Boston State Hospital Proposal

Submitted by:
Planning Office for Urban Affairs
84 State Street, Suite 600
Boston, MA 02109

In Association with:
Bohler Engineering
Boston Health Care for the Homeless
Boston Medical Center
Caribbean Integration Community Development
Nolan Sheehan Patten, LLP
Maloney Properties
Pulgini & Norton, LLP
St. Francis House
The Architectural Team
WaypointKLA

Team Representative and Contact:
William H. Grogan, President
Planning Office for Urban Affairs
P: 617-350-8885
E: whg@poua.org

Submittal Date: October 15, 2019
Part 1. Total Consideration

The Planning Office for Urban Affairs (POUA) is pleased to submit this proposal for the redevelopment of the entire 10-acres of the former Boston State Hospital site in response to the Division of Capital Asset Management and Maintenance’s (DCAMM) Request for Proposals (RFP). Our development approach is to develop the property into an inclusive mixed-income and mixed-use community that integrates affordable homeownership, affordable rental housing, permanent supportive housing, and health and wellness-focused commercial spaces to serve residents and the broader community.

Community Benefits

As outlined in the RFP response, POUA is committed to leveraging the redevelopment of the Boston State Hospital property, to the maximum extent possible, to create a range of affordable housing and economic opportunities that will support wealth creation and generate economic opportunity and community benefits.

Wealth Creation

_CICD experience and asset base_

The involvement of Caribbean Integration Community Development (CICD) as a co-owner/developer will result in developer fee/overhead remaining in the Mattapan community.

_Construction jobs and M/WBE contract opportunities_

**Construction:** POUA is committing to maximizing the number of construction jobs that will be made available for people of color and women, with a goal of achieving over 50% M/WBE participation.

**Post-construction:** It is anticipated that 20-25% of the operating expenses each year will be contracted with M/WBE firms. POUA and CICD will work with Maloney Properties to manage this goal.

Permanent Affordable and Mixed Income Rental Housing

_Affordable Homeownership Housing_

POUA’s development approach has a unique mix of affordable and workforce housing rental units. In addition to rental assisted units, POUA is including 83 units of non-rental assisted housing at various levels of affordability.

_Workforce Homeownership Housing_

POUA’s inclusion of below-market homeownership units will generate value for residents through a lower mortgage payment.

Permanent Supportive Housing

POUA’s inclusion of permanent supportive housing will result in savings to the Commonwealth health care system, as stable permanent housing is a critical component to addressing the health needs of those most at-risk.

Community Health Clinic

POUA has partnered with Boston Medical Center and Boston Health Care for the Homeless and will be working with them to determine the staffing of the health clinic space.
Open Space/Recreational Facilities
The development will include recreational space such as a playground and plaza area for outdoor seating or gathering as well as landscaped open green space. Such spaces play an important role in resident and community health by providing opportunities for physical activity, facilitating socialization, reducing heat island effects, and reducing stress.

Resident Support Services
POUA is including the provision of resident services as an integral part of the overall services to be offered to residents.

Sustainable and Resilient Design
The development will be LEED certifiable in accordance with City of Boston development goals, which includes meeting energy and water use reduction and resilience standards. These design principles not only have implications for resident health and protect residents and their homes in severe weather events but also reduce utility costs.

Transportation Benefits
In addition to encouraging public transportation use at nearby bus lines, T stations, and commuter rail stations and general accessibility and transportation improvements, the development will consider the provision of a bike share station within the property to augment the City’s network of bikeshare stations and to facilitate and encourage bicycle travel throughout the City. In addition to the above benefits, there are many benefits that cannot be quantified, including the addition of a commercial space that will benefit community residents, and the development and creation of a truly integrated development – both economically and socially – where people of all walks of life can live with dignity and respect.
Part. 2 Developer Information

Proposer: The Planning Office for Urban Affairs, Inc.

The Planning Office for Urban Affairs (POUA) is pleased to submit this proposal for the redevelopment of the entire 10-acres of the former Boston State Hospital site in response to the Division of Capital Asset Management and Maintenance’s (DCAMM) Request for Proposals (RFP). We envision an inclusive mixed-income and mixed-use community that integrates affordable homeownership, affordable rental housing, permanent supportive housing, and health and wellness-focused commercial spaces to serve residents and the broader community.

The Planning Office for Urban Affairs is a foremost non-profit developer in the Northeast whose mission is to serve as a catalyst for social justice through its work in housing development, neighborhood revitalization and affordable housing advocacy. We are a 501(c)3 organization registered in the Commonwealth of Massachusetts.

Since its inception in 1969, the Planning Office has developed nearly 3,000 units of elderly, family, mixed income and special needs housing, and currently has several additional properties under active development. Nevertheless, the emphasis of the Office is not on numbers but on having a qualitative impact on the harsh reality of housing deprivation for poor families, middle-income people, the elderly and disabled persons.

This means producing high quality residential developments; forming strong communities characterized by economic, racial, and ethnic diversity for people of all ages and abilities; providing both affordable rental and homeownership opportunities; and undertaking development efforts that address the needs of a wide-ranging population including the most vulnerable among us, as well as those of moderate means.

The Office has also been a leading advocate for affordable housing and strong communities over the years, providing leadership in the development of high quality mixed-income housing; the preservation of existing affordable housing; building permanent supported housing for the homeless; the protection of homeowners and tenants in foreclosure; the creation of additional programs and resources to support affordable housing; and the continued integrity and strength of the State’s inclusionary zoning law, Chapter 40B, to help all cities and towns provide housing for our neighbors in need.

The properties developed by the Planning Office for Urban Affairs demonstrate the capacity, drive, knowledge and commitment to social justice that enables the Office to succeed in undertaking complex, mixed-income residential developments that create strong, diverse, and healthy communities. We feel this proposal continues this legacy and in doing so meets many community needs while providing significant community benefits.

Below please find the profiles of our staff working on this project as well as examples of similar previous projects, including with many of the same development team members, as well as professional references. For additional information on our developments please visit our website at www.poua.org.
Proposer Staff
William H. Grogan, President

William H. Grogan, President of the Planning Office for Urban Affairs, has been involved in affordable housing and economic development for nearly 25 years with a particular focus on complex legal and financial deal structuring to accomplish mission objectives. Bill was appointed President in July 2019 and has been with the Planning Office since 2005. Bill led the formation of the development team and concept for this proposal and will lead the project and team through each phase of the development, from financing and structuring, to construction and lease-up. He is the authorized Proposer representative and designated contact.

Prior to becoming President, Bill was the Chief Operating Office & General Counsel. He has been involved with the acquisition, financing, construction, and development of nearly 650 units of affordable and mixed-income housing. He is overseeing another 300 units of housing at various stages of development. In this role, he has developed mixed-income, family and special needs housing, and housing for the homeless and vulnerable populations, as well as mixed-use developments. Bill has also been responsible for managing the operations of the Office, including all budget, accounting and financial aspects, working with the Board of Trustees, managing all corporate entities, and serving as General Counsel on both corporate and development project matters.

Prior to joining the Planning Office, Bill was an attorney at Goulston & Storrs, P.C., a nationally known real estate firm, where he specialized in the areas of affordable housing development and finance. He has also worked with state agencies in the development of bond financing and tax credit programs. As a result, Bill is actively involved in creating innovative approaches to financing affordable and mixed-income, mixed-use developments and has extensive experience utilizing a wide range of federal, state and local sources of financing, including 4% and 9% federal low-income housing tax credits, state housing tax credits, federal and state historic tax credits, and tax increment financing arrangements.

Previously, Bill worked in the Low-Income Housing Tax Credit Program at the Massachusetts Department of Housing and Community Development. Bill received his Juris Doctor degree from Suffolk University Law School, a Masters in Government Administration degree from the University of Pennsylvania and a Bachelor of Arts degree from Trinity College. Bill has been active in the affordable housing industry, having spoken at conferences sponsored by the American Bar Association Forum on Affordable Housing, the National Association of Affordable Housing Lenders and the National Housing and Rehabilitation Association.
Amarillys Rodriguez, Development and Policy Project Manager

Ms. Rodriguez is involved with all aspects of the project management and development process by assisting in the evaluation of potential developments, preparing funding applications, leading financial closings, reviewing design, coordinating development team members, and providing support during construction, marketing, lease-up, and management efforts. She is also leading POUA’s efforts to build relationships with hospitals, clinics, foundations, insurance companies and other entities to establish innovative models at the intersection of health care and housing to improve resident and community health outcomes through the provision of affordable housing and health-related resident services. She will support Bill and the development team in all these aspects throughout the development process for the former Boston State Hospital site.

Some of her projects to date include The Union at 48 Boylston Street, an award-winning affordable, mixed-use, adaptive reuse of a historic building in downtown Boston; 41 LaGrange Street (Boston), a planned mixed-income new construction tower (both in partnership with St. Francis House); working with the Grant Manor Homeowner’s Association on the refinancing and renovation of a 179-unit affordable housing community in Boston; and acting as consultant to St. Mary’s Center for Women and Children on the acquisition, preservation and rehabilitation of a family shelter in Boston.

Amarillys joined POUA in July 2017 as a Kuehn Fellow after graduating with a Master in City Planning degree from the Department of Urban Studies and Planning at the Massachusetts Institute of Technology (MIT), where she focused her studies on housing, community, and economic development. Prior to graduate school, Ms. Rodriguez worked in Washington, D.C., with the National Partnership for Women & Families. She also worked as an Emerson National Hunger Fellow in D.C. and Jackson, MS; as a Public Ally in her hometown of Hartford, CT; and earned a Bachelor of Arts in Public Policy Analysis from Pomona College in Claremont, CA. These experiences allow Ms. Rodriguez to approach her work at POUA with critical insight into many of the complex issues driving the need for affordable housing, the service needs facing many residents of affordable housing developments, and the transformative potential of affordable housing to promote healthy and successful communities and address various social justice problems. Ms. Rodriguez is a member of the American Planning Association and the Urban Land Institute (ULI). She was recently selected by ULI to be a part of its 2019 Pathways to Inclusion cohort.
Planning Office Project Examples
Harbor Place - Haverhill, MA – Large scale new construction

Harbor Place (44 Merrimack Street) was developed by Merrimack Street Ventures (MSV), a joint venture between The Planning Office for Urban Affairs and the Greater Haverhill Foundation, working together to transform a significant portion of downtown Haverhill. Together, they developed 80 units of affordable and mixed-income housing for households earning from 30% AMI to market-rate and featuring six different income-tiers. Harbor Place includes Harbor Place Residences, the 80 units of housing, with over 12,000 sq. ft. of ground floor commercial/retail space; a 5-story commercial/retail/educational building that includes two floors for the University of Massachusetts Lowell, a bank headquarters, a media company and office space; a 145-space below-grade parking garage; and a spacious new public plaza, complete with outdoor dining and performance areas, and a grand 15’ wide boardwalk that runs the entire length of the site and beyond. The boardwalk is accessed by three pedestrian walkways that run through the development, bringing residents to the Merrimack River in this section of downtown Haverhill for the first time in over eighty years. Harbor Place has been recognized with several honors, including the Urban Land Institute Jack Kemp Excellence in Affordable and Workforce Housing Award and was a finalist for Affordable Housing Finance AHF Readers’ Choice Award.

Developers:
Planning Office for Urban Affairs
Greater Haverhill Foundation

Architects:
The Architectural Team
Copley Wolff Design Group

Contractor: Dellbrook Construction Company

Owner’s Project Manager: WaypointKLA

Attorneys:
Nolan Sheehan Patten LLP
Richard Sheehan, Esq.
Goulston & Storrs P.C.

Property Management:
Peabody Properties

Financing:
Commonwealth of Massachusetts: Exec. Office of Housing & Economic Dvlpmnt; MassWorks; Dept. of Housing & Community Dvlpmnt; MassHousing; Mass. Housing Partnership Fund; MassDevelopment; CEDAC
City of Haverhill
North Shore HOME Consortium
Bank of America
Pentucket Bank & Haverhill Bank
Uphams Crossing – Boston, MA – Affordable housing with supportive services

Uphams Crossing consists of 80 units of affordable workforce housing for families earning up to 60% AMI; 20 of these units are set-aside to provide permanent housing for formerly homeless families and the remaining 60 provide affordable workforce housing. Uphams Crossing is home to residents employed at over 35 local businesses and institutions, filling the need for affordable housing for lower and middle-income households. The homeless families moved from 7 emergency shelters in Boston, and now have permanent affordable homes along with an on-site full time licensed social worker to ensure that each family gets the services they need. This supportive services program includes evening and weekend programming for families living at and around the development.

Uphams Crossing is the re-development of the former St. Kevin's Parish in the Uphams Corner neighborhood of Dorchester. The development incorporated the adaptive reuse of one of the three existing buildings at 516 Columbia Road and the new construction of two buildings, at 530 Columbia Road and 35 Bird Street. The development contains significant open space along with resident and public gathering spaces and amenities, including a resident fitness center, community meeting room, computer/study room, café and lounge area.

Photos: Gustav Hoiland

Services/Co-Sponsor:  
St. Mary’s Center for Women & Children

Architectural:  
The Architectural Team  
Bellalta 3 Design

Contractor: Bilt-Rite Construction

Attorney: Klein Hornig LLP

Property Manager:  
Corcoran Management Company

Financing:  
MA DHCD  
City of Boston  
CEDAC  
Bank of America  
MassHousing; MassHousing Partnership Fund  
Federal Home Loan Bank of Boston  
Federal Home Loan Bank of Atlanta  
U.S. Department of Housing & Urban Development
The St. Aiden – Brookline, MA – Rental housing and homeownership

The St. Aiden is a 59-unit mixed-income, smart growth condominium development that combines conservation, historic preservation and affordable housing to support and enhance the Brookline community. Located at 150 Pleasant Street in the heart of the desirable Coolidge Corner neighborhood, the 1.8-acre parcel site is the former home of the St. Aidan Parish. The development includes 20 affordable rental units, 16 first-time homebuyer units and 23 market rate condominiums. The Church building was converted into nine unique condominium units that include pieces of the church’s original stained-glass windows and woodwork. Two three-story town house buildings on Crowninshield Road complement that street’s suburban character. The final building on the site is a new three and five story brick structure on the corner of Crowninshield Road and Pleasant Street. The buildings are organized around a central courtyard, and the site also boasts a landmark 150-year-old Copper Beech tree with a half-acre canopy.

The St. Aiden, which opened in 2009, was developed with the support of the Town of Brookline as a friendly Chapter 40B development. It offers access to high quality education, jobs, health care, services and amenities that are beyond the reach of many young people and families in need. The waiting list for the twenty affordable rental units had over 500 applicants before it closed.

Development Consultant:
Development Synergies LLC

Architects:
The Architectural Team
DiMambro + Associates
Bellata 3 Design

Contractor:
Consigli Construction

Manager:
Peabody Properties, Inc.

Financing:
Bank of America Wainwright Bank and
Trust Housing Partnership Network
Dept. of Housing & Community Development
MassHousing
Community Economic Development Assistance Corp.
Brookline Housing Trust
Brookline Housing Authority
Federal Home Loan Bank of Boston
Home Funders LLC
Planning Office References

St. Mary’s Center for Women and Children  
Deirdre Houtmeyers, President and CEO  
90 Cushing Avenue  
Dorchester, MA 02125  
T: 617-436-8600  
E: dhoutmeyers@stmaryscenterma.org

The Greater Haverhill Foundation  
Sally O’Rourke  
80 Merrimack St  
Haverhill, Massachusetts 01830  
T: 978-521-5108

PO Box 130  
Haverhill, MA 01831  
T: 978-891-3994

Massachusetts Housing Partnership (MHP)  
David Rockwell  
160 Federal Street  
Boston, MA 02110  
T: 617-330-9955  
E: drockwell@mhp.net

A letter of support from MHP is available in the Project Partners and Supporters section.
Development Team

The Planning Office is proud to enjoy strong relationships with various financing and development partners. We have assembled a dedicated, capable, and mission-oriented team to shape and execute this proposal, with both new partners and those we have worked with on successful developments before. The following section provides information on each firm or organization, key team members, and their respective experience with similar projects as well as professional references.

As Proposer, POUA is committed to ensuring equal opportunity for women and minorities and securing minority and women's business enterprise (MBE/WBE) participation in this development, and multiple team members are either MBE and/or WBE firms or individuals. While we have not yet identified a general contractor, we are having conversations with firms to join the development team and are also exploring the possibility of a general contractor partnership with a MBE/WBE firm. Furthermore, we will require the selected general contractor to comply with MBE/WBE hiring and Section 3 requirements.

Co-Sponsor: St. Francis House

St. Francis House (SFH) is Boston’s largest day shelter, providing shelter, food, clothing, and a range of medical, counseling, and job training services to its guests every day of the year. Together with St. Francis House, POUA co-developed The Union at 48 Boylston, a historic building in downtown Boston rehabilitated into 46 units of affordable rental housing, commercial, and office space, with 26 units targeting households that have experienced homelessness. Our fruitful partnership is continuing with 41 LaGrange Street, a proposed new construction tower of affordable rental housing on the same site as The Union that will provide affordable housing to 94 formerly homeless, low-income, and moderate-income households. In addition to these developments, SFH has experience developing and managing housing through their Next Step SRO housing program, as well as making other capital improvements at their 39 Boylston Street location. St. Francis House is a co-sponsor on this proposal due to their expertise with part of the target population for the development and will be the service provider for residents of the permanent supportive housing.

St. Francis House Project Staff
Karen LaFrazia, President and CEO

For more than 30 years, Karen LaFrazia has worked as a counselor, caseworker, advocate, community organizer, and program developer. During her twenty years at St. Francis House, Karen LaFrazia has provided a guiding vision of growth for the agency and created a culture that fosters innovation and rewards creativity. Under her leadership, St. Francis House has become a model of integrated programs and services for homeless men and women and people experiencing poverty.

Ms. LaFrazia spearheaded the expansion of Next Step, the agency’s permanent supported housing program, and doubled the capacity of vocational rehabilitation services within the Sullivan Family Moving Ahead Program.
Ms. LaFrazia played an integral role in the oversight of two successful Capital Campaigns. She steered the planning and implementation of the construction and renovation of our 70,000+ square-foot building. She also led Under One Roof, an initiative to expand the capacity of the agency’s most successful programs. The Campaign concluded in December 2011, exceeding its goal during the worst recession in decades.

In 2008, Ms. LaFrazia was a recipient of the Massachusetts Commission on the Status of Women’s Unsung Heroine Award, and in 2009 she was honored by the Boston University Alumni Association for “Outstanding Contributions to the Field of Social Work.” In 2012, she was the first recipient of HomeStart’s Partner Award.

At the invitation of Mayor Marty Walsh, Ms. LaFrazia also serves on the City of Boston’s Leadership Council to End Homelessness. The Council looks for innovative ways to eliminate family and individual homelessness in Boston.

Prior to joining St. Francis House, Ms. LaFrazia was a social worker and later the Statewide Director of Social Services with the Salvation Army in Massachusetts. She has also worked as a supervisor at a residential treatment facility for adolescents and was a founding member and president of the Somerville Homeless Coalition. Ms. LaFrazia has a Bachelor’s degree in social work from Regis College and a Master’s degree in social work from Boston University.

Joe Fitzpatrick, Vice President, Facilities

Joe Fitzpatrick joined St. Francis House in 2014 because of their commitment to providing pathways to stability for the poor and homeless. He has developed a result-driven facilities management program, completed several capital projects and helped manage the development of The Union at 48 Boylston.

An established operations and facilities executive in residential, commercial and asset management, Joe has 15 years of experience in all facets of operations, service-support functions, facilities management, capital planning, project rehabilitation, construction, environmental compliance, safety, and contract management. Prior to SFH, he held executive management positions in Operations and Facilities at Morgan Memorial and Trinity Management LLC. Joe also served honorably in the United States Marine Corps and is a University of Massachusetts-Boston Alum.
St. Francis House Project Examples
The Union at 48 Boylston – Boston, MA

The rehabilitation of the former Boston Young Men’s Christian Union building located at 48 Boylston Street converts a vacant historic building into 46 units of affordable housing and approximately 12,000sf of space for St. Francis House administrative offices and business ventures that will provide jobs for homeless individuals. Located in a critically important area of the City between the Boston Public Garden and the Chinatown community, this development represents a key opportunity to balance the effects of gentrification in one of Boston’s most significant neighborhoods.

For generations, the area around 48 Boylston Street has provided homes to lower-income families and ethnic groups, and support to homeless individuals. Over the past several years, a number of luxury housing properties were built. With that, there was a dramatic need to build new affordable housing for the community and permanent housing for the homeless. Twenty-six of the housing units are targeted to those who have experienced homelessness, and the remaining units are available to residents earning up to 60% of the area median income. St. Francis House is delivering comprehensive supportive services for residents of The Union at 48 Boylston.

Developers:
Planning Office for Urban Affairs
St. Francis House

Architect:
The Architectural Team

Contractor:
Gilbane Building Co.

Attorney:
Nixon Peabody LLP

Manager:
Maloney Properties, Inc.

Financing:
Commonwealth of Massachusetts:
Department of Housing & Community Dev.
Community Economic Dev. Assistance Corp.
MassHousing Finance Agency City of Boston:
Department of Neighborhood Development
Neighborhood Housing Trust
Massachusetts Historical Commission
National Park Service
Bank of America Merrill Lynch
Eastern Bank
Federal Home Loan Bank of Boston
41 LaGrange Street - Boston, MA (Underway)

Building off the success of The Union at 48 Boylston Street, POUA and St. Francis House are continuing to partner on 41 LaGrange Street, a proposed 13-story new construction tower located at the rear of The Union site. The development will consist of 94 studio, one-bedroom, and two-bedroom units affordable to households earning up to 80% of the area median income, as well as amenity and bike storage space. More than half of the units will be targeted to households earning less than 30% of the area median income, including those that have experienced homelessness. Once again, St. Francis House will offer their services to residents of the building. The project has received its approvals and is in the process of securing all its remaining financing.

Next Step – 39 Boylston Street, Boston, MA

Next Step Housing is a Housing First community providing low-barrier, permanent supportive housing to individuals who have experienced homelessness. Residents benefit from the assistance of professional case managers who provide individual supports to help residents live successfully in permanent housing long-term. They partner with residents to support their overall well-being and recovery, connect to community resources, stabilize income sources, and develop the life skills required for community reintegration and independence.

Next Step occupies floors 7, 8, 9, and 10 of St. Francis House, offering 56 furnished single occupancy rooms. Each floor houses both men and women and features a shared kitchen, bathrooms, and dining and community areas. Two of the four floors are handicapped accessible. The program also houses a fitness room, computer room, library, and crafts room for the use of all program residents. Residents also are welcome to access breakfast and lunch served daily on the first floor of St. Francis House.

Each Next Step resident creates a service plan that meets their unique needs. They participate in individual case management, floor meetings, and monthly community meetings. Residents do not have a curfew and are welcome to have guests during the day and in the evening hours.

