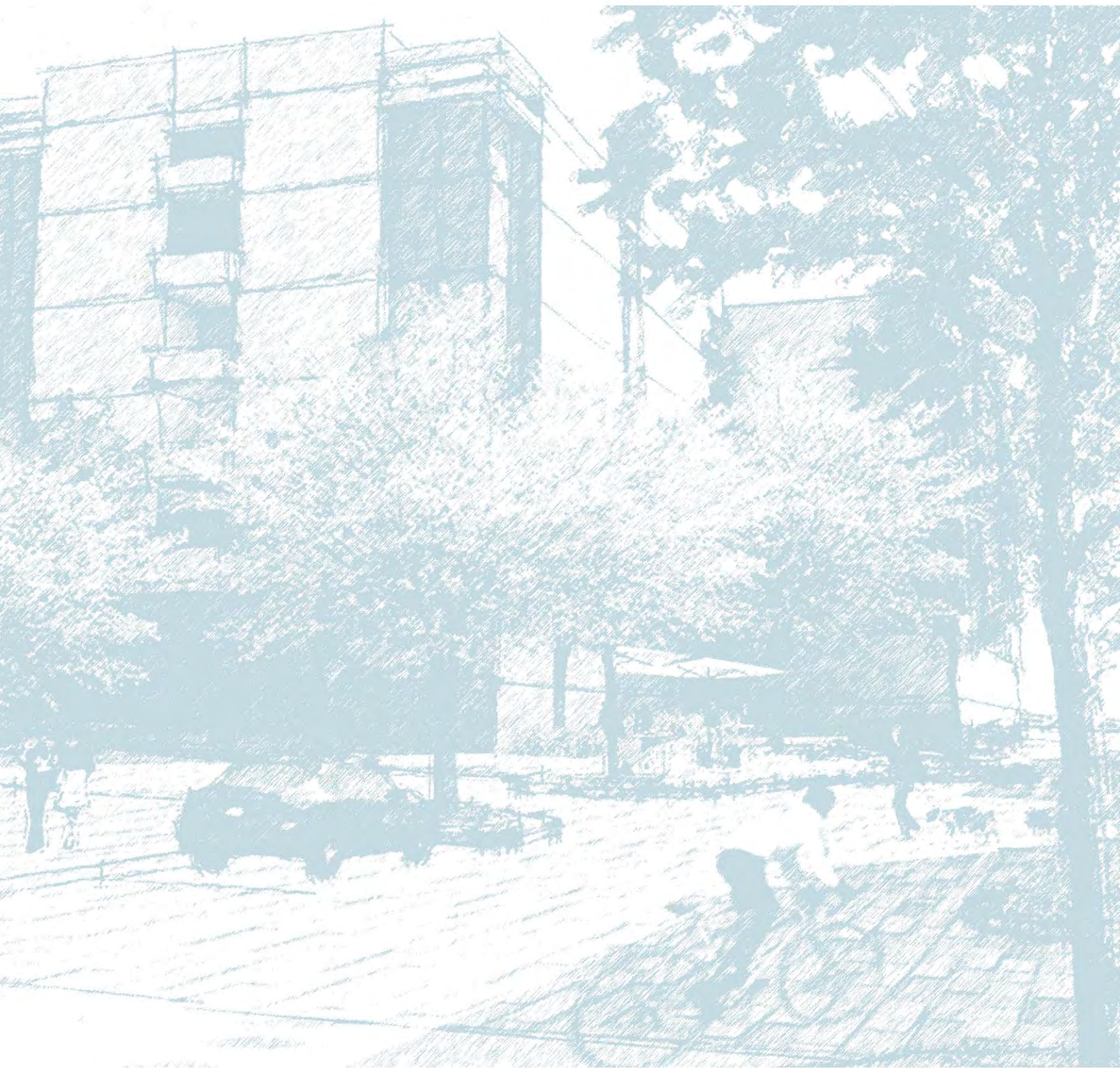


# CLARENDON HILL REDEVELOPMENT PROPOSAL



Preservation of  
Affordable Housing

**GATE RESIDENTIAL**<sup>™</sup>  
a REDGATE COMPANY



**Preservation of Affordable Housing**

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Boston, MA 02108  
(617) 449-0860



**Preservation of  
Affordable Housing**



**Gate Residential**

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Somerville, MA 02143  
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**CLARENDON HILL  
REDEVELOPMENT PROPOSAL**

## EXECUTIVE SUMMARY

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Our development team, comprised of Preservation of Affordable Housing, Gate Residential and the Somerville Community Corporation, thanks the Somerville Housing Authority for seeking proposals from the development community to redevelop and reinvest in Clarendon Hill. The challenge is exciting, extremely worthwhile and one which will set new precedents in the affordable and public housing arena. As further described in our proposal, we have developed a program designed to achieve three fundamental objectives:

The first objective is to redevelop the 216 existing public housing units to create a safe and attractive environment, both within and outside of the units, for the deserving residents of Clarendon Hill. We have seen the consistent, dedicated effort that the Somerville Housing Authority and the Somerville community have taken to ensure that SHA properties are up-to-date and attractive, and the pride that SHA and the community have shown in striving to meet and maintain that standard for all of its public housing stock. The team, through POAH and SCC, brings a long and established track record of developing and maintaining quality affordable housing that well serves its residents and that Somerville can be proud of. This is our primary objective.

The second objective is to redevelop the property in a manner that enhances and improves the surrounding Somerville neighborhood. Our proposed development program does this in multiple ways: by dramatically improving how the property meets and greets each of its three street edges; by creating for the first time inviting and welcoming opportunities for neighborhood residents to pass through and visit the property, instead of merely around it; and by creating proprietary outdoor spaces that residents can invest in, enjoy, and be proud of. The team, through Gate Residential and SCC, brings a deep, experienced knowledge of the Somerville community and the concerns of its residents.

The third objective is to redevelop the property in a cost-effective way that fully leverages the site's market value potential, enabling a quality redevelopment of the existing public housing units with the lowest possible burden on scarce City and State resources. This is not an incidental element of our approach, it is fundamental. As further described within, our proposed development program and associated financing strategy supports sufficient debt and equity financing, using only generally available (i.e., non-competitive) Federal resources, to permit the complete redevelopment of all 216 public housing units at a cost of less than \$100,000 per unit of State and City subsidies. This not only enables a cost-effective redevelopment of the site, but sets a new standard and creates a new model for redeveloping public housing units in an era of inadequate public resources.

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# THE DEVELOPMENT TEAM



THE DEVELOPMENT TEAM

## DEVELOPMENT TEAM OVERVIEW

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Preservation of Affordable Housing (POAH), Gate Residential, and Somerville Community Corporation (SCC) propose to team up as co-developers for the redevelopment of Clarendon Hill. The three organizations are committed to working with the Somerville Housing Authority (SHA) to maximize the potential of the site, leveraging its underlying value to extend and preserve the long-term affordability of the existing units in a reimagined, vibrant, sustainable, mixed-income community. The team is committed to implementing a development strategy that creates needed housing for households at different income levels while creating new connections to the surrounding community, and does so without an over-reliance on public subsidies. The three organizations intend to form an LLC joint venture which will oversee all aspects of the Clarendon Hill project, providing complete project management and development services from preliminary planning through long-term asset management of the property.



The three organizations offer a uniquely relevant and complementary set of skills and characteristics:

- POAH brings substantial experience with complex, mixed-finance, mixed-income multifamily housing projects similar to Clarendon Hill. POAH has worked collaboratively with public housing authorities in Boston and Chicago and understands how to creatively blend public and private resources. POAH has strong relationships with local public agencies as well as private funders, and knows how to get projects like Clarendon Hill done. The organization is financially solid, and its staff is strong, seasoned and entrepreneurial.
- Gate Residential brings deep expertise with getting high-quality, market-rate housing projects financed and built. Their team knows the local market, with projects recently completed or underway in Somerville, Quincy, and Chelsea. The firm's principals have decades of local experience, a strong network of personal relationships, and a reputation for cost discipline while consistently delivering high-quality projects.
- Somerville Community Corporation brings decades of grassroots experience and extensive knowledge of the Somerville community, where it has deep roots and a rich network of relationships. SCC is skilled at engaging Somerville residents like those who currently live at Clarendon Hill in thinking about how to ensure redevelopment of their property is done in a way that meets their needs.

In addition, two of the three developers are led by former Massachusetts officials in housing and economic development, bringing important capacity to the team in working with SHA to access funds via the DHCD State-Aided Public Housing Mixed-Income Community Demonstration program. In Governor Deval Patrick's administration, Gate Residential's Executive VP, Greg Bialecki, served as Secretary of the Executive Office of Housing and Economic Development, working closely with POAH's CEO, Aaron Gornstein, who was Undersecretary of DHCD at the time.

More detailed information on each of the developers is presented separately in the following pages, but the three organizations are committed to a seamless and collaborative process with the Somerville Housing Authority (SHA). The intent is to fully leverage the three organizations' respective strengths toward a common goal, adding capacity without adding complication.

The three companies will establish a joint venture entity that will undertake the permitting, community engagement, and planning for the project. Post-permitting, the team expects that each phase of the development will be leased to a phase-specific development entity led by one of two teams: either Gate Residential or POAH/SCC. Generally, responsibilities will be allocated as shown in the chart below:

Organizations	Proposed Roles
<b>POAH</b>	<ul style="list-style-type: none"> <li>⇒ Primary point of contact for SHA and residents during all phases of the project</li> <li>⇒ Lead on overall site planning</li> <li>⇒ Lead on securing resources for affordable housing component</li> <li>⇒ Overall project management, construction management, and asset management for identified phases</li> <li>⇒ POAH Communities: Property management for the entire site</li> </ul>
<b>Gate Residential</b>	<ul style="list-style-type: none"> <li>⇒ Lead on securing resources for market-rate housing component</li> <li>⇒ Lead on design for market-rate component</li> <li>⇒ Overall project management, construction management, and asset management for identified phases</li> <li>⇒ Provision of cross-subsidy to POAH/SCC-led phases</li> </ul>
<b>SCC</b>	<ul style="list-style-type: none"> <li>⇒ Lead on resident and community engagement, including identifying opportunities for resident employment and use of resident-owned and M/WBE businesses</li> </ul>
<b>Collaborative</b>	<ul style="list-style-type: none"> <li>⇒ POAH Communities to collaborate with SHA on coordinating relocation</li> <li>⇒ SCC to collaborate with SHA on comprehensive local planning process</li> <li>⇒ SCC to collaborate with POAH Communities on supportive services planning and coordination</li> <li>⇒ Gate Residential to collaborate with POAH/SCC across phases on maintaining construction cost discipline and identifying potential market-rate equity</li> </ul>

Legally, responsibility will be clear and complete. The execution of this plan will be through a joint venture (JV) between POAH, Gate Residential, and SCC. The JV partners will form a Master Developer LLC entity for the purpose of implementing the development of Clarendon Hill. The LLC's operating agreement will define each member's roles, responsibilities, decision-making authority, and economic participation. The JV team will work collaboratively on the overall development plan for the site, including overall program, design, unit mix, etc., defining a plan that is acceptable to the SHA. The Master Developer will sign the Ground Lease with the SHA. The organizations will each provide any short or long term guarantees necessary for project financing on the components for which they are the lead. Further detail on the proposed ownership structure is included below in the Other Development Team Information section.

All three organizations are financially sound and able to provide the working capital, staff capacity, and guarantees needed to implement the project as described in this proposal. All three organizations have a track record of underwriting by national and local institutions and a history of successful project completion.

## DEVELOPMENT TEAM COMPOSITION & CONTACT INFO

POAH, Gate Residential, and SCC have assembled a strong team with solid experience in successfully completing projects similar to Clarendon Hill in key ways – e.g., other new construction projects of a similar size, in comparable locations and with comparable site issues, targeting a mixed-income tenant population, including sustainability features, similar financing, collaboration with a public housing authority, etc. Several of the team members are Somerville-based and know the local terrain. Both Ground, Inc. and Nitsch Engineering are certified Women-Owned Business Entities (WBEs).

The members of the development team and their primary contact’s address, phone and email are listed in the chart below. Team member experience and relevant background information is provided in the subsequent sections of this proposal, with resumes and other supplementary information in the attachments.

DEVELOPMENT	
Co-Developer (Lead)	Preservation of Affordable Housing, Inc. (POAH) Cory Mian, Vice President, Real Estate Development 40 Court Street, Suite 700 Boston, MA 02108 617.449.0867 cmian@poah.org
Co-Developer	Gate Residential (a Redgate company) Greg Bialecki, Executive Vice President 265 Franklin Street, 6 <sup>th</sup> Floor Boston, MA 02110 617.904.7029 Gregory.bialecki@redgate-re.com
Co-Developer	Somerville Community Corporation Scott Hayman, Director of Real Estate 337 Somerville Avenue, 2 <sup>nd</sup> Floor Somerville, MA 02143 617.776.5931 x227 shayman@somervillecdc.org
DESIGN & OTHER CONSULTANTS	
Architect	Davis Square Architects (DSA) Cliff Boehmer, Principal 240A Elm Street Somerville, MA 02144 617.764.3700 cboehmer@davissquarearchitects.com
Architect, Planner (Market-rate expertise)	Cube 3 Studio John Harding, Associate Principal 360 Merrimack Street, Building 5, Floor 3 Lawrence, MA 01843 978.379.8718 jharding@cube3studio.com
Landscape Architect	Ground, Inc. Shauna Gillies Smith, Principal 6 Carlton Street Somerville, MA 02143 617.718.0889 sgs@groundinc.com



<b>Civil Engineer</b>	Nitsch Engineering David Conway, Senior Project Manager 2 Center Plaza, Suite 430 Boston, MA 02108 617.338.0063 dconway@nitscheng.com
<b>Traffic Engineer</b>	Design Consultants, Inc. David Giangrande, President 120 Middlesex Avenue, Suite 20 Somerville, MA 02145 617.776.7710 DGiangrande@dc-ma.com
<b>Energy / Sustainability Consultant</b>	CLEAResult Matthew Root, Senior Project Manager 50 Washington Street, Suite 3000 Westborough, MA 01581 508.365.3494 Matthew.Root@clearesult.com
<b>LEGAL</b>	
<b>Attorney</b>	Nolan Sheehan Patten, LLP Stephen Nolan, Partner 101 Federal Street, 18 <sup>th</sup> Floor Boston, MA 02110 617.419.3171 Nolan@nspllp.com
<b>PROPERTY MANAGEMENT</b>	
<b>Property Manager</b>	POAH Communities Patricia Belden, President 40 Court Street, Suite 700 Boston, MA 02108 617.449.0859 pbelden@poah.com

Although a contractor has not been selected at this time, the team has incorporated recent pricing experience from qualified contractors that would be able to successfully complete a phased construction of this complexity. Contractor selection would take place post-award and would be based on a comprehensive review of the contractor’s qualifications and experience, cost to complete the job, and experience and success working with goals for local, minority, and women hiring as well as minority and women business enterprise (M/WBE) utilization.

Many of the proposed team members have longstanding relationships and have worked on prior projects together. For example, SCC has worked with Davis Square Architects (Saint Polycarp Village and Linden Street), Nitsch (Saint Polycarp Village), Design Consulting Inc. (181 Washington Street), and Ground Inc. (on a proposal response). Gate Residential has worked with DCI (Maxwell’s Green) and Cube 3 (on a proposal response). And POAH has worked with Nolan Sheehan Patten (State Street portfolio), DSA (over 10 other projects), Nitsch (Whittier Street, Temple Landing), and CLEAResult (over 10 other projects). POAH Communities, POAH’s wholly-owned property management subsidiary, manages all of POAH’s properties. These independent experiences have confirmed that these team members will bring to the table a talented and experienced group of individuals with a deep commitment to building sound, sustainable, livable communities.

## THE DEVELOPERS

Each of the three developers' profile, track record, and proposed team are detailed below. Please see the attachments for resumés, financial information, a listing of projects developed, and other pertinent information.

### Preservation of Affordable Housing (POAH)

KEY OFFICE AND STAFF CONTACT INFORMATION	
Developer	<b>Preservation of Affordable Housing, Inc. (POAH)</b> 40 Court Street, Suite 700 Boston, MA 02108 617.261.9898 www.poah.org
Principal-in-Charge	<b>Rodger Brown, Jr.</b> <b>Managing Director, Real Estate Development</b> 617.449.0860 rbrown@poah.org
Primary Contact Person / Project Manager – Predevelopment	<b>Cory Mian</b> <b>Vice President, Real Estate Development</b> 617.449.0867 cmian@poah.org
Project Manager – Development Period	<b>Cory Fellows</b> <b>Vice President, Real Estate Development</b> 617.449.0878 cfellows@poah.org
Financial Planning Support	<b>Andrew Spofford</b> <b>Chief of Staff</b> 617.449.1016 aspofford@poah.org
Sustainability & Design Support	<b>Julie Klump</b> <b>Vice President, Design and Technical Services</b> 617.449.1017 jklump@poah.org
Construction Management	<b>Steven Wolfrey</b> <b>Construction Project Manager</b> 617.449.0886 swolfrey@poah.org

#### Organizational Overview

Preservation of Affordable Housing, Inc. (POAH) is a nationally active nonprofit housing developer based in Boston, with branch offices in Chicago and Washington, DC, in business since 1998. POAH's mission is to create, preserve and sustain affordable communities that provide economic security and access to opportunity for all people. POAH currently owns and operates more than 8,700 rental apartments in more than 75 properties in nine states and the District of Columbia, housing the working poor, families, veterans, persons with disabilities, and seniors. (Of these properties, roughly a third are in Massachusetts.) Overall, POAH's portfolio comprises a total of \$950 million in real estate assets. The organization's staff of 46 full-time employees is led by a seasoned five-person leadership team. POAH's wholly-owned property management company, POAH Communities, employs an additional 361-person staff.

POAH leverages its strengths – its commitment to the nonprofit housing mission, strong bottom-line financial acumen, and innovative approach to navigating complex regulatory environments – to bring partners together to structure and implement revitalization strategies that address the needs of diverse communities and stakeholders. Its strong reputation has resulted from a demonstrated ability to craft complex financial transactions, tackle regulatory challenges, and close tough redevelopment deals that preserve or create affordable housing. The organization and its leaders are at the forefront of policy and legislative discussions around housing preservation, affordable housing finance, and regulatory reform.

**Financial strength.** POAH takes seriously its role as a long-term steward of its developments and its communities and is built on the principle that its real estate portfolio must be sustainable long-term. This has resulted in robust corporate capitalization, with parent company net assets of over \$40 million. POAH also has solid access to predevelopment and bridge acquisition credit lines with \$20 million of total funding available through Local Initiatives Support Corporation, or LISC (\$5 million), Low Income Investment Fund, or LIIF (\$5 million), the Calvert Foundation (\$4 million), and the Massachusetts Life Initiative (\$1.5 million), among others. POAH enjoys additional credit relationships with other state-based predevelopment lenders such as the Community Economic Development Assistance Corporation (CEDAC), MA Housing Investment Corporation (MHIC), and MA Housing Partnership (MHP). Overall, the organization benefits from a strong board of directors, dedicated management team, and knowledgeable staff led by Aaron Gornstein, who is an experienced affordable housing practitioner as well as a former Massachusetts cabinet secretary for housing and community development.

**Experience securing funding.** POAH has broad experience securing funds from the full range of multi-family financing programs at the federal, state, and local levels, including federal and state housing tax credits, HUD operating subsidy and debt funding, bond financing, renewable energy financing, HOME, Department of Housing and Community Development (DHCD) programs, and many others. The organization has been highly successful at securing competitive resources like 9% LIHTC awards: within the last ten years in Massachusetts alone, POAH has raised over \$225 million in federal tax credit equity and \$20 million in state tax credit equity, with over 2,000 units receiving financing and subsidy with DHCD in 20 separate transactions.

**Experience with mixed-income housing.** While POAH’s roots are in developing and managing low- to moderate-income housing, an increasing number of its projects are mixed-income, including a market-rate component. POAH has successfully developed nine mixed-income properties, with at least five more expected to close in the next 12 months. These 14 mixed-income projects include a total of over 1,200 units, and over half of these properties include 100+ units. One of these properties is:



*Billings Forge Apartments (Hartford, CT):* Ongoing occupied rehabilitation of a 112-unit historic, mixed-income, mixed-use property acquired by POAH in 2014. Of the existing units, 10% are market-rate. The project is comprised of a 95-unit historic former factory as well as 17 scattered-site units located on the adjacent block.

*Briston Arms Apartments (Cambridge, MA):* Purchased in June 2015, this 154 unit property serving Cambridge families offers units that serve a diverse range of incomes (from 15% to 180%). 35 of the 154 units (23%) are market-rate. The property is undergoing a major renovation currently and is still able to maintain at 93% occupancy.



POAH’s Chicago office has completed more than 600 mixed-income units since 2011, and the occupancy rate at these properties averages over 96%. One of POAH’s mixed-income properties in Chicago is:



*The Washington at Woodlawn Park*: including 102 renovated units -- 51 unsubsidized market-rate and 51 public housing replacement units. The Washington helped to establish a new market for unsubsidized rental units in a neighborhood hard-hit by the downturn in the real estate market, driving the revitalization of several nearby buildings in West Woodlawn. The project was completed in 2012, and its occupancy is over 95%.

**Commitment to sustainable development.** POAH believes in creating green, sustainable, energy-efficient properties as a core organizational principle. It was one of the first 50 housing organizations in the country to sign up for the Department of Energy’s Better Building Challenge, and has committed to a 20% reduction in energy use portfolio-wide by 2020. With two employees focused on maximizing sustainability – Julie Klump and Toby Ast, POAH’s VP of Design and Technical Services and Director of Energy Management respectively – POAH has achieved great results, both at its existing portfolio, where energy use has decreased significantly in recent years, and with regard to new projects. For example, POAH’s new Jackson property at Woodlawn Park in Chicago recently earned LEED Platinum certification, and The Residences at Melpet Farm in Dennis is designed as a near net zero energy property. POAH works with sustainability consultants like CLEAResult on most of its projects to analyze possible ways to further increase efficient use of resources, successfully implementing initiatives such as solar power generation, significant building envelope air-sealing and insulation, high-efficiency heating and cooling systems, and innovative approaches to storm-water and wastewater management. CLEAResult’s work with POAH is further detailed in its profile in the Other Team Members section below.

