "E" PLANS
F-1.1	TYPICAL BASEMENT FLOOR PLANS
G-1.1	COMMUNITY BUILDING FLOOR PLAN
H-1.1	TYPICAL UNIT PLANS STUDIO # ONE BEDROOM
H-1.2	TYPICAL UNIT PLANS TWO # THREE BEDROOM

**Issued for  
RESPONSE TO TOWN OF NANTUCKET RFP  
5/19/17**

### DEVELOPMENT DATA

LEASED LOT AREA	2.87 acres	124,872 SF
NUMBER OF PARKING SPACES	71 (1.1 PER UNIT) (.68 PER BEDROOM)	
NUMBER OF BUILDINGS	18 (16 RESIDENTIAL, 1 COMMUNITY, 1 MAINTENANCE SHED)	
NUMBER OF UNITS	64 (8 STUDIO, 24 ONE BEDROOM, 25 TWO BEDROOM, 7 THREE BEDROOM)	
NUMBER OF BEDROOMS	104	
NUMBER OF ACCESSIBLE UNITS	4 (1 STUDIO, 1 ONE BEDROOM, 1 TWO BEDROOM, 1 THREE BEDROOM)	
TOTAL SF OF RESIDENTIAL BUILDINGS	61,554 SF	
COMMUNITY BUILDING SF	1,660 SF	
MAINTENANCE SHED SF	80 SF	
TOTAL BUILDING SF OF DEVELOPMENT	63,294 SF	

### LEGEND

-  SITE LIGHTING LAMP POST
-  SHADE TREES
-  FLOWERING TREES
-  ORNAMENTAL FLOWERING SHRUBS AND PERENNIALS
-  COMMUNITY GARDEN
-  GRILLING PATIO
-  BIKE RACK SHELTER

FAIRGROUNDS ROAD



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 203 WILLOW STREET, SUITE A  
 YARMOUTH, MA 02075  
 PH 508-362-8382  
 WWW.CBAARCHITECTS.COM  
 938 COURT STREET, UNIT #22  
 PLYMOUTH, MA 02360  
 PH 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**CONCEPTUAL SITE & LANDSCAPE PLAN**

DATE ISSUED: 5/19/17  
 REVISIONS:  
 NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 1" = 20'-0"

DRAWING NO.:

**L-1.1**

1 CONCEPTUAL SITE & LANDSCAPE PLAN  
 1" = 20'-0"

5/11/2017 1:09:58 PM  
 Client: Fairgrounds Housing, 4.17.17, HQ02-04



STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**

203 WILLOW STREET, SUITE A  
YARMOUTHPORT, MA 02575  
2828

PH 508-362-8382  
FAX 508-362-  
www.cafarchitect.com

FAIRGROUNDS ROAD  
AFFORDABLE RENTAL HOUSING  
6 FAIRGROUNDS ROAD

TITLE:  
ENLARGED CONCEPTUAL SITE & LANDSCAPE PLAN

DATE ISSUED: 5/19/17

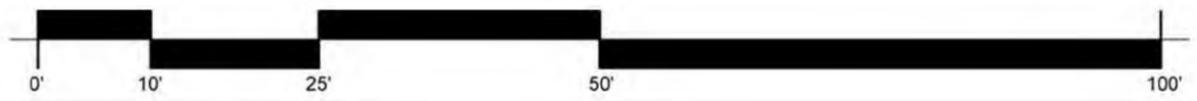
REVISIONS:

DRAWN BY:

DRAWING NO.:

L-1.2

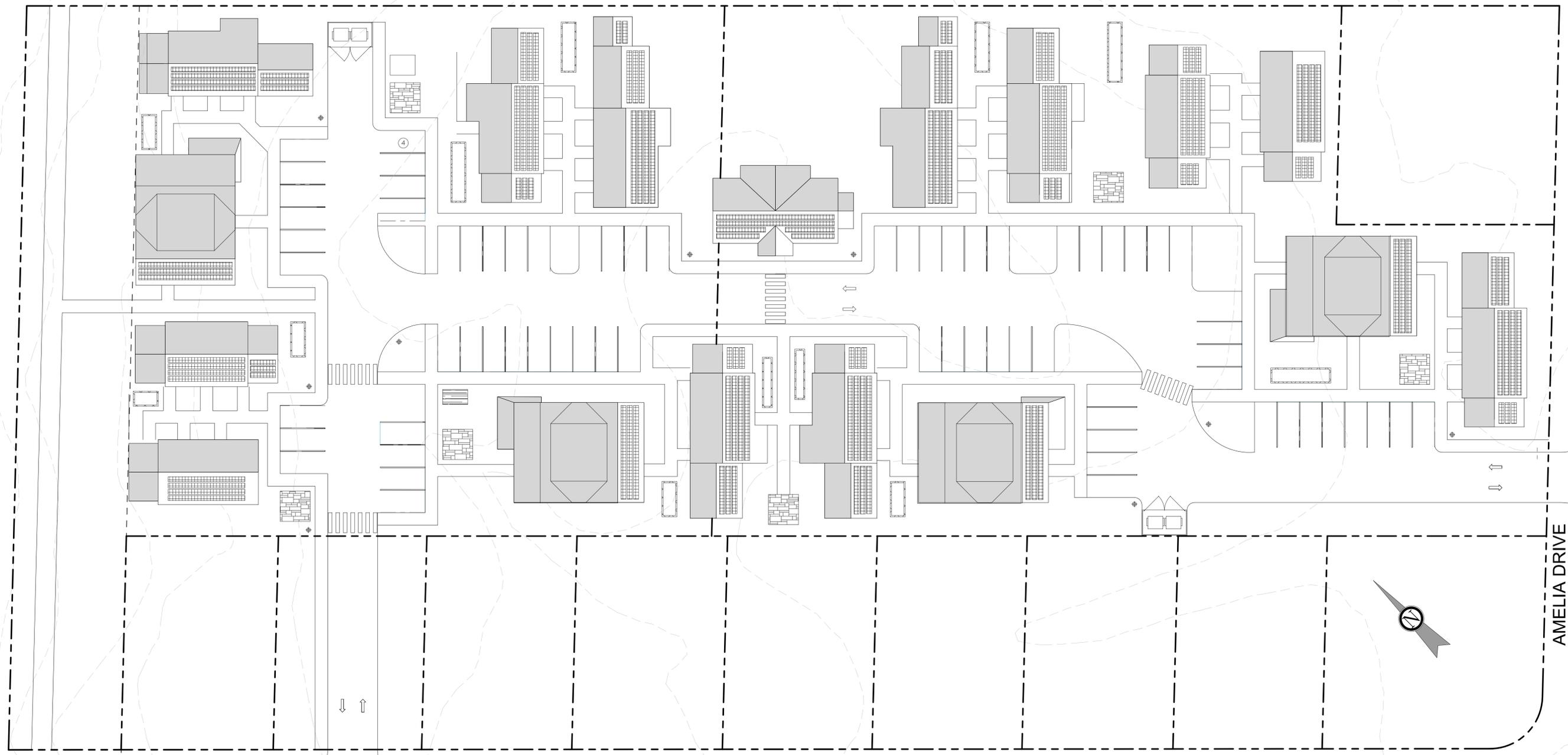
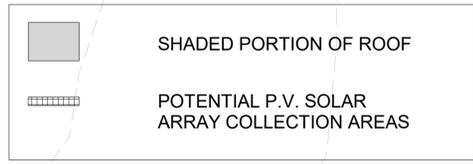
1 ENLARGED CONCEPTUAL SITE & LANDSCAPE PLAN  
1/16" = 1'-0"



5/18/2017 5:00:27 PM  
C:\Revit Files\Fairgrounds Housing CF\_4-17-17 -HUGO.rvt

FAIRGROUNDS ROAD

SOLAR STUDY KEY



**NOTE:**  
 THIS DRAWING IS PROVIDED TO CONVEY A CONCEPTUAL SOLAR PHOTOVOLTAIC LAYOUT ONLY. UPON AWARD, WE WILL CONDUCT A MORE DETAILED STUDY TO DETERMINE THE ECONOMIC FEASIBILITY OF THIS APPROACH