Residents with an income are required to pay rent, which is calculated on 30-35% of their gross income from all income sources.
St. Francis House References

Downtown Boston Business Improvement District (BID)
Rosemarie Sansone, President and CEO
101 Arch Street, Suite 160
Boston MA 02110
T: 617-482-4312
E: rsansone@bostonbid.org

HomeStart
Matt Pritchard, President & Executive Director
105 Chauncy St. Suite 502
Boston, MA 02111
T: 617-542-0338 x231
E: pritchard@homestart.org

Boston HealthCare for the Homeless
Barry Bock, Chief Executive Officer
780 Albany Street
Boston MA 02118
T: 857-654-1000
E: bbock@bhchp.org

St. Anthony’s Shrine
Fr. Thomas Conway, OFM, Executive Director
100 Arch Street
Boston MA 02110
T: 617-542-6440
E: ofmcpa@yahoo.com
Co-Sponsor: Caribbean Integration Community Development

Caribbean Integration Community Development (CICD) is a housing and community development organization that creates and maintains affordable housing in areas of Boston where large numbers of people of Caribbean descent reside, leveraging real estate development in struggling communities to build healthy neighborhoods and broaden access to economic opportunities. POUA has partnered with CICD on multiple developments underway in the Mattapan area. CICD provides the development team with valuable familiarity and relationships with the community surrounding the Boston State Hospital parcel and will be responsible for leading a portion (approximately 50-60 units) of the development plan.

CICD Project Staff
Donald Alexis, President

Donald co-founded CICD in 2011 with the belief that it could work hand-in-hand with Boston’s (and particularly Mattapan’s) growing Caribbean immigrant population to create a strong, thriving and diverse community.

From years of first-hand experience, CICD has come to know that prosperous mixed-income housing developments cannot be successfully planned and implemented without human networks and social capital. To spur social and economic upward mobility for low-income households within CICD developments, Donald has sought collaboration with and between various impact partners, stakeholders, non-profits, and other community organizations, including POUA. This effort has established multi-agency cooperation across the private and public sectors — including local, state, and federal agencies — to actively campaign for redevelopment to reverse the blight of dilapidated parcels in Mattapan. This has resulted in significant capital investment as well as the opening of the Cummins Highway commuter rail station and the planned Cote Village housing development at the station. Donald’s leadership and support of community activism supported the creation of a community serenity garden and other community amenity space. Other programs and services to support self-sufficiency, overcome barriers to success, and build physical, mental, and spiritual health for CICD’s target population are also in the pipeline.

MUAMMAR HERMANSTYNE, Senior Project Manager

Mr. Hermanstyne brings a range of development and project management experience gained with several organizations including Codman Square Neighborhood Development Corporation (CSNDC) as a Senior Project Manager, The Community Builders (TCB), Corcoran Jennison, and as Director of Economic Development and Commercial Revitalization Programs at the Hunts Point Economic Development Corporation (HPEDC) in Bronx, New York. Mr. Hermanstyne has also worked with the City of Boston’s Department of Neighborhood Development as an NSP 2 Program Specialist, working in a project management capacity to underwrite loans, provide technical assistance to owners and banks and to act as a direct interface between banks, real estate brokers and construction professionals to aid in the completion of homeownership initiatives under the auspices of the City of Boston.

Projects he has worked on include:
- Talbot Commons Phase I, a transit oriented 40-unit low income housing tax credit project
• Whittier Lyndhurst Washington, a 44-unit multi-use, multi-site project that includes a State public housing component which was completed in 2017.
• Secured financing and city land via RFP for a 16-unit homeownership project called New England Heritage Homes.
• Pre-development activities for Four Corners Plaza, a 31-unit affordable housing project including the negotiated sale of a commercial space to Gravestar a real estate REIT as well as state and local financing submissions.
• Crosstown Center, a mixed use, multi-phased office and garage project and;
• Peninsula Housing, a 332-unit two-phase residential development.

Mr. Hermanstyne completed his education at New York University and the University of Pennsylvania.

CICD Project Examples
Cote Village – 820 Cummins Highway, Mattapan, MA (In development)

Caribbean Integration Community Development has been building partnerships to connect affordable housing with jobs and opportunities for working families in Mattapan — with an aim to provide a safe, livable, and pedestrian-friendly community with services and retail options for residents and visitors. In keeping with this goal, the planned Cote Village development is located near the newly built Cummins Highway Commuter Rail Station (on the Fairmount Line).

Cote Village consists of fifty-two apartments, 1,200 square feet of retail space, and 1,000 square feet of office space for CICD. It also includes 7,000 square feet of amenity space and 62 parking spaces. All of the fifty-two units will be built within a five-story L-shaped building that faces the Cummins Highway with views towards Regis Road. This building will sit atop the existing concrete garage structure, which will be renovated for tenant parking. The part of the garage not covered by the structure will become an active
deck area for the residents and occasional community use. At the front of the development on Cummins Highway near the bridge there will be retail and office space.

Morton Station Village – Mattapan, MA - Family housing (In development)

Morton Station Village, projected to begin construction in 2020 and open in 2021, is comprised of 40 units of mixed-income workforce housing, serving households with incomes ranging from 30% AMI to 100% AMI. The development will consist of 31 rental and 9 affordable homeownership condominium units. Morton Station Village will re-activate the site of the Boston Police Department’s former Mattapan precinct adjacent to the Morton Station MBTA Fairmount Line station at 872 Morton Street, Mattapan, MA.

The development will also include significant community space that will be connected to a unique feature—the creation of a new passive Boston Parks’ Department designed public space to be known as the Stephen P. Odom Serenity Garden.

150 River Street Village – Mattapan, MA (In development)

150 River Street Village, projected to begin construction in 2021 and open in 2022, is comprised of 30 units of mixed-income age restricted studio and one-bedroom rental units, serving households with incomes ranging from 30% AMI to 70% AMI. The development will be located at 150 River Street, Mattapan, MA and may be financed with a combination of HUD Section 202 Housing for the Elderly and Low-Income Housing Tax Credits.

The development is in early schematic design after POUA and CICD were selected as Co-Developers during a City of Boston sponsored RFP process. Full design and permitting is underway throughout 2019. The building and units will be designed to focus on aging in place while ensuring residents have access to on-site services, passive open space, and community spaces.
CICD References

Magnolia Contreras, Director Community Benefits
Dana-Farber Cancer Institute
450 Brookline Avenue, HS 413
Boston, MA 02215-5450
(617) 632-3462

Bishop Nicolas Homicil
Founder and Director of Caribbean outreach Ministry
Member of Black Minister Alliance of Greater of Boston
47 Edgewater Dr.
Boston, MA 02126
(617) 615-8178

Donald Wright, Deputy Director, Real Estate Management and Sales
City of Boston
26 Court Street, 9th Floor
Boston, MA 02108
617-635-0398
For 44 years, The Architectural Team (TAT) has been driven by a commitment to exceptional design and an unyielding focus on achieving client objectives. Our insightful, pragmatic design solutions reflect our respect for site, context and environmental sustainability. We believe that inspired and responsive design doesn’t happen in isolation. It’s the result of a committed partnership between the client and the design team; where regard for the character and quality of the natural and built environment is fundamental. Innovative solutions begin with client goals. These goals evolve through collaborative relationships and come to life through the insight, expertise and dedication of our design teams.

Our 90-person master-planning and architectural design firm has developed a portfolio of distinctive design solutions for a broad range of building types and programs and has earned more than 100 awards for design excellence. These include the new construction of large urban, mixed use developments, multifamily and senior housing, commercial and hospitality developments, assisted living, skilled nursing and healthcare facilities, community and recreation facilities, and moderate rehabilitation; as well as a national reputation in the areas of historic preservation, restoration and adaptive reuse. Recent iconic skyline-changing designs, urban developments and transformative projects include: The Kensington, The Back Bay Hotel, Battery Wharf, Lovejoy Wharf, The Sibley Building, Harbor Place, Arlington 360, Baker Chocolate Factory, Loft Five50, and Voke Lofts, among others.

Led by founder Robert J. Verrier, FAIA, NCARB, and partners Michael E. Liu, AIA, NCARB and Michael D. Binette, AIA, NCARB, the firm has successfully grown by nurturing an entrepreneurial culture which thrives on trust, responsibility and a passion for designing meaningful places that live to tell their own story - stories of compassion, relationships and purpose - empowering the people and communities they serve. Our firm has been recognized for its award-winning work by local and national professional and trade organizations, including the American Institute of Architects, Massachusetts Historical Commission, National Association of Homebuilders, National Housing and Rehabilitation Association, and Urban Land Institute. While our work has been honored with many awards, we are most proud of our lasting client relationships, and our part in their success.

TAT Project Staff

Michael D. Binette | AIA NCARB | Vice President, Principal

Mike is a registered architect with more than 25 years of experience in coordinating and managing teams on complex projects in the multifamily, mixed use, post-acute care and commercial markets. As partner, he has a value-based approach to design that seeks first to understand the client’s goals and then to identify strategic opportunities for greater return. Mike is a hands-on leader and is involved in all facets of design – from master-planning, space programming, design and planning to construction administration. His people management and organizational skills, combined with an extensive understanding of the construction process, he continually delivers projects efficiently and successfully. Mike’s award-winning work includes
Arlington 360, and Bourne Mill Apartments, having earned recognition from the American Institute of Architects, the Boston Society of Architects, and the National Housing and Rehabilitation Association.

Mike has been involved in the design of hundreds of developments to include the following projects:

**THE CARRUTH, DORCHESTER, MA**
The design of a new 6-story mixed-use, transit-oriented development providing 116 mixed-income apartments and condominiums, ground level retail/commercial space, and underground parking, located adjacent to the MBTA Station.

**FENWAY CENTER, BOSTON, MA**
The proposed design of a new mixed-use 1.3M square foot air rights development located adjacent to Kenmore Square and Fenway Park to include five buildings consisting of residential, commercial and retail space; as well as public and private parking garages.

**THE SIBLEY BUILDING, ROCHESTER, NY**
The historic adaptive reuse of a former 1.1M square foot department store into a mixed-use development to include retail, office space, and multifamily residential and senior rental apartments.

**ARLINGTON 360, ARLINGTON, MA**
The design of a new market-rate multifamily community located on the 18-acre former Symmes hospital campus offering 200 units in a mix of for-sale and rental townhomes and rental midrise buildings, with ample resident amenities, garage and surface parking.

**AVALON MARLBOROUGH, MARLBOROUGH, MA**
The design of a new 350-unit multifamily housing community situated on 24-acres and comprised of townhomes, midrise buildings, direct entry apartments and leasing center. Resident amenities include clubhouse, fitness center, outdoor swimming pool, and surface parking.

**EDUCATION**
Wentworth Institute of Technology, Bachelor of Science in Architectural Engineering

**PROFESSIONAL AFFILIATIONS**

**PUBLIC AND PROFESSIONAL SERVICE**
Chelsea Neighborhood Developers Committee 2010 - Present, Design Mentor: Federal Home Loan Bank of Boston’s Affordable Housing Development Competition, 2005 – Present | Boston Society of Architects Housing Committee Member, 1997 – Present | Masconomet Regional School Building Committee Member, 1998 – 2002 | Boston Society of Architects Housing Committee Chairman, 1997 - 1998

**REGISTRATION**
Alabama, Connecticut, District of Columbia, Georgia, Illinois, Kentucky, Maine, Maryland, Massachusetts, Minnesota, Missouri, New Hampshire, North Carolina, New Jersey, New York, Ohio, Pennsylvania, Rhode Island, South Carolina, Texas, Virginia, W. Virginia
Jay has extensive project management experience including all facets of design and delivery from master planning and space programming to permitting, community engagement and construction administration. He directs diverse teams, consistently achieving cross-collaborative success, and reliably brings innovative and agile design solutions to the firm’s clients. His projects have won design awards at both the local and national level; recent design and planning successes include the award-winning Lovejoy Wharf and The Homes at Old Colony. Jay contributes to the firm with a broad range of expertise designing multifamily housing, commercial, healthcare, mixed-use and hospitality developments.

FENWAY CENTER, BOSTON, MA
A new mixed-use 1.3M square foot air-rights development located adjacent to Kenmore Square and Fenway Park to include five buildings consisting of 550 luxury rental units, 140,000 square feet of office space, 60,000 square feet of commercial and retail space, and public and private parking to accommodate 950 vehicles.

THE METROPOLITAN, BOSTON, MA
The new construction of a 23-story mixed-use development in Boston’s Chinatown neighborhood. The community includes 118 condominiums, 133 rental apartments, retail, commercial, and a community program space.

LOVEJOY WHARF, BOSTON, MA
A LEED Gold Certified mixed-use waterfront development involving the adaptive reuse of an existing nine-story building, the new construction of a 50,000 square foot addition of commercial/retail space, a 7,600 square foot pavilion for a total of 220,000 square feet and a 40,000 square foot wharf structure which serves as the headquarters of Converse.

BATTERY WHARF, BOSTON, MA
A new $180M mixed-use waterfront development comprised of four buildings which includes 104 luxury condominiums, a four-star 150-room hotel, 30,000 square feet of retail space, a waterfront promenade, and a 376 space below grade parking garage.

HARBOR PLACE, HAVERHILL, MA
A new mixed-use waterfront development. The phased program consists of two new midrise buildings, a five-story building to provide office and retail space and a six-story mixed-use building to provide 80 mixed-income residential units, ground level retail and commercial space.

REGISTRATION Massachusetts
JOINED THE ARCHITECTURAL TEAM 1994
EDUCATION Wentworth Institute of Technology
Bachelor of Architecture
Associate of Architectural Engineering
PROFESSIONAL AFFILIATIONS American Institute of Architects
Boston Society of Architects
U.S. Green Building Council
The National Council of Architectural Registration Boards
Urban Land Institute
PUBLIC AND PROFESSIONAL SERVICE Wentworth Institute of Technology
Secondary Thesis Advisor
Fire Station Committee and Pine Grove School Building Committee, Rowley, MA
TAT Project Examples
Harbor Place – Boston, MA – New construction multifamily + mixed-use

This transformative new mixed-use development is designed to reinvigorate the streetscape, create active pedestrian corridors to the river from Merrimack Street, and offer a variety of uses that significantly enhance the local business district. Among the properties included in the development was the Woolworth Building, which had been vacant for more than 40 years, and three other nearby parcels.

The site features two new midrise buildings: a five-story, 58,000 square foot commercial building with first floor tenants Haverhill Community TV studios; a UMass-Lowell satellite campus space on the second and third floors; headquarters for Pentucket Bank and additional office space on the upper floors; and a six-story 118,000 square foot mixed use building with ground floor riverfront restaurant space, commercial uses, and 80 residential units above.

A significant design challenge was to innovatively repurpose an imposing concrete wall built after the flood of 1836, which blotted out views and restricted access to the Merrimack River. The solution was to situate the two new structures and the public promenade on a raised development platform abutting the flood wall, allowing direct pedestrian access to the river, while also providing underground parking.

The interiors are designed to visually attract pedestrians into the enlivened and activated space, using contemporary elements, as well as reclaimed finishes to create stimulating focal areas. A combination of reclaimed wood, contemporary decorative pendants, stone and tile combine to create a vibrant and energetic space 24/7.
Situated on an 18-acre hilltop campus of the former Symmes Hospital, the firm master planned and designed this new, mixed income multifamily community located within close proximity to downtown Arlington and recreational amenities. Consisting of 199 units, comprised of both for-sale townhomes and rental midrise buildings, the units are elegantly styled with sophisticated features and finishes. The program offers spacious open studio, one-, two- and three-bedroom apartments, and provides residents with landscaped courtyards and sweeping vista parks overlooking the Boston skyline. In addition, resident amenities include a club room, media room, fitness center, recreational sport court, playground, an outdoor swimming pool, as well as garage and surface parking.

Arlington 360 has been recognized with multiple awards, including Affordable Multi-Housing News Magazine’s Excellence Award (Silver) for Development & Design, the Best Reuse of Land Award from Multifamily Executive News Magazine, and the Editor’s Choice Award from Multifamily Executive News Magazine.

As master planners for this 633,000 square foot medical, mental health and residential campus, the scheme includes the development of four new state-of-the-art buildings built over three phases on the site of the former Massachusetts Mental Health Center in the Longwood Medical Area of Boston. Phase One includes the LEED Gold Certified Binney Street clinical and office building and the LEED Silver Certified Fenwood Inn mental health day hospital. Future design phases include a residential building and a medical research facility. The firm designed the building envelope for the Binney and Fenwood buildings.
TAT References

MassHousing
100 Cambridge Street, Suite 300
Boston, MA 02110
Contact: Crystal Kornegay | Executive Director
Phone: 617.854.1000

Partners Healthcare
MGH – Ruth Sleeper Hall, 18 Blossom Street
Boston, MA 02114
Contact: John Messervy | Director
Phone: 617.724.1380

AvalonBay Communities
600 Atlantic Avenue
Boston, MA 02210
Contact: Bill McLaughlin | Vice President,
Michael Roberts | Senior Vice President
Phone: 617.654.9500
Bohler Engineering provides consulting services for land development projects. As a strategic partner, we integrate multiple disciplines of civil engineering to simplify the development process and provide our clients the information they need to make smart decisions. At Bohler, we go above and beyond what is typically expected from a consultant. We take the time to understand our clients’ business and are known for our ability to consistently deliver the highest quality product and service in the industry. With three offices in New York State and over 20 throughout the East Coast and Texas, Bohler provides site civil engineering, permitting, urban planning, landscape architecture, program management, land surveying and transportation design services.

Bohler Project Staff
MATTHEW D. SMITH, PE | PRINCIPAL

Matt serves as Principal for Bohler’s New England Region. With over 20 years of land development experience, he plays an integral role in the company’s growth and reputation through his efforts in staff mentoring, business development, quality control and client relationships. Matt focuses on empowering employees to identify and overcome development obstacles for our clients. Through Matt’s broad technical background, he is able to manage projects of any size and scope from inception through due diligence, design, entitlements and construction. He oversees design teams working in the mixed-use, residential, retail, education and healthcare market sectors.

RELEVANT PROJECT EXPERIENCE
St. Gabriel’s Monastery Redevelopment, Brighton, MA: Matt is serving as Principal-in-Charge for this adaptive reuse of a monastery and church facility on 12 acres. The project includes 652 apartments and 520 parking spaces.

Tremont Crossing, Roxbury, MA: A Principal-in-Charge, Matt is overseeing the civil engineering and permitting services for this 1.9 million SF mixed-use development on over seven acres including hotel, retail, restaurant, cinema, residential units, office and parking garage.

South Bay Town Center, Dorchester, MA: Matt is providing site civil engineering oversight for this one million SF mixed-use redevelopment that will include 475 multifamily units, 115,000 SF of retail and two parking structures.

EDUCATION
B.S. Civil Engineering, Northeastern University

PROFESSIONAL LICENSES
CT Professional Engineer # PEN.0024567
MA Professional Engineer # 45496-C
ME Professional Engineer # 11023
NH Professional Engineer # 12931
NJ Professional Engineer # 24GE05110200
NY Professional Engineer # 094789-1
NC Professional Engineer # 041111
RI Professional Engineer # 8145

INDUSTRY AFFILIATIONS
American Society of Civil Engineering
International Council of Shopping Centers
National Association of Industrial and Office Properties
Steve serves as Associate and Branch Manager for Bohler Engineering, specifically responsible for the day-to-day operations of the Boston office. Steve brings over 19 years of experience in site civil engineering, surveying, and construction to his current projects and clients. In addition to design duties, his efforts include financial management, business and staff development. Steve is a “go-to” consultant for City of Boston permitting, having guided dozens of projects through the regulatory processes including Boston Redevelopment Authority Article 80 Review, Boston Water and Sewer Commission, Public Improvement Commission, Boston Transportation Department, Inspectional Services Department, and the Boston Parks & Recreation Department.

RELEVANT PROJECT EXPERIENCE

Tremont Crossing, Roxbury, MA: Steve’s team is providing civil engineering and permitting services for a 1.9 million SF mixed-use development on over seven acres including hotel, retail, restaurant, cinema, residential units, office and parking garage.

South Bay Town Center, Dorchester, MA: Steve is providing site civil and consulting engineering services for this one million SF mixed-use redevelopment that will include 475 multifamily units, 115,000 SF of retail and two parking structures. As part of the project, our team coordinated with MassDOT.

St. Gabriel’s Monastery Redevelopment, Brighton, MA: Steve provided site civil engineering and permitting for this adaptive reuse of a monastery and church facility on 12 acres. The project includes 652 apartments and 520 parking spaces.

North Quincy Station Redevelopment, Quincy, MA: Steve is providing site civil engineering design services for the development of a 1.2 million SF redevelopment on seven acres of an existing MBTA parking lot. The new development will include 610 multifamily units, 50,000 SF of retail space, and 1,567 parking spaces. As part of the project, our team coordinated extensively with MBTA to provide parking spaces for the North Quincy Station commuters.

EDUCATION
B.S. Civil Engineering, University of New Hampshire

PROFESSIONAL LICENSES
MA Professional Engineer #45942
LEED BD+C

PROFESSIONAL AFFILIATIONS
American Society of Civil Engineering
National Association of Industrial and Office Properties
Urban Land Institute
Tim has over nine years of design experience and is currently a Project Manager in Bohler’s Boston office. He has provided project engineering, utility expediting and construction administration efforts on numerous large-scale projects throughout New England. Tim has been involved in many projects requiring a high level of local utility coordination and has successfully designed and permitted sewer and water extensions, water storage tanks, transmission line relocations, utility easements, assent agreements, etc.

**RELEVANT PROJECT EXPERIENCE**

**South Bay Town Center, Dorchester, MA:** 700,000 SF mixed-use development to include hotel, two parking garages, retail, restaurants, cinema, and multifamily residential units. Tim and his team provided site civil and consulting engineering and permitting services for this project.

**Marine Wharf, Seaport, Boston, MA:** As Project Manager, Tim’s team has provided site civil design and permitting services for this 320,000 SF, 400-key dual hotel. Separated by two towers, the development includes a 245-key Hampton Inn and a 166-extended stay key Homewood Suites by Hilton.

**20 Rugg & 80 Rugg Rd, Allston, MA:** Tim is overseeing the site design, permitting and landscape architecture for this 270,000 SF mixed-use redevelopment. Formerly four industrial buildings, the site now holds two, six-story buildings, 2,5000 SF of ground floor retail, a restaurant and a five-story automated parking garage.

**Woburn Village Redevelopment, Woburn, MA:** As Project Manager, Tim is providing site civil design, permitting and landscape architecture services for this 23-acre mall redevelopment.

**Two Drydock, (Parcel Q1), Boston, MA:** Currently under construction, this 13-story, 300,000 SF building will feature office space, ground floor retail, a large public plaza, and two roof terraces facing the Boston skyline. As Project Manager, Tim provided site civil and consulting engineering and permitting services.