**Integrating community and supportive services.** Through its property management company, POAH Communities, POAH has a strong track record of providing robust resident services within its properties and working with the surrounding community to connect residents with the resources and tools they need to succeed. Further detail about these efforts is provided in the POAH Communities profile in the Other Team Members section below.

**Pipeline.** POAH currently has nine projects (approximately 800 units) in construction. An additional three projects (approximately 280 units) are anticipated to close in the first quarter of 2016. POAH is also working on three large-scale, multi-phase neighborhood redevelopments in Chicago, Boston, and Washington, DC, which are expected to begin construction in early 2017 and continue into 2019. All told, POAH’s development pipeline includes approximately 3,500 units, with a total value of \$580 million.

**Board of Directors**

POAH’s Board brings a wealth of experience in affordable housing and related fields. A more detailed bio for each board member is included in the attachments, in Appendix 1.

Name	Employer, Position	Main Areas of Expertise
Herbert Morse, Chair	KPMG, Vice Chairman (retired)	Accounting/Finance
William Apgar	Harvard University, Kennedy School of Government, Lecturer	Housing/Community and Economic Development, Policy, Finance
Jarrett Barrios	American Red Cross Los Angeles, CEO	Law, Housing Finance, Health Care
Reese Fayde	Reese Fayde & Associates, Principal	Housing/Community and Economic Development

Mark Goldhaber	Goldhaber Policy Services, Principal	Mortgage Finance, Government Relations
Toby Levy	Local Initiative Support Corporation, Executive Vice President and CFO (retired)	Finance, Information Technology, Compliance
Georgia Murray	MMI, LLC (real estate investment company), Managing Partner	Property Ownership and Management
Estelle Richman	US Department of Housing and Urban Development, Senior Adviser to the Secretary (retired)	Housing, Social Services
Aaron Gornstein	POAH, President and CEO (and former DHCD Undersecretary)	Housing/Community Economic Development, Policy

### Staff Experience

Rodger Brown will serve as the principal-in-charge for the Clarendon Hill project and Cory Mian will serve as primary contact person and project manager during the predevelopment period, with Cory Fellows taking over as project manager as the project heads into the construction period and proceeds through completion and stabilization. All three have had wide experience managing a variety of complex projects and coordinating multi-disciplinary teams, and all three have completed a number of projects similar to Clarendon Hill. Providing additional project support will be Julie Klump, Vice President for Design and Technical Services, Andrew Spofford, Chief of Staff, and Steven Wolfrey, Construction Project Manager. Their resumé's are included in Appendix 1.



**Rodger Brown, Jr.** POAH’s Managing Director of Real Estate, Rodger Brown, has 30 years of experience developing and financing affordable housing, focusing primarily on project implementation and financial engineering of redevelopment initiatives. He joined POAH in 2004, and currently oversees the activities of its real estate development staff, managing resource allocation, establishing strategic initiatives, and providing direction on its most complex real estate transactions. Among the projects he has overseen at POAH are: (1) the 173-unit Temple Landing project in New Bedford (described below in Highlighted Projects); (2) the 841-unit, \$290 million acquisition and rehabilitation of the former State Street portfolio, involving six properties, financed with state and federal LIHTC and privately-placed tax-exempt bonds – the largest single transaction in MassHousing’s history; and (3) the acquisition and rehabilitation of a troubled 825-unit, 5-property portfolio in Florida. Prior to joining POAH, Brown served as principal of a firm which provided financial and project management consulting services to various nonprofit and governmental sponsors of affordable and public housing. He has been directly involved with 26 projects and over 14 tax credit syndications.

Brown has worked extensively on public housing redevelopment projects, starting in 1993. Among the mixed-finance transactions Brown has worked on are two Boston Housing Authority projects: Mission Main and Orchard Park (phase 3). In addition to this HOPE VI work, Brown provided project management as well as financial advisory services to the Philadelphia Housing Authority on its \$187 million mixed-finance redevelopment of Tasker Homes, which utilized Capital Fund Anticipation Bonds and 4% LIHTC funds.

Brown is a graduate of Boston College and held a two year HUD fellowship at MIT’s Department of Urban Planning.



**Cory Mian.** Cory Mian, POAH's Vice President of Real Estate Development, has deep experience with the acquisition and redevelopment of affordable housing projects, from predevelopment assessment and budgeting, through financial and programmatic structuring, to project oversight and completion. Since coming to POAH in 2005, she has served as project manager on the acquisition and recapitalization of over 20 projects (including 13 syndication closings) with over \$433M of total development costs. Mian's current and recent projects include:

- *Whittier Street:* The planned redevelopment of the Boston Housing Authority's distressed 200-unit Whittier Street property, creating a 500-unit mixed-income, mixed-use community at the existing site and in the surrounding neighborhood (see Highlighted Projects below for more detail). Mian has shepherded the project through an extensive predevelopment process with intensive resident and community engagement, ultimately succeeding in getting the site rezoned for higher density development.

- *Blackstone Apartments:* One of the six State Street properties, a 145-unit building in downtown Boston, involving a complex acquisition and renovation that had to take place within a compressed timeframe in 2013. Mian coordinated over \$10M (\$70K per unit) in renovations with an elderly and disabled tenant population in place, managing a tight site extensive engagement with residents and coordination with contractors.

Mian holds a BA from Brown University and a Masters in Urban Planning from Harvard University's Graduate School of Design. Prior to attending graduate school, Mian worked in Baltimore for MMA Financial in its underwriting and asset management groups. Mian lives in Somerville; she is a volunteer coach with Somerville Youth Soccer and a board member of East Somerville Main Streets.



**Cory Fellows.** Cory Fellows, Vice President of Development at POAH, will direct and coordinate the affordable housing component of the Clarendon Hill development effort from initial closing through completion and stabilization. Fellows has over 15 years of multifamily project management experience in both the for-profit and non-profit sectors. During his four years at POAH he has led some of the organization's most complex redevelopment projects, taking them through predevelopment assessment and budgeting, financial and programmatic structuring, construction and permanent loan closings, resident relocation coordination, construction oversight, and lease-up. Much of his work has featured substantial renovations with residents in place, necessitating thoughtful construction coordination and extensive relocation planning.

Fellows' recent projects at POAH have included the following:

- *Torrington West Apartments (Torrington, CT):* Substantial rehabilitation of an occupied 78-unit elderly property. Scope of work included roof and window replacement, elevator modernization, HVAC and life safety system upgrades, ADA accessibility modifications, community room expansion, and the modernization of apartment kitchens and bathrooms. The project was completed in 2014.
- *Grace Apartments (Providence, RI):* FHA-financed redevelopment of an occupied 101-unit senior property. Renovations included window replacement, ventilation improvements, plumbing repairs, ADA conversions, apartment modernizations, and community space enhancements. Also worked closely with incumbent nonprofit food-service job-training operation to improve its space while keeping it up and running during construction. Work was completed in 2015.
- *Billings Forge Apartments (Hartford, CT):* Ongoing occupied rehabilitation of a 112-unit historic, mixed-income, mixed-use property acquired by POAH in 2014. The project is comprised of a 95-unit historic former factory as well as 17 scattered-site units located on the adjacent block. POAH is partnering with the non-profit Melville Charitable Trust, with POAH as development lead and Fellows serving as

its point person. This high-profile project has entailed close coordination with residential and commercial tenants, and with an active non-profit community organization which runs a wide variety of programs from the property. Renovations will be complete by the spring of 2017.

- *Tribune Apartments (Framingham, MA)*: 53-unit senior property slated to undergo a significant occupied rehab, including new roof, windows, fire alarm improvements, fire suppression system, apartment upgrades, and ADA modifications. A summer 2016 construction start and 2017 completion are projected.

Prior to joining POAH, Fellows served as project manager for the Maine-based Wishcamper Companies for redevelopment projects in New England and the Midwest. He has also worked in the international arena on USAID- and World Bank-sponsored land-use reform initiatives. Fellows is a graduate of Colgate University, and earned a Masters in City Planning from MIT.



**Andrew Spofford.** Spofford joined POAH as an intern in 2006 while pursuing a Master’s Degree in Urban Planning from Harvard’s Graduate School of Design, with a concentration in Real Estate Development. Since then he has held a number of positions of increasing responsibility at POAH – Development Project Manager, Policy Director, Vice President for Policy and Strategic Planning, Vice President for Urban Transformations and Strategic Initiatives, and Chief of Staff, his current role. Spofford’s current responsibilities include internal business planning and collaborating with POAH’s Managing Directors to formulate strategies and systems to support POAH’s growth. He was instrumental in POAH’s receiving a \$30.5 million Choice Neighborhoods grant for the redevelopment of Grove Parc Plaza apartments and the surrounding Woodlawn community on the South Side of Chicago, and in managing many aspects of the project, including overall site planning and budgeting, creation of a TIF district, coordinating funding applications, and working on zoning issues. He has played a similarly major role in overseeing and coordinating POAH’s other major urban redevelopment efforts, including Whittier Street in Boston and Barry Farm in Washington, DC.



**Julie Klump.** Klump assists POAH primarily during the predevelopment process, guiding the building investigation (existing buildings) or advising during the design process (new construction), developing the scope of work and reviewing cost estimates for POAH developments. She works with the project team, including architects and engineers, on all developments – new construction, acquisition/rehabilitation, and refinancing of existing properties in the portfolio – and is expert at integrating green and sustainable design elements. A LEED-certified architect with an undergraduate degree in environmental design from Texas A&M University, she has been involved with several projects that were LEED-certified. Prior to working at POAH, she has worked as an owner’s project manager, construction manager, architect, and Executive Director of the Texas Historical Foundation. In addition to her undergraduate degree, she has a Masters in Architecture, with Certification in Historic Preservation, from the University of Texas at Austin.



**Steven Wolfrey.** Wolfrey is a Construction Project Manager within POAH’s Development team. He came to POAH in 2014 with 10 years of multi-family and mixed-use construction experience, having managed more than \$500 million in new and rehab multi-family construction in his previous positions. At POAH, Wolfrey has completed the implementation of three in-place rehab projects, skillfully navigating and responding to the needs of the largely elderly and disabled tenant population while keeping construction on schedule to achieve various completion benchmarks. His ability to successfully coordinate three occupied rehab projects at the same time, in three states, with a total of 280 units and more than \$14 million in renovations demonstrates his expertise and agility as a construction project manager. Wolfrey is a graduate of Norwich University with a degree in Architectural Studies. He is also LEED-certified and holds General Construction Licenses in Massachusetts and Florida.



## Gate Residential (a Redgate company)

KEY OFFICE AND STAFF CONTACT INFORMATION	
Developer	Gate Residential (a Redgate company) 265 Franklin Street, 6 <sup>th</sup> Floor Boston, MA 02110 617.904.7000 www.redgate-re.com
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Principal	<i>Damian Szary</i> Principal and Founding Member 617.904.7111 das@gateresidential.com
Primary Contact Person	<i>Greg Bialecki</i> Executive Vice President 617.904.7029 Gregory.bialecki@redgate-re.com
Project Manager	<i>Stephen Perdue</i> Senior Project Manager 617.904.7016 Steve.perdue@redgate-re.com
Project Manager	<i>Lizbeth Bello</i> Project Manager 617.904.7108 Lizbeth.bello@redgate-re.com
Assistant Project Manager	<i>Courtnae Curry</i> Assistant Project Manager 617.904.7005 courtnae.currie@redgate-re.com
Market Research / Investment Analysis	<i>Nate Ardente</i> Financial Analyst 617.904.7007 nate.ardente@redgate-re.com

### Organizational Overview

Redgate Capital Partners is a private equity real estate investment firm based in Boston, formed by a team of former colleagues from Spaulding & Slye / Jones Lang LaSalle – seasoned real estate professionals with a long history of working together successfully to maximize the value of real estate investments. Gate Residential is one of several Redgate companies, a real estate development firm that focuses on creating vibrant apartment communities that enhance and enliven urban neighborhoods. Founded in 2010, Gate Residential has over the past six years become one of the most active apartment developers in the Greater Boston area, with over 1,000 units completed or under development. Its recent projects in Somerville, Chelsea and Quincy aim to attract residents who are seeking quality housing with high-end finishes and amenities but who have been priced out of the downtown market. Focusing on Boston’s “outer-urban” neighborhoods, Gate Residential’s developments provide great transit access to Boston’s urban core as well as convenient walkable access to the increasingly lively urban neighborhoods in which they are located. With its team’s extensive industry experience and hands-on approach, Gate Residential creates and fulfills a

unique vision for each of its projects. The company's success is built on its ability to make strategic investment decisions, build project teams based on longstanding industry relationships, mitigate risk continuously, utilize a streamlined decision-making process, and execute plans consistently. Other qualities that make Gate Residential well-suited to deliver a terrific redevelopment of the Clarendon Hill property are as follows:

- **Focus on managing costs and delivering value.** Through a combination of innovative building and unit design, thorough understanding of the relevant demographics and market trends, and forward-leaning construction management skills, Gate Residential delivers great quality and value while maintaining a disciplined, bottom-line focus on capital and operating costs.
- **Emphasis on community-building amenities.** Gate Residential spends as much time, energy and resources on creating great amenities, common areas and outdoor spaces as it does on the apartment units themselves. It knows that tenants are not just looking for a nice place to live – they are looking for the opportunity to become part of a real community.
- **Desire to become part of the fabric of the neighborhood.** Gate Residential's site designs build off of connections with local streets, sidewalks and community paths. Its building types, massing and design reflect the neighborhoods that they are part of, and it is comfortable using a variety of building types (even within a single project, as at Maxwell's Green) to create that result. Its tenant marketing and promotion efforts encourage its residents to get out into the neighborhood and patronize local businesses.
- **Close cooperation with the community.** An essential part of Gate Residential's design development process is listening to the neighbors and the community. It works cooperatively with the community and with local government officials. The company has had consistent success in local permitting processes. Every community where it has built would welcome it back again for another project (or already has).
- **Preference for partnering.** Maxwell's Green and in fact most of Gate Residential's projects have been developed in partnership with property owners or others. Pursuing the opportunity to redevelop Clarendon Hill in partnership with POAH and SCC is not a new experiment for the company. Developing with partners is what it does.
- **Commitment to creating housing for all market segments.** The company's Maxwell's Green development includes 24 low-income units, in accordance with the City of Somerville's inclusionary zoning policy. Market-rate units at Maxwell's Green and elsewhere are targeted to be accessible to a broad range of renters. Market-rate rents at its new developments in Chelsea and Quincy, for example, include units affordable to middle-income households at 110-120% of Area Median Income.
- **Track record at securing financing.** Over the past five years, Gate Residential has raised and invested over \$74M of private equity and over \$142M in construction debt. The company always been successful in securing the equity and debt financing needed to complete its projects. Gate Residential's equity partners have included AEW Capital Management, Quincy Mutual, and CrossHarbor Capital Partners. Construction lenders have included Santander, East Boston Savings Bank, and Cambridge Savings Bank.

### Staff Experience

The team that will be working on Clarendon Hill includes Gate Residential Founders and Principals Kyle Warwick and Damian Szary, Greg Bialecki, who started in 2015 as Gate Residential's Executive Vice President after leaving state government, Senior Project Manager Stephen Perdue, and Financial Analyst Nate Ardente. Their prior experience is described below.



**Kyle Warwick.** Warwick has more than 25 years of diverse real estate experience, with particular expertise in master planning, mixed-use development, financing, and regulatory approvals. He has led the planning and development of over 15 million SF of real estate with an aggregate dollar value in the billions. Warwick is a Founding Member and Principal of Gate Residential Properties, where he has co-led the development process for projects with a total of 1,005 multifamily residential units, including site acquisition, joint venture structuring, design and planning, regulatory approvals, finance structuring, construction oversight, marketing and leasing, and asset management. Among the Gate Residential projects he has overseen are:

- *Maxwell’s Green (Somerville):* a 184-unit, LEED-certified, \$52.5M residential development next to future Lowell Street Green Line Station, with amenities including roof deck, yoga studio, and theater room (see Highlighted Projects for more detail);
- *West of Chestnut (Quincy):* a 169-unit, mixed-use project, under construction, scheduled for completion summer 2016;
- *One North of Boston (Chelsea):* a 452-unit, 460,000 SF, transit-oriented development project, the second and final phase now under construction, scheduled for completion spring 2016;
- *Ten Farnsworth (Boston):* 9-unit condo building in Fort Point Channel Landmark District, with ground-floor retail and garage parking;
- *36 River Street (Waltham):* “Acadia on the Charles,” a 200-unit market-rate apartment community, with excellent transportation access for commuters.

Prior to co-founding Gate Residential, Warwick was the Director of Investment Development at Jones Lang LaSalle. Warwick joined Spaulding & Slye/Jones Lang LaSalle in 1994 and served the company in several leadership capacities, becoming a Principal in 2000. He initiated and oversaw the firm’s residential investment and development practice, including the planning and development of over 3,000 units of housing in the Northeast and Puerto Rico over the next decade. Warwick holds a BA from Colgate University, and serves on the Boards of Save the Harbor/Save the Bay and Sail Boston. He has served as a guest lecturer at Harvard’s Graduate School of Design, Harvard Business School, and MIT’s Center for Real Estate.



**Damian Szary.** Szary has over 14 years of experience in real estate development and acquisitions, with a specific focus on multifamily and mixed-use projects. Like Warwick, he is a Founding Member and Principal of Gate Residential, and has co-led the planning and development of the five projects described above.

Prior to co-founding Gate Residential, Szary was an executive with Archstone, one of the nation’s largest apartment owners and developers, serving as its senior development officer in the Boston office. He was responsible for the origination, underwriting and execution of multifamily development projects in the metro areas of both Boston and New York City. These projects included Archstone NorthPoint, a 426-unit, 22-story, luxury high-rise development in Cambridge adjacent to the Lechmere Green Line T-Station, and Archstone Avenir in Boston, a 241-unit, 10-story apartment building constructed above North Station, with direct access to both the Orange and Green Lines. Szary began his real estate career as a commercial broker with Spaulding & Slye, transitioning to the firm’s development group. Szary holds a BA in Economics from Colgate University, and an MS in Real Estate Development from Columbia University.



**Greg Bialecki.** Until 2015, Bialecki served as Cabinet Secretary for the Executive Office of Housing and Economic Development for the Commonwealth of Massachusetts. In that role, he oversaw 12 state agencies with over 800 employees and an annual budget of over \$400M. As the Governor’s chief advisor on jobs, housing and the economy, he led a number of key administration initiatives to promote the state’s innovation economy and to support transit-oriented, mixed-use real estate developments that included multifamily housing. Among these was a statewide multifamily production effort designed to increase the supply of reasonably-priced, market-rate, multifamily housing for young people and young families. Under Bialecki’s leadership, his office received the 2013 Robert C. Larson Workforce Housing Public Policy Award from the Urban Land Institute for this effort.

Bialecki joined Redgate in 2015 to launch a new Gate Residential multifamily fund, leading business development, acquisitions, and fundraising.

Prior to his work in the public sector, Bialecki was a real estate development and environmental lawyer at the law firms of Hill & Barlow and DLA Piper, where his work focused on major mixed-use urban redevelopment projects. Representative projects included Fan Pier, a 3 million SF mixed-use development in Boston; NorthPoint, a 5 million SF mixed-use development in Cambridge, and Cronin’s Landing, a 281-unit rental housing development in Waltham. Bialecki holds a bachelor’s degree in Economics from Harvard and a JD from Harvard Law School.

University and a Master’s in Urban Planning and Economic Development from Columbia University.



**Stephen Perdue (AIA Associate Member, LEED Green Associate).** Perdue has over 8 years of experience in architectural design and real estate project management, including all phases of development, from due diligence, programming and design, through construction and asset management. He has managed projects of varying scales and of varying types, including residential, office, retail, and adaptive reuse. Perdue is currently Gate Residential’s senior project manager for One North of Boston, now under construction, as well as its West of Chestnut project, also under construction (see above for project details). He served as senior project manager for Maxwell’s Green, now complete, a 186-unit TOD project in Somerville.

Prior to joining Gate Residential, Perdue worked as a project architect for various firms, including Hellmuth Obata Kassabaum (HOK), Childs Bertman Tseckares, and Machado and Silvetti Associates. He also served as a project manager with Cargo Ventures, a commercial real estate development company focused on port and airport-related properties in and around major cities in the US. Perdue holds a BA from Baylor University, and a Master’s in Architecture from MIT.



**Lizbeth Bello.** Bello is trained in urban planning and sustainable architecture, and focuses on predevelopment planning and permitting for a range of different project types. Her work includes coordinating team consultants, managing project schedules and budgets, updating financial underwriting, doing community outreach, and conducting market research and analysis. She has been involved with both the West of Chestnut and One North of Boston projects. Prior to joining Redgate, Bello worked as an intern at an architectural firm in Virginia. She has a BA in Architecture from the University of Puerto Rico and a Master’s in Architecture from Boston University.



**Courtnae Curry.** Curry has recently joined Gate Residential after receiving her MS in Engineering Management from Duke University's Pratt School of Engineering. She also has a BS in Architectural Engineering from the Worcester Polytechnic Institute. Her prior work experience includes internships exploring sustainable residential development, including working on a near-zero-net energy home in China and a near-zero-net energy 30-story high-rise in San Francisco.



**Nate Ardente.** Ardente will lead Gate Residential's market research and investment analysis for the Clarendon Hill project. Prior to joining Gate Residential, Ardente was a research analyst at Jones Lang LaSalle, where he analyzed various submarkets in the Greater Boston region, delivering insight on market and economic activity, conditions, forecasts, industry trends, and demographics that affect the real estate market. Ardente holds a BA in Environmental Studies from Denison University and an MA in Sustainable Real Estate Development (Finance) from Tulane.