TICCOMA WAY

AMELIA DRIVE

1 PRELIMINARY P.V. SOLAR STUDY PLAN  
 1" = 20'-0"

STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
 203 WILLOW STREET, WARWICK, MA 02880  
 PH: 508-362-8382  
 WWW.CARARCHITECTS.COM  
 938 COURT STREET, UNIT # PLYMOUTH, MA 02860  
 PH: 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**PRELIMINARY SOLAR STUDY**

DATE ISSUED: 5/19/17

REVISIONS:  
 NO. DESCRIPTION DATE

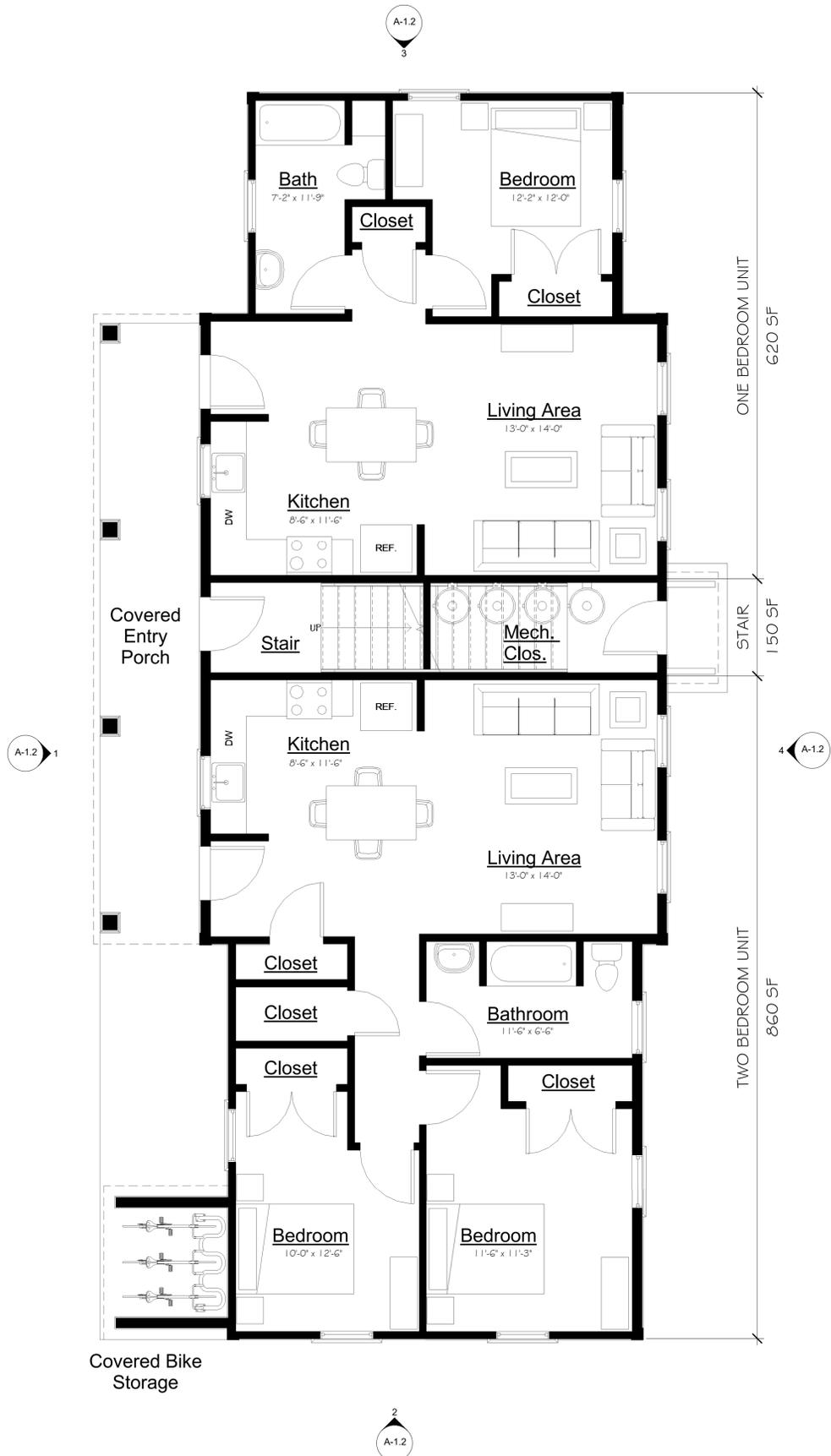
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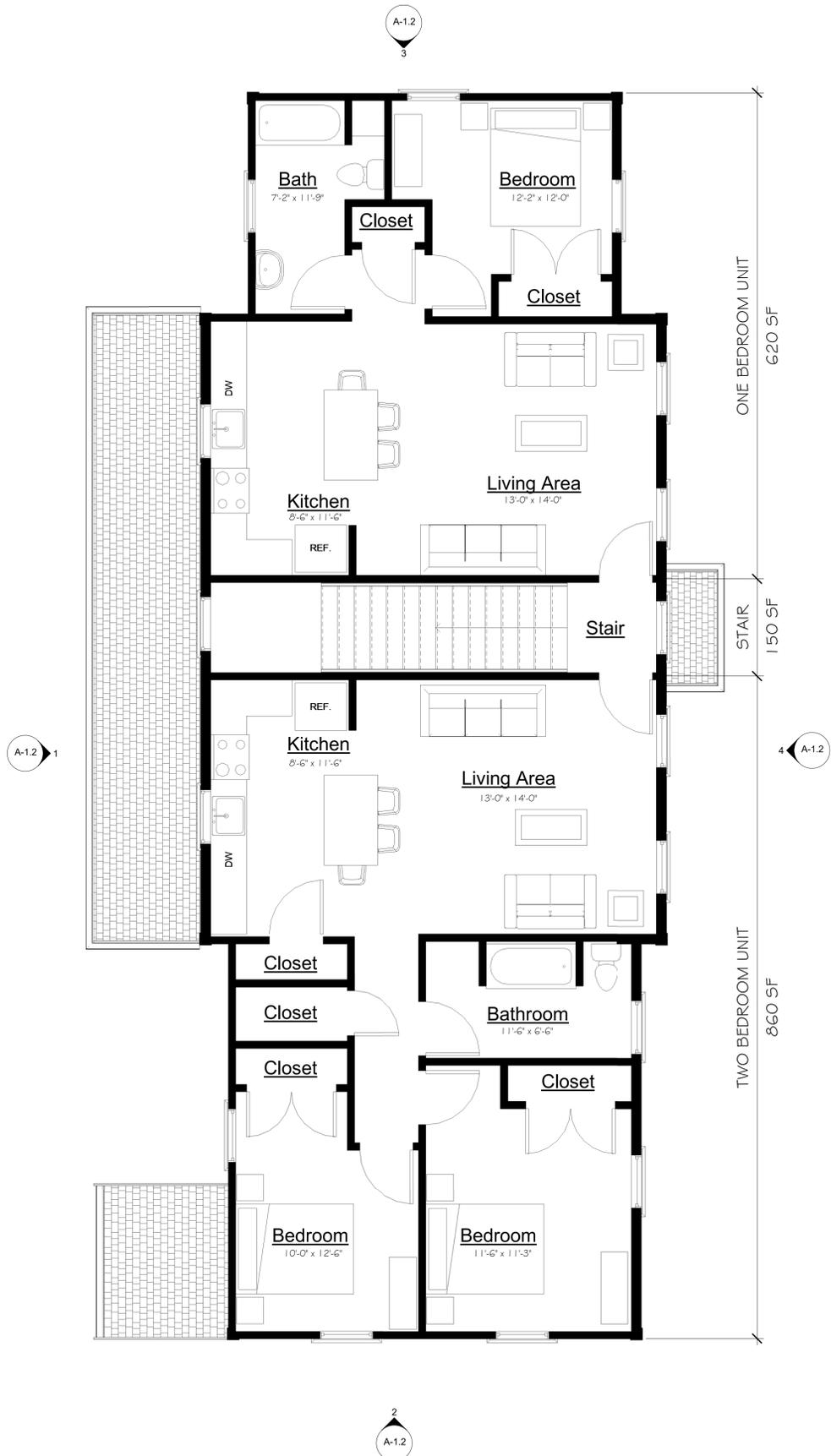
DRAWING NO.:

**L-1.3**

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1 1ST FLOOR - BUILDING TYPE "A"  
1/4" = 1'-0"



2 2ND FLOOR - BUILDING TYPE "A"  
1/4" = 1'-0"

STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
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 WARWICK, MA 02880  
 PH: 508-362-8382  
 WWW.CARARCHITECTS.COM

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**BUILDING TYPE "A" PLANS**

DATE ISSUED: 5/19/17

REVISIONS:  
 NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 1/4" = 1'-0"

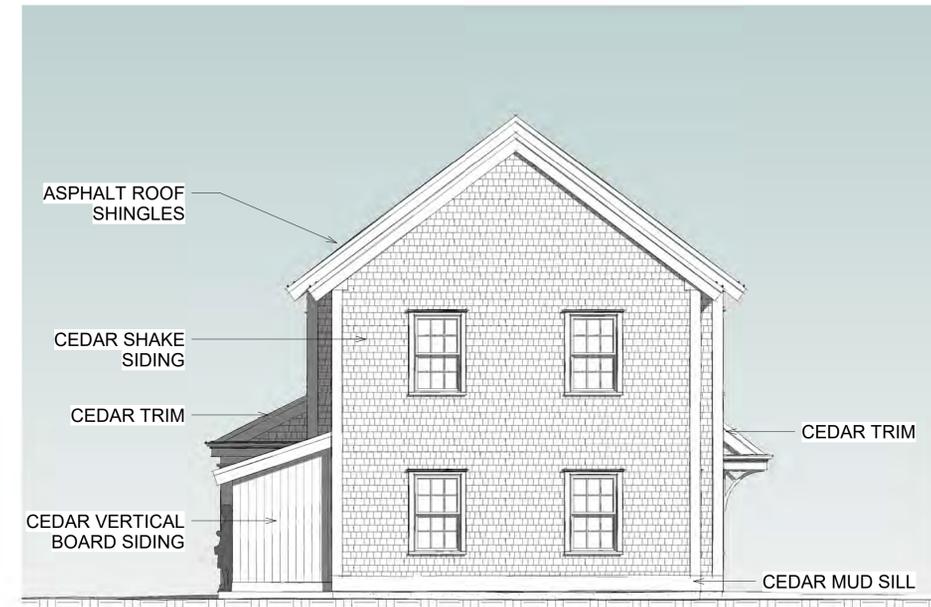
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1 BUILDING 'A' - FRONT ELEVATION  
3/16" = 1'-0"



2 BUILDING 'A' - RIGHT SIDE ELEVATION  
3/16" = 1'-0"



3 BUILDING 'A' - LEFT SIDE ELEVATION  
3/16" = 1'-0"



4 BUILDING 'A' - REAR ELEVATION  
3/16" = 1'-0"



5 BUILDING 'A' - PERSPECTIVE #1



6 BUILDING 'A' - PERSPECTIVE #2

STAMP:

BROWN LINDQUIST FENUCCIO & RABER  
ARCHITECTS, INC.  
938 COURT STREET, UNIT #  
PLYMOUTH, MA 02860  
203 WILLOW STREET,  
PLYMOUTH, MA  
PH: 508-362-8382  
WWW.CARFARCHITECTS.COM  
PH: 508-927-4127

FAIRGROUNDS ROAD WORKFORCE  
AFFORDABLE RENTAL HOUSING  
6 FAIRGROUNDS ROAD

TITLE:  
BUILDING  
TYPE "A"  
ELEVATIONS

DATE ISSUED: 5/19/17

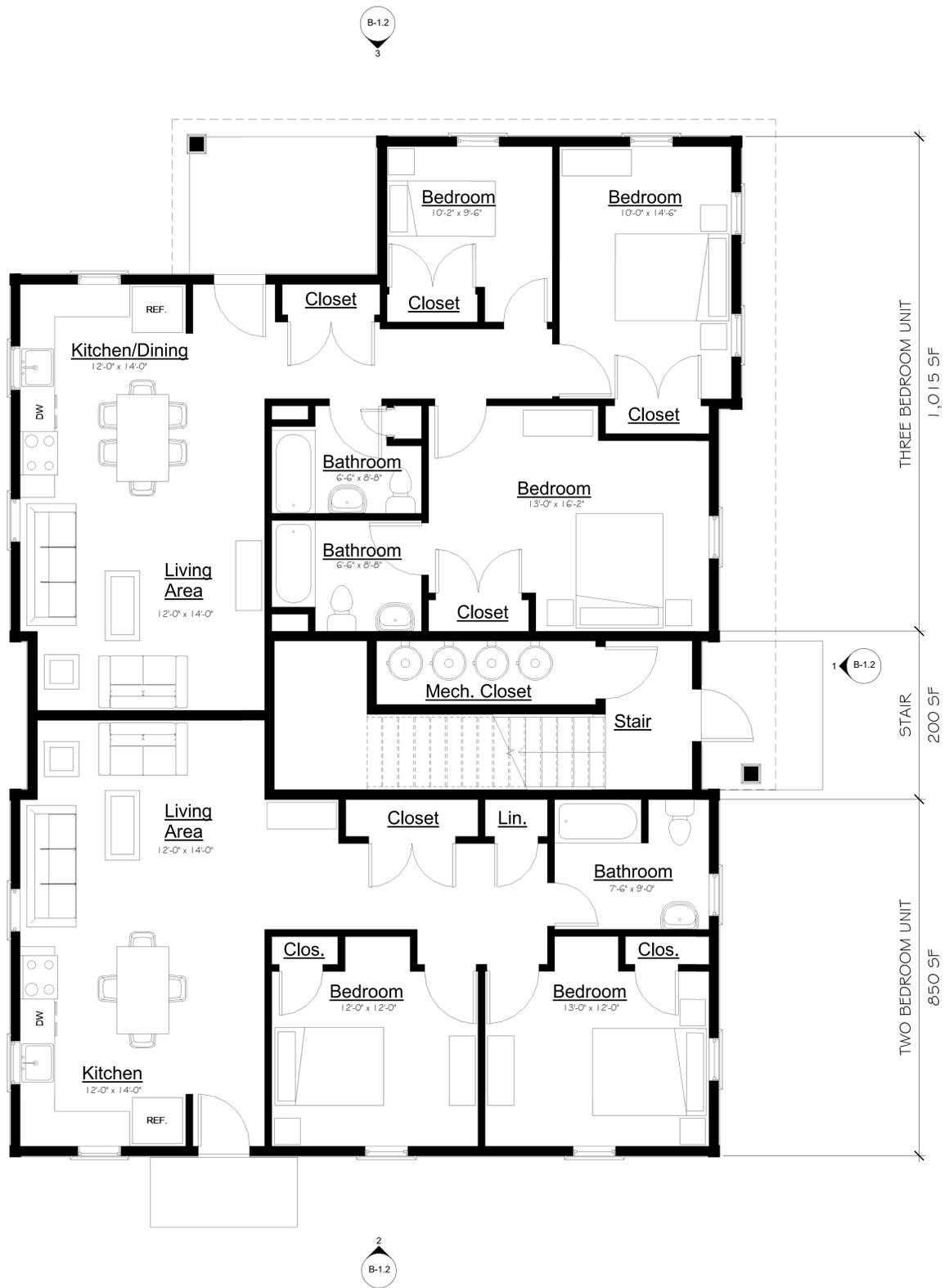
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NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 3/16" = 1'-0"

DRAWING NO.:

A-1.2



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1/4" = 1'-0"



2 2ND FLOOR - BUILDING TYPE "B"  
1/4" = 1'-0"

