



The Residences At Cottage Hill

TRINITY
FINANCIAL

Response to the Town of Medfield's Request for
Proposals for the Redevelopment of the Former
Medfield State Hospital

Submitted by Trinity Acquisitions LLC
August 2, 2021

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TRINITY FINANCIAL

August 2, 2021

Nicholas Milano
Assistant Town Administrator
Board of Selectmen
Town House, 2nd Floor
459 Main Street
Medfield, Massachusetts 02052

Dear Mr. Milano,

Trinity Acquisitions LLC (Trinity) is pleased to submit this response to the Town of Medfield's Request for Proposals for the Redevelopment of the Former Medfield State Hospital. Our proposed development, preliminarily called The Residences at Cottage Hill, proposes the certified historic rehabilitation of 33 buildings into 334 rental apartment homes, of which 25% are affordable, in order to restore a sense of magnificence to the site and preserve its significance to the Town.

Trinity recognizes the significance surrounding the development of the historic campus and the importance of the property to the community of Medfield. Restoring the buildings and revitalizing the grounds will bring new light and life to the area, and the opportunity to add to the vitality and allure of the Town. With this development, the Town will not only benefit financially from an influx of new residents but will also benefit from the creation of the Cultural Arts Center, enhancing the arts and harnessing the creative community.

Trinity also understands that this project is inherently complex. Notably, there are two significant challenges that will require creativity and collaboration between the development team and the Town in order for the project to be successful.

First, the site's proximity to the neighboring firing range presents a substantial impediment for the marketing of the property, not only to potential residents but also to the project's institutional investors. Our concern was verified after Trinity completed a comprehensive monitoring study with acoustical engineering firm, Acentech. In summary, the presence of the startling and loud sounds of the firing range, present an acoustic condition that is significantly more intrusive, unnerving and psychologically disturbing than typical noise sources such as aircraft and traffic. In order to successfully advance the development, the Town will need to implement appropriate sound mitigation to enable the marketability and financial feasibility of the project. Please see Appendix C of the proposal for the detailed study.

Additionally, the historic buildings, while architecturally and aesthetically appealing, inherently present an obstacle. With the existing floorplates, the project necessitates the buildout of larger,

inefficient units. The scattered nature of the expansive property will require carefully coordinated construction mobilization and management. Additionally, in a real estate climate marked by rapidly increasing construction costs, the complicated rehabilitation will be priced at a premium that challenges the financial returns required by an investor. These financial realities will require a development team that is adept at leveraging public and private sources of financing. The ability of a developer to permit, finance, build and lease the project in an efficient, timely manner will be crucial to the success of the development.

Trinity has assembled a development team of highly experienced and motivated firms and individuals that will work with the Town to achieve the highest and best use of the property, while respecting the historical context of the surrounding district. Trinity's team has worked together in multiple projects across New England. In Lowell, our historic revitalization of the first phase of the Hamilton Canal District created a signature new neighborhood with critical infrastructure and complicated financial structure. In Lawrence, our restoration and renovation of the historic mills has achieved the highest quality of design while respecting the unique historic character of the building and immediate area. Like Medfield State Hospital, those projects not only required developing creative financing strategies, but also required the ability to work closely and effectively with government agencies, elected officials and community groups.

Trinity's proposal illustrates a creative and thoughtful design concept, a pro forma that reflects the intricacies and realities of this particular site and a development team that embraces the challenges of the entire development process. Trinity is confident we have created a proposal that not only honors the Medfield State Hospital's dynamic past, but also launches its exciting future.

Finally, Trinity has a well-deserved reputation for being flexible, for being honest, for being loyal, for having a sense of humor, and we never, ever quit. Your thoughtful consideration of this team and proposal will be very much appreciated.

Sincerely,

A handwritten signature in black ink, appearing to read 'Abby Goldenfarb', written in a cursive style.

Abby Goldenfarb
Vice President

TRINITY FINANCIAL

DATE: August 2, 2021


RE: Letter of Transmittal

FROM: Abby Goldenfarb
Trinity Acquisitions LLC
c/o Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110

TO: SEALED PROPOSAL
Medfield State Hospital Development Proposal
Board of Selectmen
Town House, 2nd Floor
459 Main Street
Medfield, MA 02052
Attn: Nicholas Milano, Assistant Town Administrator

DO NOT OPEN UNTIL AFTER 11:00 AM on MONDAY, AUGUST 2, 2021

Dear Mr. Milano,
On behalf of Trinity Acquisitions LLC, please find attached the submission to the Town of Medfield's Request for Proposal for the Redevelopment of the former Medfield State Hospital. Please accept this transmittal as acknowledgement that Trinity Acquisitions LLC has received all Addenda.