**EDUCATION**

B.S. Civil Engineering,
University of Virginia School of Engineering and Applied Science

**PROFESSIONAL LICENSES**

MA Professional Engineer
#51929
Bohler Project Examples
TREMONT CROSSING

LOCATION
1200 Tremont Street
Roxbury, Boston, MA

COMPLETION DATE
Ongoing

RENDERING
Feldco Development Corporation

PROJECT RELEVANCE
- Transformative development renewing Roxbury
- Harmonious balance of future uses to enhance the existing community

PROJECT DESCRIPTION
- 1.2 million SF mixed-use development on seven acres
- Retail, office, residential, hotel, structured parking and multi-cultural facility
- Permitting includes BPDA Article 80 Large Project Review, BTD, MEPA, DEP, BWSC
- One of the largest and most transformative projects in the city
- Services Provided: Site Civil and Consulting Engineering, Permitting
SAINT GABRIEL’S MONASTERY REDEVELOPMENT

LOCATION
159-201 Washington St
Brighton, Boston, MA

COMPLETION DATE
Ongoing

RENDERING
CUBE 3 Studio

PROJECT RELEVANCE
- Restoration and reimaging of former monastery
- Incorporation of and enhancements to the original campus’ framework into new site design

PROJECT DESCRIPTION
- 775,000 SF redevelopment located on 12 acres
- Adaptive reuse and restoration of former church and monastery buildings into amenity spaces and residential units including construction of four additional new buildings, each up to six stories
- 500 parking spaces including surface and garage spaces with seven acres of open space
- Project includes a new shared bicycle hub and MBTA bus stop at the main site entrance and is also located a short walk (¼ mile) from the Washington Street subway (Green Line)
- Services Provided: Site Civil and Consulting Engineering, Permitting
LOCATION
8 Allstate Road
Dorchester, Boston, MA

COMPLETION DATE
Ongoing

PROJECT REL evance
• Local revitalization project reflective of local community
• Pedestrian-friendly with diverse mix of end uses
• Serves as a mixed-use community gathering place for local residents

PROJECT DESCRIPTION
• One million SF mixed-use development on 10 acres
• 115,000 SF of retail, including a 65,000 SF cinema
• 130-room hotel and 475 residential units with two parking structures
• Part of the revitalization of Dorchester, provides connection to existing shopping, restaurants, and MBTA train station
• Services Provided: Site Civil and Consulting Engineering, Permitting
April 24, 2018

RE: Letter of Recommendation

To Whom It May Concern:

It is my pleasure to provide a reference for Bohler Engineering, a land development consulting firm I have worked with for the past 4 years in downtown Boston. I first met Steve Martorano just prior to the start of our South Bay project in Dorchester and have been very fortunate enough to cultivate a highly effective working relationship with him and his team as we worked through the design, development and recent opening of this project. Steve is a respectable engineer who runs his firm with integrity and skill. The firm’s work product is always punctual and meticulous and they have been the most reliable member of our consultant team. Bohler Engineering provided all of the site civil and consulting engineering services throughout the various phases of our South Bay Project, from due diligence through project close out.

The company offers top-notch quality and customer service. They go above and beyond what is typically expected from a consultant, and I am always pleased with their work. The South Bay project required an agile and cost effective approach to the ever changing design as the project navigated through permitting and political processes, and worked to incorporate the neighborhood needs and wants. Although challenging, this all helped to shape a better project which we are proud to have open and operating. The support of Steve and his team were integral to making the project a success.

Bohler successfully collaborates with large project teams including architects, landscape architects, attorneys, MEP’s, traffic consultants, etc., pushing to ensure a coordinated effort which is crucial to efficiently navigate the necessary permit approvals. Please consider Bohler Engineering for your land development needs. I highly recommend them and look forward to working with them again soon.

Sincerely,

[Signature]

Vice President – Construction & Development
October 10, 2019

RE: Letter of Recommendation

To Whom It May Concern:

Please accept this letter as evidence of my glowing recommendation for Bohler Engineering, with whose Boston office, and its lead Steve Martorano, I have worked with for a number of years. Steve’s team, including his teammate and right-hand man Timothy Hayes, has been an instrumental partner throughout the continuum of our development activities, and most importantly, success.

The Boston Bohler team has been engaged by Michaels for its land development consulting services during project conceptual phases, providing due diligence support and project feasibility background information during land acquisition negotiations with their Site Impact Reports, where they have outlined each particular project’s entitlement process, from both the site engineering and zoning perspective, provided anticipated impact and utility connection fees algorithms, to initial recommendations for site improvement and utility budgeting.

Further, they have been instrumental in collaborating with our large development teams throughout the City of Boston’s BPDA’s Article 80 Large Project Review process, serving as team liaison and planner, kickstarting the entitlement process with us through initial stakeholder meetings and managing the delivery of our comprehensive Expanded Project Notification Forms, incredibly detailed reports consisting of project design, environmental impact, and green building research and initial deliverables. In this capacity, they have also collaborated with us and our teams in the BPDA Impact Advisory Group, Boston Civic Design Commissions’, and Boston Parks and Recreational Departments presentations and, later, approval sessions.

Additionally, Bohler’s civil design capacity and acumen are unmatched in the market. They have led the outreach in our engagement with the various public works, improvement, utility, and streets entities, overseeing the deliverables for the many locally based technical approval’s requisite to realize our development activities. Their keen knowledge of the Massachusetts Department of Environmental Protection’s protocol has also proven invaluable in navigating the various hurdles to get project design to the Construction Documents level.

In summary, my first choice for land development consulting in the Boston metropolitan market has and will continue to be the Bohler team. We greatly value that Bohler, like Michaels, has grown organically over the past 35+ years by following their partners’ and clients’ growth into new markets. Their zest for the work and similar culture to ours has made a unique and often challenging real estate market, a pleasure to work in and personally, visit. We have successfully worked hand-in-glove on our many exciting projects and we look forward to continuing and growing our strong relationship on our forthcoming development adventures. We hope that you
10/11/2019

RE: Letter of Recommendation- Bohler Engineering

To whom it may concern,

I am very happy to have the opportunity to provide a reference for Bohler Engineering, a civil engineer and land development firm with which I have worked very closely over the past several years. I continue to work with Bohler on the Tremont Crossing project, a 1.7 million square foot, mixed-use development (including office, retail, residential and structured parking) in Boston, which has received all of its City and State approvals and is now shovel-ready. The Project is located on approximately eight acres and will comprise four, new city blocks.

In the time I have worked with Bohler, I have come to know that they are not only highly qualified engineers and land consultants, but also understand the many metrics that comprise the "day-to-day" of real estate development. Thus, the professionals at Bohler have not only been extremely competent in accomplishing the various assignments we have worked on together, but they have also proactively added value to the development process by identifying many site-related challenges before they occur. The Bohler team I have worked with does not look at engineering in a vacuum, but rather understands that the information it provides is an important ingredient in the decision making of his clients.

My primary contact at Bohler has been Steven Martorano who is not only a highly sophisticated engineer but is articulate and able to present materials at the highest levels of municipal and regulatory oversight. Steve and his colleagues at Bohler clearly have engendered the respect of the many State and City officials with whom we do business. Over the years, there have been several “mission critical” assignments (ranging from planning substantial infrastructure relocations to site aggregation) that have been successfully navigated in no small part to the confidence that the City and or State had with the engineering team at Bohler.
Additionally, Bohler has also been able to collaborate with and lead large project teams, including architects, general contractors, attorneys, and other engineering disciplines. Often times, Bohler has been the critical, "coordinating element" that has assembled and pieced together significant amounts of information from other team members in a clear and concise manner related to project approvals.

Bohler Engineering is Feldco Development's go-to firm for our land development and civil engineering needs. I give Bohler my highest recommendation and look forward to working with them on many projects in the future.

Sincerely,

Jeffrey Feldman, Vice President
Feldco Development Corp
WaypointKLA provides a wide range of consulting and management services for owners, operators, and developers of commercial, residential, industrial, and mixed-use real estate and development projects. We bring unparalleled visibility to every aspect of a construction project – from pre-design to final completion – providing oversight, accountability, and control that ensure projects are completed on time and on budget.

Our capabilities include due diligence, pre-development, development consulting, project management, sustainability planning, move coordination, and lender representation. We offer a full range of services within each of these categories, from high-level strategy and consulting to project management services and other daily processes.

WaypointKLA’s principals – each with deep expertise and more than 25 years of experience in architecture, construction management, engineering, investment, and other real estate-related disciplines – are active participants in every project. Their cross-disciplinary, total-project perspective brings new ideas to our work, and fosters an entrepreneurial culture where projects are staffed, planned and managed according to the needs of each client. And we actively collaborate with all members of the client, design, construction, and approvals team, involving them in every step of the process. It is an approach that results in more successful project planning and execution.

We provide the expertise, resources, and focus required to manage real estate and development projects in today’s highly complex construction market. By offering complete technical and financial visibility, we minimize cost overruns, drive projects to completion, and protect the reputation and financial interests of our clients. They stay focused on their core competencies, confident that their valuable investment is being overseen by a true industry leader.

WaypointKLA Project Staff
Ray Mitrano, Principal

Ray has been practicing architecture and project management for over 25 years. Prior to joining Waypoint, Ray was a Senior Associate at Bergmeyer Associates, a nationally ranked architecture and interior design firm in Boston, Massachusetts. At Bergmeyer, Ray headed a commercial design studio managing a variety of client and building types including multi-unit housing, historic tax credit projects, institutional buildings, public projects, retail, and commercial office buildings. As a licensed architect, Ray has extensive experience in design/construction planning, value engineering, contract relations, project development/implementation, and consultant coordination. His primary focus over the past several years has been working with developers in strategically repositioning urban adaptive re-use projects and providing technical and administrative support throughout the construction process. Ray holds a Bachelor of Architecture degree from Wentworth Institute of Technology.
Waypoint KLA Project Examples

UPHAM'S CROSSING/ST KEVIN’S – 530 COLUMBIA ROAD, DORCHESTER, MA

CLIENT
Planning Office for Urban Affairs, Boston, MA

ARCHITECT
The Architectural Team, Cambridge, MA

GENERAL CONTRACTOR
Bilt-Rite Construction, Boston, MA

KEY POINTS
• 80,000 SF 3-Building Multi-Family Affordable Housing, 56-Units
• 2-Mid-Rises/22-Townhomes, Daycare, Social/Neighborhood Clubs
• LEED Certified, Historic, Affordable Tax Credits

Radius - 530 WESTERN AVE, BOSTON, MA

CLIENT
Mount Vernon Company, Boston, MA

ARCHITECT
Prellwitz Chilinski Associates, Cambridge MA

GENERAL CONTRACTOR
Cranshaw Construction, Newton, MA

KEY POINTS
• 168,000 SF 132-Unit, 6-Story Multi-Family Housing
• Ground Floor Retail, Parking, Expansive Roof Deck w/Dog Run
• Fitness Center, Community Room, Library, Demonstration Kitchen
CLIENT
Chelsea Jewish Foundation, Chelsea, MA

OWNER'S PROJECT MANAGER
WaypointKLA, Brookline, MA

ARCHITECT
KDA Architects, Voorhees, NJ

GENERAL CONTRACTOR
PROCON, Manchester, NH

KEY POINTS
- 120,000 SF Assisted Living/Memory Care Facility
- Award Winning 65 Skilled Nursing Bed Complex
- Adult Day Care, Long-Term Care, Early Learning Child Care
WaypointKLA References

Mount Vernon Company
Bruce Percelay, Owner
T: 617-267-0006

WKLA has been working with Mount Vernon Company since 2012 to develop 5 multi-family housing facilities with over 550 units.

Beacon Communities
Pam Goodman, CEO
T: 617-574-1142
Dara Kovel, President
T: 617-574-1114

WKLA has worked with Beacon Communities to develop thousands of Multi Family Affordable housing and rental units.

Affirmative Investments
David Ennis, Principal
T: 617-367-4300

WKLA has worked with Affirmative Investment to develop a 32,000 SF grocery store and Multi-Cultural Adult Outpatient Clinic.
We formed Nolan Sheehan Patten in 2009 to bring our knowledge and skill set as “big firm lawyers” to a boutique law firm environment where we could provide the same expertise and reliable service for our clients but in a more flexible and cost-conscious environment. We pride ourselves on being accessible to our clients and personally attentive so that every client feels they’re in good hands. Despite our broad experience in general real estate matters, Nolan Sheehan Patten focuses primarily on providing strategic and technical advice to clients in the fields of affordable housing and community development. This work uniquely combines our legal expertise with the socially-conscious principles of our firm, resulting in a practice that is both professionally and intrinsically rewarding.

Our capabilities and expertise encompass the full range of public and private financing sources and structures including federal and state Low-Income Housing Tax Credits, Historic Rehabilitation Tax Credits and New Markets Tax Credits.

At Nolan Sheehan Patten, we have represented clients on a full range of New Markets Tax Credit (“NMTC”) matters since the inception of the federal program in 2000. From representing numerous allocatees in completing NMTC applications, to closing NMTC transactions on behalf of Community Development Entities (“CDEs”) and Qualified Active Low Income Community Businesses (“QALICBs”) for projects such as healthcare facilities, youth centers, performing arts venues, charter schools, assisted-living facilities, manufacturing plants, office buildings and mixed-use projects, we have the full breadth of experience in the NMTC field.

Many of our NMTC transactions utilize layers of tax credit programs, including the federal Historic Rehabilitation Tax Credit and state tax credits, and we have identified structures that allow for housing components (both affordable and market rate) alongside traditional NMTC uses. These transactions involve a wide range of deal structures, often times more challenging than a typical NMTC transaction because the projects have greater financial need and need to utilize non-traditional financing sources.

We also have extensive experience both with the federal LIHTC and the Massachusetts LIHTC and regularly represent the Massachusetts Department of Housing and Community Development with respect to the implementation of both programs. Our attorneys were also involved in the drafting of the regulations implementing the Massachusetts LIHTC and were also actively involved in the implementation of the American Recovery and Reinvestment Act Tax Credit Assistance Program and the Section 1602 Credit Exchange program, which provided relief for the LIHTC industry.

We are experienced in the many tax issues that arise in LIHTC syndications, and we developed some of the early structures for maximizing the value of state LIHTC using non-profit entities as recipients and sellers of the credit. We also frequently represent both for-profit and non-profit developers using LIHTC to develop affordable housing. Our experience representing investors, lenders and developers offers us the unique perspective of understanding each participant’s goals and concerns and allows us to provide a full spectrum of advice to our clients.
Stephen Nolan’s practice focuses on affordable housing and community development, especially involving the federal Low Income Housing Tax Credit, Historic Rehabilitation Tax Credit and the New Markets Tax Credit. He is one of a small number of attorneys nationally who are recognized as technical specialists in creating complex legal and financial structures for real estate developments using the New Markets Tax Credit program. Steve has represented numerous community development entities in closing New Markets Tax Credit financings for a broad range of projects, including health care facilities, youth centers, commercial facilities, theaters and performing arts centers, manufacturing plants, grocery stores, office and retail buildings, senior care facilities, community centers and mixed use projects.

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

Prior to founding Nolan Sheehan Patten, Steve was a Partner at DLA Piper LLP (US) in Boston and at Hill & Barlow, P.C. in Boston. He also clerked for Chief Judge Levin Campbell of the United States Court of Appeals for the First Circuit. **Education:** University of Michigan School of Law (J.D. magna cum laude 1983); Contributing Editor, University of Michigan Law Review; Northwestern University (B.S. in Environmental Engineering with highest distinction 1980)

**NSP Project Examples**

**Lowell Community Health Center – Lowell, Massachusetts**

Nolan Sheehan Patten represented Community Health Center Capital Fund, Inc. in connection with NMTC financing for the Lowell Community Health Center. The project involved the rehabilitation and adaptive reuse of an approximately 64,000 square foot historic mill building on the Merrimack River in Lowell, Massachusetts. The Lowell Community Health Center provides affordable health care to children and adults and has served the communities of greater Lowell since 1970. This project will allow Lowell Community Health Center to expand its services substantially to the greater Lowell community.

Photo: Gumula Photography
Nolan Sheehan Patten represented Washington Gateway Associates Limited Partnership and Hub Holdings LLC in the acquisition and construction financing of the first Workforce Housing Opportunity Fund project in the Commonwealth. The Workforce Housing Opportunity Fund is a program of Massachusetts Housing Finance Agency designed to fund the construction of housing for individuals and families earning between 70% to 120% of the area median income. Hub Holdings LLC working with the Neighborhood Assistance Development Corporation of Lynn designed and financed the development of Gateway Residences on Washington, a 71-unit residential development with approximately 2000 sq. feet of ground floor retail space in Lynn, Massachusetts across the street from the North Shore Community College.

The project will contain 53 affordable residential units, 10 workforce housing units and 8 market rate units. The project has been financed with construction and permanent loans from Massachusetts Housing Finance Agency, including financing from the Workforce Housing Opportunity Fund. A portion of the loan financing was provided through a bond acquisition by the AFL-CIO Housing Investment Trust. Subordinate financing was provided by the Department of Housing and Community Development under the HOME Program, the Housing Stabilization Fund Program, the Affordable Housing Trust Fund Program, and the Commercial Area Transit Node Housing Program, and by the City of Lynn from its local HOME funds. Additionally, Boston Capital Partners, Inc. is making an equity investment to further advance the development of Gateway Residences at Washington.

Nolan Sheehan Patten represented the developer EBCDC Inc. in connection with the development of 32 units of affordable housing in East Boston. Financing sources included loans from Citizens Bank, the City of Boston, DHCD, AHT and MHP, together with tax credit financing from Boston Financial. The project will revitalize the neighborhood by developing a currently vacant parcel of land.
NSP References

Reference Name: Cambridge Housing Authority  
Contact: Margaret Donnelly Moran

Address: 362 Green Street, Cambridge, MA 02139  
Email Address: mmoran@cambridge-housing.org

Phone Number: (617) 864-3020  
Fax/Other Number: (617) 868-5372

Description and dates(s) of commodities/services provided: Redevelopment of public housing portfolio.

Reference Name: Massachusetts Department of Housing and Community Development  
Contact: Catherine Racer

Address: 100 Cambridge Street, Suite 300, Boston, MA 02114  
Email Address: Catherine.racer@state.ma.us

Phone Number: (617) 573-1322  
Fax/Other Number: (617) 573-1330

Description and dates(s) of commodities/services provided: Closing of loans to affordable housing projects and general advice on affordable housing developments.

Reference Name: Homeowner’s Rehab., Inc.  
Contact: Peter Daly

Address: 280 Franklin Street, Cambridge, MA 02139  
Email Address: peterd@homeownersrehab.org

Phone Number: (617) 573-1322  
Fax/Other Number: (617) 868-1022

Description and dates(s) of commodities/services provided: Complex affordable housing and mixed use developments.
Permitting Consultant: John Pulgini, Pulgini & Norton, LLP

Pulgini & Norton have more than 40 years of collective experience representing owners near Boston in land use and zoning matters. They represent individuals and lenders in financing, purchases, sales, and other matters involved with property transactions. Pulgini & Norton is proud of providing their clients with attentive, individualized representation that is tailored to their specific needs.

Pulgini & Norton Project Staff
John A. Pulgini, Partner

John Pulgini is one of the most respected and experienced real estate development and land use attorneys in Boston. His experience spans a wide range of legal representation, including serving as zoning counsel to some of the largest non-profit and commercial real estate developers in Massachusetts. John represents his clients in the securing of all permit approvals, purchases, sales, zoning opinions for financing, community outreach and other real estate matters.

Founding Partner Pulgini & Norton, LLP
• 15 years with firm
• 25 years Real Estate Experience

Education
• JD New England Law
• BS Fordham University

Pulgini Project Examples
150 Seaport Boulevard, Seaport, Boston

Zoning counsel for the development of 150 Seaport Boulevard. This development consists of 283,700 sf of new development including 120 residential units, 10,700 sf of commercial and retail space, and 179 parking spaces.

36-40 Sprague Street, Hyde Park

John Pulgini currently serves as zoning counsel for the redevelopment of 36-40 Sprague Street in Hyde Park. This proposal calls for 247 units of residential housing located in the Readville section of Hyde Park.

872 Morton Street, Mattapan (Morton Station Village)

John Pulgini served as zoning counsel for the development at 872 Morton Street, Mattapan. This project is a joint venture of The Caribbean Integration Community Development, Inc. and The Planning Office for Urban Affairs, Inc. The Morton Station Village is a new construction development consisting of 40 units of mixed-income affordable and workforce housing, of which thirty-one (31) units will be rental units for households with incomes of 30% AMI to 100% AMI and nine (9) units will be deed-restricted affordable condominium units for households with incomes of 80% AMI to 100% AMI. The Proposed Development will be adjacent to the Steven P. Odom Serenity Garden.
500 Talbot Avenue, Dorchester

John Pulgini served as zoning counsel for the approval of the redevelopment of 500 Talbot Avenue in Dorchester. This 49,500 square foot development consists of 40 residential units, 23 parking spaces, with a commercial/retail space and space reserved for church use.

Pulgini References

Michael Kineavy, COO
Cronin Development Group
250 Northern Avenue
Boston, MA 02210
T: 617-737-2366

James Baker, Principal
JMB Property Development Company, Inc.
866 Dorchester Avenue
Dorchester, MA 02125
T: 617-504-9248

Jordan Warshaw
The Noannet Group
185 Dartmouth Street
Boston, MA 02116
T: 617-963-7715
Maloney Properties, Inc. opened for business on May 1, 1981, to provide professional property management services to community-based housing owners who are committed to the interests and well-being of the resident population that the housing serves. Since then, Maloney Properties has emerged as a leading women-owned firm working in communities throughout New England.

Our executive staff works collaboratively with each client to achieve their goals while providing excellence in property and asset management. Our highly qualified team of professionals will work closely with you to understand your objectives and execute a plan to achieve them. In our long-term relationships with our clients these goals have grown, changed and shifted over time. What has remained constant is our commitment and our standard for excellence.

Our work in the multifamily housing business is well known and respected. We pride ourselves on the ability to think creatively, create lasting partnerships, and bring excitement to both new and existing projects.

We are proud of our diverse workforce and our work in the community. Our outreach in recruitment has ensured that our staff members represent the communities in which we work. With our workforce of over 400 employees, 52% of whom are Asian, African-American, and Latino we are able to provide management services that reduce or eliminate cultural and linguistic barriers. Maloney Properties is a certified Women Business Enterprise (WBE). In addition, 20% of the company is minority-owned.
Ms. Frazier is the President/CEO of Maloney Properties, Inc. and a founding partner of the firm. Ms. Frazier oversees the operation of the Management Company as well as thousands of units of housing including rental housing developments, condominiums and cooperatively owned properties. Ms. Frazier has served first as Chief Operating Officer in 1981, and then as President/CEO since 2000.

Ms. Frazier is a licensed real estate broker and a member of the Institute of Real Estate Management and the Greater Boston Real Estate Board. Ms. Frazier serves on the Boards of Directors for the Franklin Square House Foundation and the Metro Housing Boston.

Ms. Luce is Vice President at Maloney Properties, Inc. Ms. Luce has been a member of the Maloney leadership team spanning 34 years since 1983. She oversees the management of a large portfolio of mixed income senior and family housing. Ms. Luce is widely respected for her work overseeing the management of complex and challenging properties.