STAMP:  
BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.  
938 COURT STREET, UNIT #  
PLYMOUTH, MA 02980  
WWW.CARFARCHITECTS.COM  
PH 508-927-4127

FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING  
6 FAIRGROUNDS ROAD

TITLE:  
BUILDING TYPE "B" PLANS

DATE ISSUED: 5/19/17

REVISIONS:  
NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 1/4" = 1'-0"

DRAWING NO.:

B-1.1

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1 BUILDING 'B' - FRONT ELEVATION  
3/16" = 1'-0"



2 BUILDING 'B' - LEFT SIDE ELEVATION  
3/16" = 1'-0"



3 BUILDING 'B' - RIGHT SIDE ELEVATION  
3/16" = 1'-0"



4 BUILDING 'B' - REAR ELEVATION  
3/16" = 1'-0"



5 BUILDING 'B' - PERSPECTIVE #1



6 BUILDING 'B' PERSPECTIVE #2

STAMP:

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ARCHITECTS, INC.  
938 COURT STREET, UNIT #  
PLYMOUTH, MA 02660  
WWW.CARARCHITECTS.COM PH 508-927-4127  
203 WILLOW STREET,  
PLYMOUTH, MA  
PH 508-362-8382

FAIRGROUNDS ROAD WORKFORCE  
AFFORDABLE RENTAL HOUSING  
6 FAIRGROUNDS ROAD

TITLE:  
BUILDING  
TYPE "B"  
ELEVATIONS

DATE ISSUED: 5/19/17

REVISIONS:  
NO. DESCRIPTION DATE

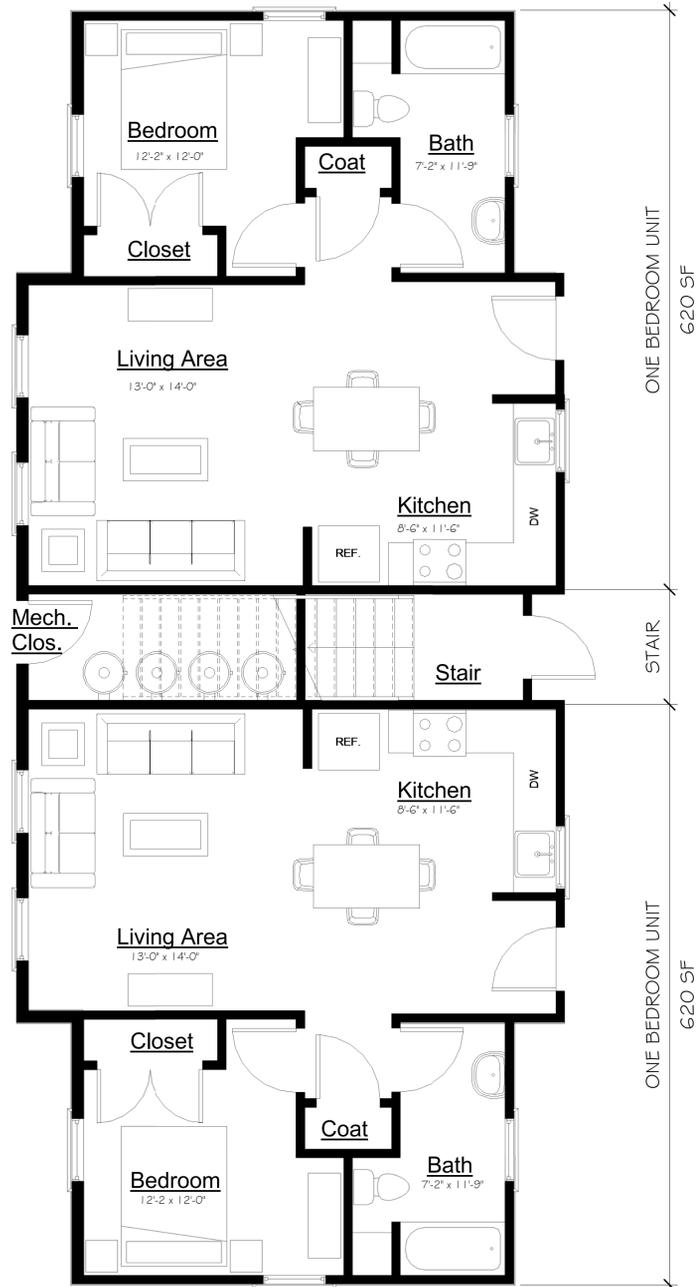
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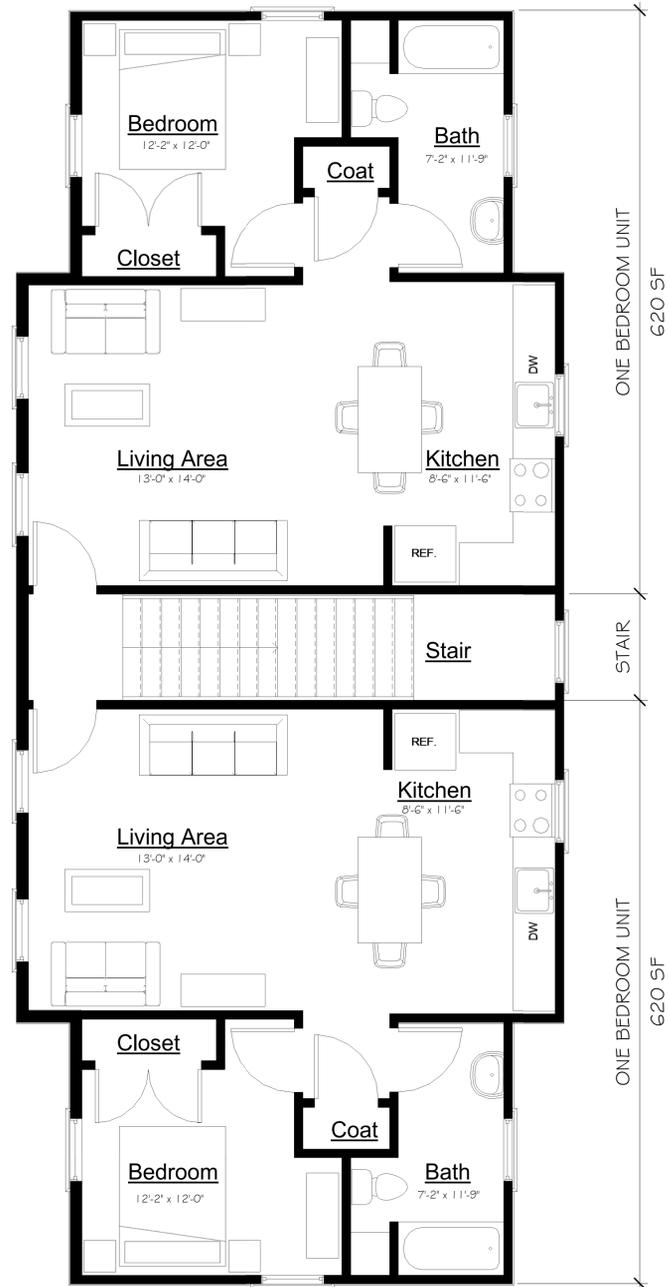
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B-1.2

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2 2ND FLOOR - BUILDING TYPE "C"  
1/4" = 1'-0"

STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
 938 COURT STREET, UNIT #  
 PLYMOUTH, MA 02860  
 WWW.GARARCHITECTS.COM PH 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**BUILDING TYPE "C" PLANS**