## Somerville Community Corporation (SCC)

KEY OFFICE AND STAFF CONTACT INFORMATION	
Developer	<b>Somerville Community Corporation (SCC)</b> 337 Somerville Avenue, 2 <sup>nd</sup> Floor Somerville, MA 02143 617.776.5931 www.somervillecdc.org
Principal-in-Charge	<b>Daniel LeBlanc</b> Chief Executive Officer 617.776.5931 x223 dleblanc@somervillecdc.org
Primary Contact Person / Project Manager	<b>Scott Hayman</b> Director of Real Estate 617.776.5931 x227 shayman@somervillecdc.org
Additional Project Support	<b>Jesse Kanson-Benanav</b> Senior Project Manager 617.776.5931 x238 jkanson-benanav@somervillecdc.org

### Organizational Overview

Somerville Community Corporation (SCC) is a longstanding community-based nonprofit organization working to sustain affordability and livability for the lower-income two-thirds of Somerville’s population. It does this primarily via affordable housing development, community organizing and planning, education and asset-building initiatives, and school- and community-based mediation work. Founded in 1969 as a multi-service center, SCC has grown into an effective and trusted local organization with a staff of 15, an annual operating budget of \$1.5M, and 400 members, serving over 1,500 constituents a year throughout the city of Somerville. Some of its employees are fluent in several languages, including Haitian Creole, Spanish, and Portuguese.

SCC takes a four-pronged approach to its work of creating and preserving diversity, livability, and housing affordability in a rapidly-changing Somerville:

**Affordable housing development:** SCC works to develop and preserve as many affordable housing units as it can. It has developed 21 projects, resulting in over 200 affordable rental and homeownership units. SCC currently owns 184 affordable rental units at seven project locations, managed by a third-party professional property management agent. Currently under development is the Union Square Apartments mixed-use project at 181 Washington Street, 35 units of rental housing plus ground-floor retail, now in construction, with completion expected in September 2016 (see below for more detailed description under Highlighted Projects). In addition, SCC is partnering with the City of Somerville on a “100 Homes” initiative to acquire existing one-, two-, and three-family homes at market prices, make whatever modest improvements are needed, and then rent them to low and moderate income Somerville residents, taking these units off the speculative real estate market and serving as a benevolent landlord. Financing for this program comes from the City, local banks, and the Massachusetts Housing Investment Corporation.

**Community Organizing and Planning:** SCC works to empower Somerville residents to become active leaders in the community, organizing for affordable housing, local jobs, and grassroots planning in the areas of land use, transportation, and other important local issues. Through this work, it aims to promote policies that enhance the regulatory and funding environment for affordable housing. SCC offers an annual Leadership Development Institute for 20-25 residents aiming to develop their organizing and advocacy skills. Some of SCC’s recent organizing “wins” include: getting the housing linkage fee increased, and getting the state Department of Transportation to agree to sign an MOU ensuring a commitment to local jobs as part of

the Green Line extension.

**Education and Asset-Building:** SCC’s Department of Economic Opportunity staff works to create access to opportunities for SCC constituents through a range of financial education, counseling, and asset-building programs. SCC staff helps hundreds of Somerville residents every year through these programs, which include career counseling, job search and linkage, financial literacy, first-time homebuyer classes, foreclosure prevention, and Individual Development Account matched savings accounts.

**Mediation:** SCC staff has trained 100 student mediators to work within the public schools in both Somerville and Medford as well as with the court system and community agencies to mediate disagreements and prevent violence. SCC staff works with young people to train them in conflict resolution, respect, and tolerance. Over 800 cases a year are successfully resolved.

**Board of Directors**

SCC’s Board, listed below, is representative of key organizations and constituencies in the community, with members who bring a range of needed skills to the organization. All SCC Board members must live in Somerville and demonstrate a history of community engagement. Some are professionals, and others are affordable housing residents, formerly homeless, non-college graduates who are active with SCC due to their concern for keeping Somerville a vibrant and diverse community for low-income residents.

Name	Employer, Position	Main Areas of Expertise
Van Hardy, President	Retired	Community Activism
Ezra Haber Glenn, Vice President	MIT, Professor of Urban Planning	Affordable Housing, Urban Planning
Kathy McGilvray, Treasurer	Massachusetts Housing Investment Corporation, Director of Investment	Affordable Housing Finance
Jillian Moreira, Clerk	MIT	Community Activism
Jeanette Amazeen-Thomas	Museum of Science and Cambridge Friends School, Educator	Early Childhood Education
Cassie Arnaud	City of Cambridge, Housing Planner	Affordable Housing Planning
Fred Berman	National Center on Family Homelessness, Senior Associate	Homelessness/Public Policy
John Cater	Salvation Army, Volunteer	Homelessness (formerly homeless)
Mary Jo Connolly	University of Massachusetts-Boston	Public Policy/Research
Michelle Green	Dorchester Bay Economic Development Corporation (retired)	Community Development
Glenn Morgan	SkyWorld Interactive, Co-Owner/ Partner	Business Administration
Adam Rich	Gentle Giant Moving	Community Activism
Stephanie Toews-Moeling	MIT	Financial Analysis
Mulugeta Zegeye	Student and Affordable Housing Resident	Community Activism
Valerie Zinkus	Community Resident	Community Activism

**Staff Experience**

SCC’s staff team for the Clarendon Hill project includes CEO Daniel LeBlanc, Director of Real Estate Scott Hayman, and Senior Project Manager Jesse Kanson-Benanav, whose respective track records and experience are detailed below.





**Daniel LeBlanc.** SCC's CEO Danny LeBlanc has worked in a range of capacities in community organizing, community development and nonprofit management for over 30 years. Beginning in the late 1970s, he has held senior roles at Somerville United Neighborhoods, Massachusetts Fair Share, the Massachusetts Office of Communities and Development, the North Shore Community Action Programs, and the Merrimack Valley Project, before becoming SCC's CEO in 2001. In addition to his work at SCC, LeBlanc teaches Management Studies at Cambridge College, and serves on the Boards of the Somerville Affordable Housing Trust Fund, the Metro North Regional Employment Board, and the Massachusetts Association of Community Development Corporations. He holds a BA in Political Science from U Mass Amherst and an MS in Public Affairs from U Mass Boston.



**Scott Hayman.** Scott Hayman joined the SCC staff in 2013 as Director of Real Estate, where he has spearheaded all of SCC's housing development work, including the 181 Washington Street development described in more detail below. Prior to joining SCC, Hayman served as Program Consultant to the MA Housing Investment Corporation, administering MHIC's Neighborhood Stabilization Loan Program in 10 cities throughout the state. Before working with MHIC, he served as Director of Housing for the City of Worcester's Executive Office of Planning and Community Development, where he advanced resident-driven initiatives such as a 30-acre neighborhood revitalization plan sponsored by Clark University and the Main South CDC. This initiative included the reclamation and remediation of industrial Brownfields, the construction of more than 80 new for-sale units for of first-time homebuyers, a new Boys and Girls Club facility, and mutli-purpose athletic fields for the neighborhood. Hayman also served as a supportive housing technical assistance provider for the Massachusetts Executive

Office of Health and Human Services, and the Executive Director of the Central Massachusetts Housing Alliance. He holds a bachelor's degree in English and Psychology from the University of Redlands.



**Jesse Kanson-Benanav.** SCC's Senior Project Manager Jesse Kanson-Benanav has over a decade of relevant experience in housing and community development. His career in the field began in 2003 at SCC, where he initially worked as a Community Organizer, engaging Somerville residents in campaigns to preserve affordable housing and strengthen municipal housing policy. Kanson-Benanav went on to work as a consultant to affordable housing developers and public housing authorities in the areas of market research and program management. He then spent two years working at The Community Builders, where he helped build TCB's New England development pipeline, including winning designation for TCB and two local CDCs to redevelop the Amory Street public housing development in Jamaica Plain into 500+ units of mixed-income

housing. He came back to work at SCC in February 2015. Kanson-Benanav holds a BA from Oberlin College and a Master's in City Planning from MIT with a concentration in housing and community development.



## HIGHLIGHTED PROJECTS

Several projects undertaken by each of the three developers are described below, showing the developers' experience with projects of similar scale and complexity as the proposed Clarendon Hill redevelopment.

### POAH: Comparable Projects

#### WOODLAWN PARK (formerly Grove Parc Plaza)

Location	Chicago, IL
Project Type	Mixed-income, mixed-use rental housing
Project Scope	995 units, mix of new construction and gut rehab
Income Mix	Of the 995 units - 54% are for < 80% AMI, 17% for 80-120% AMI, 29% market-rate. (Of the 995, POAH is developer for 579 units, of which 22% are for 80-120% AMI, 9% are unrestricted market-rate. The other units are being developed by partners.)
Construction Start	2009
Construction Finish	770 units completed in phases (430 by POAH, 340 by partners), the rest in development; all on-schedule, on budget
TDC	\$94M for POAH's completed units
Team	Architects include - Landon Bone Baker Architects, Worn Jerabek, Studio C Contractors include - Powers & Sons, Constructors Inc., Linne-Mathes
Market Rents/Prices	Market rents ranging from \$624 (1BR), \$770 (2BR), \$928 (3BR)
M/WBE	41% MBE, 4% WBE (first phase); 53% MBE, 15% WBE (second phase)



Before



After

In 2008, POAH purchased Grove Parc Plaza, a distressed 504-unit Section 8 development encompassing three city blocks in Chicago's South Side, aiming to preserve and revitalize it. Starting with extensive community outreach and stakeholder dialogue, POAH identified key issues, challenges and strengths. This qualitative information – combined with the hard data POAH collected on the property's capital needs, financial history, and market conditions – shaped POAH's intervention strategies, leading to a Transformation Plan and subsequent award of a HUD Choice Neighborhoods Initiative (CNI) implementation grant in the program's

first round of awards. Besides \$30.5M in CNI funds, resources included City, State, and LIHTC funds.

Although the ultimate plan at Grove Parc included its demolition and new construction, at POAH's initial 12/30/08 purchase, the team took over a property with over 300 existing resident households, significant deferred maintenance, collections problems, and gang activity. The POAH development and property management team was able to stabilize Grove Parc, address immediate physical needs, and successfully manage the property up and through a period of transition. Working closely with a relocation consultant, the POAH Communities team helped to relocate the existing households and support them through the redevelopment process.



The initiative is now well into the implementation phase, with a total of 430 units completed by POAH – including 165 newly-built, “green” units on the redeveloped Grove Parc site and 265 additional units renovated throughout the surrounding Woodlawn community. POAH partners including the City of Chicago have built an additional 340 units in the neighborhood. Both on- and off-site units are a mix of affordable replacement units, workforce housing targeted at households earning 80-120% AMI, and unassisted, market-rate units. Completed Woodlawn phases have been recognized for excellence in design, receiving awards in 2014 from the Richard H. Driehaus Foundation and the Affordable Housing Finance magazine. The community is designed to meet LEED-Neighborhood Development standards, as well as LEED Platinum for the new developments (initial phases have been certified at this level).

The project includes a community resource center, housing a computer lab, community services program space, and a 120-person auditorium, as well as a new 20,000 square foot youth recreation/education center financed, built and operated by MetroSquash. The new Woodlawn Park will also include, when complete, 100,000 square feet of new commercial space, to include a new grocery store. POAH is working closely with its key partners, including SGA Youth and Family Services, to provide a holistic set of resources to community residents. These include mental and physical health and wellness programming, health insurance enrollment, financial education and income supports, GED classes, and summer camp programming for kids. In addition, more than 100 residents have been placed in jobs. POAH and its partners have also been engaging with the Chicago Police, Ceasefire Chicago and community stakeholders to organize the Woodlawn Public Safety Alliance, and violent crime in the area is down in the past few years: 2014 saw a 48% decline in violent crime compared with 2008, when POAH began work in the area.

References: Mark Risch, Director, Citi Community Capital  
Phone: 303.308.7401  
Email: mark.g.risch@citi.com

Mark McCann, Director, JP Morgan Capital  
Phone: 312.336.2842  
Email: mark.mccann@jpmorgan.com

## TEMPLE LANDING (formerly Grove Parc Plaza)

Location	New Bedford, MA
Project Type	Affordable rental housing
Project Scope	173 units, mix of new construction and gut re-hab
Income Mix	80% affordable to < 60% AMI, 20% affordable to < 80% AMI
Construction Start	2009
Construction Finish	2011 projected and actual
TDC	\$42M
Team	ICON Architects; Keith Construction
Market Rents/Prices	N/A
M/WBE	33% combined M/WBE contracting



Before



After

In 2009, POAH undertook the renovation of Temple Landing, a 200-unit family housing development in downtown New Bedford that had slid into disrepair, with high vacancies and financial losses. The property, an 11-acre parcel with an “urban renewal” design, concentrated all units of low-income housing on a “super-block” site. Buildings were out of context with the surrounding architecture, did not facilitate emergency access, and typically had no street view.

Similar to the Grove Parc story, POAH took over ownership and management prior to implementing its redevelopment plan, and worked closely with the existing residents throughout the process, helping them with temporary relocation during construction, and welcoming those who chose to return to a brand-new home.

The revitalization involved the complete reconstruction of 5 city blocks and public infrastructure. POAH began with the selective demolition of 80 of the existing units, allowing the site to be opened up and new streets to be built. The remaining units were substantially rehabilitated, and seven new apartment buildings as well as a security office were constructed. POAH made deep investments in energy efficiency, and added 12 new handicapped-accessible units. The end result was a transformed site, with 173 attractive, affordable housing units and a revitalized community center, changing the site’s image, as well as the amenities, functionality, and safety of the entire community. New streets reconnect the site to the surrounding neighborhood and allow families to benefit from a proper street orientation with a front door and a back door. The team successfully retained all residents and utilized extensive planning and unit phasing to minimize disruption during construction. The complex \$42M financing package included equity from the sale of federal and state LIHTC credits, taxable financing from the housing finance agency, bond funds, state infrastructure funding, and federal stimulus funds.



POAH’s commitment to community involvement, coupled with its close collaboration with its local partner, United Front Development Corporation, shaped the project from initial engagement through completion, with residents and neighbors helping to refine the plan in recurring meetings throughout the planning, design, and construction processes. Further, POAH and its management affiliate, POAH Communities, partnered closely with community resource providers to link residents to services and activities aimed at establishing resident stability, building financial and social assets, and sustaining community engagement. Regular resident services now include a full-time service coordinator providing consultation and referrals; an early intervention literacy program; school activities; assistance in securing summer camps for school-age residents; summer job placements; and bimonthly early lunches for senior residents.

*Reference:* Kimberly V. Brand, Senior Service Specialist, Disbursement and Loan, Servicing CDB Wholesale Loan Operations, JP Morgan Chase  
 Phone: 214.965.2088  
[Kimberly.v.brand@chase.com](mailto:Kimberly.v.brand@chase.com)

## WHITTIER CHOICE NEIGHBORHOODS INITIATIVE

<b>Location</b>	Roxbury, MA
<b>Project Type</b>	Mixed-income, mixed-use rental housing
<b>Project Scope</b>	500 units, primarily new construction
<b>Income Mix</b>	60% of units affordable to < 60% AMI (224 units public housing, 77 LIHTC) 9% of units moderate/workforce 19% of units market-rate 12% of units homeownership
<b>Construction Start</b>	2017 projected
<b>Construction Finish</b>	2022 projected
<b>TDC</b>	\$202M
<b>Team</b>	The Architectural Team; contractor not yet selected
<b>Market Rents</b>	From \$1,750 (1BR) to \$3,200 (4BR) per month

POAH and its development partner, the nonprofit Madison Park Development Corporation (MPDC), were selected in 2013 to partner with the Boston Housing Authority in applying for a Choice Neighborhoods Initiative (CNI) implementation grant focused on the BHA’s 200-unit Whittier Street site in Roxbury, and if funded, to serve as project co-developers. With the BHA and MPDC, POAH has been working hard over the past two years to finalize a community-supported plan that preserves deeply affordable housing while expanding workforce and market-rate housing opportunities as part of a broader neighborhood revitalization effort. A \$30 million CNI application submitted in 2015 was a top finalist but did not get funded; the BHA and POAH/MPDC plan to resubmit this year. Similar to Woodlawn, the Whittier Street site presents TOD opportunities: the Ruggles Street transit stop (rail, subway, and bus) is directly across the street.

During the planning phase, POAH and its partners have worked within the Choice Neighborhoods framework of Neighborhood, Housing, and People, with POAH being the lead on the housing-specific component, working with MPDC as co-developer. Much like POAH’s successful work in Woodlawn, the redevelopment at Whittier will begin with the 200 units of public housing that currently exist on site, with new construction of

replacement public housing units phased in as part of a higher-density, mixed-income community with both on-site and off-site components. The envisioned new community will include 100% replacement of the public housing units, as well as significant new moderate-income and market-rate housing components, new street-level retail, recreational and other community space.

POAH and its partners went through an extensive public process with the Boston Redevelopment Authority and community stakeholders to get the Whittier Street site designated as an urban renewal “U” district and to get the site permitted. The rezoning of the 3.3 acre site was essential to submitting a competitive grant application, and will allow POAH and its partners to increase density from 200 to 378 units and to build a tower of up to 18 stories in height. The project has also received its Article 80 approval. Extensive engagement with the residents helped them to understand the trade-offs between low and high density and resulted in their ultimate support for the proposed redevelopment.

POAH has worked to creatively balance the needs of current residents with those of future residents in honing its vision of an innovative, sustainable, and resilient community where Whittier currently exists. By participating in this large-scale public housing redevelopment planning process, POAH has gained useful skills that will help it successfully take on similar projects, like Clarendon Hill.



Before



After (proposed design)

*Reference:* Kate Bennett, Deputy Administrator for Planning and Sustainability,  
Boston Housing Authority  
Phone: 617.988.4108  
Email: [kate.bennett@bostonhousing.org](mailto:kate.bennett@bostonhousing.org)

## Gate Residential: Comparable Projects

### MAXWELL'S GREEN

Location	Somerville, MA (Davis Square area)
Project Type	Mixed-income, TOD, Class A rental housing
Project Scope	184 units, new construction, in two phases
Income Mix	87% market-rate; 13% affordable
Construction Start	August 2011
Construction Finish	September 2012 (first phase) and February 2013 (second phase)
TDC	\$54M
Team	ICON Architecture, Callahan Construction
Market Rents	From \$2,305/month (studio) to \$3,985/month (3BR)

This transit-oriented residential development offers vibrant neighborhood living with easy access to Cambridge and Boston. Maxwell's Green is located half a mile from bustling Davis Square and its restaurants, coffee shops, retail, nightlife and music venues, as well as the Davis Square MBTA stop on the Red Line. It is also located adjacent to the future Lowell Street MBTA Green Line stop, as well as the Somerville Community Path, a popular paved public pathway for biking and walking. Project amenities include: yoga studio, fitness center, theater room, roof deck, club suite (featuring a chef's kitchen and sophisticated dining and entertaining area), bike storage, dog park, and electric car charging station.

The community is situated on 5.5 acres and consists of four buildings (three 4-story and one 3-story) above podium-constructed parking garages. One building is LEED certified and the others are LEED certifiable, with units designed with contemporary, sustainable materials and finishes.



To develop this project, Redgate Capital Partners formed a joint venture with a land partner on this off-market deal, taking advantage of Redgate's local knowledge, residential experience, and regulatory mastery to extract risk and create maximum value. The project was completed in February 2013 and is fully leased (24% pre-leased, with 9 months to stabilization).



*References:*

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**ONE NORTH OF BOSTON**



Location	Quincy, MA
Project Type	Market-rate, TOD, Class A rental housing, plus 12,340 SF retail
Project Scope	169 units, new construction
Income Mix	100% market-rate
Construction Start	April 2015
Construction Finish	August 2016
TDC	\$57M
Team	Sheskey Architects, Dellbrook Construction
Market Rents	From \$1,824/month (studio) to \$2,675/month (3BR)

Located in Chelsea, one block from the commuter rail and one mile from Boston, this multifamily transit-oriented development offers stylish, neighborhood living with quick access to downtown Boston, Logan Airport, and North Shore locations. The development is also located near the future Silver Line extension which will provide convenient access to the Seaport District and South Station. One North offers skyline views of Boston, a diversity of eateries and coffee shops, and a nearby Market Basket grocery store. The development’s many amenities include: an interior basketball court, fitness center with state-of-the-art equipment, yoga/cross-training/spinning studio, theater room, club suite, media room, swimming pool and deck in a landscaped courtyard, outdoor gas fire pit and grills, café seating area, and a professionally-managed indoor/outdoor dog run and care facility.

The first of the project’s two phases was completed in 2014 – it was 44% pre-leased, leasing up and reaching stabilization in a record four months. As a notable example of Gate Residential’s success in listening to the

community and moving smoothly through the permitting process, the second phase proceeded through the public hearing and public comment process with no objections or opposition. Phase II construction is now nearly complete, and is currently 35% pre-leased, with an expected 6-8 months to stabilization. The buildings are 5- and 6-stories, with associated parking and extensive landscaping.



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**WEST OF CHESTNUT**

Location	Quincy, MA
Project Type	Market-rate, TOD, Class A rental housing, plus 12,340 SF retail
Project Scope	169 units, new construction
Income Mix	100% market-rate
Construction Start	April 2015
Construction Finish	August 2016
TDC	\$57M
Team	Sheskey Architects, Dellbrook Construction
Market Rents	From \$1,824/month (studio) to \$2,675/month (3BR)

West of Chestnut will be a mixed-use, market-rate development in the heart of downtown Quincy that addresses the market demand for new urban, amenity-rich housing with easy commuting access. The development, now under construction, will consist of two new 6-story buildings with a total of 169 residential



units, along with ground-level retail, amenities, and associated parking. The high-profile location is 5 minutes from the Quincy Center MBTA Red Line station, with Boston's South Station only a 20-minute ride away, with direct connections to Cambridge, Somerville, and the rest of Greater Boston. Within a quarter mile of the development are grocery stores, a farmer's market, diverse ethnic restaurants, and coffee shops. West of Chestnut will include a range of amenities, including an outdoor kitchen, fire pit, and café seating, a dog run, media lounge, fitness center, club suite, cross-training studio, and indoor basketball court.

Gate Residential joint ventured with an affiliate of Quincy Mutual Fire Insurance Company to develop West of Chestnut. Construction is slated for completion in summer 2016; the project is currently 25% pre-leased, with an expected 6-8 month period to full stabilization.