In her leadership role as a Partner in the firm, Ms. Luce serves on the Board and acts as Principal-in-Charge and internal consultant to Regional Managers within our company overseeing portfolio operations including quality assurance, start-up support for new properties, training for resident and community Boards.

Ms. Kadilak joined Maloney Properties, Inc. in 2009 as the Director of Resident Services. Ms. Kadilak is responsible for various resident services functions including development and direction of services and programs, trainings and activities. Jennifer also participates in the resident interview process, resident programs, trainings, services, and activities, participating in the resident interview process, new resident orientation, recruitment and coordination of volunteers and interns, maintaining communications with residents including the distribution of newsletters and providing information and referrals to service agencies, supporting the resident council, and other such duties.

Ms. Kadilak is a licensed social worker and is a Certified Trainer in Non-Abusive Physical and Psychological Intervention (N.A.P.P.I).
Maloney Properties Project Examples

66 HUDSON AT ONE GREENWAY – 66 Hudson St, Boston, MA

Maloney Properties, Inc. in conjunction with the Boston Office of Fair Housing and Equity, and the Asian Community Development Corporation (ACDC) conducted a fair housing lottery on May 15, 2015 for the 95 affordable rental units at 66 Hudson, part of the One Greenway development.

More than 4,500 applications were submitted creating a potential two-day paper drawing.

Our Team was successful in holding the first electronic lottery system by a private company for affordable housing in Boston. After extensively testing and tailoring the process, Maloney’s IT Team finalized a simple, computerized lottery process that was transparent and viewed by an audience at the drawing. The entire lottery was about 1.5 hours with the actual selection of numbers taking 2 minutes, tops! Streamlining this process was key in the successful lease up of 95 tax credit units ahead of schedule and allowed the Owner to take credits early.

88 HUDSON – 88 Hudson St, Boston, MA

88 Hudson is located on Hudson Street in Boston and consists of 51 affordable condo units. Maloney Properties, Inc. Real Estate Brokerage Division successfully completed the marketing and lottery process for the condo units in 2017. Closings were completed in February 2018. Maloney Properties, Inc. is also the managing agent for this development.

ST FRANCIS HOUSE – 39 Boylston St, Boston, MA

Located in the heart of downtown Boston, St. Francis House is the largest day shelter in Massachusetts. St Francis House serves 500 homeless men and women each day. Additionally, the Next Step Housing Program, offers formerly homeless clients permanent sober housing. Residents benefit from the assistance of professional case managers who provide individual support, foster sobriety, and aid the development of life skills required for community reintegration and independence. Maloney Properties provides property management services and, in that capacity, we collaborate daily with service providers and residents to foster cohesive services.
Maloney Properties Real Estate Brokerage Division conducted the marketing and lottery services for 22 DND affordable homeownership units at Olmsted Green Phase II in Mattapan, MA. Maloney was responsible for all phases of the affordable marketing and sales process from initial Affirmative Fair Housing Marketing Plan development and submission through final closings. Closings were completed in March 2018.

Maloney Properties References

Asian Community Development Corporation (ACDC)
Angie Liou, Executive Director
Email: angie.liou@asiancdc.org
Phone: 617-482-2380

Inquilinos Boricuas En Acción (IBA)
Vanessa Calderon Rosado, CEO
Email: vicroso@ibaboston.org
Phone: 617-927-1711

St. Francis House
Karen LaFrazia, President, President and CEO
Email: klfrazia@stfrancishouse.org
Phone: 617-654-1214
Project Partners and Supporters
In addition to gathering the development team, POUA has also conducted outreach to financing, commercial, service provider and health care organizations that may play a role in financing, operating, occupying the development as a tenant, or provide additional consulting on an aspect of the development plan. As the following letters attest, Boston Health Care for the Homeless, Boston Medical Center, Bank of America, Massachusetts Housing Investment Corporation (MHIC), and Massachusetts Housing Partnership (MHP) have all expressed strong support for and interest in participating in the project. Other potential partners that POUA has had preliminary conversations with or is interested in working with include Commonwealth Kitchen and the Boston Nature Center.

Boston Health Care for the Homeless

October 10, 2019

Commonwealth of Massachusetts
Division of Capital Asset Management and Maintenance
One Ashburton Place, 15th Floor
Boston, MA 02108

To Whom It May Concern:

Boston Health Care for the Homeless Program (BHCHP) affirms our support of the Planning Office for Urban Affairs' (POUA) proposed development of the former Boston State Hospital site and interest in working with POUA as a project partner. The proposed Health and Housing Integrated Development is a creative and needed approach to assisting households who have experienced homelessness or are at-risk of homelessness, as well as other low- and moderate-income households, achieve housing stability while addressing the health and wellness needs of the broader community.

Founded in 1985 as one of the first Health Care for the Homeless programs in the country, BHCHP is committed to a singular, powerful mission—to provide and assure access to the highest quality health care for Boston's homeless men, women and children. BHCHP has extensive experience addressing the special needs of homeless people. We understand the medical complexity of our patients and the obstacles of life without safe and reliable housing as well as the challenges of those who are newly housed. This expertise allows us to care for more than 11,000 of our community's most vulnerable citizens each year, making BHCHP one of the largest and most comprehensive health care for the homeless programs in the country. BHCHP maintains strong ties with the medical community, operating daily primary care clinics for homeless patients on the campuses of three major hospitals — Massachusetts General Hospital, Boston Medical Center (BMC), and Lemuel Shattuck Hospital. In addition, BHCHPs multidisciplinary teams deliver direct medical, dental and behavioral health services to homeless men, women, and children in 45 unconventional locations — in shelters and soup kitchens, under bridges, along back alleys, and recently in a fully licensed medical van. BHCHP also runs a unique 104-bed medical respite program that provides
sophisticated, round-the-clock medical and nursing care for homeless individuals when they are too sick for shelters or the street but not in need of a costly inpatient hospital stay.

We address the existing barriers to accessing care that our population experiences by embedding our clinics and services in areas where the homeless population can be found, such as the Saint Francis House shelter (SFH). BHCHP has been working collaboratively and in a mutually satisfying and existing relationship with proposal co-sponsor Saint Francis House (SFH) since 1985. BHCHP and SFH have a long history of serving the homeless population in the Boston area and our program is committed to continuing this collaboration. In addition, BHCHP is working with POUA and SFH as a referring medical service provider for their proposed 41 LaGrange Street development in connection with Section 811 vouchers provided by the Cambridge Housing Authority. Therefore, we feel confident about working together with POUA and SFH on this proposal. To date, we have provided input on the design and programming of the health clinic space together with BMC, and we are committed to continuing to provide this input as the project moves forward. We also envision working with POUA to determine the staffing of the health clinic space.

The proposed development of the former Boston State Hospital campus represents an opportunity to fill a gap in the continuum of care by providing sorely needed permanent supportive housing and other affordable housing for the Boston community. We look forward to working with POUA and the other project team members to make this vision a reality.

Please feel free to contact our program with any questions or concerns.

Sincerely,

Jessie M. Gaeta, MD
Chief Medical Officer

jgaeta@bhchp.com
857-654-1012

Providing services as Barbara McInnis House and McInnis Health Group

780 Albany Street Boston, MA 02118-2524 Tel 857.654.1000 Fax 857.654.1100 www.bhchp.org
To Whom it May Concern:

Boston Medical Center is pleased to provide this letter of support for the Planning Office for Urban Affairs’ (POUA) proposed development of the 10-acre property on the former Boston State Hospital Parcel. The proposed Health and Housing Integrated Development describes a unique opportunity to improve both community and patient level health and reduce medical costs by addressing homelessness and housing insecurity.

Boston Medical Center is a private, not-for-profit, 514-bed, academic medical center located in Boston's historic South End. The primary teaching affiliate for Boston University School of Medicine, BMC is the largest safety net hospital and busiest trauma and emergency services center in New England. We are dedicated to providing accessible healthcare to everyone. The majority (57%) of our patients are from under-served populations, and 32% do not speak English as a primary language. We have found that 25% of patients admitted to our hospital are homeless. In addition, data from our pediatric Emergency Department shows that one in three families are housing insecure. Thus, we see firsthand, on a daily basis, how housing insecurity is tied to a wide array of health problems, including asthma, lead exposure and depression. People in these situations are often forced to choose between paying for medication or rent. And, children whose parents are behind in rent are more likely to suffer from food insecurity and related health problems.

To address these challenges, over the last few years, Boston Medical Center has invested millions of dollars in a wide range of affordable housing initiatives. And, we are committed to working with mission-driven community partners in neighborhoods where many of our patients already live with the overarching goal of increasing the availability of stable, affordable housing as well as housing stabilization for those with complex medical problems, including substance use disorders.

Over the last several months, we have been meeting with POUA, a mission-driven organization, to explore opportunities for partnership and believe that their proposal for the former Boston State Hospital parcel is precisely in line with our overarching goal. To date, we have provided input on the design and programming of the health clinic space, and we are committed to continuing to provide this input as the project moves forward. We also envision working with POUA to determine the staffing of
the health clinic space, which could, for example, be accomplished either with our own personnel or through our partners at area health centers such as the Mattapan Community Health Center.¹

We strongly support POUA’s vision of the health clinic as not only providing care to residents, including targeted services for those who have experienced homelessness, but also to those living in the surrounding community. Ultimately, we view POUA’s proposal as not only providing direct benefit to people with complex health and social needs, but also building a healthier community. We look forward to partnering with POUA on this, and other future projects!

Please feel free reach out to me for any additional assistance or information.

Sincerely,

Megan Sandel, MD, MPH
Associate Professor of Pediatrics and Public Health
Boston University Schools of Medicine and Public Health

¹ Boston Medical Center is a founder of Boston HealthNet, a network affiliation of the medical center, Boston University School of Medicine and 14 community health centers, including the Mattapan Community Health Center.
October 11, 2019

Bill Grogan, President
Planning Office for Urban Affairs
84 State St, suite 600
Boston, MA 02109

Re: Redevelopment of the Former Boston State Hospital, Boston, MA

Dear Mr. Grogan:

I would like to express Bank of America’s support for the Planning Office for Urban Affairs proposal to redevelop the former Boston State Hospital site into a mixed-use, mixed-income development that will provide a range of housing options, commercial space and community benefits. The proposed redevelopment includes affordable and workforce rental and homeownership opportunities, commercial and community space in an integrated neighborhood setting.

Bank of America has a long-standing relationship with the Planning Office for Urban Affairs. Over the last 15+ years, Bank of America has provided construction loan and equity financing to support the development of over 1,200 units by the Planning Office, representing over $325 million in loan and equity funds invested by Bank of America in these developments across the Commonwealth. We understand that the redevelopment of the former Boston State Hospital will include construction loan financing and equity from federal and State low-income housing tax credits. In addition, given the location of the property in a federal Opportunity Zone and a census tract that qualifies for New Markets Tax Credits, we are interested in working to structure investments that can benefit from these resources.
While this letter is not an offer or commitment by the Bank to lend, it is intended to serve as an indication of the Bank’s interest in providing construction and equity financing for the redevelopment of the former Boston State Hospital property. Loan and equity approval are subject to such terms and conditions as the Bank may require in its sole discretion. We understand that the amounts and other terms and conditions are subject to change.

Bank of America is committed to serving experienced developers who build high quality affordable apartments for low- and moderate-income families and the elderly. We are, therefore, looking forward to providing financing for the redevelopment of the former Boston State Hospital and to continuing a long and valued relationship with the Planning Office for Urban Affairs.

Sincerely yours,

Mary Thompson,
Senior Vice President

Cc: Trish Marinilli; Michael E Clarke
October 14, 2019

Mr. William H. Grogan
President
Planning Office for Urban Affairs, Inc.
84 State Street, Suite 600
Boston, MA 02109

Dear Bill:

Thank you for your interest in having MHIC provide financing for the development of the final 10-acre parcel on the Boston State Hospital campus. MHIC welcomes the opportunity to work with you on this important mixed-use, mixed-income development. It is our understanding from the information you have provided to us that the current development plan consists of the new construction of three (3) three- to fourstory buildings with 165 residential rental units and commercial space, along with 32 townhouse-style homeownership units.

Your anticipated residential rental program is as follows:

- 50 studio units with permanent supportive house services provided by St. Francis House;
- 85 mixed-income family units;
- 30 mixed-income units for seniors; and
- 15% of the total units will be accessible for clients of DMH.

You expect the commercial space to include:

- A 20,000 square foot (sf) health/wellness clinic, in partnership with Boston Medical Center;
- A 4,000 sf childcare facility; and
- A 5,000 sf food hall for local food entrepreneurs.

The proposed development will provide much needed affordable and moderately priced housing, homeownership opportunities, and community services that will help neighborhood residents thrive. The potential benefits to the community in terms of long-term health outcomes and the ability to build community wealth are of particular interest to us.

MHIC is interested in working with you to develop a financing program for the site. The three primary funding programs that we are interested in bringing to the project are:

- New Markets Tax Credit financing would provide gap-filling subsidy for the commercial and, perhaps, the moderate/market rate residential rental components of the project. While the NMTC is a scarce resource, the site is located in a census tract that is considered severely distressed by the NMTC program. Further, the healthcare, childcare and small business development/wealth building opportunities offered by the commercial space fit well with our NMTC business....
strategy. We feel strongly that you will be able to attract NMTC resources for the commercial portion of the project.

- Our Healthy Neighborhood Equity Fund (HNEF) program provides economic equity to transit oriented development project that are likely to result in improved health outcomes for the community. We are in the process of closing out our first HNEF fund and launching HNEF II. Based on the information we have the commercial and moderate/market rate rental, as well as the homeownership phase, would be a good fit for HNEF II financing.
- We are very interested in working with you to diligently market the low-income housing tax credit (LIHTC) at the highest price we can achieve.

This letter is an indication of interest to provide the above financing, subject to availability of funding, completion of normal and customary due diligence, and approval of our Board of Directors. We are very interested in supporting your development of this last parcel at the Boston State Hospital site and feel strongly that it will improve the quality of life in the area. We wish you the best of luck with this project.

Sincerely,

Kathleen McGilvray
Director of Investment
October 14, 2019

Carol W. Gladstone, Commissioner
Commonwealth of Massachusetts
Division of Capital Asset Management & Maintenance
One Ashburton Place, 15th Floor
Boston MA 02108

Dear Carol:

This letter is written as an enthusiastic endorsement of the application by the Planning Office of Urban Affairs for selection as the developer for the remaining ten acres of undeveloped land at Boston State Hospital, a development that we understand will include rental and for-sale affordable housing for families and seniors, with a set-aside for units for clients of the Department of Mental Health, as well as facilities for health and wellness, child care and food service. We have long been a lender to POUA, with more than $14.9 million in permanent loan commitments closed on 10 projects totaling 304 units in Haverhill, Lynn, Dorchester, and Salem, and we continue to be very pleased with POUA as a borrower and impressed with its work as a mission-driven affordable housing developer and owner.

MHP has new financing incentives for energy savings and healthy housing, which may enhance the financing that we could bring to POUA’s transactions for the benefit of the development and its eventual residents.

In addition, since 2005, MHP has financed four of the affordable housing developments at Olmsted Green in the vicinity of the subject project. These developments have been remarkably successful, and we would certainly be pleased to work with POUA on further development there.

Please feel free to call if you have any questions. I can be reached at 857-317-8550.

Thank you.

Sincerely,

David P. Rockwell
Director of Lending

Cc: Bill Grogan, POUA president
Organizational Structure and Communication
POUA will acquire the property through an affiliated entity and undertake the development and build-out of the site in accordance with our development plan and approach. Immediately prior to construction completion, POUA will create a condominium structure that will govern the ownership and operation of the property. The master condominium will be comprised of four distinct units – 1) the homeownership unit, which will contain all of the homeownership units, 2) a 9% low-income housing rental unit, which will contain 20 of the 165 units, 3) a 4% low-income housing rental unit, which will contain approximately 106 of the 165 units, and 4) a workforce rental/commercial unit, which will contain approximately 39 units and all of the commercial space. POUA will have an ownership interest in all of the rental unit condominium units, and CICD will be the primary owner of one of the condominium units. With this type of structure, POUA, CICD, SFH, and Maloney Properties will all play an active role in the long-term management of the site.

POUA will act as convener of the development team members and project partners, as needed, in regular project meetings throughout the development period, from the financial closings through construction and lease-up. POUA will gather and funnel communication from the development team to DCAMM and vice versa to simplify the process but will facilitate meetings or direct communication with DCAMM when helpful. Moreover, POUA is also committed to holding or attending community meetings throughout the development process to provide updates on the process, answer questions, and incorporate feedback from the community.

Confirmation on Payment of Taxes
The Planning Office as well as its development team members confirm that all local, state, or federal taxes are current. Please see the respective certifications in the appendices.

Legal or Administrative Action
There are no legal or administrative actions against The Planning Office that would prevent the implementation of the development plan for the former Boston State Hospital site.
Part 3. Development Plan

Development and Design Narrative

Today, we are in the midst of a housing crisis that extends across all households, from extremely low-income households to working class and middle-income households. The impact of having a safe, decent, affordable home ripples through every single aspect of our lives, affecting our health and our economic and social well-being. Housing is one of the most powerful social determinants of health, and the affordable housing crisis is quickly becoming a public health crisis. Individuals and families without a stable home are unable to address chronic health conditions and are more likely to experience poor health. At the same time, increased housing opportunities are critical to removing barriers to economic mobility and helping to address the wealth disparity that exists among our communities.

In response to these challenges, POUA is focused on developing an integrated approach that brings together a range of mixed-income housing opportunities, economic development opportunities and health and wellness services. POUA’s vision is to create a development that can address housing, economic development, health care and community needs in an integrated, holistic manner. The disposition of the 10-acre property on the former Boston State Hospital Parcel is a unique opportunity to address these needs in an innovative and comprehensive manner, while providing significant benefits to the community.

The proposed development at the former Boston State Hospital site incorporates multiple housing options along with residential amenities, supportive services and job training opportunities all within a campus setting. The site’s location, geometry and existing natural features make it simultaneously challenging, unique and dramatic. The adjacent Mass Audubon Boston Nature Center and Wildlife Sanctuary and Clark Cooper Community Garden provide abundant outdoor activity with walking trails, gardens and natural resources.

The site is bound by Harvard Street to the south and Mass Biologics and the Massachusetts Public Heath Campus to the west. Just north of the site is the Mass Audubon Boston Nature Center and Wildlife Sanctuary. To the east is the Olmstead Green development. The site is divided in the east west direction by West Main Street. The irregularly shaped site includes significant change in elevation over its 10+ acres. The site varies in elevation across its frontage on Harvard Street by +/- 25’.

The site plan was specifically designed to work in concert with the site’s existing terrain and natural amenities. The proposed multifamily buildings are linear in nature and run parallel to the sites’ contours to act as retaining walls which minimize site disruption and earthwork. Three clusters of townhouse units line Harvard Street and step up in elevation to the west providing an edge along the street and are in keeping with the scale of the existing neighborhood. The three multifamily buildings on the site are 3 - 4 stories in height and incorporate residential units as well as a variety of resident services including a clinic / wellness center, food hall and daycare center as well as residential amenity spaces to support the units. Buildings 2 and 3 include direct entry residential units on the ground floor with raised stoops. These direct entry units provide a sense of ownership, security and add to the residential scale of the development. The northern portion of the site which is separated from the remainder by West Main Street, includes 4 clusters of townhome units and their associated open space. The challenging elevation change across the site provides the unique opportunity for the architecture of the individual buildings to vary in height and to provide a much more interesting relationship between one another. The site includes significant clusters of mature trees in the south west corner as well as the north side of the site adjacent to the Mass
Audubon property. These areas are left untouched to the greatest extent permissible to preserve as many trees as possible and to provide a natural buffer to our neighbors.

The proposed design provides primary access from Harvard Street at the south east corner of the site. The main drive winds through the site providing access to the three multifamily buildings. Parallel parking along the access drive is included for convenience to residents as well as to slow traffic and provide a more pedestrian friendly site. The access drive is split in some locations in order to better respond to the existing cross slope. This has the added benefit of allowing the inclusion of a planted median. Additional parking is generally provided to the rear and sides of the multifamily buildings, again, purposely sited to minimize disruption of the existing grades. Parking for the Harvard Street townhomes is provided to the rear of the units under the structures as allowed by the existing change of grade. Parallel parking is provided for the north townhome units on the street.

Several different types of open space are provided throughout the development. Untouched, wooded areas of the site provide natural open spaces that can be used for walking trails and other passive uses. The proposed food hall located in Building 1 includes an outdoor patio to allow users to dine and generally gather outdoors. The proposed daycare center in Building 2 will include and outdoor play area located adjacent to the center’s main entry and drop off area. Each townhome unit will be provided with a private patio area in the rear. The north townhome units will also have a shared common green space as well as the natural wood buffer to the north. In addition to the open space provided on the site itself, residents also can enjoy the abundant natural resources directly adjacent to the site.

Please see the plans, graphics, and unit and area breakdown for more information.

Boston State Hospital - Zoning Analysis

District
Mattapan Neighborhood District
Enterprise Protection Subdistrict
Map 8D-8F
Article 60
Planned Development Area (PDA) is allowed
Site area 10.003 Acres ~ 435,739 sf

Table C - Mattapan Neighborhood District - Enterprise Protection Subdistrict - Use Regulations
Proposed uses:
- Daycare Center – Allowed
- Clinic – Conditional
- Open Space – Allowed
- Multi-family Dwelling – Conditional
- Townhouse – Allowed
- Restaurant – Conditional

Table E - Mattapan Neighborhood District - Enterprise Protection Subdistrict – Dimensional Regulations
<table>
<thead>
<tr>
<th>Maximum Floor Area Ratio</th>
<th>.5(2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Building Height</td>
<td>45(2)</td>
</tr>
<tr>
<td>Residential Use</td>
<td>(2,3)</td>
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</tbody>
</table>
Other Use

Minimum Lot Size none
Minimum Lot Width none
Minimum Lot Frontage none
Minimum Front Yard 20’
Minimum Side Yard none
Minimum Rear Yard none

(2) For the Maximum Building height, Floor Area Ratio, and number of dwelling units per acre for a Planned Development Area, see Section 60-30.

(3) In any Enterprise Protection Subdistrict, there shall be a maximum of eight (8) dwelling units per acre and a minimum lot size of one (1) acre.

Section 60-30 – Planned Development Areas: Use and Dimensional Regulations.

1. **Use Regulations.** A proposed Project within a PDA shall comply with the use regulations applicable to the underlying subdistrict for the location of the Proposed Project, except as those regulations are expressly modified by an approved Development Plan.

2. **Dimensional Regulations.** The dimensional regulations for a proposed project within a PDA shall be set forth in the applicable Development Plan, provided that the Building Height, Floor Area Ratio (FAR), and number of dwelling units per acre for such Proposed Project shall not exceed the limits set forth in Table 2, below:

Table 2 – Greater Mattapan Neighborhood District Planned Development Areas Maximum Building Heights, Floor Area Ratios, and number of Dwelling Units per Acre.