DATE ISSUED: 5/19/17

REVISIONS:  
 NO. DESCRIPTION DATE

DRAWN BY: Author

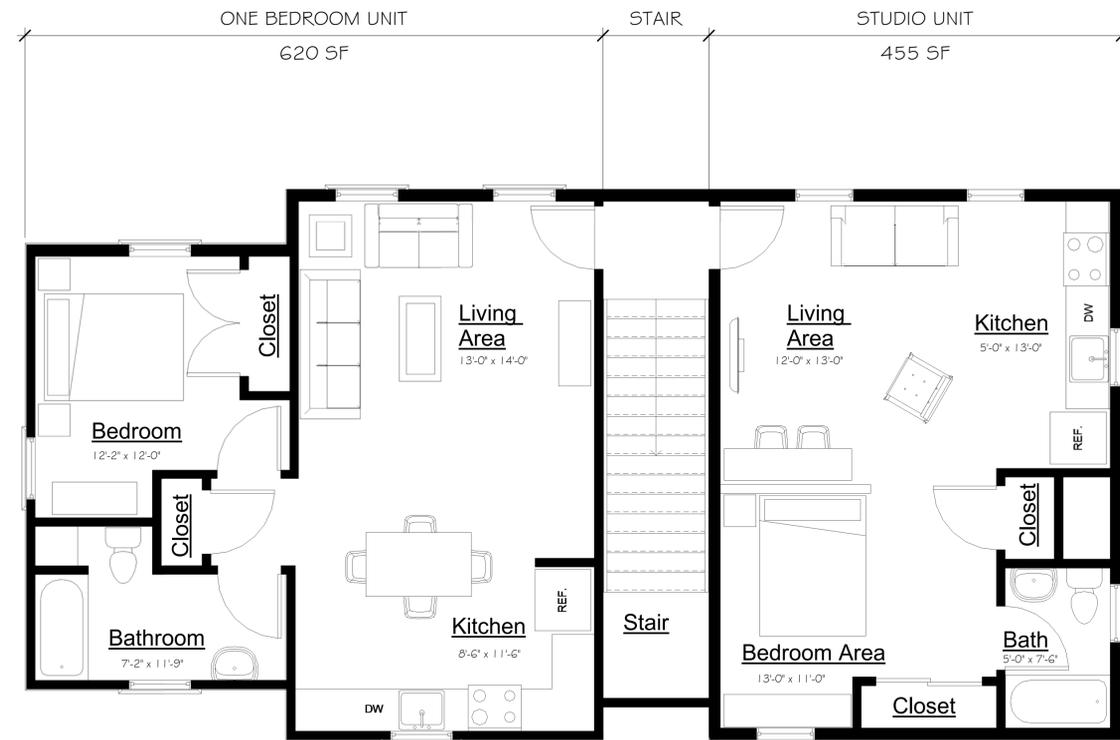
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DRAWING NO.:

**C-1.1**



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1/4" = 1'-0"



2 2ND FLOOR - BUILDING TYPE "D"  
1/4" = 1'-0"

STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
 203 WILLOW STREET,  
 PLYMOUTH, MA 02860  
 PH: 508-362-8382  
 WWW.CARFARCHITECTS.COM  
 938 COURT STREET, UNIT #  
 PLYMOUTH, MA 02860  
 PH: 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**BUILDING TYPE "D" PLANS**

DATE ISSUED: 5/19/17

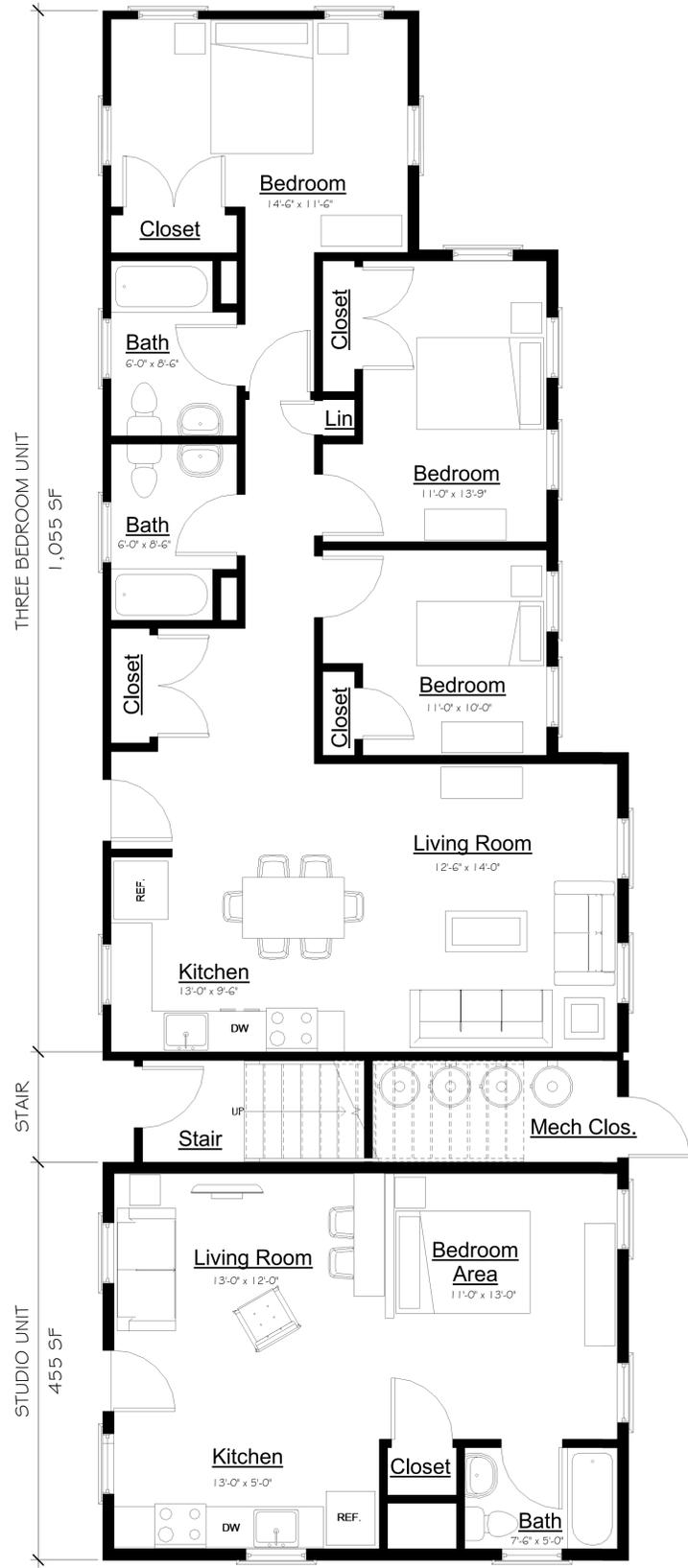
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 NO. DESCRIPTION DATE

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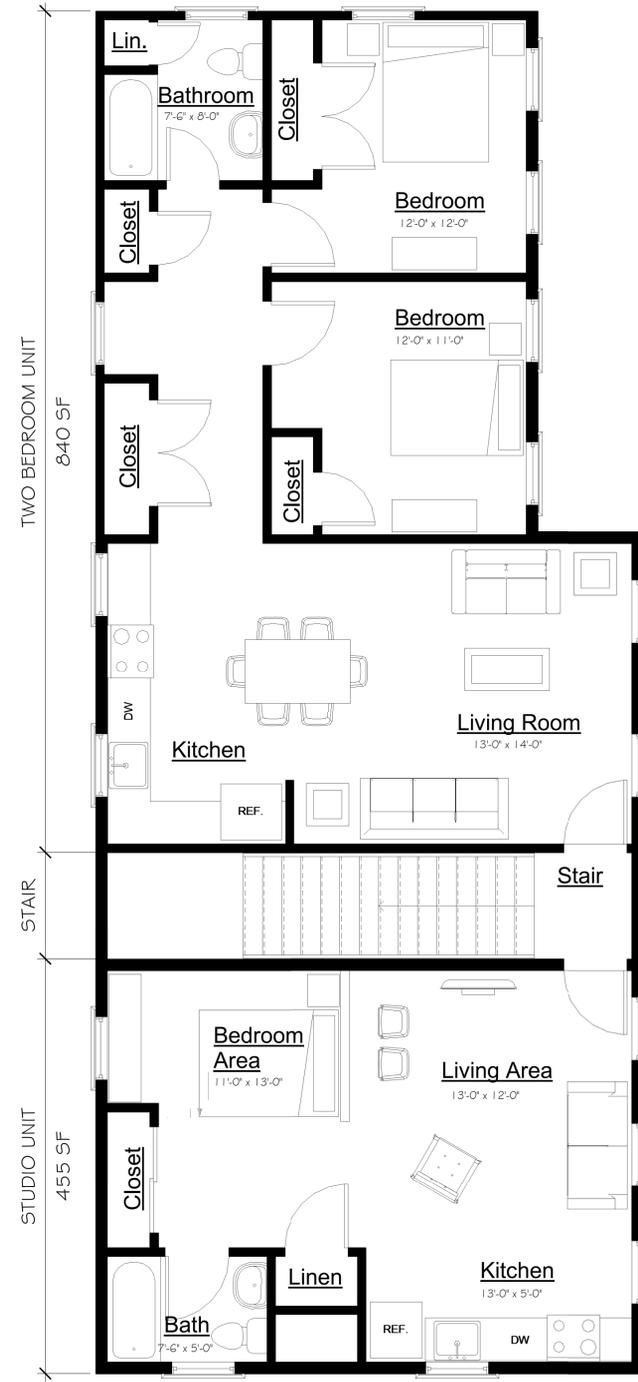
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DRAWING NO.:

**D-1.1**



1 1ST FLOOR - BUILDING TYPE "E"  
1/4" = 1'-0"



2 2ND FLOOR - BUILDING TYPE "E"  
1/4" = 1'-0"

STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
 203 WILLOW STREET,  
 LYNNPORT, MA  
 01903  
 PH: 508-362-8382  
 WWW.CARFARCHITECTS.COM

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**BUILDING TYPE "E" PLANS**

DATE ISSUED: 5/19/17

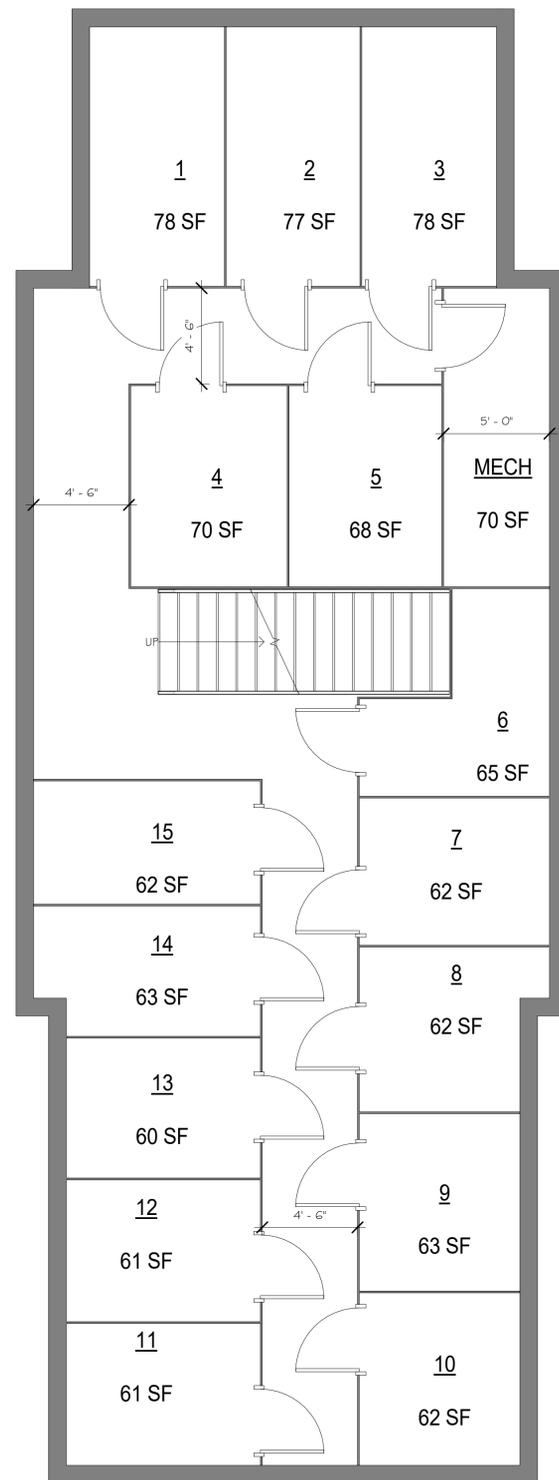
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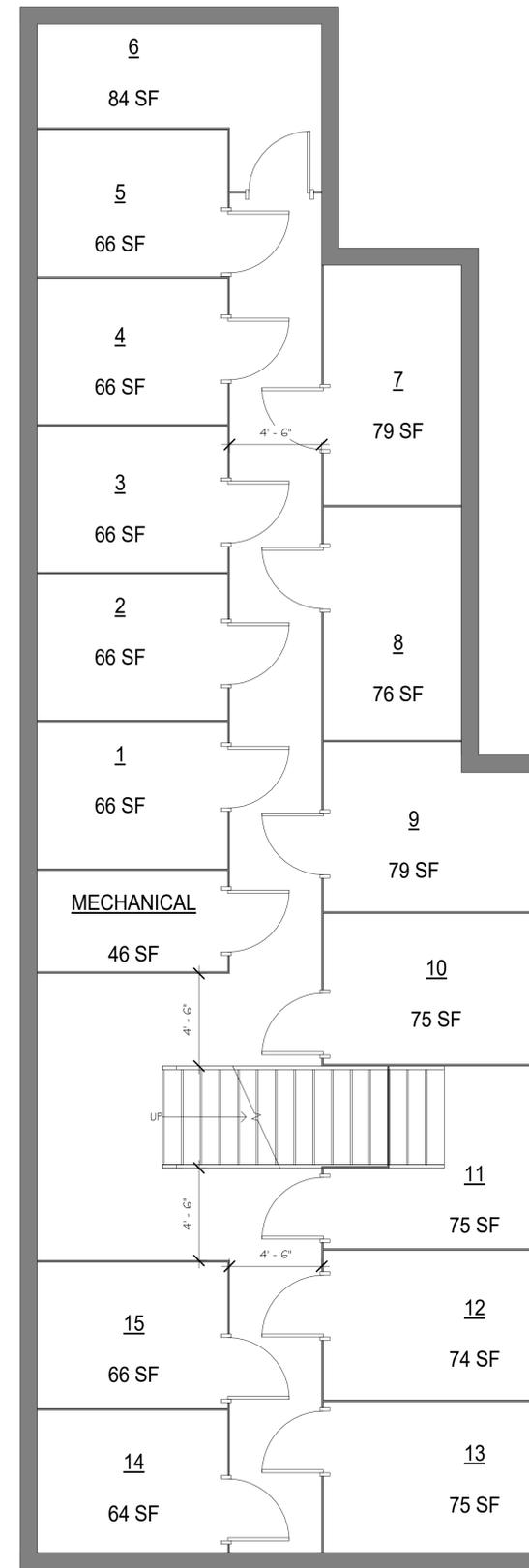
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DRAWING NO.:

**E-1.1**



1 00 LOWER LEVEL - TYPICAL BASEMENT BUILDING TYPE A  
1/4" = 1'-0"



2 00 LOWER LEVEL - TYPICAL BASEMENT BUILDING TYPE E  
1/4" = 1'-0"

STAMP:

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 938 COURT STREET, UNIT #  
 PLYMOUTH, MA 02860  
 PH: 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**TYPICAL BASEMENT FLOOR PLANS**

DATE ISSUED: 5/19/17

REVISIONS:  
 NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 1/4" = 1'-0"

DRAWING NO.:

**F-1.1**



1 COMMUNITY BUILDING FLOOR PLAN (1,660 SF)  
 1/4" = 1'-0"

STAMP:

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 WARWICK, MA 02880  
 PH: 508-362-8382  
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 PLYMOUTH, MA 02860  
 PH: 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**COMMUNITY BUILDING FLOOR PLAN**