*References:*

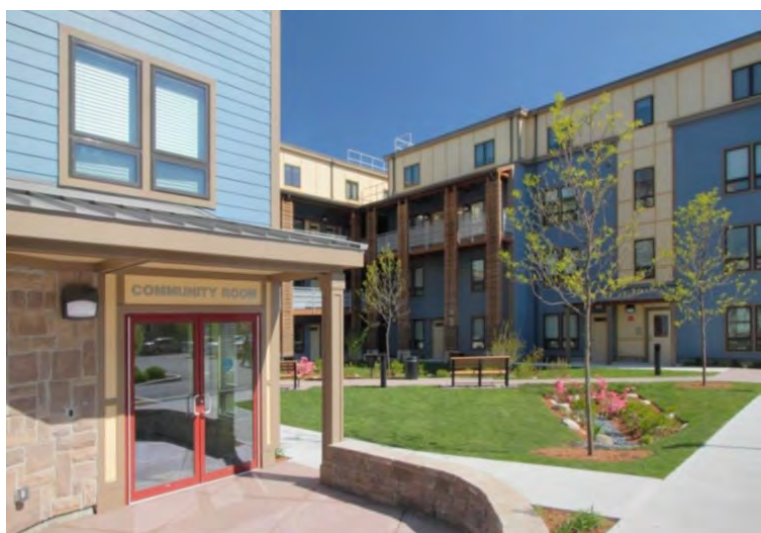
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## Somerville Community Corporation: Comparable Projects

### SAINT POLYCARP VILLAGE

Location	Somerville, MA (Winter Hill)
Project Type	Affordable rental housing, with 6,200 SF retail and community space
Project Scope	84 units, new construction, in three phases
Income Mix	100% affordable (13 units < 30% AMI, 15 under 50% AMI, 56 < 60% AMI)
Construction Start	2008 (Phase I)
Construction Finish	2014 (Phase III) projected and actual
TDC	\$32M
Team	Davis Square Architects; Curtis Construction (Phase I), Dellbrook Construction (Phases II and III)
Market Rents/Prices	NA
M/WBE	For Phase II, 80% minority participation, 17% M/WBE contracting



Upon learning that the Archdiocese of Boston was putting the 3.5-acre former Saint Polycarp Parish property up for sale in 2005, SCC staff and board members began an extensive door-knocking and community engagement process, ultimately speaking with over 300 neighborhood residents. Using the insight they gained through these conversations as well as feedback from a community meeting with over 100 participants, SCC put together a bid to purchase the underutilized property, located at a key gateway into Somerville. The bid was accepted, and SCC purchased the property in 2006. SCC worked closely with neighborhood stakeholders throughout the planning and implementation process, facilitating a zoning change (up-zoning

from Residence B to Neighborhood Business) and gaining broad neighborhood support for the site's overall master plan as well as specific project elements like the playground and community room.

The three phases of SCC's Saint Polycarp Village were designed with a strong focus on sustainability (the first two phases achieved LEED Silver and the third LEED Platinum certification as well as meeting Energy Star Version 3 and Enterprise Green Communities standards). Sustainability features include solar photovoltaic and solar thermal panels, a green roof, on-site storm water filtration via a rain-garden, high-efficiency heating and cooling systems, and high levels of building envelope insulation. Financing for the \$32M project came from a variety of sources, including LIHTC equity, private bank financing, philanthropic grants, and public subsidies from the city, state, and federal government (e.g., HOME, AHTF). The completed project is a vibrant, smart-growth community with 84 units of affordable housing for households with incomes under 60% of the area median, along with a GED program, convenience store, child care center, dentist's office, community room, and outdoor green space and playground. The project also includes two historically preserved buildings: the renovated rectory building, now housing a transitional home for single mothers and their children operated by the Just-A-Start House, and a church building owned by the Missionary Church

of the Haitian Community, providing space for services and events for their parishioners. Davis Square Architects served as the project architect.



*References:*

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**TEMPLE STREET CONDOMINIUMS**



<b>Location</b>	Somerville, MA (Winter Hill)
<b>Project Type</b>	Affordable homeownership housing
<b>Project Scope</b>	15 units, new construction
<b>Income Mix</b>	8 units affordable for < 80% AMI; 7 units between 80-110% AMI
<b>Construction Start</b>	2005
<b>Construction Finish</b>	2006 projected and actual
<b>TDC</b>	\$4.8M
<b>Team</b>	Narrow Gate Architecture; Landmark Structures
<b>Initial Market Prices</b>	\$218K for 3BR, \$243K for 4BR (for 80-110% AMI units, in 2006)

SCC purchased the 65 Temple Street site in 2003 from the Saint Polycarp Church. Beginning in 2004, SCC engaged neighbors of the former Saint Polycarp Men’s Club in thinking about the property’s redevelopment. Through a series of neighborhood meetings, SCC reached agreement with residents and other stakeholders on issues like the number of units to be built, size of the buildings, parking, and design. The proposed project that emerged from these discussions cleared the zoning process with no opposition.



SCC built 15 for-sale units, a mix of two- and three-bedrooms, providing an affordable option for low and moderate income households to purchase their first home. Eight of the units were sold to families earning less than 80% of the area median, and seven to those earning between 80% and 110% of area median. Of the families now living at Temple Street, 14 were Somerville residents who were able to remain in the city thanks to this opportunity. SCC’s multi-lingual marketing campaign resulted in a diverse group of new homeowners, with six primary languages spoken, seven ethnicities represented, and residents with ages ranging from 2 to 70 years old.

Project financing included private bank financing, City CDBG and HOME funds, and State Housing Stabilization Fund and Affordable Housing Trust funds.



*Reference:*

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**181 WASHINGTON STREET APARTMENTS (UNION SQUARE APARTMENTS)**

<b>Location</b>	Somerville, MA (Union Square)
<b>Project Type</b>	Affordable family rental housing, plus 2,400 SF commercial space
<b>Project Scope</b>	35 units, new construction (9 1-BR, 22 2-BR, 4 3-BR)
<b>Income Mix</b>	100% affordable - 8 units for households < 30% AMI, 27 units < 60% AMI
<b>Construction Start</b>	March 2015
<b>Construction Finish</b>	On track to meet September 2016 projected completion
<b>TDC</b>	\$15.4M
<b>Team</b>	DiMella Shafer (architect); Dellbrook Construction
<b>Market Rents/Prices</b>	N/A

SCC purchased this property in 2012 from the Somerville Boys and Girls Club with the intention of demolishing the former clubhouse and building affordable rental housing there. The site is conveniently located a few blocks from Union Square as well as the proposed new Green Line Extension stops. An adjacent funeral home property was acquired by Cathartes Private Investment for redevelopment into 30 market-rate condos, and SCC and Cathartes have worked collaboratively to create a joint site plan for a larger, mixed-income, mixed-use community. SCC has worked to engage community stakeholders in the project since the fall of 2011, and has reshaped the planned development in response to community input, decreasing the initial proposed height and size of the development to the current 4-story, 35-unit plan.



Before



After (as designed)

The project is now under construction and should be complete by late summer 2016. The building is designed to be highly energy-efficient and sustainable, with very efficient systems and fixtures, high levels of insulation, and a focus on providing a healthy environment and high air quality for tenants. SCC is aiming for LEED for Homes Mid-Rise Platinum certification as well as EPA’s Multi Family High Rise certification, both of which require a holistic approach to design and construction, as well as extensive testing and verification of installed features and systems.

Project financing includes federal and state LIHTC, HUD McKinney funds, state and local housing subsidies via HOME, the Affordable Housing Trust Fund, Housing Stabilization Funds, Community-Based Housing Program, private bank construction financing, and permanent financing via the Massachusetts Housing Partnership.

SCC has already begun to receive inquiries from Somerville residents about the new units. SCC will undertake extensive outreach and affirmative/fair marketing in connection with lease-up, as it always does, and will hold a lottery to select residents. Over 1,500 households applied for the 31 affordable apartments SCC completed in 2014 as the last phase of Saint Polycarp Village, and expects to receive the same level of interest for these new units.

*References:* Clark Ziegler, Executive Director  
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## OTHER TEAM MEMBERS

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Summary information about each of the other proposed team members and their key staff is provided below, with additional information and resumés provided in Appendix 1.

### DAVIS SQUARE ARCHITECTS (Architects)

Davis Square Architects (DSA) is an award-winning, 35-person architectural design and planning studio based in Somerville that has helped to create or renovate more than 20,000 units of housing in New England since its inception in 1984. While DSA's practice covers a wide range of building types, affordable and mixed-income multifamily housing is an area of special expertise. Both POAH and SCC are former DSA clients, as are most of Boston's active community development corporations. DSA has solid working relationships with funding and regulatory agencies at every level, including MassHousing, CEDAC, DHCD, the BRA, Boston's Department of Neighborhood Development, and the MA Historical Commission.

**Relevant experience.** DSA has worked on numerous projects that share key characteristics with the proposed redevelopment of Clarendon Hill: e.g., multifamily rental with an affordable component, new construction, large projects requiring a master-planning approach, projects with similar financing and involving extensive community review, smart growth projects involving sustainable features, etc. Several examples of similar projects that DSA has worked on are described below.

- ***Saint Polycarp Village (Somerville, 84 units):*** This SCC project (described above in Highlighted Projects) involved the master planning and redevelopment of a 3.5-acre church campus. DSA and SCC led the effort to up-zone the site and reconfigure a dangerous intersection, improving pedestrian safety and site access. The 3-phase smart growth project added 84 family apartments, three neighborhood-focused retail spaces, a community room and terrace, a management office, under-building parking, and public green spaces including a tot lot and a rain garden. All units have air conditioning and open kitchens, and most have balconies and access to indoor bike storage rooms. The final phase is LEED Platinum-certified, and the entire project features extraordinary thermal efficiency, solar-heated domestic water, solar PV, and a vegetated roof.
- ***Trolley Square (Cambridge, 40 units):*** Located on a former trolley yard, Trolley Square is a 40-unit affordable mixed-use project, with 32 rental and 8 homeownership units, developed by the nonprofit Homeowner's Rehab, Inc. It is widely-acclaimed as beautiful, environmentally-responsible urban housing that enhances the surrounding neighborhood. The project incorporates solar power generation, energy-efficient systems, healthy indoor air standards and finishes, storm water management, and native landscaping. Located at the intersection of Massachusetts Avenue and the Linear Park bike path, its residents can take advantage of many transportation choices. The project has won several prestigious design awards, from the American Institute of Architects, the Boston Society of Architects, the Enterprise Foundation, and the Home Depot Foundation.
- ***Bartlett Place (Roxbury, 315 units):*** Bartlett Place is a joint venture between nonprofit Nuestra Comunidad Development Corporation and Windale Developers, aiming to create a new community with 315 units of affordable, moderate, and market-rate rental and for-sale housing, senior housing, and commercial/retail space. Situated on a former MBTA lot just outside Dudley Square, this transit-oriented development will offer public and private green spaces complete with outdoor seating and dining areas, tot lots, and generous planted walkways. The project is designed both to be a comprehensive community in its own right and to knit the surrounding neighborhoods together. Currently beginning construction, the project is registered with the LEED-ND pilot program, targeting a Silver or Gold rating.
- ***Park Holm Master Plan (Newport, RI):*** DSA worked with the Housing Authority of the City of Newport, residents, the Board of Commissioners and the community as a master planning consultant focused on the redevelopment of the existing 262-unit Park Holm public housing development. DSA helped to explore the feasibility of developing a 50-unit HUD Section 202 elderly mid-rise on the site, as well as various combinations of rehab, new construction rental housing, and possible homeownership units.

- **Talbot Bernard Senior Housing (Dorchester, 72 units):** Working with the nonprofit Codman Square Neighborhood Development Corporation, DSA helped to transform an abandoned field strewn with industrial rubble into a gracious park containing 42 units of family housing and a 30-unit independent living facility for seniors (a HUD 202 project). The project included master planning studies of the 2-acre site and required a multi-layered strategy for financing and approvals. The design for the three-story, wood-framed, handicapped-accessible senior building also includes activity spaces and a computer room. The courtyard is bright and sunny, enlivened with gardening plots.

**Experience with green/sustainable/healthy housing.** DSA is known for its dedication to creating sustainable design without overloading project budgets. With numerous LEED-accredited staff members, the firm is expert at using commonly available materials to create well-designed, energy-efficient, environmentally friendly communities. Its sustainable design services include:

- “Green Screen” – evaluating programming plans to determine the most promising green opportunities for a particular site or building;
- Green charrette – a meeting early in the design process where stakeholders brainstorm ideas for energy/resource efficiency and generate goals and strategies to achieve them;
- Capital needs assessment – with a focus on energy-saving opportunities and sustainable improvements;
- LEED documentation services;
- Life-cycle analysis of prioritized design goals;
- Partnerships with LEED-accredited consultants, clerks, and contractors for the most effective green project team;
- Commissioning of building envelope and building systems;
- Post-occupancy assessment of actual energy savings.

**Team.** DSA’s team for the Clarendon Hill project will include:

**Clifford Boehmer, Principal (AIA).** Boehmer is co-founder and President of DSA and was a Principal of its predecessor firm, Mostue & Associates. His work focuses on site and project feasibility analysis, conceptual and schematic design, master planning and programming, engagement with public officials, community groups and residents, and renovation/adaptive reuse of historic buildings. He reviews state-funded housing proposals for the MA Department of Housing and Community Development. Boehmer holds a Bachelor of Science in Art and Design from MIT and a Master in Architecture from Harvard’s Graduate School of Design.

**Iric Rex, Principal (AIA, LEED AP BD+C).** Rex has over 20 years of experience in architecture, planning, and sustainable design. He leads project teams for a wide range of green residential and mixed-use developments (including Saint Polycarp Village), community facilities, and adaptive reuse projects. He has extensive experience with the requirements of public and private funders and regulators, and consults to public agencies on multifamily housing and smart growth. He holds a BA in Biology from Trinity College, and a Masters in Architecture from Harvard’s Graduate School of Design.

**Artan Sadiku, Project Architect.** Sadiku joined DSA in 2014, and brings a high level of skill in design drafting, 3D visualization and modeling, and producing quality images, animations, and presentations for community meetings. He is responsible for reviewing schematic drawings, pricing sets, and construction documents. He is currently working on the 315-unit Bartlett Place project in Roxbury, described below. He holds a degree in architecture from the Polytechnic University in Tirana, Albania.

#### References.

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## CUBE 3 STUDIO (Architects)

Cube 3 Studio is an architecture, master planning, and interior design firm based in Lowell, MA, with a broad practice that spans the residential, retail, academic, healthcare, corporate, hospitality, and fitness sectors. In addition to significant multifamily housing work, Cube 3 has also worked on numerous multi-phased campus planning and dormitory projects with colleges and universities. Started in 2004 by founding partners Nicholas Middleton and Brian O'Connor, the firm has grown rapidly and now employs a staff of 55.

Cube 3's residential experience includes over 6,000 units completed or in construction, with over 20,000 units designed. Most of Cube 3's residential work is large-scale multifamily apartment developments in the mid-rise height range (typically 4-5 stories, but sometimes 7-9), and most of it is in Massachusetts. While Cube 3's experience is predominantly with market-rate development, many of its projects involve a mixed-use and/or a mixed-income component, typically 10-25% affordable units with retail and/or other commercial uses.

**Boston-area multifamily residential experience.** Cube 3 has designed 15 projects within the Boston Metro area within the last several years. Recent projects include:

- *Atmark (Cambridge):* A 428-unit, market-rate, multi-family TOD community in a former industrial area near the Alewife T-station, with 10% affordable units; involved the creation of new public streets and pedestrian connections; includes a 10,000 SF central clubhouse, below-grade parking, 200 covered bike spaces; designed to achieve LEED Silver certification and comply with Stretch Energy Code; underwent review by the Cambridge Design Review Committee, the Planning Board, and neighborhood groups.
- *Vox on Two (Cambridge):* A 248-unit mixed-use TOD project in Cambridge, half a mile from the Alewife T, involving extensive community input and review; includes exceptional wetland views, with community courtyards and nearby walking/bike paths; contained a mixture of challenging site and environmental conditions; involved increased noise mitigation for residents due to proximity of heavily traveled highway (Route 2); this project became the "gateway" to the City of Cambridge from the West.
- *Deco (Quincy):* A 180-unit TOD project located directly across the street from the Quincy Adams T Station; highly visible project with a distinct character; open raised courtyards on three sides providing sanctuary from the bustling surrounding area; includes a small wetland on the rear side that presented a design challenge, with capacity for flooding within the parking structure; currently pursuing LEED Silver certification.
- *Currents on the Charles (Waltham):* A 200-unit development in four levels over a two-level parking garage on a steeply sloping site; significant street frontage and a prominent corner on River Street; three-story clubhouse facing the Charles River; publicly permitted with Gate Residential.
- *Lumiere (Medford):* A 163-unit development that serves as a major focal point along the Mystic Valley Parkway (Route 16), directly adjacent; shuttle service to neighboring Wellington T Station; easy access to ball fields at Hormel Stadium, bike/walking paths into the Mystic River Conservation, and shopping at nearby Meadow Glen Mall; currently pursuing LEED Silver certification.

**Green/sustainable design.** Sustainable design is a core part of Cube 3's business, and most of its projects (including all of those noted above) are designed to meet some form of green certifiability: LEED, Earthcraft, ENERGY STAR, or similar rating systems. Cube 3 has \$800 million in completed projects designed and built to the standards of one of these rating systems. As noted above, several of its projects are designed/built to meet LEED Silver certification (Atmark, Vox on Two, Deco). Other Cube 3 projects have met



other LEED standards, such as LEED-Commercial Interiors (Harvard Business School renovation) and LEED-New Construction (Shippensburg University, a 900,000 SF project involving the three-phase expansion of on-campus living/learning, with 2,800 beds, and a wellness center.)

**Team.** The principal staff for this engagement are Founding Partner and CEO, Nicholas Middleton, Founding Partner/Project Executive, Brian O'Connor, and Associate Principal/Project Architect, John Harding.

**Nicholas Middleton, Partner/CEO** (Royal Institute of British Architects, or RIBA) has 30 years of design experience both internationally and in the United States. He handles client development and business management for Cube 3, and is also involved with the firm's complex building and master planning projects. Projects he has worked on recently include: Atmark, Vox on Two, Shippensburg University, Residences at Marina Bay, and the new Northeastern Dormitory, as well as a variety of academic and corporate projects. Middleton holds Bachelor of Architecture and Bachelor of Architectural Studies degrees from Huddersfield University and University of Newcastle.

**Brian O'Connor, Partner/Project Executive (AIA)** has over 25 years of design experience, and at Cube 3, focuses on design and oversight of the studio teams. Projects he has worked on recently include: Atmark, Vox on Two, Shippensburg University, Deco, Currents on the Charles, and a series of other residential and academic projects. O'Connor holds a Bachelor of Architecture degree from Carnegie-Mellon University.

**John Harding, Associate Principal/Project Architect (AIA)** has been with Cube 3 since 2006, focusing on market-rate multifamily and student housing in particular. Projects he has worked on recently include: Atmark, Deco, Lumiere, Shippensburg University, and a series of other residential and academic projects. Harding holds a Bachelor of Architecture degree from Roger Williams University.

#### References.

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### GROUND, INC. (Landscape Architect)

Ground, Inc. is a Somerville-based, award-winning landscape architecture practice, committed to creating beautiful and sustainable landscapes that unite aesthetics, ecology, and practicality. Ground's project experience is broad, ranging from community parks to residential projects to academic campus common spaces. Past clients have included developers, cities, public institutions, architects, and individuals. Whatever the project size and type, Ground aims to create designs that are a unique fit to the parameters of the particular project and its context and client, adding value that is at once ecological, social, financial, and aesthetic.

Among the local projects Ground has recently been involved with are:

- *Gateway to the Tufts Collaborative Learning and Innovation Complex:* Outdoor classroom space, corner park, and planted courtyard, with multiple spaces for casual outdoor gathering, and covered

bike parking. The design includes pervious paving and a terraced rain garden, as well as native ground covers and plants that can tolerate varying amounts of water.

- *Grounds and roof decks at Waterside Place:* Streetscape landscaping as well as two green roofs with spaces for vegetable gardens, yoga, bocce, outdoor grill stations, and socializing at a multifamily residential building in Boston's Innovation District.
- *Grounds of the Massachusetts College of Art Residence Hall:* Whimsical, undulating outdoor seating areas for individuals and small groups, planted with swaths of evergreen ground covers and flowering perennials under a tree canopy.

Cut sheets for these projects are included in the attachments.

**Team.** The principal staff for this engagement are as follows:

**Shauna Gillies Smith, Principal (ASLA, LEED AP).** Gillies Smith has over 20 years of landscape design experience. Trained first as an architect and urban designer, her shift to landscape architecture was motivated by a desire to shape exceptional moments in the public realm. She has led the design of many critically-acclaimed projects across the USA and beyond, and has been honored with numerous awards. She has taught and lectured widely, and has professional degrees from Harvard's Graduate School of Design and the University of British Columbia.

**Olivera Berce, Senior Associate (RLA, BSLA, MLA).** Berce has over 20 years of experience in landscape design. She has overseen multiple award-winning projects, including the three noted above, and has particular expertise in crafting technical details. She has a Bachelor's degree in Landscape Architecture from the University of Ljubljana and a Master's in Landscape Architecture from the University of Pennsylvania.

**Jungsoo Kim, Design Associate (BARCH, MLA).** Kim has worked on most of the firm's residential and mixed-use projects over the past few years, including the Tufts project noted above. She brings a particular focus on sustainability, and is skilled at leading community engagement and public processes. Kim has a BA in Architecture from the Ewha Womans University and a Master's in Landscape Architecture from the Harvard Graduate School of Design.

#### References.

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(Projects: Tufts Collaborative Learning and Innovation Complex, Tufts Diversity Stair)

## NITSCH ENGINEERING (Civil Engineer)

Nitsch Engineering is a multi-disciplined engineering and surveying firm offering an integrated suite of services to its real estate development and infrastructure clients. Its civil, transportation, and structural engineers, land surveyors, planners, and GIS specialists work collaboratively to deliver client-focused, creative, cost-effective, and sustainable project solutions. Founded in 1989, Nitsch has 100+ employees based in its two offices in Boston and Worcester, and it is the largest woman-owned engineering business enterprise (WBE) in the state. Nitsch works in 18 states and five countries, and has been recognized by the Boston Business Journal as one of the Top 25 Engineering Firms in Massachusetts. With 92% of its work representing repeat engagements, Nitsch has earned the respect and confidence of its clients.

Nitsch has worked on many projects that are similar to the proposed redevelopment of Clarendon Hill, as detailed below.