<table>
<thead>
<tr>
<th>Maximum Building Height</th>
<th>65’</th>
<th>proposed 50’</th>
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<tbody>
<tr>
<td>FAR</td>
<td>0.5</td>
<td>217,870 gsf allowed</td>
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<tr>
<td>Maximum No. of Dwelling Units/Acre</td>
<td>15</td>
<td>proposed 19.7</td>
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Economic Impact and Community Benefits

Wealth Creation/Economic Benefits

POUA is committed to leveraging the redevelopment of the Boston State Hospital property, to the maximum extent possible, to achieve their goal of generating economic opportunity and community benefits for residents of Mattapan and local Minority and Women Business Enterprises (M/WBE).

Our approach and vision involve the creation of a range of economic opportunities that will support wealth creation within the local business and residential community. Key economic benefits/wealth creation goals and other community benefits identified by our team include:

Minority Role in the Development

A major component of our wealth-creation plan is structured around the unique partnership between CICD and POUA. CICD will be the primary owner/developer of one of the buildings to be constructed as a part of the development approach. CICD’s role on other development in Mattapan – Cote Village, 872 Morton Street and 150 River Street Village, have laid the groundwork for the CICD to begin building a substantial asset base that will generate wealth within the minority community through the organization’s future development projects, spinning off construction and permanent employment opportunities as well as professional service contracts. CICD’s role in the redevelopment of Boston State Hospital property represents an important next step in CICD’s progression and growth and will assist in further developing CICD into a thriving local non-profit organization.

Contract Opportunities for Minority/Women Business Enterprises

POUA is committed to maximizing opportunities for Minority/Women Business Enterprises, during the pre-construction and construction phases of the Project. Additionally, the Proponent will use all necessary and appropriate measures to establish a diverse construction workforce in compliance with City of Boston requirements. POUA are deeply committed to generating wealth-creation in the minority business community, and this commitment is reflected in the composition of its other developments in Mattapan, as well as this one. Toward that end, we are implementing a M/WBE Business Utilization Plan that is structured around maximizing diversity and inclusion during all project phases (pre-construction, construction, and post-construction).

POUA’s development team includes two M/WBE companies: CICD and Maloney Properties, which is a women-owned business and will be the property manager for the development. As the project advances to the pre-construction, construction and post-construction phases, our goal is to conduct a comprehensive level of outreach in an effort to identify qualified businesses in advance of contracting opportunities for both construction and property operations, in order to broaden the pool of M/WBEs competing for the work. Key M/WBE opportunities that are currently under evaluation include:

1. **Pre-Construction/Construction Phase**
   A. Contractors, either individually or through a joint venture/partnership arrangement, who have experience in this type of development
   B. Subcontractors who have expertise in a particular trade
   C. Consultants and advisors, such as acoustical engineers
   D. Vendors who provide construction-related goods and services

2. **Post Construction Phase**
   A. Landscaping Services
Permanent Affordable and Mixed-income Rental and Homeownership Housing
POUA is proposing to develop a mix of rental and homeownership housing that will be affordable to a wide range of households to create a truly economically and socially integrated community. The housing component will include 165 units of rental housing that will be a mix of affordable, workforce and moderate-income, and market-rate housing, allowing individuals and households to transition into permanent housing, promoting diversity and inclusion, and providing a variety of housing opportunities for neighborhood residents in terms of number of available units and unit types. Of these units, 15% will be set-aside for DMH clients. POUA has experience incorporating DMH units in an integrated residential community, most recently in Bethany Apartments, a 37-unit mixed-income development in Hanover. POUA will also be setting aside 30 of the rental units for older adults, recognizing the need to provide housing opportunities for individuals and/or couples who wish to downsize but remain in the community. Finally, the development will include 32 units of first-time homebuyer workforce and market-rate homeownership units, with nearly two-thirds of the units being made available for 80% and 100% AMI households. This mix of rental and ownership housing will help build an economically and socially integrated vibrant and strong community.

Integrated Health Clinic and Wellness Space
There will be approximately 20,000 square feet of health care clinic and community wellness space that will provide health and wellness services to residents and the community. POUA has partnered with Boston Medical Center and Boston Healthcare for the Homeless to run the clinic out of this space and will be working on community and neighborhood-based wellness programs and services that can be provided.

Permanent Supportive Housing
The development will include 50 units of permanent supportive housing which will be located above the health clinic/community wellness space for individuals to receive case management and supportive services.

Economic Development Opportunities Through the Creation of Commercial and Community Space
The development will include commercial space that will integrate active economic development and commercial activity into the site. A food hall/restaurant space and day care center are planned, as well as health and wellness services in the clinic building space to support the residents and the community at-large. These spaces will provide opportunities for residents who are DMH clients or in the supportive housing units to obtain job training in appropriate roles, such as learning to work in an industrial kitchen, through programs to be developed in partnership with St. Francis House, CICD, and selected commercial tenants or other service providers.

Open/Recreational Space
In keeping with the themes of health, wellness, and inclusive community, there will be a focus on utilizing open space to facilitate neighborhood involvement and interaction as well as physical activity, including a playground. As noted in the Total Consideration narrative, these spaces play an important role in resident and community health by providing opportunities for physical activity, facilitating socialization, reducing
heat island effects, and reducing stress. Studies have also found that playgrounds, parks, and other spaces support economic development by increasing patronage at nearby businesses. As the site plan develops, we will explore opportunities to incorporate additional walking paths, community gardens, or other landscaping options.

**Resident Support Services**

Resident service coordination staff will be located on site to help residents access the supportive services they need to maintain health, remain in housing, and stay socially engaged. These staff members will work in collaboration with our service partners, including St. Francis House, who will provide their own full range of services to residents. Examples of the programs and services the property manager, Maloney Properties, has experience providing and we would work with to offer at the site are detailed below.

- Group Adult Foster Care
- Meals Programs
- Homemaker and Personal Care Programs
- Multigenerational Arts and Cultural Programs
- Computer Learning Centers/Neighborhood Networks
- After School & Summer Camp Programs
- Adult Day Health Programs
- Assisted Living
- Senior Care Options (SCO)
- Elder Service Plan (PACE)
- Health Screening & Wellness
- Community Safety & Policing Programs
- Academic Support and Tutoring
- Youth Enrichment Programs
- Youth Mentoring Programs
- Parenting Support
- GED Programs
- Job Skills Training & Placement
Construction Jobs
In the construction phase of the project, we anticipate that more than 500 construction jobs will be generated. We will explore every opportunity to achieve local workforce levels that will exceed City of Boston goals.

Transportation benefits
Please see the Transportation Systems section for more information on transportation and access benefits.

Community Organization Support
In addition to the extensive economic and community benefits provided by the development, POUA is supporting local community organizations and the integration of community-based services into the larger development. Understanding that the completion of the development would be several years away, POUA would work with the community to outline a process for selecting appropriate organizations so that the services can be provided when the development is complete.

DMH Client Housing, Training, and Employment Opportunities
As noted above, POUA is committed to ensuring that DMH clients receive 15% of housing units on site and 10% of employment or training opportunities resulting from the development plan. Both POUA and Maloney Properties have experience working with the DMH population on other developments and would work together and with other members of the development team to ensure DMH residents/workers are included in the hiring and marketing process. We will also work with Maloney, St. Francis House, and the staff of the clinic space to coordinate care and services with any case managers that DMH residents may have.
### Anticipated Permits and Approvals

<table>
<thead>
<tr>
<th>AGENCY</th>
<th>APPROVAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Environmental Protection Agency</td>
<td>National Pollution Discharge Elimination System (NPDES) NEPA Review</td>
</tr>
<tr>
<td>Massachusetts Water Resources Authority</td>
<td>Construction Dewatering Permit</td>
</tr>
<tr>
<td>Massachusetts Department of Environmental Protection, Division of Air Quality Control</td>
<td>Notification prior to demolition and/or construction (BWP AQ 06) Certification for Emergency Generator</td>
</tr>
<tr>
<td>Massachusetts Historical Commission</td>
<td>No adverse effect finding</td>
</tr>
<tr>
<td>Boston Planning &amp; Development Agency</td>
<td>Large Project Review (Article 80) Cooperation Agreement Boston Residents Construction Employment Plan Affordable Housing Agreement and Restriction</td>
</tr>
<tr>
<td>Boston Board of Appeal</td>
<td>Schematic Design Review</td>
</tr>
<tr>
<td>Boston Civic Design Commission</td>
<td>Flammable Storage License</td>
</tr>
<tr>
<td>Boston Committee on Licenses/Public Safety Commission</td>
<td>Approval of Fire Safety Equipment</td>
</tr>
<tr>
<td>Boston Fire Department</td>
<td>Building Permit Occupancy Permit</td>
</tr>
<tr>
<td>Boston Inspectional Services Department</td>
<td>Curb cut approval</td>
</tr>
<tr>
<td>Boston Public Improvement Commission/Public Works</td>
<td>Transportation Access Plan Agreement Construction Management Plan Street and Sidewalk Occupancy Permit(s)</td>
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<tr>
<td>Boston Transportation Department</td>
<td>Water and Sewer Connection Permits General Service Application Site Plan Review Infiltration and Inflow (I&amp;I) Fee</td>
</tr>
</tbody>
</table>

### Preliminary Project Schedule

As an experienced developer of mixed-use, mixed-income developments, POUA has a well-established track record in advancing mixed-use, mixed-income developments, such as the redevelopment of the former Boston State Hospital site, in a timely and expeditious manner, while taking the time to work closely with and be responsive to community and neighborhood objectives.

As described in more detail in the Financial Feasibility section, the Development will be financed with a combination of equity from the sale of federal 4% and 9% low-income housing tax credits (“LIHTC”), State LIHTCs, New Markets Tax Credits and other equity investments; permanent mortgage and bridge financing; and grants and soft loans from the Commonwealth of Massachusetts and the City of Boston. In order to expedite the development schedule and structure the redevelopment so that it can be financed...
all at the same time, POUA will structure the development as a master condominium with four distinct units – 1) the homeownership unit, which will contain all of the homeownership units, 2) a 9% low-income housing rental unit, which will contain 20 of the 165 units, 3) a 4% low-income housing rental unit, which will contain approximately 106 of the 165 units, and 4) a workforce/commercial unit, which will contain approximately 39 units and all of the commercial space. With this type of a structure, POUA would seek to obtain funding from the City in the Fall 2020 and from the Commonwealth in the Winter 2020-21.

To meet this timeframe, POUA would immediately seek to engage with the Citizens Advisory Committee, local elected officials and other representatives of the adjacent residential, commercial, and institutional community in a very comprehensive manner. Assuming a developer selection is made by January 1, 2020, POUA, along with its partners, would hold a series of community meetings in the first couple of months following a designation. Following this initial community engagement process, POUA would make any necessary revisions to the design and programmatic approach and commence the Article 80/zoning process in the Spring of 2020, with the goal of obtaining final approvals in the Fall/Winter of 2020. By obtaining approvals within this timeframe, POUA would be well positioned to submit funding applications to the City and State that demonstrate a high level of readiness to proceed. Assuming the receipt of funding awards from the Commonwealth during the Summer of 2021, construction would be expected to get underway in the Spring of 2022 and would be completed for occupancy in approximately 24 months.

Financial Feasibility

The disposition of the 10-acre property on the former Boston State Hospital Parcel is a unique opportunity to address a wide range of housing and community development needs, and POUA has identified and will secure equity financing and construction and permanent loans from a range of private, public and quasi-public agencies to make this initiative a reality. One of the challenges of large-scale, mixed-income, mixed-use developments is that the public funding sources often require multiple rounds of awards, which can necessitate expensive phasing structures and delay the entire build-out of the site.

In order to address this issue, POUA will structure the development as a master condominium with four distinct units – 1) the homeownership unit, which will contain all of the homeownership units, 2) a 9% low-income housing rental unit, which will contain approximately 20 of the 165 units, 3) a 4% low-income housing rental unit, which will contain approximately 106 of the 165 units, and 4) a workforce/commercial unit, which will contain approximately 39 units and all of the commercial space. With this type of structure, POUA can minimize costs associated with a multi-phased project, leverage private equity and financing that is specifically targeted to the housing workforce units and commercial space and reduce expenses and costs that would be borne by the Commonwealth.

The total development costs will be supported by the following sources of funds:

- Equity from federal and State Low Income Housing Tax Credits (“LIHTC”). In order to maximize the equity that can be raised, POUA will secure equity from 9% LIHTC and 4% LIHTC through the use of tax-exempt financing. POUA has successfully used this financing approach on the Cote Village development in Mattapan. A letter of interest is included from Bank of America.

- Bridge and permanent tax-exempt financing from MassHousing. POUA has closed taxable and tax-exempt financing from MassHousing over the last two years and has a successful track in securing and closing this type of financing.
• Permanent taxable financing from the Massachusetts Housing Partnership ("MHP"). A letter of reference from MHP is included with this response demonstrating POUA’s extensive lending relationship with the agency.

• Equity investments through the New Markets Tax Credit and Opportunity Zone program. POUA has had conversations with Bank of America and the Massachusetts Housing Investment Corporation, and letters of interest are included with this response.

• Equity investment and financing through the Healthy Neighborhood Equity Fund. POUA has had conversations with the Massachusetts Housing Investment Corporation, and a letter of interest are included with this response.
Infrastructure Systems and Environmental Impact and Mitigation

Overview of Project Site

The Site is located in the Greater Mattapan Neighborhood of Boston. It is bound by Harvard Street to the southeast, the Mass Biologics Campus to the southwest, Mass Audubon’s Boston Nature Center to the northwest and Olmsted Green to the northeast. The main site access and frontage for the project is on Harvard Street and in the middle of the parcel there is an existing driveway known as West Main Street. A portion of West Main Street, from Harvard Street to the project site, is approved by the City of Boston Public Works Department as a Public Way and is proposed to be constructed to City of Boston standards. The remainder of West Main Street is a private driveway through the Mass Biologics campus.

The site is generally undeveloped at present time with the exception of driveways remaining from the former campus. Buildings that previously had occupied the site have since been demolished and removed and a significant portion of the lawn and previously developed areas have been revegetated with trees and natural grasses. In general, the site slopes from south to north with the high point in the southwest corner at Harvard Street and the lowest portion of the site near the Mass Audubon Boston Nature Center. The change in grade is roughly 40-feet across the parcel.

Overview of Utility Services

Review of the surrounding area and the utility records provided within the RFP show the major utility providers have required infrastructure systems in both Harvard and West Main Streets. Existing sanitary sewer, storm drainage, water, gas, electric and telecommunications lines are in the Project’s vicinity. Additionally, a new 12” water main, 12” drain main and 10” sanitary sewer main are proposed as part of the West Main Street construction, which further enhance the area’s infrastructure.

Approval of Site plans and a General Service Application are required from the Boston Water and Sewer Commission (BWSC) for construction and activation of sewer, water, and storm drainage service connections. The final sewer and water connections, as well as the Project’s stormwater management system, will be designed in conformance with BWSC’s design standards, Requirements for Site Plans, Regulations Governing the Use of Sanitary and Combined Sewers and Storm Drains, and Regulations Governing the Use of the Water Distribution Facilities of the Boston Water and Sewer Commission.

A Drainage Discharge Permit Application will be submitted to BWSC for any required construction dewatering. The appropriate approvals from the MassDEP and the EPA will also be sought.

Water System

Existing Water System

BWSC owns, operates, and maintains the water distribution systems near the Site and will ultimately own and operate the new 12” main, post construction and acceptance of West Main Street.

Proposed Water Service

The Project’s engineer will coordinate water demand and availability with BWSC during Project design to ensure the Project needs are met while maintaining adequate water flows to the surrounding neighborhood. Confirmatory hydrant flow testing will be conducted by BWSC prior to construction. Based on the current Concept Plan it is assumed that the multi-family and commercial buildings will each be served by a single domestic service connection and separate fire protection service connection. The Townhouses will likely be served and metered individually.
Final service locations will be coordinated with BWSC. Metering will be conducted in accordance with BWSC requirements including the installation of meter transmission units (MTU’s) to comply with BWSC’s automatic meter reading system. Appropriate gate valves and backflow prevention devices will also be installed on each water service to allow individual services to be shut off and to prevent potential backflow of non-potable water or other contaminants into the public water supply.

At this point in the design it anticipated that additional fire hydrants will be proposed to ensure appropriate safety measures for public protection are in place. Any additional proposed hydrants will be coordinated with the Boston Fire Department (“BFD”).

**Water Supply Conservation and Mitigation**

The Project will be LEED certifiable in accordance with the BPDA’s Article 37 Green Building program. As such, various water conservation measures such as low-flow toilets and urinals, restricted flow faucets, and sensor operated sinks, toilets, and urinals may be incorporated to meet the LEED water conservation requirements. Specific water conservation measures to be included in the Project will be more fully described as the Building designs develop.

**Sanitary Sewer System**

**Existing Sanitary Sewer System**

BWSC owns, operates, and maintains the sanitary sewer mains near the Site and will ultimately own and operate the new 10” main, post construction and acceptance of West Main Street.

**Proposed Sanitary Sewer Connections**

Service connections are anticipated to occur in Harvard and West Main Street.

Sewer connections will be constructed to minimize effects on adjacent streets, sidewalks, and other areas within the public right-of-way, and sewer service connections will be kept separate from storm drain connections in accordance with BWSC requirements. Per current BWSC records, it appears that all storm and sanitary sewer drains within Harvard Street and West Main Street are separated.

**Sewer System Mitigation**

The sanitary sewer connections are subject to approval by the municipal sewer system owner, BWSC, as part of the Site plan approval process. As part of the Project mitigation, the Project will need to mitigate inflow and infiltration (I/I) into the BWSC sewer system, and ultimately the MWRA regional wastewater system, at a rate of 4-gallons for every 1-gallon of new sewer flow. Currently, the BWSC calculates the monetary amount required to fulfill the 4:1 Inflow Reduction requirement by multiplying the estimated wastewater flow by 4 and then by $2.41. The Proponent will continue to work with BWSC as the building program is finalized to identify the I/I payment to be made.

Additionally, as stated in the Water Supply Conservation and Mitigation Section, various measures for water use reduction, which translates directly into wastewater reduction, are being implemented into the design which will also benefit the overall goal of reducing the volume of flows being sent to the MWRA wastewater treatment facility.
Storm Drainage System

Existing Storm Drainage System
The existing Site is predominantly wooded and meadow areas with remnant and active driveways. Runoff from the Site currently flows overland, generally south to north towards an offsite wetland area northeast of the Project site.

Proposed West Main Street Storm Drainage System Improvements
In 2018 the Commissioner of Boston Public Works approved plans to extend West Main Street from Harvard Street up to and onto the Project site. The plans detail the roadway, sidewalk, streetscape and utility provisions, including a roadway storm drainage system. When constructed, the roadway and associated drainage system will intercept approximately 2/3 of the project site flows and treat prior to discharge to the downstream wetland areas. The proposed Project will be designed to comply with the applicable State and City requirements and will not be dependent on the construction of West Main Street, but will be designed to work with the West Main Street improvements when they are constructed.

Proposed Storm Drainage System
The site’s proposed stormwater management system will be designed to comply with BWSC requirements. It is anticipated that stormwater runoff will be collected and treated on-site, as necessary, and will be routed to subsurface infiltration systems to reduce the impact on the downstream wetland and BWSC drainage system. On-site systems will be designed in conformance with BWSC and Boston Smart Utilities Standards with a target capacity of 1.25-inches over the impervious area of the Site. Appropriate stormwater best management practices (“BMP’s”) are to be included in the Project to improve the quality of stormwater runoff discharged from the Site, to promote infiltration to groundwater, and to ensure peak flows are at or below existing levels. Overflow connections from the underground infiltration/detention areas are proposed to handle larger, less frequent storm events and will discharge towards existing overland discharge points or into the BWSC separated storm drainage system.

Electrical Services
Eversource owns and maintains the electrical infrastructure within the Project’s general vicinity. Existing overhead electric lines are located along Harvard Street and records show existing service along portions of West Main Street.

Telecommunication Services
All energy and telecommunications connections will be coordinated with the appropriate utility companies and the City. Existing overhead telecommunication lines are located along Harvard Street and records show existing service along portions of West Main Street. Final service and appropriate connection points will be coordinated with private utility providers as the Project design progresses.

Natural Gas System
National Grid provides natural gas service in the Project area along Harvard Street and records show existing service along portions of West Main Street. Final service and appropriate connection points will be coordinated with National Grid as the Project design progresses.
Utility Protection During Construction

The Contractor will notify utility companies and call “Dig-Safe” prior to excavation. During construction, infrastructure will be protected using sheeting and shoring, temporary relocations and construction staging as required. The Contractor will be required to coordinate all protection measures, temporary supports, and temporary shutdowns of all utilities with the appropriate utility owners and/or agencies. The Contractor will also be required to provide adequate notification to the utility owner prior to any work commencing on their utility. Also, in the event a utility cannot be maintained in service during switch over to a temporary or permanent system, the Contractor will be required to coordinate the shutdown with the utility owners and Project abutters to minimize impacts and inconveniences. The Proponent will continue to work with BWSC and utility companies to ensure safe and coordinated utility operations in connection with the Project.

Transportation Systems

Public Realm Access and Accommodations

- Proposed Site plans envision city standard sidewalks along both sides of the street that will provide an integrated means of pedestrian accommodation to existing sidewalk systems along West Main Street and Harvard Street.

- Proposed Access at Harvard Street and at West Main Street will be designed to ensure ample sight lines based on ambient travel speeds to ensure proper visibility to oncoming vehicles and vice-versa.

- Vehicular traffic is designed to access the site from Harvard Street and the Public Way portion of West Main Street. Currently there is no access contemplated through the Mass Biologics Campus.

- ADA-compliant pedestrian crossings and associated signs and markings shall also be provided at the West Main Street roadway intersections to safely accommodate pedestrian activity generated between the northerly and southerly property residences and clinic/wellness center.

- Bicycle accommodation features are envisioned for consistency with the City of Boston Complete Streets design guidelines including use of Sharrow markings and/or bicycle shoulder markings on project roadways and along the Harvard Street and West Main Street corridors in the project vicinity. Such features, when combined with an integrated system of sidewalks will provide a safe and viable means of non-auto (walking and bicycle) travel within and to/from the project with appropriate access to public transportation stops at American Legion Highway via Harvard Street.

- In accordance with BTD guidelines, bicycle racks will be provided on-site in close proximity to the building entrances for use by employees, patrons, and residents.

- A bike share station will be considered for the site to provide easy access to bicycles to encourage and facilitate this mode of transportation.

Transportation Mitigation Measures

- Traffic impacts of the project are anticipated to be immaterial relative to current conditions on area roadways; dual means of access via the Public Way portion of West Main Street and Harvard
Street will allow distributed traffic flow estimated to represent net increases of less than 5 percent over existing traffic.