Rebecca Hemenway, *authorized signatory*

SELECTION CRITERIA ANALYSIS: GENERAL REQUIREMENTS

The Trinity submission contains all required relevant documentation as listed in the RFP. The following guide demonstrates Trinity's responsiveness and qualifications toward the Selection Criteria of this RFP as detailed in Section 4-2: General Requirements.

A. Submission Conformance. Conformance with *all* submission requirements as outlined in this RFP, including all required forms and certificates. This includes organizing the proposal in accordance with the submission requirements outlined in Section 3-5.

Trinity's submission is in conformance with all submission requirements as outlined in this RFP, including all required forms and certificates. It is in conformance with all submission requirements outlined in Section 3-5.

B. Financial Feasibility. The financial feasibility of the development proposed, must be demonstrated in a comprehensive financial plan (as included in Section 3-5, subsection E), which includes at a minimum:

- Underwriting financing assumptions;
- Hard and soft cost development budgets;
- Operating budgets; and
- Summary of overall sources and uses.

Trinity has prepared and included a feasible financial plan, demonstrated by underwriting assumptions, hard and soft cost development budgets, operating budgets, and a summary of overall sources and uses, in the proposal.

C. Public Access. Public access must be maintained for continued use including, at a minimum, recreation and public-use access through the Disposition Property, to roadways from Hospital Road, and to open spaces adjoining the MSH property including those providing access to the Charles River. Address the requirement for the permanent pedestrian Connector Access Easement.

Public Access, addressed in the Trinity plan, will be maintained through infrastructure improvement, community event programming, and appropriate Campus property management. We are excited to discuss with the Town how this will take shape and benefit all residents especially once the historic rehabilitation of the Campus is complete.

D. Recognition of Existing and Continuing Obligations. Proposals must directly confirm willingness to accept existing and continuing obligations associated with the Disposition Property and address how the proposed development will recognize and incorporate these into the proposal. These include but are not limited to the DCAMM LDA, the MOA with the Massachusetts Historical Commission, the MEPA Agreement, 2010 EENF and resulting 2010 MEPA Certificate, and the long-term lease to CAM for the proposed Arts Center. This requirement applies to all submissions, including proposals to acquire only a portion of the Disposition Property.

Trinity acknowledges and accepts all existing and continuing obligations associated with the Disposition Property; the proposal describes how we will approach, recognize, and incorporate these obligations into the proposal.

E. Ability to Proceed upon Award. Proposers must demonstrate an ability to commence work within 12 months of selection, including evidence of sufficient staff and capital resources required to perform the work. Proposers must provide a schedule including start-date, significant milestones, and completion dates for the redevelopment.

Trinity can and will proceed with development work upon designation as developer. The proposal outlines a detailed permitting and financing schedule, five (5) Trinity personnel and consultants assigned to perform the work, and sufficient financial capacity to develop and complete the project.

F. Ground Lease Proposals. If a ground lease is proposed, the term assumed must be disclosed in the proposal submission. MSHDC anticipates a term of 99 years based on industry standards although a shorter term may be proposed.

Trinity is proposing an outright acquisition of the property for \$2 million.

SELECTION CRITERIA ANALYSIS: COMPETITIVE EVALUATION CRITERIA

The Trinity submission contains all required relevant documentation as listed in the RFP. The following guide demonstrates Trinity's responsiveness and qualifications toward the Selection Criteria of this RFP as detailed in Section 4-3: Competitive Evaluation Criteria

A. Community Impacts/Benefits. Proposals will be evaluated for impacts on the Town, Town services, and current residents with respect to costs, uses, density, traffic, noise, aesthetic effect, and other considerations.

- 1. Fiscal benefits. Proposals that successfully enhance and diversify Town tax revenues net of any Town costs will be received most favorably. Proposals should estimate potential tax revenues to the Town based on proposed residential, commercial, and other development as well as anticipated municipal expenditures required (snow removal, public safety, public services, increase in school age children, water/sewer capacity, etc.) to service the site. While discouraged, proposals must indicate whether any real estate tax agreements or financing mechanisms requiring additional negotiation with the Town are proposed (for example, Abatement or District Improvement Financing).**

Trinity's proposal estimates tax proceeds, net of expenditures from the Town, of \$716,000 annually. Section M: Community Benefits and Impacts and Appendix A: Fougere Planning and Development Fiscal Analysis discuss this calculation in more detail.

- 2. Town Obligations and Liabilities During and Following Redevelopment. Proposers may submit a proposal for all or part of the Disposition Property. The Town strongly prefers Master Developer, Joint Venture/teaming, or similar comprehensive proposals that will result in the near-term or phased transfer of the entire Disposition**

Property and consequent elimination of ongoing Town maintenance expenses and potential liabilities related to retained portions of the site. Proposals that address only a portion of the Disposition Property should discuss how ongoing Town expenses and liabilities associated with the entire site can be addressed in conjunction with the proposed limited disposition and development.