**Experience with redevelopment of large public housing sites:** Nitsch has provided a range of engineering services at several large, HOPE VI-funded public housing redevelopments in Boston: Orchard Gardens in Roxbury, Maverick Landing in East Boston, Old Colony in South Boston, and Washington-Beech in Roslindale. Each of these projects involved breaking up an existing public housing “super-block” with the creation of new streets and new utility infrastructure, and the construction of hundreds of new units of mixed-income housing. For example:

*Washington-Beech:* Nitsch provided land surveying, civil engineering, and transportation engineering services for the redevelopment of this distressed, 266-unit public housing project, originally built in 1952. The project also involved cleanup of what was an AUL Contaminated Site. Nitsch designed the site utilities, grading, and layout for the seven new streets as well as site improvements, which included a mix of townhouses and mid-rise buildings. Nitsch permitted the improvements with a series of City of Boston departments and commissions, as well as with the private utility companies. Nitsch developed the specs and cost estimates for the work, and provided construction administration services. Phase I was completed in 2010 and Phase II in 2013.

**Experience in Somerville.** In addition, Nitsch provided civil engineering and sustainable consulting services for Somerville Community Corporation’s Saint Polycarp Village project, described earlier. Nitsch worked with SCC on creative approaches to harvesting stormwater for use within the site, and assisted with the design of sustainable features such as a vegetated roof and a rain-garden bio-retention area.

**Other multifamily housing experience.** Nitsch has worked on various other large multifamily housing projects in recent years, including: The Edge (79 loft-style, upscale units in Allston’s new Green District), The Kensington (381 units in a new 27-story tower in downtown Boston), the Carruth (105 units in a mixed-income, mixed-use, TOD project at Dorchester’s Ashmont T-station), and Archstone Avenir at North Station (241 units in a 10-story building over Boston’s North Station).

**Team.** The proposed team for this project will include the following professionals:

**David Conway, Senior Project Manager (PE, LEED AP Building Design and Construction).** Conway has 23 years of civil engineering experience (21 of them at Nitsch), providing civil/site design, roadway design, utility design, permitting and regulatory assistance, and construction administration services primarily for academic, municipal, and nonprofit clients. His recent projects have included Somerville Community Corporation’s Saint Polycarp Village, Tufts University’s Hillside School Apartments, and Cambridge Rindge and Latin School’s campus renovation project. He holds a bachelor’s degree in Civil Engineering from Tufts University.

**Emad Elsakka, Director of Structural Engineering (PE, Associate Design Build Professional).** Elsakka has more than 26 years of structural engineering experience, and specializes in providing engineering services to support horizontal construction such as roadways, bridges, culverts, and other site elements. He is currently Nitsch’s project manager for the redevelopment of the Boston Housing Authority’s 331-unit Orient Heights development. He holds a bachelor’s degree in Civil Engineering from Northeastern University.

*Denis Seguin, Director of Land Surveying (Professional Land Surveyor).* Seguin has 39 years of experience in land surveying, managing and coordinating survey field crews, processing survey data, and providing mapping for all levels and types of survey. He is familiar with virtually all modern survey methods. As Director of Land Surveying at Nitsch, he is responsible for coordinating projects and providing quality control within the survey group.

#### References.

Darcy Jameson, Development Director, Beacon Communities Development

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Email: [djameson@beaconcommunitiesllc.com](mailto:djameson@beaconcommunitiesllc.com)

(Project: The Homes at Old Colony)

Noah Maslan, Principal, Eden Properties (former Director of Real Estate Development, Urban Edge)

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(Project: Jackson Commons, developed by Urban Edge)

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(Project: Whittier Place)

## DESIGN CONSULTANTS, INC. (Traffic Engineers)

Design Consultants, Inc. (DCI) is a Somerville-based, multi-discipline engineering company that specializes in civil and transportation engineering, traffic studies, water/wastewater, stormwater, geotechnical, site development, and residential land development projects. Incorporated in 1980, DCI is in its second generation of family ownership. In 2011, DCI opened a second office in Newburyport to service its North Shore clients, and in 2015, DCI acquired Polaris Consultants of Quincy, further expanding the organization and strengthening its technical capabilities.

DCI's staff of 25 is comprised of professional civil engineers, transportation engineers, geotechnical engineers, professional land surveyors, construction inspectors, draftsmen, wetland specialists, and other technical and administrative professionals. Its client base includes a range of public sector agencies (housing authorities, cities and towns, state agencies, municipal public works and transportation departments) as well as private developers, corporations, and other private entities.

DCI has extensive experience with projects similar to Clarendon Hill:

**Experience in Somerville.** DCI's main office is in Somerville, and it is working on or has successfully completed numerous projects there. A small sample of these includes:

- *181 Washington Street* (35-unit Somerville Community Corporation project): providing survey, concept design, traffic and parking analysis, as well as community meeting and permitting assistance, construction documents and construction administration.
- *Capen Court* (97-unit Somerville Housing Authority project): providing civil engineering and surveying services.
- *Windsor at Maxwell's Green* (199-unit Gate Residential project): providing civil engineering design, permitting, and construction assistance.
- *Millbrook Lofts* (100-unit Berkeley Investments project): providing survey, utility design, civil and traffic engineering, including traffic impact study.

DCI has also worked extensively with the City of Somerville on a variety of transportation planning studies, parking studies, traffic impact analyses, and other projects, some of them very large in scope.

**Experience with large, multifamily housing projects.** Some of the many other large multifamily

developments where DCI has provided transportation engineering and other services include:

- *Avalon Natick*, a 407-unit luxury apartment development, where DCI has carried out traffic studies and created detailed models to optimize traffic signal phasing and timing, enhancing safety and intersection capacity for all users of the roadway;
- *Charleston Loft Condominiums*, conversion of a former candy factory into 70 condos, where DCI has provided parking design and civil as well as traffic engineering services;
- *Malden Place*, a 116-unit condo project now under development, where DCI is providing a range of services, including traffic studies and traffic signal design plans; and
- *Frank J. Manning Towers*, a 19-story Cambridge Housing Authority building with 199 units for elderly/disabled residents, where DCI is providing permitting, site grading and design, utility design, and ADA compliance.

**Team.** DCI's proposed team for this project includes the following:

**David Giangrande, President/Principal (MS, PE).** Giangrande has over 30 years of experience providing civil and traffic engineering on a wide range of project types and sizes, including large, complex, mixed-use facilities. His practical problem-solving skills are widely acknowledged. He was principal-in-charge of many of DCI's mixed-use development projects, including the Capen Court and 181 Washington Street projects noted above. Giangrande holds a BS in Civil Engineering and an MS in Transportation Engineering from Northeastern University.

**Tom Bertulis, Manager of Traffic Engineering (MS, PE, PTOE).** Bertulis is a skilled traffic engineer and transportation planning professional with more than 15 years of managerial and technical expertise in areas including traffic impact studies, traffic signal timing and design, parking studies, road safety audits, traffic analysis reports, and walking audits. He has served as Transportation Manager for a wide range of Somerville projects. He holds a BS in Civil Engineering from Santa Clara University and an MS in Civil Engineering from Northeastern.

**Steven Sawyer, Director of Civil Engineering (PE).** Sawyer has more than 30 years of civil engineering experience, including the planning, design, permitting, and construction phases of a wide range of project types and sizes. Sawyer holds a BS in Civil Engineering from Northeastern.

**Matthew Lowry, Director of Survey (PLS).** Lowry has more than 25 years of experience in land surveying, including providing oversight of field survey crews, researching right-of-ways, abutting properties and underground utilities, and preparing plans and maps. He has served as Lead Project Surveyor on various Somerville projects, including Maxwell's Green, Capen Court, and Boynton Yards.

#### References.

Stanley Koty, Commissioner, City of Somerville Department of Public Works

Phone: 617.666.3311 x5100

Email: [skoty@somervillema.gov](mailto:skoty@somervillema.gov)

(Projects: Somerville Avenue reconstruction, Magoun Square reconstruction, East Broadway streetscape and roadway improvements, Beacon Street roadway reconstruction)

Terry Smith, Traffic Engineers, City of Somerville

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Email: [tsmith@somervillema.gov](mailto:tsmith@somervillema.gov)

(Projects: 181 Washington Street Apartments, 100 Fellsway West Apartments, 625 McGrath Highway Apartments, 5 Middlesex Avenue mixed-use development)

David Depree, Development Manager, Cathartes Investments

Phone: 774.255.0157

Email: [daved@cathartesprivate.com](mailto:daved@cathartesprivate.com)

(Projects: 181 Washington Street, Somerville; Green Street Condos, Jamaica Plain)

## NOLAN SHEEHAN PATTEN LLP (Legal)

Nolan Sheehan Patten is a mission-driven real estate law firm with a deep commitment to affordable housing and community development and a breadth of experience with different kinds of projects. The firm offers both real estate and tax expertise, providing strategic, technical, and transactional advice to a range of clients, including nonprofits, developers, equity investors, syndicators, lenders, and public agencies. Its attorneys are broadly experienced in handling complex transactions involving multiple financing sources and overlapping governmental programs, with particular expertise in utilizing tax credit programs like LIHTC and New Markets. They are known for their ability to develop innovative investment structures that take advantage of these and other tax incentive programs.

Based in Boston, Nolan Sheehan Patten was founded in 2009, with a staff of 11, including 8 lawyers. While the firm is relatively young, its attorneys bring decades of experience, having practiced real estate and tax law in other major law firms before coming together to found Nolan Sheehan Patten. They combine a depth of expertise in their areas of practice with accessibility, personal service, and reasonable fees. The firm works with clients located around the country, but with a heavy focus on Massachusetts.

**Public housing experience.** The firm has worked on a number of recent projects involving the redevelopment of public housing. Stephen Nolan and Hannah Kilson (see below) worked on five Rental Assistance Demonstration (RAD) conversions for the Cambridge Housing Authority (Putnam Gardens, Washington Elms, Manning Apartments, Newtowne Court, and Woodrow Wilson Court), as well as a mixed-finance deal for the Brookline Housing Authority (86 Dummer Street), all within the last two years. Project financing for these deals included LIHTC, tax exempt bonds, sponsor financing through Moving to Work, and a range of other state/city subsidies. All six projects involved a ground lease structure.

**Experience working with DHCD.** The lawyers at Nolan Sheehan Patten have represented the Department of Housing and Community Development (DHCD) for over 20 years on a wide variety of projects ranging from policy issues to transactional work. They have developed deep familiarity and expertise with state policy and regulatory matters, and have earned the trust of DHCD staff. This DHCD work has included design of the MassDocs loan document system, drafting of regulations for the state's LIHTC program, advice on tax issues related to the federal LIHTC, and closings of numerous loans under virtually all of the various state housing financing programs.

**Experience working with POAH.** Nolan Sheehan Patten represented POAH in its acquisition and redevelopment of the State Street portfolio (described earlier in POAH's profile) – 841 units in six different properties, all of which needed to close simultaneously. This \$290M deal involved a range of complex issues, and it was the largest single transaction in MassHousing's history. The firm also worked with POAH on its Tribune Apartments project, 53 units of senior housing in Framingham, a project that needed to close within 90 days of purchase-and-sale execution, and did.

**Mixed-income project experience.** The firm has worked on various mixed-income projects, some of which involve multiple partners. For example, the firm recently closed a large mixed-income, mixed-use transaction in Haverhill involving a partnership between two non-profits. The project includes a housing component with LIHTC and workforce housing financed under the Housing Development Incentive Program, as well as a commercial building leased to a variety of tenants, including a restaurant, a university, a cable TV company, and a bank, all constructed over a parking garage on top of which was a public plaza. The legal structure included multiple entities owning three different condominium units.

**Other joint venture experience.** The firm is currently closing a LIHTC and workforce housing project in Lynn, a joint venture between a for-profit developer and a nonprofit entity created by the Lynn Housing Authority. The project involves a combination of state and local funding sources, including MassHousing tax-exempt bonds and likely to include funding through MassHousing's new workforce housing loan program.

**Team.** The attorneys working on this project will include the following:

**Stephen Nolan, Founding Partner.** Nolan’s practice focuses on affordable housing and community development. He has deep expertise in creating complex legal and financial structures for projects using tax credits (LIHTC, New Markets, and Historic Rehabilitation Tax Credits), working with developers, lenders, and syndicators. Prior to founding Nolan Sheehan Patten, Nolan was a Partner at DLA Piper and at Hill & Barlow. He holds a BS in Environmental Engineering from Northwestern University and a JD from U Michigan. He serves as Chair of Medfield’s Zoning Board of Appeals, State Hospital Master Planning Committee, and Affordable Housing Committee, and does a variety of *pro bono* legal work.

**Hannah Kilson, Partner.** Kilson’s practice focuses on real estate transactions, particularly in the area of affordable housing and community development. She represents developers, borrowers, investors, syndicators, and lenders in a broad range of real estate transactions, and is expert in acquisition and disposition matters, leasing, and permitting. Prior to joining Nolan Sheehan Patten, Kilson was Deputy General Counsel for the Massachusetts Development Finance Agency, and prior to that, practiced at DLA Piper and Hill & Barlow. She holds a BA from Amherst College and a JD and M.Ed. from Harvard. She also performs a variety of *pro bono* legal work.

**Patrick Niebauer, Associate.** Niebauer is experienced with real estate transactions, specifically in the area of affordable housing and community development, representing developers and lenders in transactions involving a variety of public and private financing sources. Prior to joining Nolan Sheehan Patten and during law school, Niebauer worked as a paralegal at POAH, gaining experience with a wide variety of affordable housing development projects and working on all aspects of the acquisition process, including new business entity structuring and HUD compliance requirements. He holds a BA from Colgate, and a JD from Suffolk University.

#### References.

Margaret Donnelly Moran, Director of Planning & Development, Cambridge Housing Authority

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(Project: Putnam Gardens and other RAD conversions noted above)

Patrick Dober, Executive Director, Brookline Housing Authority

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(Project: 86 Dummer Street)

Peter Daly, Executive Director, Homeowner’s Rehab, Inc.

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(Project: Chapman Arms, Putnam Square, Putnam Gardnes, Cast II/Inman, Auburn Park)

## CLEARRESULT (Energy / Sustainability Consulting)



Typical Photovoltaic Installation

CLEARResult (formerly Conservation Services Group, or CSG) is a mission-driven company that has been working since 1984 with owners, developers, and design/construction teams to achieve high-performing buildings that are durable, healthy, affordable, and energy-efficient. CLEARResult takes a “whole building” approach, viewing buildings, their systems and sites as an integrated system delivering comfort, indoor air quality, lighting, water, and durable shelter. A market leader in sustainability

and energy-efficiency work in North America for many years, the company has helped millions of homes and businesses to save energy and money. CSG's recent merger with CLEAResult, an Austin-based energy efficiency firm, results in a combined company with 2,700 employees in 50 cities in the US and Canada.

CLEAResult's 20-person Building Performance Consulting team, based in Westborough, MA, includes highly-qualified engineers, building scientists, LEED professionals, construction specialists, raters, and energy specialists; this is the team that will be working with POAH on the Clarendon Hill project. The team offers a broad range of services, including design review, sustainable design charrettes, integrated design process coordination, energy modeling, construction oversight, program verification and certification, energy auditing, commissioning, operations/maintenance plan development, and technical training. CLEAResult offers third-party verification and certification for sustainability programs including LEED, Enterprise Green Communities, Energy Star, Home Energy Rating System (HERS), Passive House, and Net-Zero.

**Other work with POAH.** CLEAResult has worked with POAH on many of its other projects in recent years, providing design review, energy modeling, construction oversight, commissioning systems for optimum performance, and training maintenance staff on using new equipment. For example, CLEAResult provided energy efficiency design and verification services at POAH's Torrey Woods project in Weymouth, 20 units of new construction completed in 2011. By adding significant levels of building envelope insulation, the team was able to reduce the heating load such that it could utilize air source heat pumps and avoid a new \$40,000 gas line to the property. Currently, CLEAResult is working with POAH on over 10 different projects.

**Somerville experience.** Within Somerville, CLEAResult has recently worked with SCC and Davis Square Architects on the Saint Polycarp Village project (Phases I, II, and III). In addition, CLEAResult has provided energy-efficiency ratings or verifications for projects at 1323 Broadway (an assisted-living project done by Volunteers of America) and 625 McGrath Highway (a 34-unit market-rate project done by Berkeley Investments).

**Other multifamily housing projects.** CLEAResult has worked on a wide range of affordable housing projects, including redevelopment projects with the Boston, Cambridge, and Taunton public housing authorities. CLEAResult has helped these and other housing owners to achieve LEED, Enterprise Green Communities, Energy Star, and other sustainability certifications on many of these projects, as well as significant reductions in energy and water use. At Cambridge Housing Authority's LBJ Apartments, for example, energy consumption and cost were 62% lower post-rehab, and water consumption was down by 54%. Other noteworthy projects include:

- *Fairfax Gardens HOPE VI project (Taunton, MA):* CLEAResult provided design support and construction oversight on this 160-unit new construction project, designed to achieve deep energy savings by using double-stud walls, high-efficiency air source heat pumps, and energy recovery ventilators. Heating energy use at Fairfax Gardens has been very low, almost achieving Passive House standards and significantly lower than energy use at comparable LEED Gold buildings.
- *226-232 Highland Street E+ Green project (Boston, MA):* These 4 new townhouse homes recently won one of the AIA Committee on the Environment's 2015 Top Ten Green awards, the profession's most rigorous recognition program for sustainable design excellence. They are rated as LEED Platinum, and have a Net Energy Positive HERS rating. CLEAResult provided HERS rating and other consulting services for the project, part of the City of Boston's E+ program.
- *Washington Beech HOPE VI project (Roslindale, MA):* Completed in 2011, this 206-unit Boston Housing Authority (BHA) project was certified LEED Gold, the first LEED for Homes certified HOPE VI project in the area. Key LEED features included ENERGY STAR Homes certification, reuse of existing site infrastructure, incorporation of mechanical ventilation in units, and high-efficiency boilers. CSG worked on the LEED certification.
- *Old Colony HOPE VI project (South Boston, MA):* This 600+-unit redevelopment project includes a range of sustainability features, pursuing near energy independence. The project participated in LEED for Homes, ENERGY Star Homes, LEED for Neighborhood Development, and Enterprise Green



Communities. CSG worked on certifications for these programs, with LEED Platinum and Gold certification for different components.

**Team.** CLEAResult's team for the Clarendon Hill project will include:

**Matt Root, Senior Project Manager (Certified Passive House Consultant, LEED AP Homes):** Responsible for developing CLEAResult's consulting services, Root has extensive experience in enclosure and mechanical system design, as well as diagnostic analysis (e.g., blower door, duct blaster, infrared testing) and construction oversight. Root joined CSG in 2004, and has served as a HERS rater and supervisor of CSG's LEED for Homes verification team. He holds MS and BS degrees from Brown in Mechanical Engineering.

**Michael Schofield, Senior Project Manager (LEED AP Homes):** Having joined CSG in 1989, Schofield currently oversees ENERGY STAR rating and LEED certification of CLEAResult's new construction projects in the New England area. He advises project coordinators on building methodologies and strategies that will improve cost effectiveness and durability, with a focus on multifamily buildings. Schofield is certified as LEED faculty and as a trainer for ENERGY STAR Homes Version 3, and has led trainings on Energy Code and Smart Building Practices for public officials, builders, and design professionals across Massachusetts. He holds a BA from the University of Massachusetts and an MS in Energy Analysis and Policy from the University of Wisconsin.

**Henry Harvey, Senior Project Engineer (PE, LEED AP):** Harvey provides mechanical engineering expertise to CLEAResult's clients, performing energy analyses, HVAC commissioning, design reviews, energy audits, energy benchmarking, and feasibility studies. Before joining CSG in 2013, Harvey worked for over 20 years for other energy efficiency companies, including Terrasol Energy, Sebesta Blomberg, and his own insulation business. A licensed MA Professional Engineer, Harvey holds a BA in Physics from Middlebury and an MS in Building Technology from MIT.

**Ken Neuhauser, Senior Field Project Manager (LEED AP):** Neuhauser provides design review and field quality control on new construction and retrofit projects, with a focus on ensuring durability and performance of the enclosure. Previously, he led CSG's participation in a nationwide pilot of EPA's Energy Star Homes program, and led multiple research projects. He worked for six years at Building Science Corporation before returning to CSG in 2014. Neuhauser holds Master of Architecture and Master of Science of Architecture degrees from University of Michigan, and a BA in Economics from Boston College.

#### References.

Tina Miller, Energy Consultant, Cambridge Housing Authority

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(Project: Putnam Gardens, Jefferson Park, Manning Apartments, Cambridge, MA)

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(Project: 2 Washington Street, Melrose, MA)

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(Project: Curtain Lofts – Fall River; Counting House Lots – Lowell; Volk Apartments – Worcester)

## POAH COMMUNITIES (Property Management)

**Overview.** POAH Communities has specialized in the professional management of affordable and mixed-income multifamily housing for more than 25 years. Initially founded as Midland Property Management, the company became part of the POAH family in 2001, and is wholly owned by POAH. The company currently manages more than 8,700 affordable housing apartments in nine states (Connecticut, Florida, Illinois, Maryland, Massachusetts, Michigan, Missouri, New Hampshire and Rhode Island) and the District of Columbia. POAH Communities has a staff team of 361 people, maintaining corporate offices in Boston, along with satellite offices in Kansas City, Chicago, and Miami, and staffed offices at each of its properties.

POAH Communities manages a wide range of apartment communities that vary in age, size, geographic location and physical configuration. The portfolio has been financed with a variety of financial programs including Low Income Housing Tax Credits, tax-exempt bonds, HUD mortgages, conventional financing and a myriad of state and local funding sources. Operating subsidies including federal Section 8 and state rental subsidies are layered onto most properties. Consequently, POAH Communities' staff is expert at managing properties with complex financing and equally sophisticated compliance and reporting requirements. POAH Communities' team, including property managers and corporate staff, work closely with HUD, state housing finance agencies, investors, lenders, community housing organizations and community leaders, bringing a consistent, high level of customer service to each of these groups. POAH Communities has a strong track record, having consistently achieved high scores in management and physical asset inspections, with an excellent record of program compliance across the portfolio and timely, accurate financial reporting.