DATE ISSUED: 5/19/17

REVISIONS:  
 NO. DESCRIPTION DATE

DRAWN BY: Author

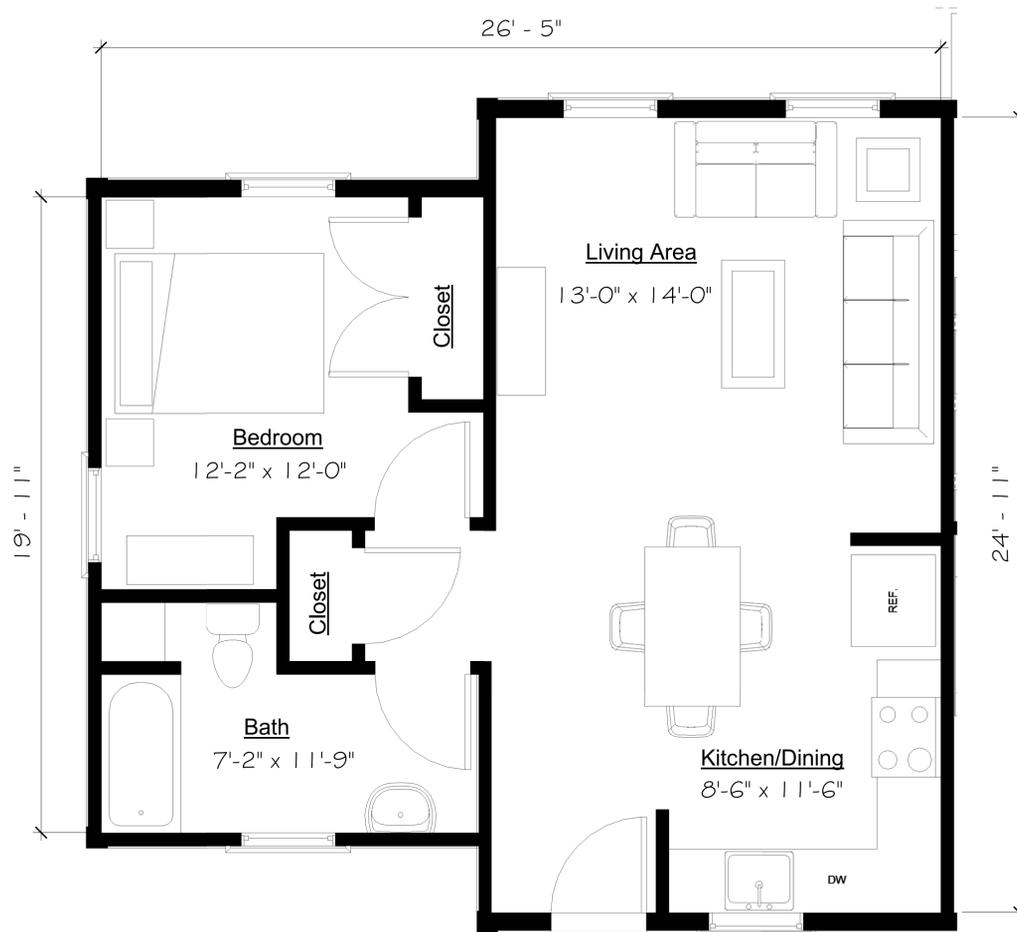
SCALE: 1/4" = 1'-0"

DRAWING NO.:

**G-1.1**



1 TYPICAL UNIT PLAN - STUDIO (+/- 455 SF)\*  
3/8" = 1'-0"



2 TYPICAL UNIT PLAN - ONE BEDROOM (+/- 620 SF)\*  
3/8" = 1'-0"

\*One unit of each type will be handicap accessible and designed in accordance with MAAB and ADA regulations.

STAMP:

**BROWN LINDQUIST FENUCCIO & RABER ARCHITECTS, INC.**  
 203 WILLOW STREET,  
 LYNNPORT, MA  
 PH: 508-362-8382  
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938 COURT STREET, UNIT #  
 PLYMOUTH, MA 02860  
 PH: 508-927-4127

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**TYPICAL UNIT PLANS STUDIO & ONE BEDROOM**

DATE ISSUED: 5/19/17

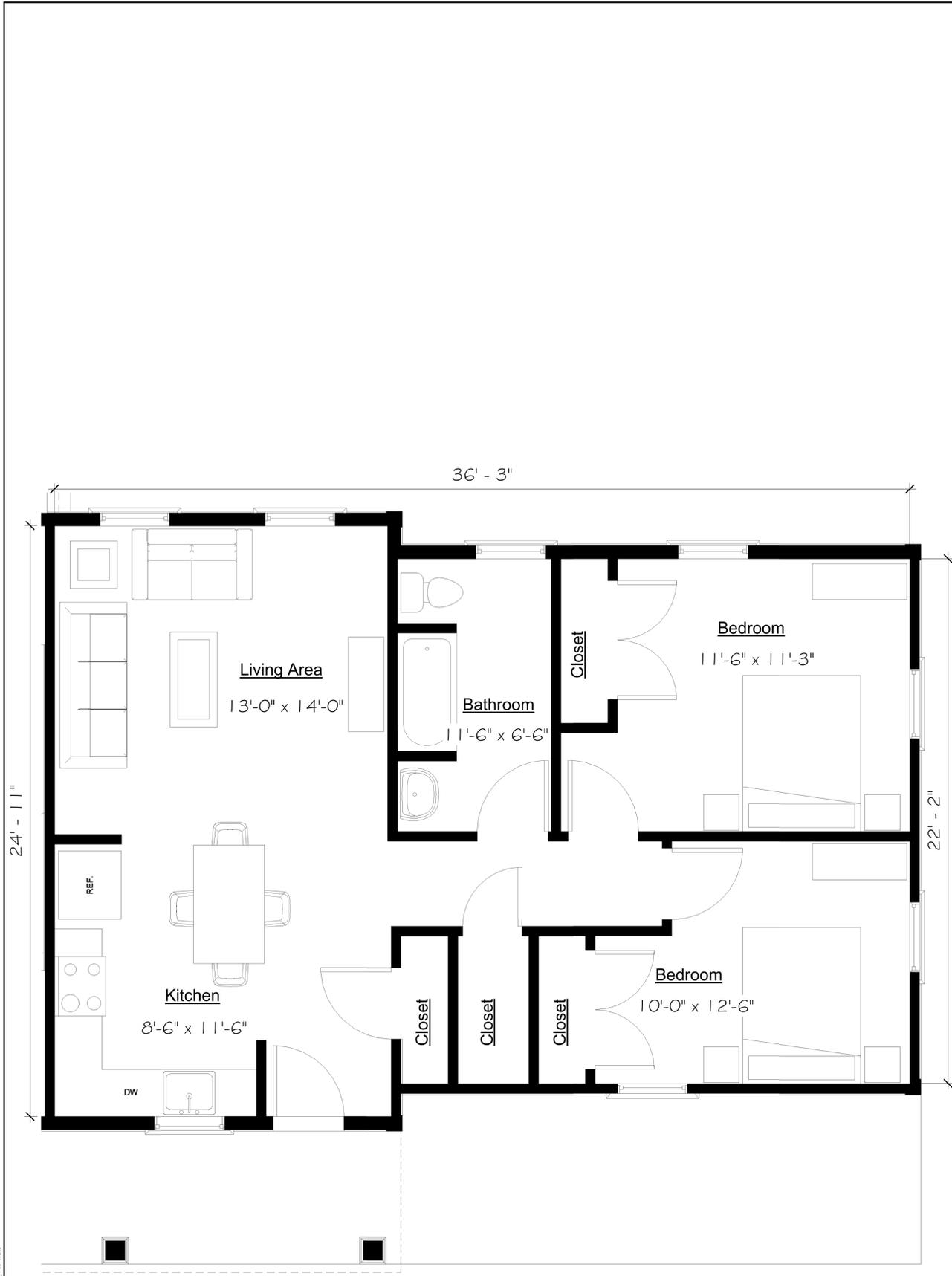
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DRAWN BY: Author