It is anticipated that the Designated Developer of the Medfield State Hospital be a to-be-formed Delaware or Massachusetts limited partnership that is comprised of an affiliate of Trinity Financial, Inc. In order to execute the predevelopment activities for the redevelopment, the working capital will be provided by Trinity Financial, Inc.

- 3. Estimated impacts on the local public school system. Based on the housing program proposed, respondents shall provide an estimate of the number of school-aged children that are anticipated to reside at the development and an assessment of the capacity of the existing Medfield Public Schools to accommodate additional students.**

Trinity, with its consultant Mark Fougere, has determined that the proposed development will generate few school aged children whose impact on the local public school system will be minimal and offset by the benefits generated from the project. Included in the Appendix A: Fougere Planning and Development Fiscal Analysis is a detailed assessment.

- 4. Impacts on local traffic. Respondents must include an initial analysis of the proposal's impact on local traffic, including estimated vehicle counts, on-site traffic management/mitigation strategies, and accommodation for public traffic access. Proposals that limit impact and outline a clear plan to manage that impact will be rated more highly. The Designated Developer will be required to provide a full third-party engineering analysis as a condition of the Developer LDA and mitigation measures may be required depending on the impact estimated.**

Initial analysis of the proposed project's traffic impact is included in Trinity's proposal. The residential only program that we offer produces a significantly lower traffic generation compared to other uses. Trinity, working with its consultant VHB will also create a Transportation Demand Management Plan that will focus on use of alternative modes of transportation and providing strong bicycle and pedestrian connections on site and to the surrounding area.

- 5. Provisions for parking. Proposals must indicate how parking will be organized and utilized appropriate to support the scope and mix of the development proposed, and to accommodate shared parking including for the site's recreational and cultural uses.**

Our plan incorporates small lots throughout the Campus, targeted to match parking count with adjacent building unit count. Building entries will continue to match current locations to minimize impact; in some cases, we may incorporate additional entries directly into units off the porch structures. We have also incorporated the larger lot as designed by the Cultural Arts Center.

6. **Additional Community Benefits.** In accordance with Section 3-5 paragraph M, submissions should specify additional Community Benefits, if any, associated with the development proposal.

Trinity's proposal includes a Community Benefits plan that addresses all additional benefits that will be generated by the proposed development.

7. **Total Consideration.** Proposals are to clearly specify the Total Consideration to be granted for the Disposition Property or the portion of the Disposition Property that is the subject of the proposal. Total Consideration consists of a cash purchase price, proposed ground lease rent and terms, and Community Benefits, each as applicable.

Total Consideration within the Trinity plan amounts to approximately \$4 million, inclusive of acquisition payment, contributions to the development of the Cultural Arts Center, contributions to artist programming on Campus, contributions to the Town of Medfield for consultants retained for the redevelopment project, and net tax proceeds paid to the Town by the redeveloped Campus.

B. Vision/Consistency with Disposition Intent. The Disposition Intent expressed in Section 1-2 is a product of many years of planning and community engagement in Medfield. While all proposals meeting the threshold criteria in Section 4-2 of this RFP will be considered, it is expected that the proposer's vision for the site and proposed Development plan will be generally consistent with the Disposition Intent including the considerations below.

1. **Proposal's recognition of the general redevelopment aspirations.** The Town acquired the Disposition Property in 2014 and since that time completed an extensive Master Planning process and rezoning of the Property toward achievement of certain goals expressed in the Disposition Intent. However, departures from and/or enhancements to the 2018 Master Plan concepts or current zoning requirements are permissible if they advance feasibility for the Town and the developer and are consistent with the stated Disposition Intent.

Trinity's plan, as discussed in detail in Section B: Disposition, addresses the goals in the following ways:

Goal 1: Successfully repurposes MSH to support overall Town needs and interests

Trinity's proposed redevelopment of the MSH Campus thoughtfully infuses new life into the historic buildings and restores them to their grandeur. Honoring the site's historic and architectural significance, our proposed revitalization takes its direction from the existing landscape and maintains public access to the new Cottage Hill neighborhood, with its verdant surroundings, open space and vistas. We honor the desire of the Town to introduce a cultural component to the property, by incorporating a segment of the housing program with a preference for artists. We introduce new principals of sustainability to the development, ensuring that the redevelopment is in alignment with and contributing to the Commonwealth's climate and carbon neutrality goals.