**Mixed-income and market-rate housing.** Mixed-income properties that include a market-rate component comprise a growing part of POAH Communities' portfolio. POAH has successfully developed and leased up nine mixed-income properties, with at least five more scheduled to close within the next 12 months – a total of over 1,200 units. Two of these properties are in MA (154-unit Briston Arms in Cambridge, and 108-unit Kings Landing in Brewster) and one is in CT (116-unit Billings Forge). Another local mixed-income project, the 500-unit Whittier Street, is in predevelopment, with a market-rate component projected at approximately 100 units, or 20%. The occupancy rate in POAH's mixed-income properties exceeds 96%.

POAH Communities believes that good management is fundamental no matter what the incomes of the tenant population are. It has found that good management, along with a strong market, high-quality design, and the right location are the key ingredients for a successful mixed-income housing development. POAH Communities' senior staff includes people with market-rate management experience, and it intentionally hires on-site staff with such experience at all of its mixed-income properties.

**Residents.** Beyond providing safe, comfortable, and affordable homes, POAH believes that well-managed housing can empower residents and serve as a platform for their success. Where needed, POAH's properties have staff members devoted specifically to resident support. POAH believes strongly in a partnership model, and works actively to develop partnerships in the communities it works in to bring needed programs and services to residents. By working with community partners, engaging residents in decision making, and focusing on shared, positive outcomes – stable housing, health, education, finances, and employment – POAH supports residents and families across its portfolio.

All POAH properties have identified local providers of quality adult education, employment training/job prep and employment placement and have created referral pathways to help residents connect with those resources. Many POAH communities also feature on-site community space which is used by community partners to provide programs and services. Examples of POAH's efforts in this area include:

- At Woodlawn Park in Chicago, POAH has delivered job training/placement services to 267 individuals through its Financial Opportunities Center since 2013. To date, POAH has successfully placed 160 local residents in non-construction jobs and increased wages for 62% of those placed.
- At Temple Landing in New Bedford, POAH Communities has built job training and placement partnerships with two local hospitals and brought in an on-site afterschool program. Since 2012,

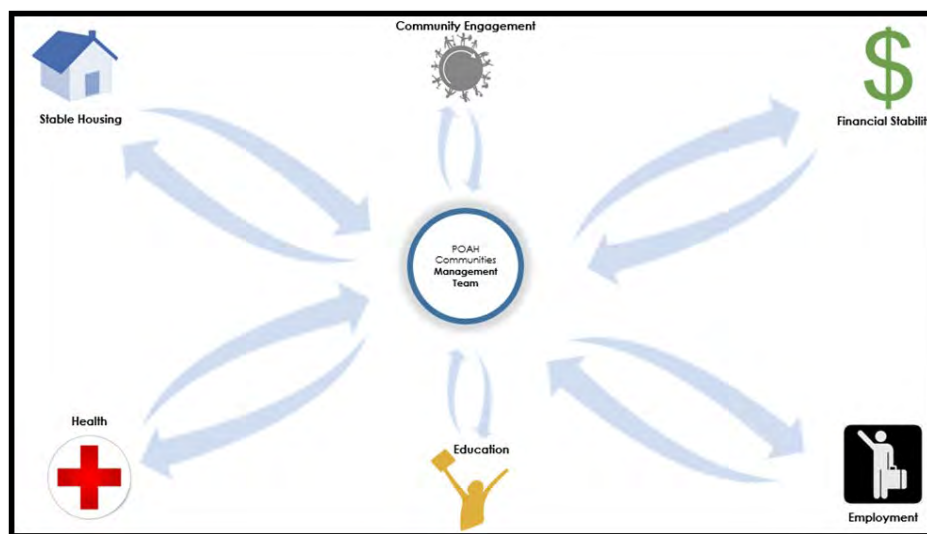
average household incomes have increased by 15%.

- At Billings Forge in Hartford, CT, POAH's partnership with Billings Forge Community Works gives residents access to "farm-to-table" culinary job training at the on-site Firebox restaurant, plus youth programs including hands-on cooking and gardening classes as well as lessons in business fundamentals and leadership.

In addition, POAH Communities has recently launched a new Community Improvement Program, which will pay residents monthly stipends to participate in organized improvement projects, such as beautification and community art projects, a property management shadowing summer program for teens, a building captain program, and others. Through this program, POAH residents are earning income, building leadership skills, and engaging with their communities.

POAH backs its commitment to resident services with funding, investing directly in innovative programs and partners that support its mission. POAH has made a budget commitment of over \$3 million across its portfolio for 2016 for resident service coordinators at its developments as well as resident-led engagement programs, healthcare and housing partnerships, a Family Self-Sufficiency pilot, a youth literacy campaign, and capacity-building grants to support operations of its community partners, as well as the systems and evaluation necessary to grow and expand its outcomes-driven model.

**Outcomes.** POAH is also a member of the Stewards of Affordable Housing for the Future (SAHF) network, 11 social enterprise nonprofits who are committed to long-term sustainable ownership of affordable multifamily rental properties. As a founding member of SAHF's Outcomes Initiative, POAH is working with its sister organizations to identify and document common outcome measures across a spectrum of areas – work, income and assets, youth and education, housing stability, health and wellness, community engagement – in order to learn from each other and build a stronger case for collaboration with other community development partners focused on these areas. By establishing the ability to document outcomes from varied types of interventions in these key areas, POAH has helped to position its projects as attractive investments for both public and private funders interested in health promotion and poverty reduction.



**Sustainability and healthy homes.** POAH Communities pays careful attention to the sustainability of its properties, tracking and analyzing energy consumption at each property and implementing measures to save on utility costs. POAH monitors over 1,500 utility accounts and tracks ongoing energy consumption across five usage categories for every site to ensure ongoing performance and identify opportunities for improvement. At each site, maintenance staff and residents are trained on the efficiency measures of their buildings and are encouraged through competitions and incentives to conserve. Since 2009, POAH has implemented over \$7 million worth of energy and water conservation projects throughout its existing portfolio. These projects, collectively, save 2 million kilowatt hours of electricity, 80,000 therms of natural gas, and 56 million gallons of

water each year. In addition, POAH Communities instituted a Smoke-Free campaign and policy in 2011 to maintain air quality and preserve a healthy and comfortable interior environment for residents.

**Values and awards.** Finally, POAH Communities' corporate values are rooted in broader social values. POAH looks for opportunities to work with minority-owned and disadvantaged businesses, and 47% of its employees describe themselves as members of a racial or ethnic minority. In 2014, POAH Communities received the following awards:

- Outstanding Achievement Award from MassHousing in its Management Company Supplier Diversity Program, for having exceeded \$1M in annual M/WBE spending;
- Award from MassHousing's Tenant Assistance Program for participation in the set-aside of low income units for referrals from the Departments of Mental Health and Developmental Services (DMH and DDS);
- Award from the National Affordable Housing Management Association (NAHMA) for commitment to Communities of Quality, adherence to the National Affordable Housing Professional Code of Ethics, and dedication to providing safe and decent housing to all eligible residents.



**Team.** POAH Communities' team for the Clarendon Hill project includes the following people:

**Patricia Belden, President.** Patricia Belden has been part of POAH since its founding in 2001, rising from project manager to managing director to chief operating officer, and in 2014, taking the helm of POAH Communities. Belden has been involved in every aspect of POAH's operation over the years, playing a key role in the acquisition, preservation, or construction of its 8,500+ unit portfolio, as well as the organization's strategic direction. Belden began her career as an asset manager at MassHousing, and also worked at Boston Financial Group, where she was involved with workout and sale negotiations on syndicated properties. She currently serves on the board of the Housing Partnership Network and the National Affordable Housing Trust. She has a BA from Cornell and an MPP from Harvard's Kennedy School of Government.

**Rochelle Beeks, Senior Vice President and Chief Operating Officer.** Rochelle Beeks has been with POAH since 2006, and is responsible for the operations and performance of the POAH-owned portfolio, overseeing the profitability, financial direction, achievement of long and short term goals of each property, and training and transition processes on new property acquisitions. Prior to joining POAH, she worked for 20 years at Aimco, one of the largest owners/operators of apartment communities in the US, where her portfolio included market-rate properties. She holds an MBA from Boston University.

**Kathleen Hennessy, Senior Regional Property Supervisor.** Kathleen Hennessy has been with POAH since 2006, overseeing property management for nine properties with a total of 994 units and 43 employees. She is experienced in ensuring compliance with a variety of subsidy programs, including Section 8, LIHTC, Section 236, and HOME. Before coming to POAH, she worked for 10 years as a Portfolio Manager at The Community Builders. Prior to that, she worked for public housing authorities in Worcester, Athol, and Stow, MA as a Section 8 Program Administrator. She holds a BA from Assumption College.

**Trevor Samios, Director of Resident Services.** Trevor Samios has been with POAH since 2014, and is responsible for the design, implementation and evaluation of a comprehensive strategy to support residents at POAH's growing portfolio of properties. Prior to joining POAH, Samios served as Senior Operations Manager at The Community Builders, launching the place-based Community Life initiative, using stable housing as a platform for residents to achieve greater economic stability. He also held other positions at TCB, including property management and resident services work at several of TCB's HOPE VI developments. Samios has a BA from Allegheny College and an MA from Clarion University of Pennsylvania.



**References.**

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(Project: Woodlawn Park: The Jackson, The Grant)

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(Project: Temple Landing, Franklin Square, Blackstone Apartments)

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(Project: Meadowbrook, Salem Heights, Kenmore Abbey)

## OTHER DEVELOPMENT TEAM INFORMATION

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### Legal and Administrative Actions

To the best of our knowledge there are no local, state or federal taxes due and outstanding for the development team or any constituent thereof, nor has any member of the development team been the debtor in a voluntary or involuntary bankruptcy filing within the past 10 years. To the best of our knowledge, there are no legal or administrative actions past, pending or threatened that could relate to the conduct of POAH, Gate Residential, Somerville Community Corporation, or their principals, or any affiliates.

### Organizational Information

POAH and SCC are Section 501 c (3) not-for-profit organizations registered to do business in the state of Massachusetts. Gate Residential Properties, LLC, is a Delaware limited liability company registered to do business in Massachusetts. All three organizations have the staffing capacity to commence work within 30 days of selection, and to fulfill the SHA's intention to enter into a Disposition/Development agreement within 120 days of selection.

### Ownership Entities and Guarantees

POAH, Gate Residential, and SCC intend to form two limited liability entities to act as the project owners and to be lessees under a ground lease from the Somerville Housing Authority. One of the entities will own the buildings on Blocks A and B. It will have Gate Residential or an affiliate as manager and have private investors and private financing. The General Partner of the other ownership entity, for the buildings on Blocks C and D, would have POAH as managing member and SCC as a member and would hold an ownership share of 0.01%. POAH and SCC will identify an investor to act as Limited Partner with an ownership stake of 99.99% in the property.

The investors in the Gate Residential entity will include Redgate partners and employees, other individuals to be determined, and an institutional equity investor to be determined (although the likely institutional equity investor is CrossHarbor, should they choose to participate). Collectively, these investors would own 100% of the equity in the Gate Residential entity, although Gate Residential has offered POAH and SCC the opportunity to co-invest on terms to be determined. The Gate Residential entity would have no legal or financial relationship with the SHA, other than as ground lessor.

POAH and Gate Residential will provide all the necessary guarantees for their respective project components as required for project financing and consistent with industry practice. POAH is financially sound and has the financial resources to do so: the organization has a robust balance sheet, with \$42 million in net assets at the core company level and \$7.9 million in unrestricted cash. POAH is experienced with the guarantees typically required for transactions of this type, and has a track record of working with national and local financial institutions and completing projects successfully on schedule and within budget.

Gate Residential will provide its guarantees through its parent entity, Redgate Holdings, LLC. Gate Residential and Redgate Holdings have experience with providing the guarantees required for their proposed elements of the overall project, and have a track record of working with local and regional lenders in comparable developments in the area with a comparable cost and scale. Gate Residential also has a demonstrated track record of completing projects on schedule and within budget.

# DEVELOPMENT CONCEPT



THE DEVELOPMENT CONCEPT

POAH, Gate Residential, and Somerville Community Corporation are pleased to share our vision for the redevelopment of the Clarendon Hill site. Our proposal is grounded in a shared commitment to the Somerville Housing Authority’s fundamental goals for the residents and for the property: to create a vibrant, mixed-income community that leverages the site’s underlying value, to avoid displacement of current residents and preserve the affordability of their units over the long-term, and to strengthen the property’s connections and contributions to the surrounding community. We have worked hard to craft a proposal that accomplishes these goals while remaining realistic and financially feasible. The narrative that follows describes key elements of the proposal in more detail.



**The challenge and the opportunity.** In recent years, Somerville has become one of the hottest residential markets in the Boston metro area, with significant investments by developers attracting new residents to the city. The attributes of the Clarendon Hill site in particular are many: a great location with extensive green space and a bike path nearby, access to Dilboy Field and pool, a supermarket next door, frequent and quick bus service to Davis Square and Arlington Center, adjacent to academic and cultural offerings at Tufts University, and near the beautiful new North Street Veteran’s playground. Yet like so many other public housing developments built decades ago, Clarendon Hill remains cut off from its surroundings, isolated both by its physical design – a superblock with no through-streets, poorly-oriented buildings of a homogeneous design that is like nothing else in the surrounding community – and by its demographics, with 100% very low income residents in a city that is otherwise enormously diverse. The SHA’s RFP offers an exciting opportunity to implement a complete transformation of Clarendon Hill: from an isolated enclave into a great new community, fully integrated into and benefitting the surrounding neighborhood, a community that everyone, regardless of income, would choose to live in.

**Vision.** We envision a vibrant new community at Clarendon Hill that includes full replacement of the 216 existing public housing units within the context of a new, mixed-income, amenity-rich urban community. Key elements of our vision, detailed in the following sections of the proposal, include the following:

- *Connections to the surrounding neighborhood:* breaking up the existing super-block with new vehicular and pedestrian/bike pathways that link the site to its surroundings; creating a series of inviting new green spaces; and orienting the new buildings to the public streets, with continuous frontage that complements existing homes and enhances safety, with more eyes on the public realm.
- *Connections to the Dilboy/Alewife Brook Park green spaces:* creating clear pathways for the neighborhood that link to the expansive green spaces, recreational fields, public pool, and bike path just across the Alewife Brook Parkway, and maximizing the number of units with great views over these green spaces.



- *New community amenities for existing and new residents:* a common nexus at the heart of the site where indoor and outdoor community spaces and amenities are located, providing recreation and socializing opportunities for all residents.
- *Income diversity without displacement:* supplementing replacement public housing units with units targeting a broad range of incomes, including both workforce and market-rate housing, with units at varying income levels integrated within each building.
- *Mix of housing types appealing to different market segments:* townhouse-style units in 4-story buildings along the quieter residential edge of the site, higher-density units with a range of bedroom sizes in slightly taller buildings; maximizing the number of units with proprietary space, such as individual entries, balconies, and patios.
- *Green/sustainable features:* Energy-efficient, sustainable buildings designed to Massachusetts Stretch Code, as well as ENERGY STAR and LEED standards, with features including Zipcar parking and electric car charging station, green roof/community gardens, sustainable landscaping and innovative approaches to managing and utilizing stormwater.



#### Implementation overview.

- **New construction.** The rehab needs of the existing buildings are likely to be too extensive to make renovation cost-effective, and it is impossible to achieve the site density we believe is necessary to achieve a significant level of cross subsidization while retaining any existing buildings. Our plan therefore assumes demolition of the existing buildings, to be replaced by 100% newly-constructed buildings. We will work closely with the SHA and with the residents to create a plan for temporary relocation of all tenants prior to the demolition of their building and construction of the new buildings.
- **Overall unit count.** We propose to create a new mixed-income community at Clarendon Hill that could include four or five new buildings, with a total of roughly 500 – 525 units. We have explored two slightly different options, with design and financial information for both included in the attachments. Our rationale for both is detailed in the Units section below.
- **Income mix.** In both options, two new buildings are proposed along Alewife Brook Parkway that would include a total of 300 units, with 85% market-rate and 15% public housing replacement units. These buildings are shown as Blocks A and B on the attached site plan. On Blocks C and D, we propose to build either two or three new buildings, with a total of roughly 200-226 units, that would serve a wide range of incomes from existing public housing residents up to a moderate-income/workforce housing tier (for households at up to roughly 110% of Area Median Income). The higher-density option would allow for more income-mixing within these blocks, which we believe will result in

a healthier community over the long-term. If a higher level of income integration is desired, we could consider moving in that direction, but doing so would require additional public subsidy as well as reconfiguration of the proposed legal structures and delivery of equity. Another strategy that would also allow for a greater level of income integration in each building would be to locate some or all of the one-bedroom units in an off-site location. This is described more fully below.

- **Phasing.** We propose to implement the project in three phases. The first phase will include the two new buildings along Alewife Brook Parkway, Blocks A and B. These primarily market-rate buildings will be the first to get into construction because their more straightforward financing will take less time to assemble, and because the cross-subsidies they create will then be available to help support the construction of subsequent phases. The buildings on Blocks C and D will follow as phases two and three, giving our team the time needed to secure public sources of financing. We anticipate the Blocks A and B can be brought online while the existing buildings under Blocks C and D remain occupied and functioning for most of the block A and B construction phase. This may help reduce relocation costs.

We want to emphasize that the plans advanced here are meant to introduce our perspective and ideas in response to the goals set out in the RFP, yet we see it as only the beginning of a dialogue with the SHA, the Clarendon Hill residents, and other stakeholders in the community.

We have carefully reviewed the information shared by the SHA about the site and its residents, we have examined the site itself, and we have assessed the landscape of likely financing sources and market opportunities. We have also brought a thorough understanding of the City's SomerVision Plan to our thinking. Our proposal represents the team's best efforts, given what we now know, to balance the various challenges and opportunities the site presents, the requirements included in the SHA's RFP, and the economic parameters of how such a project could realistically be put together and financed. We look forward to further discussions that will help us to improve and refine what is presented here, further detailed below.



## UNITS: NUMBER, SIZE, AFFORDABILITY

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**Rationale for proposed total unit count.** The development team wrestled with the issue of density: how many units to build in total on the site. On the one hand, adding density to the existing site would be beneficial in a number of ways. It would allow for a broader income mix and new vitality at the site. Adding market-rate units would create critical cross-subsidies for rebuilding the replacement units, especially important given the need to limit use of public subsidies. And adding units overall would help to meet the City of Somerville's ambitious call in its Comprehensive Plan for 2010-2030, SomerVision, for 6,000 new housing units by 2030, targeted at people earning a broad range of incomes. On the other hand, too much density could result in a site that felt less human-scale, less livable, with less open space, less in keeping with the surrounding neighborhood. And beyond a certain point, more density would necessitate taller buildings with steel construction and more underground parking, significantly more expensive and likely cost-prohibitive.

We also needed to respect certain constraints in deciding on an appropriate unit count. We needed to include replacement housing for the existing Clarendon Hill residents. And we needed to devise a financially realistic proposal, one that will both be able to attract the financial resources required to get it built and ultimately to attract residents across a range of income levels.

Our proposal for a site with approximately 500-526 units represents our best effort to balance these pros and cons and requirements. It is based on market data and a financial model that works (described further below), and an appealing site plan that responds to its topographical and neighborhood context and includes: sufficient parking located near each unit; ample public space both indoors and outdoors for gathering, social services provision, and recreation; and an interesting and comfortable feel to the built environment, with a varied mix of building types, designs, and scales.

**Options for public housing replacement.** In putting together our proposed financing plans, we explored various options for the replacement of the existing public housing units. In one, we assumed replacement of 100% of the 216 existing units on-site, and in another, we assumed replacement of only the existing 183 two- and three-bedroom units on-site, with the 33 one-bedroom units being replaced off-site, as the SHA has indicated it is willing to consider. Our preference would be to work with the SHA and the community, notably the existing residents, to find a suitable off-site solution for some or all of the 33 one-bedroom units. The off-site relocation of existing one-bedroom units would create an opportunity to add additional units at a broader range of incomes, thereby creating a more balanced income mix within Blocks C and D, as noted above. For example, assuming the slightly higher-density scheme, with 526 units, if all 216 units are replaced on-site, Blocks C and D would include only 25% non-public housing units, whereas if the 33 one-bedrooms were accommodated off-site, this percentage would climb to 39%.

If off-site replacement of the one-bedroom units is a possibility, we would work with the SHA and the community to determine the best approach. Possible options include: moving these units to a site that SHA already owns or one that it has under development, or moving them to a site that Somerville Community Corporation owns or has under development, possibly through the 100 Homes Initiative it is implementing in partnership with the City. (Note that this option might necessitate the need for additional project-based vouchers or some other form of operating subsidy).

### **Proposed bedroom mix and square footages:**

- **Blocks A and B.** The proposed unit mix and square footages for the predominantly market-rate Blocks A and B are: 10% studios (490 SF), 50% 1BRs (690 SF), 10% 1BRs with a den (820 SF), 25% 2BRs (1,025 SF), and 5% 3BRs (1,250 SF). The unit mix and sizing is based on Gate Residential's current and past successful experience designing and leasing similar projects in Somerville and other comparable near-urban communities. The unit mix seeks to maximize the capture rate for the target market.
- **Blocks C and D.** For Blocks C and D, with a mix of public housing replacement and moderate/

workforce units, the proposed mix/square footages includes: 15% 1BRs (650 SF), 66% 2BRs (850 SF), and 19% 3BRs (950 SF). The unit mix is based partly on the unit needs of the existing Clarendon Hill families, and also on POAH and SCC's experience developing similar housing as well as knowledge of the housing needs and demand within the local neighborhood market.

# SITE DESIGN, ARCHITECTURAL CHARACTER, GREEN ELEMENTS

## Site Design

**Overview.** The preliminary site designs, included in the attachments, represent our best efforts to create a thriving new community that accomplishes a series of goals:

- Replacing old buildings and an outdated site design with a contemporary community that better meets today's needs;
- Reconnecting to and enhancing the surrounding neighborhood and its green spaces;
- Achieving the requisite density and unit mix to meet program and financial feasibility objectives, without sacrificing livability;
- Creating much-needed new common spaces, green space, and amenities for residents;
- Creating new units with sufficient proprietary space as well as access to sunlight, views, and other natural attributes.