- Construction Management Plan. Details of the overall construction schedule, working hours, number of construction workers, worker transportation, and parking, number of construction vehicles, and routes will be addressed in detail in a Construction Management Plan (CMP) to be filed with BTD in accordance with the City’s transportation maintenance plan requirements. The CMP will also address the need for pedestrian detours, lane closures, and/or parking restrictions, if necessary, to accommodate a safe and secure work zone. To minimize transportation impacts during the construction period, the following measures will be considered for the CMP:
  - Construction workers will be encouraged to use public transportation and/or carpool;
  - A subsidy for MBTA passes will be considered for full-time employees; and
  - Secure spaces will be provided on-site for workers’ supplies and tools so they do not need to be brought to the Project Site each day.

*Transportation Impacts and Benefits*

- Provision of an integrated sidewalk system that connects to the existing City sidewalk system along Harvard Street and West Main Street to accommodate and encourage walking to area amenities and public transportation services.

- Provision of ADA-compliant pedestrian crosswalks at key desire lines at West Main Street to safely accommodate pedestrian activity between the northerly and southerly property uses.

- Provision of bicycle accommodation features within the Site and on roadways proximate to the site that are consistent with the Boston Complete Streets guidelines to accommodate and encourage the bicycle travel mode.

- Provision of a bike share station within the property to augment the City’s network of bikeshare stations and to facilitate and encourage bicycle travel throughout the City.

- Traffic impacts of the project are anticipated to be immaterial relative to current conditions on area roadways; dual means of access via the Public Way portion of West Main Street and Harvard Street will allow distributed traffic flow estimated to represent net increases of less than 5 percent over existing area traffic volumes at major area intersections.

- Similarly, based on the development team’s experience with part of the target population for the development, it is expected that few residents of the permanent supportive housing will have their own automobiles, reducing traffic impacts and also freeing up parking space for other residents or employees of the site.

- Accommodations for alternative travel modes including an extensive, integrated sidewalk system, bicycle accommodations and a bike share station within the property are aimed at reducing dependence on automobile use and hence reducing traffic impacts.
Ongoing Ownership, Marketing, and Management

POUA, CICD, SFH, and Maloney Properties will all take an active role in the long-term management of the site. As we have done for other properties, we will work together to craft an Affirmative Fair Housing Marketing and Tenant Selection Plan in order to effectively reach the communities and populations the development is serving, and that which complies with regulatory agency and funding requirements. This includes marketing to diverse populations that speak different languages by advertising in local foreign language papers and media outlets, conducting information sessions and interviews with prospective residents with bilingual or multilingual staff or interpreters present, identifying potential residents for set-aside units through approved channels such as City shelter lists and referral systems, conducting lotteries for relevant units, and gathering and reviewing required documentation from applicants for screening. Please see the sample Management Plan from Maloney Properties included with this proposal for more information.

While Maloney would take the lead role in the day-to-day property management operations, maintenance, and provision of resident services for the site as a whole, St. Francis House would play an integral role in providing resident services to the residents of the permanent supportive housing units, who may have more intensive or specialized needs, although their services would be available to all residents on an as-needed basis. Similarly, while the events would be open to all residents of the development and the broader community, CICD would support the programming of the food hall and resident amenity space within the portion of the development they are leading. Again, as we do for our other developments, we would convene a regular management team call or meeting with Maloney on-site and central office staff, CICD, SFH, and others as needed, such as clinic staff. These calls would be held weekly beginning before construction completion to prepare for the site opening and initial lease-up, and then held monthly once occupancy and operations stabilize. These calls are an opportunity to track resident updates, concerns, or needs and make plans to address them, discuss maintenance issues or improvements, and review development finances and performance.
CAC Development Guidelines Analysis
The proposed development fulfills the CAC Development Guidelines as follows:

Jobs
- The Planning Office will work with the development team to target 10% of employment and job training opportunities stemming from the development plan for qualified DMH clients, including in pre- and post-construction phases. This will include job readiness and skills training, counseling, and educational support provided by St. Francis through its existing curriculum or through training partnerships with vendors who utilize the commercial space on the site.
- POUA is committed to maximizing M/WBE and Boston resident employment opportunities and participation throughout the development process and ongoing operations. As noted earlier, POUA has set a goal of more than 50% M/WBE participation and will also seek to maximize local hiring.

Uses
- The development plan proposes housing, medical, and commercial uses including a daycare facility that are all encouraged uses for the site.

Housing
- The proposal includes a mix of affordable rental-assisted and non-assisted rental housing, as well as affordable, moderate-income/workforce, and market-rate rental and homeownership units.
- The development team will establish an Affirmative Fair Housing Marketing Plan and Tenant Selection Plan with the aim of creating an inclusive, diverse community reflective of the City of Boston, including DMH clients, older adults, and those who have experienced homelessness.
- 15% of the housing units, consisting primarily of studio and one-bedroom units, will be targeted to DMH clients and be indistinguishable from other units.
- The proposed site plan and design concept emphasizes the residential character of the development with private entry to individual units where possible, provides open space and recreation areas including a playground, and respects the surrounding neighborhood context.

Mental Health
- The clinic will be open to the residents of the development as well as the broader community, including DMH clients.
- The development will include commercial space that will provide opportunities for non-seasonal permanent employment for DMH clients, women, minorities, and Boston residents. The development plan aims to create linkages with our service provider partners and the vendors that will eventually occupy the commercial spaces to provide job readiness and job training programming that can also lead to employment on-site. St. Francis House will also make its full array of services available to residents of the permanent supportive housing and the broader development, which includes counseling and educational services to obtain a GED.
- POUA is committed to ensuring that women, minorities, and Boston residents will participate in the development process as much as possible with a goal of achieving over 50% M/WBE participation throughout the construction period and contracting with M/WBE firms for 20-25% of the operating expenses each year. We will work with the selected general contractor, the property manager, and our other partners to manage these goals.
• As previously noted, POUA is reserving 15% of housing units on site for DMH clients and is committed to ensuring that DMH clients receive 10% of employment or training opportunities resulting from the development plan.

Environment/Open Space
• As described in the design narrative, the development plan and site plan were designed with the natural contours of the site in mind to protect sensitive or scenic areas and minimize groundwork.
• The site plan creates a campus-like environment which retains a residential feel and connects to the surrounding neighborhood fabric.
• The site plan includes open space that provides recreational opportunities.

Transportation/Infrastructure
• The site plan is anticipated to have minimal traffic impacts while creating safe pedestrian and non-automobile access to existing sidewalks at West Main Street and Harvard Street and provide connectivity to the broader area.
• The street through the site is designed to calm traffic and support the residential character of the development.

Design
• The design of the proposed development complies with the design standards of the CAC guidelines regarding building height, buffer zones between sensitive areas, and complementing the surrounding existing uses and residential neighborhood.
• The development plan is seeking zoning relief to allow for greater density to better serve our mission of providing affordable housing for as many as possible amid a housing crisis.
### Rental Unit Mix

<table>
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<tr>
<th>Studio</th>
<th>Affordable Rental Assisted</th>
<th>Affordable 50% AMI, LIHTC</th>
<th>Affordable 60% AMI, LIHTC</th>
<th>Workforce 80% AMI, LIHTC</th>
<th>Workforce 110% AMI</th>
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### Homeownership Unit Mix

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<td>TOTAL UNITS</td>
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Building 1
4 Story Residential 30,000 GSF
50 Studio Units
20,000 SF Clinic / Wellness
5,000 SF Food Hall
+/- 54 Parking Spaces

Building 2
3-4 Story Residential 53,000 GSF
50 Units
5,000 SF Residential Amenity
+/- 54 Parking Spaces

Building 3
3-4 Story Residential 62,000 GSF
64 Units
4,000 SF Daycare
+/- 59 Parking Spaces

20 Townhouse Units
22 Parking Spaces

12 Townhouse Units
12 Parking Spaces

12 Townhouse Units
12 Parking Spaces

Site Plan
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Maloney Properties, Inc.
Sample Management Plan
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A. Roles and Responsibilities

B. Personnel & Staffing
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   - Proposed Staffing Plan
   - Job Descriptions

C. Administrative
   - Rent Collection
   - Policies & Procedures
   - Lease Enforcement
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D. Resident Services

E. Marketing
   - Approach
   - Advertising
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F. Maintenance
   - Approach
   - Maintenance Program
   - Preventive Maintenance
   - Move Out Procedures

G. Resident / Management Relations

H. Information Security

I. Financial Reporting Procedures
Management Plan
A. Roles and Responsibilities

The Management Agreement clearly defines the responsibility of both the Owner and the Management Agent. The Management Agreement incorporates, by reference, the Management Plan, and sets forth those responsibilities and obligations delegated to the Agent by the Owner. It also identifies the obligations the Agent must meet as established by applicable regulatory, municipal, state or federal agencies, laws and statutes.

The entire Management Agreement spells out the relationship between the Owner and the Agent. It is the responsibility of the Agent to propose policy matters to the Owner before implementation, and to consult with the Owner on all issues where actions to be taken are not clearly defined by either the Management Plan or the Management Agreement. Generally, in all areas of expenditure that exceed those limits and instances imposed by the Management Agreement, the Agent must provide the Owner with an explanation of the expenditure, provide documentation that appropriate purchasing processes were followed, and obtain the Owner's approval before entering into any contract for such expenditure.

The Management Agent is guided by the Owner's policies, philosophies and goals at all times.

The Regional Manager and the Property Manager will meet with the Owner on a monthly basis to review the operation of the property. The Property Manager is the senior person on site and reports to the Regional Manager.
B. Personnel & Staffing

EEO Policy

Maloney Properties, Inc. has developed this Affirmative Action Plan in order to formally state our employment and housing policies and to provide all persons with equal opportunity without regard to race, color, religion, age, sex, ancestry, physical or mental disability (unless there is a bona fide occupational qualification which precludes employment), source of income, sexual preference, creed, national or ethnic origin, citizenship, class, or marital status. Our company has consistently offered upward mobility to both persons of color and females, and we have a firm commitment to continue to do so.

Maloney Properties, Inc. does not and will not discriminate against any employee or applicant for employment because of race, color, age, religion, sex, physical or mental disability, ancestry, source of income, sexual preference, creed, national or ethnic origin, citizenship, class, or marital status. Maloney Properties, Inc. will take affirmative action at all levels of employment to ensure that all qualified applicants will receive equal employment consideration, and that employees are treated equally during their employment, without regard to race, color, age, religion, sex, national or ethnic origin, ancestry, sexual preference, source of income, class, citizenship, creed, marital status, or physical or mental disability, or any other basis prohibited by law. Such action shall include, but not be limited to the following: advertising, hiring, promotion, demotion, transfer, recruitment or recruitment advertising; layoff or termination rates of pay or other forms of compensation and benefit packages; and selections for training, including apprenticeship, on-the-job training, courses, classes, seminars, and workshops.

Proposed Staffing

Maloney Properties has extensive experience at both portfolio-styled and scattered site properties. Our broad, long-term experience has helped us identify the most efficient methods of delivering services in the most cost-efficient manner. We know that each owner, every site, every portfolio, and each group of residents is unique in a variety of ways, and therefore no single model is necessarily applicable right “out-of-the-box”. Feedback from owners and residents is invaluable to determine the most effective and acceptable staffing arrangement, based on unique ownership styles and resident preferences.

Therefore, based on our experience as a whole, we propose to manage the property utilizing a full time Property Manager, Assistant Manager, Occupancy Specialist and Leasing Agent to oversee the administrative, marketing, leasing and regulatory compliance. The maintenance staff should include full time Superintendent to oversee the day to day property maintenance needs and (2) Maintenance Mechanics to handle all maintenance of the property and Janitorial positions to handle the routine janitorial needs of the property.

Included in this section are job descriptions for these positions.

All newly hired persons at Maloney Properties, Inc. are subject to a 90 day probationary period. All full-
time employees then become eligible to accrue either 2 or 3 weeks paid vacation depending upon position and 2 weeks paid sick leave, should the employee need to use it. Full-time employees are also eligible for up to two thirds payment toward individual and family medical insurance (choice of three plans), paid limited long term disability insurance and life insurance and participation in our 401K plan (employee contribution only) after one year of employment.

Newly-hired part-time employees working at least 20 hours per week are eligible for these same benefits on a pro-rata basis. Part-time employees must work at least 30 hours per week to be eligible for the limited long term disability insurance and life insurance.

Maloney Properties Inc. staff will perform as much of the routine day-to-day services as possible. Whenever necessary, and in accordance with the operating budget, Maloney Properties will contract for certain services including turnover and common area cleaning and painting. In addition, when a repair requires expertise beyond that of site staff, a contractor will be utilized.

The Property Manager, will report directly to the Regional Manager, and is responsible for the day-to-day administrative and operational activities. The Property Manager is responsible for ensuring that any administrative and maintenance personnel perform their job-related tasks and that the residents comply with the terms of their Occupancy Agreements. The Property Manager is the direct contact with the Owner on day-to-day activities. The Regional Property Manager supervises the Property Manager in his/her daily activities and is the direct contact with the Owner and Lenders for all issues.
Job Descriptions

MALONEY PROPERTIES, INC.
PROPERTY MANAGER
JOB DESCRIPTION

The Property Manager is responsible for the overall management of the property on a day-to-day basis. This includes the direct supervision of the Maintenance Mechanic. The Property Manager reports directly to the Regional Manager in charge of the site.

As this position requires continual contact with professional peers, staff, residents, clients, contractors, and the outside community at large, the Property Manager must demonstrate effective written and oral communication skills. While working with the Regional Manager, senior members of Maloney Properties and other central office administrative staff, the Property Manager must be able to work collaboratively in the development, revision and implementation of all site policies, procedures, programs and systems.

Administrative duties include, but are not limited to the following:

➢ Oversee Marketing and Leasing

➢ Issuing final approval for all site purchases, securing Regional Manager and Owner approval when necessary. Continuously reviewing expenses against budget to ensure performance within budgetary constraints.

➢ Achieving site compliance with all applicable requirements to regulatory agencies (i.e., Affirmative Action goals, economic goals, etc.).

➢ Develop the annual operating budget for the property with the Regional Manager.

➢ Enforcing lease regulations, following through on violations of the lease with respect to state and federal regulations governing evictions. Working closely with, and reporting to, the Regional Manager with respect to legal actions.

➢ Developing a long range plan for the property with the Regional Manager, the Vice President for Facilities, and the Superintendent of Maintenance.

➢ Implementing and enforcing all policies governing the site. Making recommendations for policy changes whenever necessary.

➢ Hiring and supervising of all site personnel.

➢ Making recommendations to the Regional Manager for hiring of all other on-site staff positions.

➢ Making recommendations to the Regional Manager, in accordance with the Personnel Policy, for employment terminations.
➢ Meeting monthly with the Owner, and more often, if requested, and providing a written report updating the Owner on overall activity on the site.

➢ Assisting in the coordination of programs and services with the Owner, and working to ensure that all parties work effectively together.

➢ Establishing contact with area provider agencies servicing residents and responsible for monitoring the success of agency involvement.

➢ Identifying area programs, services and activities which enable and empower residents to live independently in a cooperative community environment and developing in-house programs as appropriate and necessary.

➢ Preparing periodic newsletters to inform residents of on-going and special in-house activities as well as to encourage their participation. The newsletter should also be formal means of communicating non-essential items (i.e. recipes, jokes, crossword puzzles, non-destructive gossip, new birth and birthday notices, anniversary notices, hospital stays, etc.).

➢ Maintaining personal, emergency and health referral information for each resident including an annual update of such files.

➢ Overseeing day-to-day maintenance schedules, the activities of the Property Superintendent and maintenance staff, and the overall maintenance program for the property.

➢ Working with the Regional Manager, Vice President for Facilities, and Property Superintendent in developing long and short range maintenance planning.

➢ Performing annual preventive maintenance inspections of all units on-site, in accordance with the Preventive Maintenance Plan. This includes scheduling the preventive maintenance work orders, coordinating this scheduling with the Maintenance Superintendent, and following the established filing and reporting procedures.

➢ Overseeing compliance with established office procedures.

➢ And other such duties as from time to time may be determined necessary for the well-being of the total operation of the property and as assigned by the Regional Manager.
The Assistant Property Manager is supervised by and reports directly to the Property Manager. The following is a description of the tasks associated with the Assistant Property Manager’s position.

Administrative duties include, but are not limited to the following:

- Collection of monthly rent. This includes following through in accordance with the rent collection policy for the property. This includes arranging payment schedules in accordance with policy for residents experiencing financial difficulties and closely monitoring these schedules in order to avoid a resident going into arrears. Keeping the Property Manager informed as to the receivables.

- Making weekly deposits to the appropriate bank accounts.

- Entering all rent and subsidy receipts in the Yardi accounting system.

- Update resident emergency contact information. Obtain any changes in writing and keep in the file.

- Carefully inspecting the common areas of the property on a weekly basis. Notifying the Maintenance Superintendent of any work orders that are necessary.

- Conducting routine Preventive Maintenance Inspection in accordance with Preventive Maintenance schedule.

- Responding to all resident concerns. This includes conflict resolution, referrals as needed, and the necessary follow-up required to ensure that all needs are addressed.

- Attending the monthly resident community meeting.
MALONEY PROPERTIES, INC.
RECERTIFICATION SPECIALIST
JOB DESCRIPTION

The Recertification Specialist is responsible to ensure that all households are recertified on an annual basis and in compliance with City of Boston Inclusionary Program, LIHTC and HUD Occupancy Requirements. The Recertification Specialist must have full knowledge of all subsidy rules and regulations and keep informed of all rules and regulations as they change. The following is a description of responsibilities:

➢ Responsible to ensure that all households are recertified on an annual basis and more often when necessary. Recertification schedules must be strictly adhered to in accordance with LIHTC and HUD’s regulations.

➢ Conduct annual interviews with residents and ensure that all appropriate paperwork and authorizations are completed by all adult members of the household.

➢ Receive resident signatures for release of information on all required third-party verifications.

➢ Send all written third-party verification to the appropriate source. Include stamped self-addressed for rapid response.

➢ Maintain a recertification checklist on each resident to ensure that documents are closely monitored and received back in a timely manner.

➢ Ensure timely notice to resident for any changes in the rent. Follow up on all notices to ensure new lease addendums and completed recertification paper work is signed by the resident.

➢ Provide resident with written notice of any changes in the monthly rent.

➢ Notify Property Manager of any changes in subsidy payment.

➢ Update emergency contact information. Obtain any changes in writing and keep in the file.

➢ All other duties as assigned by Supervisor.
The leasing specialist is responsible to assist with lease-ups, special projects and marketing initiatives. The following is a description of responsibilities:

➢ Create dynamic marketing strategies with the management team
➢ Continuously find create solutions that bring qualified residents to the property
➢ Conduct tours with prospective residents
➢ Promptly Process rental applications
➢ Network with local businesses to attract qualified applicants
➢ Develop social media initiatives
➢ Complete the move in process with new residents
➢ Prepare weekly leasing reports
➢ Follow up on all potential leads
➢ Process lease renewals
MALONEY PROPERTIES, INC.
JOB DESCRIPTION
MAINTENANCE MECHANIC

The Maintenance Mechanic is supervised by and report directly to the Property Manager. The following is a description of the tasks associated with the Maintenance Mechanic's position.

➢ Completing work orders as assigned.

➢ Perform maintenance on all equipment on the site.

➢ Performing snow removal and insuring that the walkways are always clear and ice melt applied to slippery areas.

➢ Performing all duties in accordance with established maintenance procedures.

➢ To report to the Property Manager noted violations of the property's policies and regulations.

➢ To inform the Property Manager when a situation warrants that a resident be billed for work performed in accordance with the Damage Policy.

➢ To fulfill emergency on-call responsibilities.

➢ To complete preventive maintenance work as scheduled by the Property Manager.

➢ Preparing apartments for re-occupancy whenever necessary.

➢ Performing seasonal grounds work in accordance with the Maloney Properties' Grounds and Maintenance Program. This includes mowing lawns, raking, sweeping and trimming.
The Custodian is supervised by and reports directly to the Maintenance Mechanic. The following is a description of the tasks assigned to the Custodian. These tasks are also outlined in the janitorial schedule:

- Daily cleaning and picking-up of the grounds.
- Monitoring the property continually for cleanliness.
- Performing snow removal and ensuring that walkways are clear and ice melt is applied to slippery areas.
- Daily clean common areas, including the management and resident association office, lavatories and common rooms. Follow procedures as outlined in the janitorial schedule.
- Monitoring all common areas for cleanliness in accordance with the janitorial schedule.
- Maintain parking lots, dumpster area, mechanical rooms and grounds in a clean and sanitary condition.
C. Administrative

Rent Collection

Rent collection policies are developed on a site-by-site basis, reflecting the needs and interests of the property owners and the resident population.

Residents are required to pay their rent by check or money order by the first day of the month in which it is due. Checks or money orders (not cash) are to be sent or hand delivered to the management office. For record keeping, we utilize the Yardi software system to record rental payments. All financial information is kept at the site office and a copy of all rent deposit receipts is sent to the Central Office. Rent deposits are made daily during the first week of the month, and as required during the remainder of the month.

A "No Cash" policy provides security for management and the resident. Checks received are immediately endorsed "For Deposit Only" with the name of the property and the bank account number. Checks are then posted to resident's account and deposited to a local bank in the name of the property.

All payments are due and payable on or before the first day of the month and are considered delinquent if not paid by the fifth day of the month. The Property Manager may allow a Resident, if good cause is shown, to pay portions of rent more frequently than once monthly, in accordance with the scheduled receipt of income payments. In all cases, full payment must be made by the 5th day of each month.

If a resident experiences unusual problems that create rent payment difficulties, the resident is required to contact the Property Manager in writing prior to the beginning of the month. The letter needs to state the nature of the problem, and when the rent payment can be made. If the payment needs to be spread over several payment periods, the letter should indicate this and state the amount of money that will be paid each time and the exact dates of those payments. If it is apparent that the resident is making a good faith effort to fulfill his/her obligations, the Property Manager will work closely with that individual, if necessary referring him/her to counseling on financial matters. In certain instances like these, at the Property Manager's discretion, partial payments can be accepted. This discretion is exercised in a very limited number of instances and through court ordered agreements.

While the following timing (and additional notices) can be tailored to be site specific, if the rent is fifteen (15) days late, a 10 Day Demand notice is issued. When the 10 Day Demand notice is issued, the eviction process has begun and will not be halted unless and until the resident has paid all outstanding rent charges in full.

If a resident is in arrears (i.e., does not pay rent on time or according to a rent payment agreement) three times in a twelve month period, or, if a resident receives two legal notices for non-payment of rent in a twelve month period, Management may refuse to accept the rent and may move to evict for cause and will do so unless there are extenuating circumstances.

Eviction action will be considered for residents who are chronically late in paying rent. Once an eviction...
action has been initiated, Management may accept monies from the resident, but only with the expressed stipulation, written on the check or money order prior to endorsement, that the funds received constitute payment for "Use and Occupancy" and acceptance does not constitute acceptance of a payment of rent or create a new tenancy. A written notice so advising the resident will also be sent by first class mail.

In accordance with the provisions of the lease, residents will be held responsible for all rent collection charges, including late and legal fees.

**Policy and Procedures**

Maloney Properties, Inc. will work with the Owner to develop written policies setting forth rules and regulations for the community. These policies will form the basis for the Resident Handbook and House Rules.