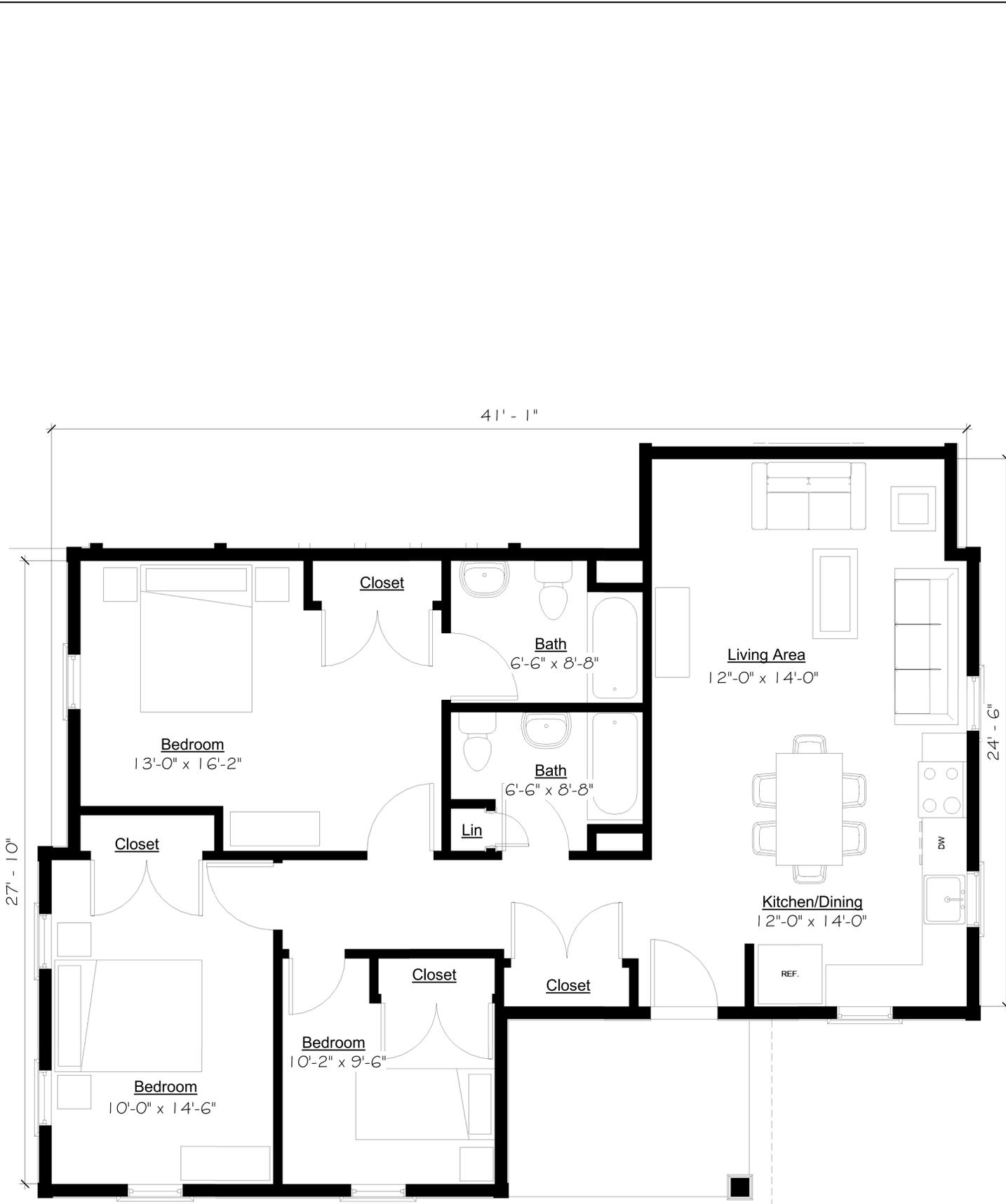
SCALE: 3/8" = 1'-0"

DRAWING NO.:

**H-1.1**



1 TYPICAL UNIT PLAN - TWO BEDROOM (+/- 860 SF)\*  
 3/8" = 1'-0"



2 TYPICAL UNIT TYPE - THREE BEDROOM (+/- 1,015 SF)\*  
 3/8" = 1'-0"

**FAIRGROUNDS ROAD WORKFORCE AFFORDABLE RENTAL HOUSING**  
 6 FAIRGROUNDS ROAD

TITLE:  
**TYPICAL UNIT PLANS TWO & THREE BEDROOM**

DATE ISSUED: 5/19/17

REVISIONS:  
 NO. DESCRIPTION DATE

DRAWN BY: Author

SCALE: 3/8" = 1'-0"

DRAWING NO.:

**H-1.2**

\*One unit of each type will be handicap accessible and designed in accordance with MAAB and ADA regulations.

# **ATTACHMENT 13**

Signed Acknowledgement Forms



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 1 ACKNOWLEDGEMENT – MISC. DOCUMENTS

March 26, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE FOR HOUSING & ECONOMIC DEVELOPMENT  
Company Name

[Handwritten Signature]  
Signed

5-22-2017  
Date



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 2 ACKNOWLEDGEMENT – INQUIRY DEADLINE

March 29, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE

Company Name

Signed

Date

5-22-2017



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 3 ACKNOWLEDGEMENT – SUBMITTED QUESTIONS

April 5, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
\_\_\_\_\_  
Company Name

*[Handwritten Signature]*  
\_\_\_\_\_  
Signed

5-22-2017  
\_\_\_\_\_  
Date



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

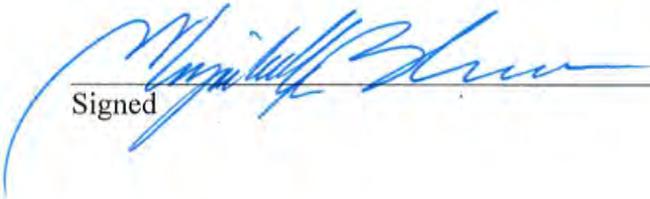
RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 4 ACKNOWLEDGEMENT – DEADLINE EXTENSIONS

April 12, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
Company Name

 Signed  
5-22-2017 Date



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 5 ACKNOWLEDGEMENT – QUESTIONS

May 10, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
Company Name

*[Signature]*  
Signed

5.22.2017  
Date



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 6 ACKNOWLEDGEMENT – PROPOSAL PRESENTATIONS

May 10, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
\_\_\_\_\_  
Company Name

*[Signature]* \_\_\_\_\_ Date 5.22.2017



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 7 ACKNOWLEDGEMENT – QUESTIONS

May 17, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
Company Name

[Signature] Signed Date 5-22-2017



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 8 ACKNOWLEDGEMENT – CERTIFICATE OF NON-  
COLLUSION (CORRECTED)

May 19, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
Company Name

[Signature] Signed 5-22-2017 Date



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 9 ACKNOWLEDGEMENT – 90-DAY AVAILABILITY

May 19, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

**I FURTHER ACKNOWLEDGE THAT THE AWARDED DEVELOPER MUST BE AVAILABLE TO COMMENCE THE PERMITTING AND APPLICATION PROCESS FOR THE PROJECT WITHIN 90 DAYS OF SELECTION; SUFFICIENT STAFF RESOURCES AND AVAILABILITY TO PERFORM THE REQUIRED SERVICES.**

WOMEN'S INSTITUTE  
Company Name

[Signature] Signed Date 5.22.2017



TOWN OF NANTUCKET  
ADDENDUM ACKNOWLEDGMENT FORM

RFP - WORKFORCE AFFORDABLE RENTAL HOUSING DEVELOPMENT  
AT 6 FAIRGROUNDS ROAD

ADDENDUM NO. 10 ACKNOWLEDGEMENT – BID PROPOSAL CHECKLIST

May 19, 2017

**I ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND UNDERSTAND I MUST  
ENCLOSE THIS SIGNED ACKNOWLEDGMENT AS PART OF MY PROPOSAL.**

WOMEN'S INSTITUTE  
Company Name

[Signature] Signed 5.22.2017 Date