Potential Landscape Scheme

**Access/pathways/connections.** The proposed designs break up the existing superblock by introducing new vehicular and pedestrian paths that will “normalize” passage through the site. A new vehicular path that extends the existing Hamilton Road into the site will allow for car access from North Street into the site and out again to Alewife Brook Parkway (selective use of one-way restrictions will prevent this new path from being used as vehicular shortcut). The existing access to the site from Powder House Boulevard will also be incorporated into a new vehicular path that meets the other one new street in the center of the site. These new roadways would likely remain under the control of the Housing Authority, however, we are willing to explore the feasibility of the City of Somerville taking control of the new roadways as public right-of-ways. Regardless of which entity controls these roads, they will be paved in such a way as to encourage slow vehicular movement with landscaping designed to encourage public pedestrian and bicycle access the site from the adjacent neighborhood to the Alewife Brook Parkway paths and Dilboy Field.

We are showing two options for a shared pedestrian/vehicular area at the center of the project. In one scheme, the central area would be a shared “woonerf plaza” (a paved, shared-use space concept pioneered by the Dutch). This large, plaza-like area would be specially paved to limit car travel speed, and could be raised to pedestrian-level, making it feel more pedestrian than vehicular. For special community events such as a festival or farmer’s market, the vehicular access could be temporarily suspended. In the second scheme, the central spine through the development connecting to the Alewife Brook green space is suggested as a generously planted tree-lined street with wide pedestrian walkways and the potential for special paving along its length. This central green street could also be shut down for shared community events.



Potential Landscape Scheme

The existing development, with its oddly-placed buildings that cut across the grain of preferred travel, has made it hard for pedestrians as well to pass through the site. Existing buildings block direct access to the Parkway and the green spaces on the other side, and grade changes add to the difficulty of traveling about the site. The proposed designs aim to create natural, safe, welcoming pathways for pedestrians/bikes, providing new linkages through the site as well as from the site across the Parkway to the recreational fields, Dilboy, and the green space/bike path located there. A new pathway will also be created to

the grocery store next door, making it easier for residents to walk over and buy groceries. In general, our designs aim to work carefully with the site's grade in order to provide universal access throughout, including to all amenities and residential units. The goal is to allow all residents and visitors to move easily around the site, accessing all its elements.

Finally, amenities within the site that are open to the public (such as the Zipcar spots) will become attractions that invite people in. Increased pedestrian, calmed vehicular and bicycle traffic will add a higher level of security for residents within as well as visitors from outside of the new community.

**Parking.** Higher density development will necessitate higher parking volume requirements. The natural grade of the site combined with podium-style construction offers a relatively affordable way to "hide" parking fields out of sight, while maximizing the usable open space above. We have taken advantage of this approach to include significant parking beneath each of the larger buildings. We also provide some limited surface parking along the new vehicular paths and a few other spaces where it fits. This parking will be parallel rather than perpendicular (as is now the case) so that the new pathways will feel more like roads than parking lots.

**Buildings.** The proposed placement of the buildings on the site accomplishes four main goals:

- *First*, a new streetscape is created by locating the new buildings along existing roads, following the form, scale, level of detail, and orientation of existing structures in the neighborhood. With the proposed addition of approximately 50-60 new at-grade units with direct access to the street network, the streets will be activated and new connections forged. By eliminating the zig-zag pattern of the existing site that ignores the streets and leaves unusable residual green spaces along the perimeter, the new site uses space much more effectively and creates a perimeter that responds to and enhances neighboring properties.
- *Second*, buildings are aligned so as to allow an extension of Hamilton Street into the new development, as noted above, inviting passage into the site and ease of circulation.
- *Third*, new buildings are designed and positioned to maximize exposure and views to the open green spaces across the Parkway.
- *Finally*, the buildings are positioned so as to open up long view corridors within the relatively dense development, preserving a sense of openness, views of greenery and open space, and access to sunshine and fresh air.

**Green space.** The proposed design includes a series of green spaces throughout the site, including planted areas on grade, planted podium decks, and the various pedestrian and bicycle oriented green links noted above. At the ground level, there will be smaller park-like areas to sit and enjoy, and possibly play areas such as a splash-pad or a natural playground. Ground level units, in particular the townhouses, will have landscaped entries or terraces. Native plantings and/or rain gardens will be included to help with stormwater management. The goal is to create a linked series of larger green spaces, along with smaller, proprietary green spaces near people's unit entries that make for varied and interesting streetscapes as well as a sense of "ownership" of outdoor spaces, consistent with neighboring properties. Finally, the design preserves the existing outdoor play space on the southeast corner of the site.



**Common spaces/amenities.** The proposed design includes a total of approximately 12,000 SF in indoor space for amenities, including space within each of the buildings. These will likely include some combination of fitness spaces, space for community meetings and services (like tutoring, after-school programming, and job-link services), common laundry, lounge/media area, bike repair space, and collaborative work space. Outdoor and other amenities will also be provided, and may include community garden plots, programmed decks, fire pits, multi-use game areas such as bocce, Zipcar or other car-share parking, electric vehicle charging stations, multiple bike racks, and an onsite dog care facility/park. Many of these amenity spaces will be clustered toward the center of the site, at the intersection of the primary pedestrian/vehicular pathways. Centrally located amenities for all residents to use will be provided both in Blocks A/B as well as Blocks C/D, helping to draw the entire site together.

**Trash.** Existing dumpsters scattered throughout the site will be eliminated. Trash will be handled within the buildings.

## Architectural Character

In the conceptual designs for Clarendon Hill, including in the attachments, the team's architects aimed to achieve several goals: (1) provision of a range of unit types and designs, including townhouse-style units, that respond to the needs of existing and future Clarendon Hill residents; (2) consistency with local architectural patterns, scale, materials, details, and colors, particularly for the buildings that are located across a residential street from other Somerville homes; (3) utilization of straightforward, traditional building forms and massing, resulting in construction efficiencies that will help control costs; and (4) responsiveness to the particular features and natural contours of the site.

The townhouse-style buildings proposed to front on the residential areas along North Street and Powder House Boulevard are designed to reflect the scale and intensity of detail of the houses across the street. These buildings on Block C are, at 4 stories high, the least high of those proposed. Maximizing the number of individual entries will benefit both the residents of the new structures and the streetscape of existing homes.

Buildings further down the site (Blocks A, B, and D) are somewhat increased in scale and height (5 stories over 1 or 2 story podium), appropriate in light of their further distance from existing homes as well as the significant grade change as the site slopes down toward Alewife Brook Parkway. These buildings will be larger in form and detail, relating to the faster pace of the vehicular use. Multiple building entries are planned along the Parkway, enlivening the pedestrian experience. The Powder House Boulevard/Parkway corner will receive the most intense architectural detailing, as its façade will be the most visible, creating a gateway into the redeveloped community.

Other elements of the proposed design include the following:

- **Increased sense of ownership.** Many apartments, whether on the Parkway or existing neighborhood side, will have access to proprietary open space, which may be in the form of balcony, patio, front planting area, or garden plot. Overall, 50-60 new at-grade units will be created, with their own entries and direct access to the street network. Some of these units will be multi-level townhouses. Others will be single-level units within townhouse-style buildings, with several units using a common entry. Other units in the larger buildings accessed from a double-loaded corridor will include elements that instill a sense of ownership, like a "front door" feel to each unit and/or balcony space. And the buildings will be designed to foster a sense of community within the "new neighborhood" by including, for example, central common areas for social interaction.
- **Central core of amenities.** Many of the amenity/community spaces, as noted above, will be centrally located so as to form an active core to the site. They will be designed to be visible and to welcome people in, with at-grade pedestrian-friendly entries and lobbies, using lots of glass.
- **Universal design.** Units throughout will meet all applicable accessibility requirements, with the goal of creating universally accessible unit and common area spaces, easy for all to use. Units will include ample maneuvering space, usable kitchens and baths, and building elements that are easy to operate for all types of people. Units will range in size and bedroom mix to fit residents' multiple

lifestyles and needs. Most of the units will be single-level units in buildings that are served by an elevator.

## Green Elements

The developers, architects, and engineers on our team all bring a commitment to sustainability as well as extensive expertise in creatively building green, energy-efficient, and sustainable elements into our projects. All buildings will be built to meet or exceed the Massachusetts Stretch Code levels that will be in place at the time of permitting. Individual structures may, in addition, be designed and built to qualify for third-party certification/verification systems, e.g. ENERGY STAR, LEED, Enterprise Green Communities, etc. All building materials will be high-quality, low-maintenance, with long expected useful lives. The team will implement best practices for optimizing air quality, building durability, efficient use of energy and other resources, and occupant comfort. CLEAResult, the independent energy modeling and sustainability consultants for the project, will work closely with the design team to develop high-performing building assemblies and mechanical systems, carry out building envelope inspections and testing, and in other ways make the project as green and sustainable as it can be. The team proposes to implement the following principles and strategies, to the degree they are feasible:

### Site Design:

- Stormwater management, which may include on-site infiltration structures, “natural” infiltration features (rain gardens), water harvesting in cisterns (for on-site irrigation, grey water toilet flushing)
- More green space and less impervious/paved areas, with covered parking largely provided below the buildings
- Selection of drought-resistant and native plantings to minimize dependence on use of public water systems
- Maximum retention of natural land features such as mature trees, site grades
- Community garden space, shared courtyard space and recreational spaces
- Attractive pedestrian circulation systems that encourage walking and enhance access to larger park system for walking and biking
- Provision of Zipcar or other ride-share option to limit need for additional cars
- Bike racks located inside the garages and outside in the landscaped areas; on-site bike repair facility.

### Building Design:

- Roofs designed and oriented to allow immediate or future installation of solar photovoltaic (PV) system to offset electricity demand
- High performance exterior wall and roof assemblies to reduce heating and cooling loads, including:
  - ◊ High R-value insulation in walls and ceilings
  - ◊ High R-value argon-filled/Low-E windows
  - ◊ Extensive air-sealing details to minimize air leakage (targeting 1.5 ACH50 or less – half the leakage rate allowed by the energy code).
- Advanced fresh air ventilation (intake and exhaust), incorporating continuous exhaust ventilation to promote good indoor air quality
- ENERGY STAR rated windows, appliances, and lighting fixtures
- High-efficiency heating and ventilation systems
- High-efficiency hot water storage tanks
- Light colored roofing materials to reduce attic heat buildup and heat island effect
- Specialized details to prevent issues of indoor mold
- Passive radon exhaust systems (with the ability to adapt from passive to active where necessary)
- Use of low VOC paint, sealants, and flooring
- Low water consumption plumbing fixtures
- Fully cut-off exterior light fixtures to reduce light pollution and improve night sky visibility
- Building materials with a high degree of recycled content and durability (e.g., steel, concrete, siding, carpeting, and flooring).



## PROJECT FINANCING

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The mixed-income financial structure that we are proposing responds directly to the SHA's RFP goals as well as to the DHCD State Office of Public Housing NOFA, issued prior to the SHA's RFP. It also responds to SomerVision, the City of Somerville's much-acclaimed Comprehensive Plan. Our proposal aims to bring the maximum amount of market resources to bear on transforming Clarendon Hill into a "vital, healthy, inclusive and distinctive urban neighborhood" (SomerVision Neighborhood Goal Statements page 18). Our proposed plan provides long-term, replacement affordable housing for all of the 216 families now living at Clarendon Hill while minimizing reliance on competitive public subsidies, through cross-subsidization from the market-rate rental units. The plan also achieves a balanced mix of income levels and housing types at Clarendon Hill, resulting in a development that will blend well with the surrounding neighborhood and provide choices to Clarendon Hill families.

As noted earlier, we explored two options in putting together our financing plan: (1) replacing all 216 of the existing public housing units on-site, and (2) replacing all but the 33 one-bedroom units on-site, working with the SHA to identify the most appropriate off-site locations for these units. The narrative below assumes the first option, with all existing units replaced on-site. However, our preference is for the second option, which allows for significantly greater income-mixing and a lower subsidy request for this transaction. We hope to be able to discuss this further with the SHA, if we are designated.

We have also explored two slightly different design schemes, as noted earlier: one with five buildings and a total of 510 units and one with a total of four buildings and a total of 526 units. Designs for both are included in the attachment, but the narrative below tracks the 526-unit option.

### Financing Overview

**Capital structure.** Revitalization of the site will proceed in three phases, as noted above. The first phase will include the buildings fronting on Alewife Brook Parkway, Blocks A and B on the site plan. While all buildings will include a mix of incomes, these two buildings will include predominantly market-rate units. The buildings in Blocks C and D, phases two and three of construction, will include a different income mix, ranging from public housing replacement units to moderate/workforce housing for families at up to roughly 110% of AMI. The financing for phase one will be different from that for phases two and three, as described below.

- **Blocks A and B.** The two buildings in Blocks A and B will include a total of 300 units: 254 units of market-rate housing (85%) and 46 units of replacement public housing (15%). Financing for this phase will include a combination of private equity (35%) and construction debt (65%). Upon stabilization of the buildings (defined as 95% occupied), Gate Residential will assess the market and either refinance or potentially explore a sale, subject to ongoing affordability commitments for the replacement units and the executed ground lease. (The ground lease would include any ongoing asset management fee payments to the SHA.) Based on Gate Residential's experience building comparable product in the region, the market-rate units are expected to generate approximately \$15M to support development of replacement units in the subsequent two phases. Gate Residential has worked to maximize the number of public housing households (at an average rent of \$488 per month) that the project can operationally support while still delivering significant land value (\$59,055 per market-rate unit) that would support development of public housing replacement units across the entire project.
- **Blocks C and D.** The buildings in Blocks C and D will include a total of 226 units: 170 units of replacement public housing (75% of the total units) and 56 units of moderate/ workforce housing (25%). Financing for this phase will utilize 4% LIHTC equity and long-term, fixed-rate debt based on favorable financing from a lender such as MassHousing or MassDevelopment, who have supplied letters of interest in the attachments. The financial gap for these buildings can be filled with a combination of:
  - ◇ Approximately \$15M of cross-subsidy generated from the market-rate housing;
  - ◇ Tax Increment Financing based on capturing a portion of the new real estate tax value created by the market-rate units, noted above and described in more detail below;
  - ◇ Financing via MassHousing's Workforce Housing program;

- ◇ Other City and State funding sources including potentially up to a \$5M in bond financing from the City, utilizing approximately \$260K in annual payments from the City's Community Preservation Act fund;
- ◇ Additional soft public subsidies from State Bond-financed programs such as Affordable Housing Trust, Housing Stabilization, and Housing Innovation Funds.
- ◇ SCC has considerable experience developing affordable homeownership units in Somerville, and could work with SHA and other members of the development team to evaluate the financial feasibility of including an affordable homeownership component in the development plan for Blocks C and D.

The underwriting assumptions that we have used, detailed below, are based on site-specific data developed for this response as well as our experience with planning and building comparable developments in the Greater Boston area.

## Development Sources and Uses

**LIHTC.** LIHTC assumptions are based on POAH-SCC's extensive experience and current market conditions. Based on the current plan, we are relying on 4% tax credit executions at a raise of \$1.10 per credit, consistent with the strong current market. We have not utilized any 9% credit allocations. We assume that in year 15, the LIHTC general partner, an affiliate of POAH, will exercise a right of first refusal to buy out the investor limited partner and continue to steward the LIHTC assets over the long-term, consistent with the 99-year ground lease.

**Private equity for market-rate housing.** Private equity for the market-rate housing will most likely be provided by a programmatic joint venture between Gate Residential Properties, LLC and CrossHarbor Capital Partners, LLC. The programmatic joint venture was established in 2015 with the intent of developing five apartment communities in urban and near-urban areas in the Eastern US, with a specific focus on Boston's near-urban market. Combined equity commitments for the joint venture total \$100M. To the extent, unrestricted, market-rate units are able to be produced within Blocks C and D, Gate Residential would bring their private equity expertise to the transaction to evaluate the feasibility of an investment in those blocks.

**First mortgage financing.** Market-rate construction financing for Blocks A and B will be sought at a loan-to-cost ratio of approximately 65%. The first mortgage will most likely be structured as an interest-only, three-year note, with amortizing extension options (typically two one-year extensions). The first mortgage will not be cross-collateralized or cross-defaulted. Current underwriting has assumed a 4.0% interest rate, which is approximately 100 basis points above current market rates for comparable loan products.

For Blocks C and D, we are assuming first mortgage financing with a 4.75% interest rate, amortized over 40 years, with a 1.25 debt service coverage ratio. Utilizing a tax-exempt bond product, MassHousing or MassDevelopment are potential lenders that POAH-SCC has worked with frequently in the past, and they are currently providing financing on these terms or better. We have limited the DSCR to 1.25x to mitigate the extremely low income revenue growth projections from the state-public housing units.

**MassHousing Workforce Housing funds.** This program aims to provide financing for housing targeting households that earn too much to qualify for most affordable housing programs but not enough to afford unrestricted, market-rate housing in markets like Somerville. Qualifying households will likely earn between 80% and 120% of Area Median Income. Funds through this program are expected to be available in Fall 2016. We are proposing to request \$100,000 per workforce unit and have priced the rents on these units at 110% of AMI.

**Tax Increment Financing (TIF)/property tax.** The project's new market-rate units will generate an estimated \$900K in annual property tax revenue. We have proposed using a TIF structure to capitalize one half of the additional revenue generated by the site over its initial 20 years of operations. Thus, we propose that the City of Somerville retain half of that new revenue to offset the site's new incremental public services costs, but leverage the remaining half by issuing a bond to provide much-needed development capital (we assume an

interest rate of 4% and a term of 40 years). We have capitalized \$450K of that incremental revenue for 40 years and generated approximately \$7 million in loan proceeds to subsidize the replacement units.

There are other potential structures we could explore – for example, providing a Tax Increment Exemption (TIE) to the market-rate units would generate higher cross-subsidies for the replacement units. Under the TIE approach, the City of Somerville would not relinquish tax revenue on these units forever, but only for 20 years. We feel that whatever the mechanism, the new value generated by market-rate development can be secured for the benefit of the site’s existing low-income residents.

**Residual land value.** The residual land value is currently estimated at \$15M (\$59,055 per market-rate unit). The \$15M is proposed to serve as a private cross-subsidy that would support development of the public housing replacement units across the entire site.

**Community Preservation Act funding.** We are including \$5M from the City of Somerville in the form of a municipal general obligation bond under Chapter 44b. This would be a 30-year bond at 3%, with level interest and principal payments of approximately \$260K per year. These payments would be made utilizing an annual draw on the City’s Community Preservation Act fund, a reasonable request given current and anticipated revenues generated by the CPA property transaction surcharge.

**Additional soft/gap funds.** Applications will be made to the Commonwealth of Massachusetts and City of Somerville for various gap financing sources as needed. Possible sources include: Community-Based Housing funds, Affordable Housing Trust, Housing Stabilization, Housing Innovation Funds, and State Low Income Housing Tax Credits. These funds are generally provided in the form of deferred payment loans in return for long-term affordable housing restrictions. These applications would be made “out-of-round” if possible to avoid the long waiting list for the most competitive rounds.

**Ground lease.** We have assumed that the land and buildings will be subject to a 99-year ground lease. In lieu of a capitalized or annual payment under the ground lease, we have assumed that all the residual land value would be reinvested into the development to avoid the use of other scarce public resources. As noted throughout our proposal, to minimize the need for competitive public resources, we have used this full market value as a source to cross-subsidize the other components of the deal, most particularly the construction of replacement public housing units. We recognize that this is just one of the many ways that the market value of the land can be realized, and would be open to considering and discussing with the SHA other possible ways to approach this issue.

**Construction costs.** The programming of the site started with the requirement that all of the buildings be wood-framed above a steel or concrete podium, the most cost-effective way of building housing for this market. Hard construction costs ranging from of \$200 to \$220 per square foot have been assumed. Total development costs for the entire program is estimated on average at less than \$300,000 per unit, including the \$15M cross-subsidy provided to Blocks C and D. These estimates are consistent with the collective development team’s current and past experience.

**Relocation.** Based on POAH’s experience with relocation at other comparable sites, we are carrying a figure of approximately \$6,800 per unit. This cost is meant to cover the cost of a housing relocation consultant for every unit and to cover the cost of two moves. If designated, the team would procure a housing relocation consultant to work with residents to find them suitable replacement housing options and to help coordinate their personal needs. This per unit estimate is not intended to cover the cost of housing during the relocation period. The assumption is that the SHA will work to find other public-housing units and /or provide tenant protection vouchers to the residents to accommodate the relocation housing need.

**Reserves.** The budget includes capitalized reserves of 6 months of operating expenses and debt service for the developments on Blocks C and D as is standard in affordable housing development.

## Operating Revenues and Expenses

**Market-rate rents and expenses.** The project is currently underwritten with rents that are approximately 90% of the current achieved market rents at Gate Residential's nearby Maxwell's Green development. The projected discount is largely due to the increased walking distance to the Red Line and Davis Square, when compared to Maxwell's Green. On the operating costs side, Gate Residential evaluated current operating costs at other comparable buildings. An estimate of approximately \$7,632 per unit per year (before property tax adjustments) has been budgeted.

**Replacement units' operating subsidies and expenses.** We assume that we will apply to SHA for and be awarded Project Based Vouchers (PBVs) for 25% of the public housing replacement units, or 54 units. We assume that for the remaining public housing replacement units, SHA will pass through the DHCD operating subsidies it receives for these units. We also assume that the public housing residents will continue to make their shelter rent payments which are included in the income stream of the property. We assume operating expenses will be comparable to those for the market-rate units, roughly \$8,000 per unit per year, based on POAH Communities' experience at similar properties.

**Other low/mod units' operating subsidies and expenses.** In Blocks C and D, we have assumed that the moderate and work-force unit rent levels are limited to 110% of AMI. The workforce funds allow incomes up to 120% (and in some cases higher), but we limited the rents to 110% of AMI for the underwriting with a state objective of hitting a rent level that is consistent with the broader needs of the community.

**Developer fees.** Gate Residential has budgeted a combined development and direct project supervision fee totaling \$3.05M, which equates to 4% of the total project cost, net of land. POAH-SCC has included a payable developer fee equal the maximum allowed under the qualified allocation plan. Additionally, POAH has utilized a strategy we have used numerous times before with DHCD to increase the amount of developer fee included in tax basis to be the maximum allowed by broader industry groups and deferred the difference between that and the maximum allowed by the QAP. This strategy allows the team to increase the eligible basis at the property, thereby increase the amount of credit allocated and the associated equity investment to the deal, ultimately leading to a lower request for subsidy.