**Leasing Policies and Procedures**

The form of Occupancy Agreement, along with all addenda, attachments and riders, will be in a form acceptable to the Owner, HUD and other lenders.

The Occupancy Agreement takes management’s policies and practices and condenses them into written rules and regulations for the residents of the property. These rules and regulations are employed as a means to emphasize the safe and peaceful enjoyment of residents, set forth both management and resident responsibilities and inform each party of the other's rights when issues arise. Rules and regulations are reasonable, specific and equitably enforced.

If a resident has a complaint about the operation of the property or the staff, that complaint is to be directed to the Regional Property Manager, but only after the resident has tried to address it through the normal channels of dealing with the Property Manager who is the person responsible for the operation and administration of the site.

The Occupancy Agreement, grievance procedures, rules and regulations are discussed with residents at the initial orientation session. Regular reminders and updates/changes to those documents are sent to each resident's household.

Eviction procedures are accomplished in a uniform and fair manner. Each resident is accorded the same degree of latitude in this regard. If eviction action is commenced for “cause” as opposed to for “non-payment of rent”, the resident will be notified in writing of the alleged breach of the term(s) of the Occupancy Agreement and allowed an opportunity to discuss the allegations with the Property Manager. Notes of all meetings and conversations regarding the eviction will be recorded by the Property Manager and kept in the resident’s file. All documentation is retained so that a case can be made if a court hearing should become necessary.

The Property Manager strives to preserve the tenancy of the resident and seeks to reach a cooperative understanding. Generally, if the resident understands the reasons behind the establishment of the rule, s/he will be less likely to violate it. Enforcement must be consistent, fair and firm. It is important
that the manager take all steps necessary to preserve the tenancy, such as referring the resident to counseling, attempting to set realistic agreements between management and the resident, etc. If these attempts fail, the summary process action must go forward.

Lease Enforcement and Eviction

It is the policy of Maloney Properties to work with residents to secure full compliance with the terms of each resident’s lease. Voluntary compliance is always emphasized. Reasonable Accommodations are made for people with disabilities. The Resident Service Coordinator will work with residents and make referrals to community agencies in cases of financial hardship or other circumstances deemed appropriate in order to avoid involuntary termination of tenancies to the maximum extent consistent with sound management of the Project.

Eviction procedures are accomplished in a uniform and fair manner. Tenancies are lawfully terminated when sufficient cause exists. Sufficient cause includes:

- non-payment of rent,
- breach of the resident’s obligations under the applicable subsidy program,
- action on the part of a resident that is considered to interfere with his/her neighbors’ right to peace and enjoyment of the premises,
- any activity which poses a threat to the safety of other residents including drug activity, violent behavior or gang-related activity, or any other breach of the terms of the lease.

Legal action is initiated immediately when a situation poses a threat to the safety of residents. For situations other than those which pose a threat to the safety of residents, the Property Manager will consider the following in determining the appropriate course of action.

- How serious was the lease violation?
- What is the probability of the situation reoccurring?
- Did the incident pose a threat to the safety and well-being of the community?
- Have members of this household exhibited this type of behavior or have they been involved in any other incidents previously? If so, what were the circumstances, how long ago, was it resolved?
- Are there circumstances beyond the resident’s control that have contributed to the situation?

Once an eviction action has been initiated, Management may negotiate an agreement in court but the court proceedings will continue until a signed agreement has been entered for judgment or the resident has been removed from the premises.
Recertification

Following the applicable funding program rules and regulations of the property and applicable HUD regulations, annual income, asset income, family composition and student status will be verified annually to be effective the month of initial occupancy. Recertification interviews will be held with each household in a location that ensures privacy. All appropriate forms will be completed and filed with the residents' folders.

The Occupancy Specialist will make sure that all determinations of eligibility and certifications and recertification of incomes are performed in a timely manner. The Occupancy Specialist will be knowledgeable of (re) certification requirements, HUD requirements and is responsible to ensure that all staff working on (re) certifications is knowledgeable of the rules of each funding source for the property.

All applicable federal, state and local requirements regarding income and family size and composition as they relate to unit size will be strictly adhered to.

All records will be available for inspection and audit as required by regulations governing eligibility, rent determination, certification and recertification. Copies of all paperwork are retained in the appropriate individual resident folder on file at the Management Office.

D. Resident Services

Resident services professionals are a fundamental part of Maloney Properties’ management team and whenever financially possible, we have a Resident Service Coordinator as part of the on-site management team.

For more than 20 years, our firm has successfully designed, created, and implemented multi-generational resident service programs that improve the quality of life in the communities we serve. Several of our properties have been recognized, regionally and nationally, for outstanding service in providing supportive housing programs.

In recognition of how important resident services programs are to successful property management, Maloney Properties has appointed an owner of the company to become Director of Resident Services and devote her full time to insuring the quality of services we provide and to supporting our Resident Services Coordinators.

We approach resident services in the following ways:

- Making Resident Service Coordinators an integral part of our management team
- Establishing working partnerships with local agencies and service providers
- Setting up programs in-house to meet specific goals and needs
- Bringing in the resources of the larger community for programs and activities
- Treating each situation individually, on a case-by-case basis.
A few examples of the programs and services we bring to our housing are detailed below.

- Group Adult Foster Care
- Meals Programs
- Homemaker and Personal Care Programs
- Multigenerational Arts and Cultural Programs
- Computer Learning Centers/Neighborhood Networks
- After School & Summer Camp Programs
- Adult Day Health Programs
- Assisted Living
- Senior Care Options (SCO)
- Elder Service Plan (PACE)
- Health Screening & Wellness
- Community Safety & Policing Programs
- Academic Support and Tutoring
- Youth Enrichment Programs
- Youth Mentoring Programs
- Parenting Support
- GED Programs
- Job Skills Training & Placement
E. Marketing

Over the past 38 years, Maloney Properties Inc. has successfully marketed affordable, mixed income and market rate housing. Maloney Properties has a full service, licensed brokerage division, with three licensed real estate brokers and a number of licensed salespersons. Maloney Properties is a Realtor® firm and is a member of the Greater Boston Real Estate Board Rental Housing Association. Site staff at our properties can and have drawn from this expertise to assist with marketing solutions for many of our properties. Maloney Properties brings its full body of experience and the resources of its property management experience to the on-going marketing and rental leasing of the properties it manages.

Approach

Maloney Properties, Inc. begins the marketing program at each of its properties with a complete and thorough market analysis. With the information compiled, a comprehensive marketing plan is developed that outlines both short term and long term plans to achieve maximum and sustainable occupancy levels. Systems are put in place to ensure wait list maintenance and short turnaround times.

Maloney Properties implements all Marketing and Resident Selection Plans to ensure that all applicants are treated fairly and consistently in its marketing initiatives. It also ensures that all personnel are operating from the same standards when administering the Marketing and Resident Selection Plan.

All marketing staff and all other persons involved in processing and/or handling applications are 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 Resident 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. In addition, the appropriate complaint procedures will be explained so that applicants may avail themselves of that process if they feel discrimination has occurred. Marketing staff will receive training on the use and appropriate review of the paperwork and processing required in marketing the units.

The supervisory staff persons of the Management Agent will be responsible for administering all training required by the Marketing and Resident Selection Plan. Those staff persons include the Regional Property Manager having direct responsibility for oversight of the property and the Director of Regulatory Compliance.

A copy of the Marketing Plan and the Resident Selection Plans are kept available for public inspection by any interested group or individual at the marketing/management office located on site.

Advertising and Outreach

The advertising component of the Marketing Plan will include the following:

1. The Fair Housing Logo used by the U.S. Department of Housing and Urban Development (HUD)
shall be prominently displayed in the on site Management Office.

3. All brochures, pamphlets and other literature will state “All units available on an open occupancy basis” and will display the Fair Housing and Barrier-Free logos.

4. All brochures, pamphlets, and other literature will state, “Maloney Properties, Inc. does not discriminate on the basis of handicap status” and will include the telephone number of the 504 Coordinator for Maloney Properties, Inc.

5. If human likenesses or models are used, they will reflect a mix of minority and majority models, which reflect the affirmative fair marketing goals for the property.

Media to be used for advertisement

Advertisements will be placed as necessary in minority and majority newspapers to attract a pool of applicants that reflect a diverse population. Further, as needed, community outreach will be conducted with community groups, agencies, churches and other community institutions to attract the pool of applicants required to lease-up available units.

Information will be translated as needed, or upon request, so that it is accessible to linguistic minorities. All newspaper ads shall state “units available on an open occupancy basis” and/or shall carry the Fair Housing and Barrier Free logos.

Community Resources

As needed, the Management Agent will send out to the Community Resource contacts written notification that housing is available on an open occupancy basis. This notification will include basic information concerning management, special program guidelines, number of units and sizes, approximate dates of occupancy, amenities of the development, availability of transportation and income levels served. The notice will also state that the group or individual is being contacted because it may be interested in participating in these affirmative marketing efforts. The notice will provide the name of a contact person if additional information is required.

Resident Selection

Maloney will work with the development owners to craft a Resident Selection and Marketing Plan in order to effectively reach the communities and populations the development is serving, and that which complies with regulatory agency and funding requirements. This includes marketing to diverse populations that speak different languages by advertising in local foreign language papers and media outlets, conducting information sessions and interviews with prospective residents with bilingual or multilingual staff or interpreters present, identifying potential residents for set-aside units through approved channels such as City shelter lists and referral systems, conducting lotteries for relevant units, and gathering and reviewing required documentation from applicants for screening.
Orientation

Once a prospective resident has been shown the unit s/he will occupy, the Property Manager and/or his/her designee will schedule an orientation session for the applicant and her/his family. In order to assist incoming residents, the designated management staff person will provide an orientation.

Prior to executing the Occupancy Agreement, the Property Manager and/or his/her designee will review the provisions of the document with the resident including the property’s rules and regulations. Thus, all incoming persons are acquainted with their responsibilities, and the responsibilities of the Management Agent. It is necessary to have executed occupancy agreements that clearly define the residents’ responsibilities with regard to payment of rent, other charges and standards of occupancy.

New residents are also briefed on the community in which they will reside, such as the location of stores, houses of worship, transportation, schools and other services in Hanson.

A Move-In Inspection Form will be prepared by the Property Manager and/or his/her designee and signed by both the resident and the Property Manager after they inspect the unit’s condition.

When the unit is vacated, the condition of the apartment will be compared to the Move-In Inspection form.

F. Maintenance

Approach

Maloney Properties, Inc. provides professional maintenance services to all of its clients. As we serve a varied client base, the interests and goals of each client shape the operating policies for each property. Working to achieve these goals, Maloney Properties applies the highest professional standards, given the individual and varied needs of each community being served.

Maloney Properties, Inc.’s maintenance program and policies require us to utilize environmentally sound practices everywhere possible on the properties we manage. This includes everything from environmentally friendly cleaning and building products to alternative and renewable energy sources.

We are 100% committed to assuring that all aspects of maintenance be as environmentally beneficial as possible.

Our facilities stay current on alternative and renewable energy sources. We have received tens of thousands of dollars for our clients from utility company energy rebates. Our sites utilize solar, Co-generation, high efficiency gas equipment and the most advanced controls to operate HVAC in the most efficient manner possible. Every replacement, whether it be apartment components or major systems, takes into account the impact on Indoor Air Quality, comfort for residents and making sure we are converting to the most beneficial equipment for the environment and the budget of the property.

Maloney Properties delivers maintenance services to its properties through a clearly defined
maintenance system. The system is completely computerized. Monthly schedules are established for preventive maintenance within each apartment and on all of the buildings systems. The schedules are tracked, the work required is defined and the performance is monitored on a monthly basis.

The system is made up of several components that ensure deficiencies are corrected, preventive measures are taken, and improvements are pursued. In addition, the system is designed to guarantee prompt and efficient response to all resident maintenance requests.

Maloney Properties maintains a 24-hour response system, 365 days per year and is responsible for communicating major emergencies to the Owner immediately and in accordance with the Owner’s emergency communication protocols. The protocol varies depending upon the client.

Deficiencies on the property are corrected through the work order procedure. The work order provides the maintenance staff with authorization to perform work on the property. Once a request for work has been entered into the computer, it is assigned a category. The categories of work are listed and explained on the following pages. The category defines the priority of the work and dictates how and when it will be dispatched for completion.

Categorizing the workload offers many benefits to the Owners and Maloney Properties. By categorizing the workload, Maloney Properties is able to ensure that residents’ maintenance issues are addressed promptly. In addition, the system allows for a continuous and accurate knowledge of the workload and what resources are available to meet the requirements of the workload.

The work order system also allows our regional managers to provide our clients with accurate information about the maintenance of the property. This helps in the determination of staffing and budgeting needs and allows clients to participate in and understand the needs of their property.

Many preventive measures are required on a property to ensure that the quality features of the buildings and the apartments are maintained. The approach of Maloney Properties is to inspect and maintain apartments on an annual basis and building systems according to the specific Preventive Maintenance Schedule that is uniquely designed for every property. A program is also established for janitorial and grounds work on every property.

Our properties are managed with an eye toward improvements, as this increases the value of the property and enhances the quality of life for the residents living in the development. Maloney Properties endorses a very specific plan and procedures for assessing the capital needs of every property, planning for the replacement of capital items, and contracting work.

**Maintenance Program**

The Maintenance Program is customized for each site to ensure the proper upkeep, conditions and quality of the buildings, grounds, building systems and common areas. Systems and procedures shall include:

- Work Order System
- Emergency Repairs and Response
The components of the maintenance program are discussed and reviewed with the Owner to ensure accurate and comprehensive procedures are developed.

**Preventive Maintenance & Repair Program**

A system of inspections, designed to eliminate emergency and/or unplanned maintenance and to help minimize property losses is consistently implemented and called the Preventive Maintenance Program. The Preventive Maintenance Program generates a series of work orders that are incorporated into the regular flow of routine work orders of the maintenance delivery system.

The foundation of an effective preventive maintenance program is regular, repeated, and documented comprehensive inspections and maintenance of components. The Property Manager performs the following inspections and generates the needed work orders.

**Inspections:**

- Weekly walk-through of all common areas, looking for significant immediate-response required problems (i.e., trip hazards, safety issues, security concerns, etc.) The Regional Manager conducts these inspections on a monthly basis, and more frequently if necessary. Items found are documented and addressed immediately.

- Monthly inspection of all maintenance and equipment rooms, including laundry areas
- Annual inspections of all building systems and all units.

Our system provides a written record of each inspection and resulting repair that can be tracked through our computerized and state-of-the-art maintenance delivery system.

Examples of items addressed through the Preventive Maintenance program include proper window/door and lock operation, proper smoke detection and carbon monoxide system operation, plumbing systems, appliance operation, etc.

**Move Out Procedures**

After the first year of occupancy residents are required to provide Management with 30 days written notice prior to termination of their lease. Upon receiving notice, the Property Manager and/or his or her designee will inspect the unit in order to determine the condition and the extent of the work necessary upon turnover. When a security deposit has been paid by a resident, following the move-out and within 30 days, the former resident will receive his or her security deposit less any deductions for damage to the unit or rent due. The resident will also receive accrued interest on the security deposit at that time.

**G. Resident / Management Relations**

Maloney Properties Inc. will meet regularly with the Owner and other groups as identified by the Owner in order to foster open lines of communication. The Regional Manager and on-site staff will be in attendance at these meetings.

**GRIEVANCE PROCEDURES & CONFLICT RESOLUTION**

A. When a resident has a complaint against another resident, Maloney Properties Property Managers are instructed to do the following:

1. Verify the information and do your own assessment – If a resident is complaining about another resident, make sure the complaint is accurate:
   - Is it feasible/possible?
   - Follow up with both parties.
   - Ask the resident if he or she is, in fact, doing the action that the other resident is complaining about (for example, allowing kids to play ball in the apartment, accosting residents as they come through the door, taking people’s newspapers from in front of their doors, etc.).
   - If appropriate, ask security to help verify the complaint by going to the apartment of the resident who is lodging the complaint, for example, when the offense is happening.

2. Is this an issue for that the property manager needs to handle? For example, are there lease violations involved? Some complaints have to do with normal noise and traffic.

3. Is there an immediate solution? For example, the resident doesn’t realize his TV is disturbing
others, apologizes and turns the volume down.

4. Is there history? Has this happened before? What was done? Is there someone that was helpful?

5. Is this an issue that needs resident service or social service intervention?

6. Who is your team? Who can help you with this issue? (Remember that you need resident’s permission to disclose confidential information.)
   - RSC
   - Regional Manager
   - Maloney Properties Resident Services
   - Resident’s service providers
   - Tenancy Preservation Project
   - Attorney
   - Social Service Agency
   - Mental Health Agency
   - Family members

7. You will either take action or do nothing. Not every issue that comes to the Property Manager or RSC, if any, requires intervention and not every complaint is legitimate.
   - Send letters
   - Conduct meetings
   - Make appropriate referrals
   - Consider conflict resolution or mediation as described in Maloney Properties/RSC Manual
   - Take legal steps, if necessary

8. Document the complaint and the steps taken to resolve it.

B. When the complaint is against the Property Manager or site management staff, residents are asked to speak to the Property Manager first to see if the issue can be resolved.

1. If Resident is not satisfied after talking with the Property Manager, the Resident should be informed how to contact the Regional Manager for the property. This can be done by writing to the Regional Property Manager, Maloney Properties, Inc., 27 Mica Lane, Wellesley, MA 02481, or by telephone to 781-943-0200.

2. The Regional Manager will speak to the Property Manager regarding the resident’s complaint and will either speak to the resident by telephone or meet with the resident in person to try to resolve the grievance. The Regional Manager will follow up with the resident in writing, as the situation warrants, to bring resolution to the issue. The Property Manager will receive a copy of any correspondence.

3. If a site has a particular grievance policy instituted by an Owner, a Board, or a regulatory authority, Maloney Properties will make this policy available in writing and will follow the
C. Conflict Resolution

1. Actively seeking conflict resolution can be very helpful after those fighting have cooled off. It can also be effective in situations where there is ongoing conflict before it escalates into a full-blown argument. Depending on the situation, RSCs can seek outside mediation or the RSC and Property Manager can attempt to intervene constructively themselves. There are principles to follow in mediation:

- Both parties must want mediation, even if the motivation is to preserve tenancy. Find the common ground. What do the parties want out of mediation?
- Assess the parties involved. Are there mental health issues that would indicate having an advocate or mental health counselor involved in the mediation? Are there other cognitive or language issues that would make “talking it out” difficult? If one person has a disability, particularly mental, is there anything required to ensure equal access and a “level playing field” for mediation? Are the parties involved willing to try to work out their differences?
- Assess and understand your own biases before entering into conflict resolution.

2. What are the steps in the process?

- Establish ground rules – suggested by you and by the parties involved – e.g., no yelling and no interrupting.
- State the goal: to create a climate of safety and fairness that will allow closure on the problem.
- Clarify the issue, e.g., the disturbance was a lease violation; the argument or fight created a danger to other residents and/or staff; the current conflict could escalate into a situation that is a lease violation and a danger to themselves or others.
- Let each party tell his/her story without interruption.
- Ask questions of clarification and to try to bring out the underlying issues.
- Ask the parties involved to suggest options that could resolve the issues.
- Try out each of the options with the parties to find out what option will best resolve the issues.
- Put whatever is agreed to in writing for all parties to sign.
- If you reach an impasse at any point, or if any of the parties cannot adhere to the ground rules, end the session and offer to come back to it at another time.

3. Mediation - Not everyone feels comfortable or competent in the role of conflict resolution, and some situations warrant outside help. There are resources to turn to and you can find a mediation center near you through the National Association for Community Mediation – www.nafcm.org - or through your local directory.

Maloney Properties, Inc.’s Employee Assistance Program (EAP) can offer assistance in de-escalation and mediation. Contact Health Resources EAP at (800) 451-1834.
H. Information Security

Maloney Properties, Inc. has a comprehensive Written Information Security Program (WISP) which employees who handle paper, electronic and/or other records containing “Personal Information” about individuals, must follow. “Personal Information” is defined as an individual’s first and last name, or first initial and last name in combination with any one or more of the following:

- Social Security number;
- driver's license number or state-issued identification card number; or
- financial account number or credit or debit card number, with or without any required security code, access code, personal identification number or password, that would permit access to a resident’s financial account; provided, however, that “Personal Information” shall not include information that is lawfully obtained from publicly available information, or from federal, state or local government records lawfully made available to the general public.

All employees who handle such information are required to read and understand these standards. This directive applies to Independent Contractors and temporary/seasonal employees as well. Maloney Properties takes seriously our legal obligation to protect the personal information of our employees, residents, and applicants.

All information which employees acquire as a result of their position and employment with Maloney Properties, Inc. is considered proprietary and confidential. This includes but is not limited to rental information, business practices, strategies, financial and employment information, salaries, annual reviews, bonuses, medical information, complaints concerning household members, criminal history, and/or credit information. Our policies and procedures are intended to comply with all federal, state and local privacy requirements, as well as the Department of Housing and Urban Development's (HUD) Enterprise Income Verification (EIV) security requirements. Accordingly, Maloney Properties identified and assessed the potential internal and external risks to the security, confidentiality, and/or integrity of electronic, paper and other records containing personal information. We have also evaluated current safeguards and our available means to detect and prevent security system failures to the extent possible.

A copy of our comprehensive Written Information Security Program (WISP) is attached to this plan for reference.

I. Financial Reporting Procedures

The monthly financial reports are completed at our central office location. The reports are prepared by our accounting department, under the supervision of our Controller and Assistant Controller. The following is a listing of all reports contained in the monthly report.

- Schedule of cash accounts;
- Schedule of all escrow accounts;
- Balance sheet;
- Comparative balance sheet;
  - Accounts receivable summary;
• Detail and aged accounts receivable;
• Summary of accounts payable;
• Detail and aged accounts payable;
• Income and expense statement – actual to budget comparison; Monthly basis; Year-to-date basis;
  *(The above income statements are produced on an accrual basis with a cash flow conversion included. This information is provided in summary and detail format.)*
• Quarterly reports to the various agencies and lenders.

Other reports completed include tax credit compliance and security deposit reports. Maloney Properties, Inc. will work collaboratively with the client to design and create special reports as needed.

Once completed, the reports are reviewed and analyzed by the Controller, Regional Manager and Principal-in-Charge. A narrative explaining major variances is prepared and accompanies the report to the client.

The monthly report process begins with the budget process. Budgets are prepared by the Regional Manager and Property Manager for each site and then reviewed by the Treasurer, Controller, and Principal-in-Charge. The budget report includes last year’s actual expenses, year-to-date and annualized expenses and the projected budget for the next fiscal year with a narrative explanation of many budget line items. The Regional Manager meets with the client to present the budget and answer any questions. The budgets are then broken out into the twelve-monthly budgets, weighted for the seasons and timing of payments. Each month this budget is then compared to actual expenses.