**SHA fees.** As the SHA's RFP requests, we have built fees for the SHA into our financial assumptions: 25% of the developer fee available from the development of the public housing units, as well as a contingent asset management fee of 1% of the operating budget payable from excess cash flow for any units that are not managed by the SHA.

**Predevelopment.** We anticipate a total predevelopment budget of roughly \$4M. POAH has ample cash reserves available to do so: its 2015 statement shows \$6.9M in cash and equivalents at the core company level. POAH has good liquidity with a working capital ratio of 4:1. In addition, POAH has strong access to credit, with \$950,000 currently available on its predevelopment line of credit from the Life Initiative and two additional predevelopment/acquisition lines from LISC and LIIF totaling \$7.3M. Gate Residential will utilize private equity from its \$100M programmatic joint venture for predevelopment expenses.

## Developers' Experience Securing Proposed Funds

As noted earlier, POAH and SCC have extensive experience securing funds for its projects from both private and public sectors, including the full range of multi-family financing programs at the federal, state, and local levels: e.g., LIHTC, bond financing, renewable energy financing, HOME, DHCD programs, and many others. Both organizations have been highly successful at securing competitive resources such as those identified above. Within the last ten years in Massachusetts alone, POAH has raised over \$225 million in federal tax credit equity and \$20 million in state tax credit equity, with over 2,000 units receiving financing and subsidy with DHCD in 20 separate transactions. More-over, POAH has a reputation and track record of identifying creative ways to finance transactions in a cost-effective way, minimizing the draw on the state and local subsidy funds.

Similarly, Gate Residential has a strong track record of securing the resources it needs for its projects: within the past five years, it has raised and invested over \$74M of private equity and over \$142M in construction debt. Gate Residential's equity partners have included AEW Capital Management, Quincy Mutual, and CrossHarbor Capital Partners. Construction lenders have included Santander, East Boston Savings Bank, and Cambridge Savings Bank.

## COMMUNITY ENGAGEMENT

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We strongly believe that redevelopment efforts are most effective when residents and community stakeholders are involved in the planning process from the very beginning, thereby becoming active participants in their neighborhood's transformation. We have put forward an initial vision for revitalizing Clarendon Hill, but will seek to engage community residents immediately upon designation in order to shape the most compelling, shared vision for the site. Initially, the team will engage in listening-oriented activities, in order to build trust, to learn how residents view the development's existing assets and challenges and what they envision for its future, and to use this input to shape the redevelopment plan.

Revitalizing Clarendon Hill within the parameters laid out in the SHA's RFP will require substantial increases in residential density at the edge of a highly built-out neighborhood in order to achieve economic viability. Increasing density on the site will no doubt raise questions and concerns amongst current residents and surrounding neighbors. Clear information sharing and ongoing dialogue with residents and community members will be key to ensuring that the project gains its development entitlements and is successful in the long run. Somerville Community Corporation is highly experienced in leading community outreach efforts of this kind to engage Somerville residents in planning for new development. SCC incorporates the following best practices into all its development-related outreach strategies:



- Engaging local stakeholders in a targeted fashion, including residents, businesses, neighborhood organizations, and municipal entities;
- Utilizing various different mediums (photos, documented stories, site plans, renderings) to share complex information;
- Ensuring that discussions about physical space involve grassroots participation and include discussion of social values, in order to achieve proposals that make sense to and are supported by the community;
- Training residents and community members to develop leadership skills, able to shape and execute effective community meetings;
- Helping community stakeholders to determine the neighborhood's priorities and needs;
- Diffusing neighborhood fears in connection with affordable housing through engagement and education;
- Building consensus among participants and working towards a collective vision.

The Clarendon Hill redevelopment is unique both in the large number of existing residents who currently live at the property and in the substantial increase in density that is envisioned. An effective and appropriate community engagement strategy will require a two-pronged approach that balances the needs of the SHA and its residents with the wishes and concerns of the surrounding neighborhood. SCC and the development team are committed to a collaborative effort with the SHA, using outreach and education strategies and actions such as:

- Utilizing SCC's on-staff Haitian Creole, Spanish and Portuguese language capabilities to ensure all development and relocation-related information is communicated to residents in the most accessible manner;
- Immediately upon designation, engaging the resident advisory board or tenant council and seeking its buy-in. SCC maintains strong relationships with the local legal services community which can help facilitate relationship-building between resident leaders and the development team;
- With the support of resident leaders, engaging in comprehensive outreach to residents to fully notify them of the planned redevelopment, engage them in planning and design charrettes, and lay the groundwork for a smooth relocation process;

- With the approval of the SHA, reaching out to all 216 Clarendon Hill families via comprehensive methods that might include door-knocking on site, working with tenant leaders to offer information sessions at which the SHA and development team can share information with the residents, and providing multi-lingual information sheets at tenant re-certifications and in the management office;
- Working closely with organizations that serve Somerville’s low-income residents (including many Clarendon households), many of which SCC already has close ties to, and ensuring that their clients who might be impacted by the redevelopment are fully engaged in the planning process. These organizations include Cambridge-Somerville Legal Services, Community Action Agency of Somerville, Somerville Homeless Coalition, and others;
- Conducting outreach to the West Somerville neighborhood surrounding Clarendon Hill through an extensive door-knocking campaign to notify neighbors of the project and discuss it with them, as well as offering a series of community meetings to solicit feedback about design and hear concerns from the local community;
- Working with Somerville’s public school administration to distribute flyers about Clarendon redevelopment-related community meetings to parents of school children living near Clarendon Hill.

All community outreach activities would be co-sponsored by the SHA and the development team, in coordination with key local officials including the Ward 7 Alderman.

Resident engagement will not end with the completion of the planning process, but will continue on through the construction period and beyond. The development team will facilitate ongoing resident participation by providing the representative residents’ organization with meeting space, so that residents can continue to be meaningfully engaged in the development’s ongoing operations.

As described earlier in this proposal, the members of the development team have experience utilizing substantial percentages of W/MBE and Section 3 firms and workers in their development activities. The team will work closely with the SHA to develop and meet specific M/WBE and local hiring goals for this project.



## LENDER/FUNDER INTEREST

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Please see attached letters of interest from potential lenders and funders in appendices.



# CONCEPTUAL DRAWINGS

Please see attachments for conceptual design drawings, including site plans, landscape plan, and concept images.



# SALES AND MANAGEMENT PLAN



## TARGET MARKET AND MARKETING STRATEGY

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POAH Communities has deep experience with outreach, marketing, tenant selection and lease-up across all income categories, and has a strong track record in compliance with all applicable fair housing and affirmative fair marketing requirements, as described below. POAH Communities will work collaboratively with both Somerville Community Corporation and the Somerville Housing Authority on outreach and tenant selection for any subsidized apartments that remain available post-revitalization after satisfying rehousing requirements for the existing Clarendon Hill residents.

For the unsubsidized, market-rate units in particular, Gate Residential's experience building, marketing, and leasing up Maxwell's Green and other similar properties will inform the team's marketing strategy, as described below:

**Target market.** The target market will consist of several groups: (1) young professionals working in the Boston/Cambridge area or along the Route 128 corridor, (2) families looking to remain in or relocate to Somerville, and (3) empty-nesters selling their homes in the Boston suburbs and seeking an urban and walkable neighborhood.

**Rationale for proposed unit mix.** The proposed market-rate unit mix consists of approximately 10% studios, 50% 1BRs, 10% 1BRs with a den, 25% 2BRs, and 5% 3BRs, ranging in size from 490 SF to 1,250 SF. The unit mix and sizing is based on Gate Residential's current and past experience designing and leasing similar projects in Somerville and other comparable near-urban communities. The unit mix seeks to maximize the capture rate for the target market.

**Rationale for proposed parking.** Garage parking will be provided at a ratio of approximately 1 parking space per dwelling unit, which is consistent with the parking utilization rates of similarly located projects and the demands of the target market.

**Rationale for proposed features/amenities.** As described earlier, shared amenities will total approximately 10,000 SF – 15,000 SF and will likely include multiple fitness concepts, outdoor pool and programmed deck, media and lounge spaces, collaborative work space, a bicycle repair facility, onsite car-share parking, electric vehicle charging stations, and an onsite dog care facility. Some of these amenities will be shared by respective building residents and some will be shared across the entire development. Unit finishes will be consistent with premier urban apartment communities.

**Rationale for projected rents.** As noted earlier, the project is currently underwritten with rents that are approximately 90% of the current achieved market rents at Maxwell's Green. The projected discount is largely due to the increased walking distance to the Red Line and Davis Square, when compared to Maxwell's Green.

**Marketing strategy and approach.** The initial marketing effort will be led by Gate Residential in conjunction with the building's management and marketing team. The marketing launch will begin roughly 9 months before construction completion and will consist of brand and collateral development, website development, and strategic media placement utilizing a public relations firm. Pre-leasing, including hardhat tours, will begin 3-4 months before the building's grand opening and will be led by a professional on-site marketing and leasing team, operating 7 days a week. Sample marketing materials for another Gate Residential project, West of Chestnut, are included in the attachments.

**Absorption.** Based on current and past experience, Gate Residential anticipates preleasing approximately 20% of the market-rate units and leasing the balance of the units to achieve stabilization within 12 months of construction completion. Absorption is projected at an average of approximately 17 leases per month.

## ONGOING PROPERTY MANAGEMENT

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Providing high-quality property management at the revitalized Clarendon Hill will be central to the success of the project. In order to achieve this, the POAH/Gate Residential/SCC team believes that a unified team approach should be taken, with one property management agent in place as lead to manage the site as a whole. We propose that this single entity be POAH Communities, POAH's property management subsidiary. As described in earlier sections, POAH Communities has a strong track record of managing a large and varied portfolio, including large, mixed-income properties similar to Clarendon Hill. POAH Communities will take care when hiring on-site staff for Clarendon Hill to select people with experience in mixed-income property management.

While we believe it is important to have one management agent coordinating the effort, POAH Communities is open to thinking creatively about ways to involve the SHA in the management of the public housing units, as well as ways to involve Gate Residential in the management of the market-rate units. With regard to the SHA, POAH would be willing to hire existing SHA staff for the site, for example, and/or contract elements of the work out to the SHA. With regard to the market-rate units, Gate Residential typically brings in a specialized and experienced third party to assist with marketing, leasing, and property management. POAH, SCC, and Gate Residential are committed to working together on identifying the right team of consultants and staff for Clarendon Hill, ensuring that work is carried out in a high-quality, unified and consistent manner.

**Overview.** As described earlier, POAH Communities has a strong track record, and currently manages a portfolio of close to 9,000 units of rental housing. POAH Communities' involvement in the Clarendon Hill project will start in the design and planning phases. Regional property managers and maintenance supervisors will attend construction meetings and begin to get familiar with the property before lease-up begins.

POAH Communities will hire an appropriate level of staffing for the proposed development, working out of an on-site office. Residents of Clarendon Hill will have access to property management staff 24 hours a day, 7 days a week, through POAH's on-call staffing plan. Additional staff will be brought in from neighboring properties and regional offices during lease-up, to ensure that this process goes smoothly.

POAH Communities will create a comprehensive management plan specifically for Clarendon Hill that is tailored to its unique features and is consistent with the SHA's practices and expectations, the management agreement, and all funder requirements. POAH has a solid starting place in an already existing standard management plan for LIHTC properties in Massachusetts (available upon request), but will tailor it to fit Clarendon Hill, in consultation with the SHA as well as SSC and Gate Residential. The management plan for Clarendon Hill will be clearly and simply written so that all central and site staff and others can easily understand the requirements. It will likely include the following sections, at a minimum: Staffing/ Personnel, Budgeting, Maintenance, Resident Satisfaction, Procurement and Contracting (including M/WBE and Section 3), Marketing and Leasing, Rent Collection, Eviction, Grievance Procedures, Eligibility and Waitlist, Financial Management, and Office Systems/Procedures. The POAH leasing and management team will work seamlessly to ensure that all buildings are managed and maintained with a high level of care and sensitivity to the mix of residents in each building and the site overall.

**Management Fundamentals.** In general, POAH Communities' achievement of excellence in property management at its developments is based on adherence to a few simple guiding principles:

- Provide extraordinary customer service day in and day out to residents and partners;
- Honor, respect and develop employees;
- Work with integrity, doing business "by the book" and to high ethical standards.
- Rent apartments; collect rent; maintain the asset; work to ensure the financial success of each property under management; predict and deliver net operating income; exceed the expectations of all.

POAH has developed a series of concrete operating standards to guide its property managers in their day-to-

day work. These include, for example: (1) maintain physical occupancy at all times of at least 98% for Section 8 properties and 95% for tax credit and market-rate properties; (2) meet or exceed budget projections, keeping revenue and expense line items within a 2% variance; (3) achieve third party inspection results of at least 90 (for REAC) and Above Average (for HUD Management and Operating Review); (4) maintain at least an 85% employee retention rate; (5) keep annual increases in total operating expenses at 2.5% or less; and (6) produce accurate and complete financial reports by the 15<sup>th</sup> of each month. POAH has built a strong property management track record, described in the earlier team member profile sections, by adhering to these property management fundamentals.

**Highlighted Strengths.** Beyond its strong foundation of property management basics, POAH's particular expertise in a number of areas will benefit the Clarendon Hill project:

- *Technological expertise:* POAH Communities is a sophisticated user of Yardi software and applications, and its Kansas City operations center works on an essentially paperless basis. POAH constantly evaluates new technologies to improve customer service, marketing/leasing, budget management, compliance, and performance analysis/reporting. POAH can handle on-line rent payment via "Rent Café;" and it manages work orders on-line as well, with maintenance staff carrying tablets to record and track their work.
- *"Green" operating procedures:* As described in the team member profile section earlier, sustainability is at the core of POAH's work, and it is creative in building "green" features and operating procedures into its property management work that result in the wise use of energy and other natural resources.
- *Relocation expertise:* While POAH understands that the SHA would like to coordinate the relocation process for the Clarendon Hill project, POAH's experience with successfully managing relocation for large, complex, urban sites like Woodlawn in Chicago and Temple Landing in New Bedford will provide the SHA and Clarendon Hill residents with another capable partner in this effort.
- *Lease-up experience:* POAH Communities has overseen the lease-up of numerous properties and is experienced in managing properties from construction through stabilized occupancy. POAH Communities staff becomes involved in POAH projects during the design phase, guiding design decisions in ways that enhance the end product and lead to better performance. POAH is creative in its marketing and outreach, in some cases utilizing on-line advertising, brokers, as well as outreach to local employers.
- *Clear understanding of fair housing requirements:* POAH employees are well-versed in fair housing laws and requirements, and have clear guidelines in place to ensure tenant selection is handled fairly and appropriately. All of POAH's projects involve public subsidies that necessitate careful adherence to affirmative fair marketing and fair housing requirements, and POAH staff are extremely practiced in this area.
- *Resident engagement:* As described earlier in its profile section, POAH believes that well-managed housing can empower residents and serve as a platform for their success in a range of areas such as health, education, finances, and employment. At Clarendon Hill, POAH would work with residents to access needed services and supports, would collaborate with local service-providers, and would help residents to achieve measurable progress towards their own goals.

**Resident Services.** At all its sites, POAH Communities works to build and maintain relationships with an integrated network of proven local and regional support service providers. A key ally in the delivery of services to residents of Clarendon Hill will be POAH's development partner SCC, which has an over 40 year history working with low-income communities in Somerville. SCC has long maintained productive working relationships with other agencies that support Somerville's low-income residents, which will ensure a full suite of services made available at Clarendon Hill.

- **Community Action Agency of Somerville (CAAS):** As Somerville's legally-designated anti-poverty agency, CAAS works to reduce poverty among local families and individuals. CAAS has a long-standing presence in the West Somerville neighborhood, including running a longtime Head Start program at Clarendon Hill. The development plans proposed by the POAH/Gate Residential/SCC team include a possible classroom space for the CAAS Head Start program, which could be used for additional programming to support anti-poverty initiatives for older children and adult residents at Clarendon Hill. CAAS Executive Director David Gibbs has provided a letter of support for this development team's

proposal.

- **Haitian Coalition:** Since the 1990s, the Haitian Coalition has been a critical support for Somerville's considerable Haitian community. SCC maintains a strong working relationship with the Haitian Coalition, and the two organizations have recently partnered to provide immigration and job readiness classes to residents of Clarendon Hill and surrounding communities. Our proposal for the redevelopment of Clarendon Hill contemplates a revitalized space for the Haitian Coalition.

In addition to working with and expanding the role of these two organizations at a redeveloped Clarendon Hill, POAH Communities and SCC will leverage SCC's existing relationships with the following organizations to supplement and expand the services available to the public housing residents:

- **The Welcome Project:** Located at SHA's Mystic public housing development, The Welcome Project is another key organization providing services, leadership development, and civic engagement opportunities for Somerville's immigrant community. The POAH/SCC team would explore an expanded role for The Welcome Project to supplement services not provided by or not feasible for the Haitian Coalition.
- **Somerville Homeless Coalition (SHC):** As one of SCC's partners in working to help homeless and near-homeless individuals and families obtain and maintain affordable housing in Somerville, the Somerville Homeless Coalition is a key supportive service provider for low- and very low-income people in Somerville. SCC would leverage their decades-long relationship with the SHC to ensure any Clarendon Hill families that face unexpected hardships are aware of and have direct access to SHC's services.
- **Cambridge-Somerville Legal Services (CSLS):** The local affiliate of Greater Boston Legal Services, CSLS provides free legal assistance to low-income individuals and families in the areas of domestic violence, housing/homelessness, public benefits, immigration and more. CSLS and SCC have worked together for years as advocates for low-income tenants in Somerville, and at Clarendon Hill the POAH-SCC team would ensure CSLS services are available to all public housing residents as needed.



As a local Somerville service provider itself, SCC manages a unique career counseling program for Somerville residents called First Source, in partnership with the City of Somerville and The Career Place. Although the program is available to all Somerville residents, employees, and students, SCC would seek to expand this program with a special focus on Clarendon Hill public housing residents and by making the service available on-site. First Source services include soft-skill workshops, interview preparation, resume and cover letter writing, job search and application assistance, case management and referrals to social service and education/training programs. SCC's First Source

Program collaborates with the following agencies in different capacities which include referrals, recruitment, training and education programs: Somerville Housing Authority, Somerville Family Learning Collaborative, Somerville High School, City of Somerville, The Career Place, The Metro North Regional Employment Board, Teen Empowerment, Parenting Journeys, CAAS, Cambridge Office of Workforce Development, Immigrant Service Provider Group and more. SCC's First Source staff also works with local employers to help identify and refer qualified candidates to job openings.

The POAH team, SCC and its partners expect to form strong relationships with the existing Clarendon Hill residents during the planning stages, which will be sustained long beyond the completion of construction. The site's redevelopment is more than just bricks and mortar -- it is the creation of a new community, and the development team is fully prepared and equipped to be a partner with and a resource to that community.

# IMPLEMENTATION PLAN AND TIMETABLE



Following is the proposed project implementation timetable, including key project milestones, benchmarks, required approvals, and other timeframes:

Milestone	Quarters
Somerville Housing Authority designates developer- MOU executed	Spring 2016
DHCD Predevelopment Grant Submitted- State Aided Mixed Income	Summer 2016
DHCD Predevelopment Grant Award – State Aided Mixed Income	
Commence Community Engagement	Fall 2016
Commence Predevelopment activities	
Execute Development Agreement with SHA	
Submit Funding Applications to State/City for <b>Building C</b>	
Commence Zoning Approval Hearings for entire site	Winter 2017
Begin Relocation Planning and Education	
LIHTC Allocation from State for <b>Building C</b>	Spring 2017
Submit funding Applications for <b>Building D</b>	
Zoning approval received for entire site	
Permits issued for <b>Buildings A &amp; B</b>	
Residents impacted by construction of buildings <b>A &amp; B temp.</b> relocated	Summer 2017
Commence Construction of <b>Buildings A &amp; B</b>	
LIHTC Allocation from State for Building D	
All debt and equity financing assembled for <b>Building C</b>	Fall 2017
All residents impacted by construction of Building C relocated	
Commence Construction of <b>Building C</b>	Spring 2018
All financing assembled for <b>Building D</b>	
All residents impacted by Construction of Building D relocated	
Commence Construction of Building D	Summer 2018
50% Construction of <b>Building C</b>	
50% Construction Complete <b>Buildings A &amp; B</b>	Winter 2019
Construction completed <b>Buildings A &amp; B</b>	Spring 2019
Leasing of <b>Buildings A &amp; B</b>	
50% Construction of <b>Building D</b>	
Complete Construction of <b>Building C</b>	Summer 2019
Leasing of <b>Building C</b>	
Complete Construction of <b>Building D</b>	Fall 2019
Leasing of <b>Building D</b>	Spring 2020



## IMPLEMENTATION PLAN AND TIMETABLE

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For context, the project site is currently zoned Residence B, which is a zone that is separate and distinct from the prevailing zoning in the surrounding neighborhood, which is Residence A. Under the currently proposed city-wide rezoning, the project site would be zoned Urban Residence, which would be a zone that is separate and distinct from the prevailing zoning in the surrounding neighborhood, which would be Neighborhood Residence. Therefore, although the current zoning and the proposed rezoning do not support the proposed development program at this time, they do both acknowledge that the project site is appropriately considered separately and distinctly from the surrounding neighborhood, presumably due to a combination of its existing uses, its unusual site topography and its location at the edge of the neighborhood.

The development team therefore proposes to establish dimensional, use and other criteria which address this particular site, and reflect the particular proposed development program, by either: (a) a comprehensive permit (a so-called “friendly 40B”) for the project site, or (b) an alternative rezoning of the project site, that accommodates the proposed development program. Upon designation as the successful proponent, the development team would immediately engage with the Office of Strategic Planning and Community Development in crafting a permitting strategy that they believe is most appropriate, balancing the goal of proceeding promptly with construction with the goal of providing a genuine opportunity for community input and engagement. The preferred approach, however, will involve a single action (whether comprehensive permit or rezoning) that fully addresses all of the requirements of the proposed development program, with the goal of achieving that milestone within six to nine months after designation. The development team is ready and able to develop the plans, analyses and other materials needed for such a focused effort, and to spend the time and effort needed for a genuine process of community input and engagement within that timeframe.