Properties are annually audited by an outside CPA firm. The audits are done in accordance with applicable regulations, most commonly Government Auditing Standards and Generally Accepted Accounting Standards. The accounting department prepares work papers in preparation of interim audits, year-end audits and tax returns.
Maloney Properties, Inc.
Written Information Security Program (WISP)

Employee Confidentiality and Security Responsibilities*

Maloney Properties, Inc. (“Maloney Properties” or “MPI”) has a comprehensive Written Information Security Program (WISP) which employees who handle paper, electronic and/or other records containing “Personal Information” about individuals, must follow. “Personal Information” is defined as an individual’s first and last name, or first initial and last name in combination with any one or more of the following:

- Social Security number;
- Driver's license number or state-issued identification card number; or
- Financial or bank account number or credit or debit card number, with or without any required security code, access code, personal identification number or password, that would permit access to an individual’s financial account; provided, however, that “Personal Information” shall not include information that is lawfully obtained from publicly available information, or from federal, state or local government records lawfully made available to the general public.

All employees who handle such information are required to read and understand these standards.¹ This directive applies to Independent Contractors and temporary/seasonal employees as well. Maloney Properties takes seriously our legal obligation to protect the personal information of our employees, residents, and applicants.

All information which employees acquire as a result of their position and employment with Maloney Properties, Inc. is considered proprietary and confidential. This includes but is not limited to rental information, business practices, strategies, financial and employment information, salaries, annual reviews, bonuses, medical information, complaints concerning household members, criminal history, and/or credit information. Our policies and procedures are intended to comply with all federal, state and local privacy requirements, as well as the Department of Housing and Urban Development’s (HUD) Enterprise Income Verification (EIV) security requirements. Accordingly, Maloney Properties identified and assessed the potential internal and external risks to the security, confidentiality, and/or integrity of electronic, paper and other records containing personal information. We have also evaluated current safeguards and our available means to detect and prevent security system failures to the extent possible.

Oversight Responsibility

➢ Maloney Properties, Inc. also recognizes that other information, including medical information, must also be kept confidential and secure at all times. An employee’s sharing of an individual’s medical information with another individual or with the individual’s service provider is strictly prohibited without the written consent of the
*Complies with Massachusetts Privacy Law
impacted individual. In addition, Maloney Properties recognizes that any discussion of confidential or Personal Information initiated by a resident with a Maloney Properties employee, may only be shared with another Maloney Properties’ employee to the extent permitted by law. Any questions regarding how to handle confidential or Personal Information not addressed in this Program should be directed to Celeste Vezina, Written Information Security Program Privacy Coordinator/Officer.

➢ Maloney Properties, Inc. designated a team to oversee Maloney Properties’ Written Information Security Program: MPI’s Treasurer (Celeste Vezina), Director of Information Technology (Melissa Andrews), Controller (Oumar Diakite), Director of Resident Services (Jennifer Kadilak) and Director of Compliance (Debbie Piltch). MPI’s Chief Financial Officer serves as MPI’s Written Information Security Program Privacy Coordinator/Officer (hereinafter referred to as Privacy Coordinator/Officer) and, in conjunction with the other members of the Team, is responsible for oversight of MPI’s privacy standards which includes:

- The security measure requirements for the use of HUD’s Enterprise Income Verification System and ensuring security of all records (paper and electronic) containing Personal Information on individuals (including, but not limited to all applicants, residents, employees, vendors, and contractors) for its employees; and
- Entities with which it does business with, which may have access to such information, including, but not limited to financial auditors, legal advisors, and Information Technology support providers.

➢ The security team will review and update the Written Information Security Program on at least an annual basis and as security incidents arise to ensure adequate procedures and controls are in place. Changes to the Written Information Security Program will be presented to MPI’s Board of Directors for final approval.

If you have any questions, or are in doubt regarding how to handle a specific situation, please contact the Privacy Coordinator/Officer, Celeste Vezina in the corporate office at (781) 943-0200, ext. 210.

Staff Training

➢ All employees who handle paper and/or electronic or other records containing personal information on individuals will be required to attend training on Maloney Properties’ Written Information Security Program. The training will provide procedures specific to oral information of a confidential matter as well as paper, electronic or other records containing Personal Information. The training will also include the following:

- The name and contact information for the Privacy Coordinator/Officer;
- The security policies that set forth whether and how employees are allowed to keep, access, and transport records containing personal information outside of business premises;
● The acceptable use of computer systems and the importance of personal information security; and
● Disciplinary measures for violations of the comprehensive Written Information Security Program rules.

➢ All new employees (including temporary and contract employees) who handle oral, paper, electronic, or other records containing Personal Information on individuals will be required to be trained on Maloney Properties, Inc.’s Written Information Security Program at the beginning of employment and prior to handling Personal Information.

All employees will be required to sign the statement on the last page of this policy acknowledging their understanding of our company’s Written Information Security Program.

➢ All employees who handle oral, paper, electronic, or other records containing Personal Information on individuals will be required to participate in annual training on Maloney Properties’ Written Information Security Program. Such training may be offered in conjunction with other annual training required for employees, such as Fair Housing Training and Sexual Harassment Training. This training may also be available in a Webinar format. All employees will be required to sign a statement acknowledging their understanding of our company’s Written Information Security Program on an annual basis.

➢ Social engineering tests and security quizzes will be administer before and after annual security awareness training in order to evaluate the effectiveness of such training. Also, relevant security awareness tips and reminders will be included in monthly company newsletters.

➢ All employees will be notified of any changes or updates to the Written Information Security Program or security standards via Maloney Properties’ standard methods of communication.

**Implementing and Evaluating Compliance with Policies and Procedures**

➢ All Managers and Supervisors are responsible for making sure that all policies and procedures contained in this document have been implemented at the site or department level.

➢ All Managers and Supervisors are responsible for making sure that their staff follows the policies and procedures contained in this document concerning records that contain Personal Information.

➢ All Managers and Supervisors have conducted an audit and have created an inventory of all paper and electronic records and computing systems that contain Personal Information that they control. This includes laptops and portable devices used to store Personal Information. All Managers and Supervisors are responsible for reviewing and
maintaining that inventory on at least an annual basis.
➢ At least once a year, either a Compliance Department representative or Senior Staff member will visit each site and evaluate compliance with Maloney Properties’ privacy and security policies and procedures, including but not limited to compliance with HUD’s EIV security requirements. On at least a quarterly basis, the Privacy Coordinator will conduct an after-hours, walk-thru audit of the central office. These internal audits will be conducted using a standardized form designed to focus on the specific components of Maloney Properties Written Information Security Program. Any violations, including loss or theft, will be reported to the Privacy Coordinator/Officer and corrective actions will be taken.

➢ An information technology expert will regularly monitor the Written Information Security Program to ensure that the Program is operating in a manner reasonably calculated to prevent unauthorized access to or unauthorized use of Personal Information and will upgrade information safeguards to limit perceived risks. On at least an annual basis, Maloney Properties will engage the services of a third party information technology expert to conduct a security audit. Maloney Properties will endeavor to implement reasonable and technically feasible recommended changes in security procedures determined during this audit.

➢ At a minimum, review of the scope of the security measures will take place on an annual basis or whenever there is a material change in business practices that may reasonably implicate the security or integrity of records containing Personal Information.

➢ All suspected security breaches, including the improper disposal or theft of Personal Information must be immediately reported to a direct supervisor. The supervisor must document the incident and immediately inform the Privacy Coordinator. The Privacy Coordinator will then take action in accordance with MPI’s Incident Response Plan. If necessary, appropriate disciplinary actions will be taken and the Privacy Coordinator/Officer will document the incident in the employee’s personnel file.

Disciplinary Measures for Violations of the Comprehensive Written Information Security Program

Any employee who violates Maloney Properties’ privacy and security standards will be subject to appropriate disciplinary measures. Maloney Properties, in its sole discretion, will determine the level of disciplinary action based upon its assessment of the egregiousness of the violation, and all the circumstances surrounding the event.

➢ If, in Maloney Properties’ sole discretion it determines that the violation was not intentional and the breach had no negative ramifications for the individual, the employee shall be given a written reprimand by his/her supervisor and may be subject to a range of disciplinary measures which will be documented in writing and placed in the employee’s file.

➢ Any intentional or significant violation of Maloney’s privacy and security standards or
repeated minor violations may be grounds for further disciplinary action, including and up to termination of employment.
Collecting Personal Information Either on Paper or Electronically

➢ Employees must collect only Personal Information from an individual that is relevant and necessary to accomplish an authorized corporate function.
➢ When Personal Information is collected, all employees must always use the Maloney Properties’ standardized forms such as the application for housing, third party verification forms, etc. which contain the information below:
  o Legal authority;
  o Purpose for collecting it;
  o What related uses will be made of this information;
  o Whether a response is mandatory or voluntary; and
  o The effect, if they refuse to respond to the notice.

If you should have any questions regarding a form that you are using, please contact the Assistant Director of Compliance.

Time Frame For Retention of Personal Information

➢ Personal Information will only be retained for the time frame reasonably necessary to accomplish business needs and as required by applicable laws and regulations.

Third Party

➢ All third party services providers must be evaluated and selected in conformance with MPI’s Vendor Management Program.

➢ Prior to contract execution, any vendor will be explicitly granted access to Personal Information must submit:
  • MPI’s Security Assessment Questionnaire which must be approved by both the Privacy Coordinator and the Director of IT
  • A comprehensive Information Security Program that is in compliance with the provisions of the Data Security Law

Also, the contract with such vendor must specifically require security compliance.

➢ Any vendor that could have access to Personal Information by nature of the service provided must sign MPI’s Acknowledgement of Security Compliance which stipulates that the vendor is aware of and will adhere to MPI’s Written Information Security Program. A copy of this acknowledgement must be submitted to the Privacy Coordinator.

➢ On an annual basis, the Privacy Coordinator will request updated security assessment questionnaires from applicable vendors. The Privacy Coordinator will also confirm that an acknowledgement of security compliance is on file for applicable vendors.
Oral Communication of Personal Information

Information about residents and co-workers must always be handled in a professional and business-like manner, demonstrating the utmost respect for individuals’ rights to privacy and confidentiality. In general, all oral communications regarding Personal Information may only occur when necessary for legitimate business needs.

➢ Conversations involving Personal Information as defined herein must be held in a private, controlled environment. All employees are prohibited from engaging in conversations with one another regarding the Personal Information of any applicant, resident or employee in any public place.

➢ Personal Information regarding residents, applicants, co-workers, or employees must never be discussed in an informal manner or as part of a social conversation.

➢ Employees are prohibited from sharing Personal Information about one resident to another resident or one employee to another employee. Exceptions are when the sharing of such information is solely for business purposes or as required by law.

Safeguarding Written Printed Records Containing Personal Information

Employees, including those that have home-based offices, who regularly obtain Personal Information in the normal course of the business day, must, to the degree possible:

➢ Avoid creating Personal Information output data, except when necessary to complete a job function; whether printed or stored on electronic media.
➢ Never post printouts of Personal Information on bulletin boards.
➢ Never leave reports unattended or unsecured. For example, paperwork and/or files containing personal and confidential information about a resident, applicant or employee should never be left out where they could be seen by visitors to the office and/or unauthorized personnel.
➢ Shred and destroy information that is no longer needed relative to employees, applicants or residents; whether printed or stored on electronic devices.

Safeguarding Electronic Records Containing Personal Information

Maloney Properties’ computer systems that electronically store or transmit Personal Information utilize specific security measures to protect privacy and confidentiality.

Secure User Authentication Protocols

Maloney Properties, Inc. has adopted specific secure user authentication protocols that include the following:
➢ All user identifications and other identifiers used to access records and files containing Personal Information are created and controlled by the IT Department;
➢ Users are required to change security passwords used to gain access to records or files containing Personal Information every 90 days. Passwords may not be reused and must meet specific strength criteria.

➢ Access is restricted to active users and active user accounts in accordance with the procedures detailed below in the section titled Safeguarding Confidential and Proprietary Information Post Employment. In addition, the IT Department may audit the active user account list randomly or on at least, a quarterly basis.

➢ User identifications unsuccessfully attempting to gain access to records or files containing Personal Information three (3) consecutive times will automatically be disabled.

➢ Cell phones will automatically wipe all data after (8) consecutive failed password attempts.

Secure Access Control Measures

Maloney Properties, Inc. has adopted specific secure access control measures that include the following:

➢ Access to records and files containing Personal Information will be restricted to those who need such information to perform their job duties. Whether a staff person needs such access will be determined by his/her supervisor in conjunction with the IT Department’s defined user roles;

➢ Any employee (including temporary and contract employees) who needs access to confidential electronic information or Personal Information will be assigned a unique user identification by Maloney Properties rather than a vendor supplied default credential set;

➢ New employees (including temporary and contract employees) will be granted access only when the training requirements detailed above in the section titled Staff Training have been met; and

➢ Anyone who has a password that accesses Personal Information must refrain from leaving passwords in the workstation area and may not share a personal password. The use of another employee’s system access credentials is strictly prohibited unless such use is authorized and documented by the IT Department.

Secure Electronic Transmission Measures

➢ To the extent technically feasible, all transmitted records containing Personal Information that will travel across public networks, and all data to be transmitted wirelessly shall be encrypted. Specific secure electronic transmission measures include but are not limited to:
○ Any internet-based software system to which records containing Personal
Information are transmitted from or to must utilize SSL technology providing at a minimum 128-bit encryption.

- Anyone using a laptop or other portable device storing Personal Information must refrain from connecting such device to a public or home-based wireless network, unless the network has been determined secure by the Director of IT.
- Any email containing Personal Information, whether in the email body or in an email attachment, must be encrypted. Emails sent from a “maloneyproperties.com” email address to another “maloneyproperties.com” email address are encrypted by default. Emails sent to any other email address must include [Encrypt] in the subject line in order to be encrypted by a third party encryption service.
- Anyone who has a “maloneyproperties.com” email account must not transmit email messages containing Personal Information to his/her personal or other email account(s) and must not establish automatic email forwarding to any non-“maloneyproperties.com” email account.
- The transmission of Personal Information, user identification, or passwords via an instant or text message is strictly prohibited.

- All mobile computing devices (laptops, tablets or cell phones) on which Personal Information is stored or to which “maloneyproperties.com” email is received must have an encrypted hard drive.

- Personal Information must not be stored on any removable media (USB flash drive, cd, dvd, external hard drive, etc.).

Secure Network Hardware and Software

- Maloney Properties, Inc. will provide reasonably up-to-date firewall protection and operating system security patches for files containing Personal Information on a system that is connected to the Internet;

  - Maloney Properties utilizes Watchguard System Manager to centrally manage all firewalls in the network. All firewalls must be configured to reasonably restrict port access and to encrypt internal network traffic. Also, all firewalls must configure to utilized Watchguard Managed Intrusion Protection Service. Firmware levels of all firewalls are maintained on at least a quarterly basis.
  - Maloney Properties utilizes Dell KACE System Management Appliance to centrally manage all computer systems. KACE is configured to automatically deploy operating system and business application security patches on a routine basis. Additionally, critical security patches may be manually deployed as needed due to severity of the patch.
  - Maloney Properties utilizes McAfee ePo to centrally manage anti-virus and malware protection. The ePo system is configured to automatically deploy anti-virus definitions and to immediately report virus detections to the Director of IT.

Monitoring of Computer Systems
Maloney Properties utilizes Dell KACE System Management Appliance to extract and store all computer event logs. A routine event log monitoring protocol is followed that specifically identifies and resolves Security Failure Audits and Application Errors. The event logs of servers are reviewed on a daily basis. The event logs of all other systems are reviewed on at least a monthly basis.

**Development of New Systems and Records**

If any staff member creates new records, systems or databases containing Personal Information, privacy plans or procedures he/she must contact the Privacy Coordinator/Officer to discuss how the information can be protected, starting with the collection and ending with disposal of this information.

**Disposal of Electronic Devices**

Before any Maloney Properties’ electronic device that is capable of storing data (computer, laptop, smart phone, external hard drive) can be disposed or ownership of transferred, the IT Department must certify that all Personal Information has been completely erased from such device. The IT Department will use proper formatting procedures to remove all data or will consult with a third party vendor that will provide certification of hard drive destruction.

Staff responsible for managing copier / scanner contracts, must witness the copier vendor destroy the hard drive of retired equipment before it is removed from the property.

**Transporting and Keeping Records Containing Personal Information Outside of Business Premises**

The following security policies set forth how employees are allowed to keep, access, and transport records containing Personal Information outside of business premises. Employees who work out of a home-based office must follow the procedures above in the sections titled **Safeguarding Written Printed Records Containing Personal Information and Safeguarding Electronic Records Containing Personal Information** below in addition to the applicable safeguards regarding transport set forth here.

- An employee is only permitted to remove records containing confidential/Personal Information if approved by his/her supervisor, if directly related and necessary to completing an employment task in a timely manner, and if a method of keeping the data in a locked facility, storage area, or container has been determined and will be followed.
  - All site offices must retain “I sign out/sign in system” of all confidential/Personal records and information.

- All employees must refrain from storing electronic records containing confidential/Personal Information on any device or electronic media that was not
issued by Maloney Properties, including, but not limited to personal cell phones,
computers, laptops, cd’s, dvds, USB flash drives, and PDA’s.

➢ The connection of a device that was not issued by Maloney Properties to the internal network of Maloney Properties is strictly prohibited.

➢ Installing or disabling a program onto a Maloney Properties’ laptop or computer is prohibited without prior written consent from the Director of IT.

➢ The use of internet-based screen sharing or remote access software is strictly prohibited unless such service has been determined secure by the Director of IT.

Safeguarding Confidential and Proprietary Information Post Employment

➢ The obligation to maintain confidential and proprietary information continues even after employees leave Maloney Properties.

➢ Terminated employees (including those who are fired, laid off, or voluntarily leave Maloney Properties) will be prohibited from accessing records containing Personal Information immediately.

  o Either prior to or upon termination, a supervisor must immediately contact the Director of IT, who will facilitate the termination of electronic access to such records, including deactivating their passwords and user names.
  o The Supervisor must ensure that all equipment issued by Maloney Properties (laptop, tablet or cell phone) is returned.
  o The Supervisor must ensure that physical access to all confidential information contained in locked cabinets is no longer possible. Locks accessing the management office and/or file cabinets containing confidential information will be changed if necessary to protect the privacy of employees, residents, and applicants.

Disclosing Confidential Information to Others

• Contact the Privacy Coordinator/Officer for questions on appropriate disclosure procedures.
• Under the law, only employees who have a legitimate reason may have access to the information. Remember, even if you may have legitimate access, sharing information on individuals with others who do not have a legitimate need to know the information and would not have access to this information otherwise, may be a violation of the law.
• Personal Information may not be disclosed to anyone, unless that individual has received prior written permission to see the information from the subject of the record, or disclosures of the record are required by law and/or via written consent is provided when appropriate.
• MPI controls all of the data information stored on its computers and telephone devices and has the right to review this data at any time and without notice.
Written Information Security Program Acknowledgment Form

Signed and Dated Acknowledging that I understand my responsibility relative to the Maloney Properties, Inc. Written Information Security Program and the importance of safeguarding the confidentiality of employee, applicant and resident information orally, via paper and electronically. I CERTIFY THAT I WILL FOLLOW THESE GUIDELINES AND UNDERSTAND THAT MY EMPLOYMENT MAY BE TERMINATED FOR FAILURE TO FOLLOW THIS POLICY.

Employee Signature: ________________________________________________

Printed Name: ____________________________________________________

Date: __________________________
MEPA AGREEMENT

The undersigned in partial consideration and as a condition to the sale of Commonwealth land and improvements, if any, located within the parcel identified by ID# 1405198410 on the City of Boston tax assessing website (the "Land") acknowledges and agrees that if there is any work or activities proposed on the Land which meets or exceeds a review threshold under the Massachusetts Environmental Policy Act ("MEPA") regulations at 301 C.M.R. 11.00 et. seq. ("MEPA Regulations"), then prior to "Commencement of Construction" as defined under the MEPA Regulations, the undersigned shall file or cause to be filed with the MEPA Office at the Executive Office of Energy and Environmental Affairs, all such documents as are required by the MEPA Regulations in connection with such work or activities and shall complete the MEPA process. In any such filing, the fact that the Land was purchased from the Commonwealth within five years of the release deed shall be disclosed. The undersigned also acknowledges that the MEPA Regulations provide that the scope of review of a project undertaken on land purchased from the Commonwealth extends to all aspects of the project undertaken on such land that are likely, directly or indirectly, to cause damage to the environment, as more specifically provided in the MEPA Regulations. The undersigned also agrees to provide to the Division of Capital Asset Management and Maintenance evidence of satisfaction of these MEPA requirements with respect to any work or activity at the Land occurring within five years after the execution and delivery of the release deed.

This agreement survives the delivery of the deed and binds the undersigned and its successors and assigns.

Executed under seal

By: Planning Office for Urban Affairs, Inc.

By: [Signature]

Print Name: William Grogan

Title: President

Date: 10/15/19

Received By The Commonwealth of Massachusetts Division of Capital Asset Management and Maintenance

By: [Signature]

Print Name: [Signature]

Title: [Signature]

Date: [Signature]
Certification on Payment of State and Federal Withholding Taxes

I, William Grogan, as President of the Planning Office for Urban Affairs, Inc., do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

William Grogan  
(Print Name)

(Signature)

10/15/2019  
(Date)
Certification on Payment of State and Federal Withholding Taxes

I, Karen LaFrazia (name), as President and CEO (title) of St. Francis House (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

Karen LaFrazia
(Print Name)

(Handwritten Signature)

October 11, 2019
(Date)
Certification on Payment of State and Federal Withholding Taxes

I, Donald Alexis (name), as president (title) of Caribbean Integration Community Development, Inc. (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

Donald Alexis
(Print Name)

[Signature]

10/14/19
(Date)
Certification on Payment of State and Federal Withholding Taxes

I, William J. Moran as Vice President of Finance & Administration of The Architectural Team, Inc do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

William J. Moran

October 11, 2019
Certification on Payment of State and Federal Withholding Taxes

I, Stephen Matorano, PE (name), as Associate (title) of Bohler Engineering (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

____________________________
Stephen Matorano, PE
(Print Name)

____________________________
(Signature)

10/11/2019
(Date)
Certification on Payment of State and Federal Withholding Taxes

I, Ray Mitrano (name), as Principal (title) of WaypointKLA (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

Ray Mitrano
(Print Name)

(Signature)

October 15, 2019
(Date)
Certification on Payment of State and Federal Withholding Taxes

I, [Name], as [Title] of [Company], (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

[Signature]

10/15/19

(Date)
Certification on Payment of State and Federal Withholding Taxes

I, John A. Pulgini (name), as Zoning Attorney (title) of Boston State Hospital RFP (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

John Pulgini
(Print Name)

(Signature)

10/15/19
(Date)
Certification on Payment of State and Federal Withholding Taxes

I, JANET FRAZIER, (name), as PRESIDENT / CEO (title) of MALONEY PROPERTIES, INC. (development team member) do hereby certify under the pains and penalties of perjury that all local, state and federal taxes are current for the above-referenced team member.

JANET FRAZIER
(Print Name)

Janet Frazier
(Signature)

October 11, 2019
(Date)