Goal 2: Address Town housing needs including the need for senior housing, mixed income housing, and other residential options such as nursing and memory care, special needs housing and artist live/work housing

Trinity's proposed redevelopment of the historic site proposes to restore the historic buildings of the Core Campus and Arboretum, creating 334 new homes for Medfield targeting a mix of income levels. With 25% of these homes as affordable apartments in historic structures, our plan provides alternatives to Medfield's larger single-family home supply and will be an attractive option for renters and those who are downsizing.

Goal 3: Attain reasonable and desirable economic financial and non-financial impacts on Medfield residents and Town services

The Trinity proposal provides a number of financial and non-financial impacts on Medfield residents and Town services.

First, the proposal provides a number of financial benefits to the Town of Medfield:

- A purchase price of \$2M for the proposed development site, 50% to be paid to the Town of Medfield at the closing
- A payment of \$1M towards the CAM's Cultural Arts Center;
- Development assistance and construction oversight for the CAM's Cultural Arts Center;
- The assumption of landscape and maintenance costs for the Hospital District site

The proposal calls for a number on non-financial benefits to the Town of Medfield:

- A development team with experience in large scale redevelopment and complicated historic preservation projects ensures that the development process will be thoughtfully executed;
- A plan that maintains the site as a neighborhood of Medfield; as opposed to a restricted community;
- A purposeful plan that incorporates attractive open space that is accessible and inviting to residents of Medfield;
- The restoration of an historic assets to the Town of Medfield and the Commonwealth, with a celebration of their history of wellness; and
- A development proposal that fits within the parameters of the Master Plan.

Goal 4: Maintain and enhance the character and values of the Town of Medfield and its residents

By intentionally focusing on the restoration of the existing buildings, the Trinity plan enhances the character of the Town and retains the focus on the property's existing character. Residents of Medfield remain able to soak in the rejuvenating benefits of the property and will be able to take advantage of new opportunities for community building on site. Trinity's focus on residential development in combination with the arts and open space, allows downtown Medfield to retain its vibrancy and dynamic commercial atmosphere.

2. **Historic Preservation.** Proposers should review the Medfield State Hospital Historic Resources Existing Conditions Memorandum compiled by Epsilon Associates in July 2014 (Appendix C-1) and the 2003 Medfield State Hospital Re-Use Study by

Lozano, Baskin, and Associates, Inc. (Appendix C-2). Redevelopment is subject to a MOA among the Town of Medfield, DCAMM, and the Massachusetts Historical Commission (Appendix D-1) concerning historic preservation/rehabilitation and any proposed new construction. The Disposition Property is located within the Medfield Hospital Farm Historic District and accordingly the Medfield Historic District Commission's *Guidelines for Changes within Medfield Local Historic Districts* (Appendix D-2) applies to proposed changes to historic structures and proposed new construction. Proposals that include preservation and rehabilitation of the historic buildings or proposed new construction should specifically refer to applicable requirements. Rehabilitation of buildings that contribute to the historic nature of the core property may qualify for State and/or Federal Rehabilitation Tax Credits. Proposers should also consult the Massachusetts Historical Commission's website <https://www.sec.state.ma.us/mhc/mhctax/taxidx.htm> and the National Park Service website: <https://www.nps.gov/tps/taxincentives.htm> for additional information on the State and Federal Historic Rehabilitation Tax Credit Programs. Per Section III of the V of the MOA, an archaeological survey may be required with respect to proposed new construction prior to the commencement of any ground disturbing activities. Section V stipulates that prior to substantial new construction, demolition of any contributing buildings, structures or objects, or other major change, the Town shall require that the buildings, structures and objects on that part of the site be documented by photographs and narratives in accordance with a "Recordation Plan". This is to be provided at the developer's sole expense. Proposers are advised to include an architect or historic sub-consultant with expertise in the preservation and adaptive reuse of historic buildings. While not required, proposers should consider the following principles in their Development Plan:

- Preservation of the character-defining features of the contributing buildings, structures, and landscapes is encouraged where feasible.
- If it is determined that it is not feasible to preserve all of the character-defining features of the contributing buildings, structures, and landscape features of the Disposition Property, preservation of the character-defining features should be examined and is encouraged where feasible. Any proposed alteration of the existing buildings including proposed demolition and new construction is subject to applicable reviews and permits including but not limited to those required by the Town of Medfield, the Medfield Historic District Commission, the Medfield Historical Commission, and the Massachusetts Historical Commission.
- Rehabilitation of the buildings should be consistent with recommended approaches in the Secretary of the Interior's Standards for Rehabilitation of Historic Properties (Standards) incorporated herein by reference, and
- Use of the Massachusetts Historic Rehabilitation Tax Credit.

Trinity has reviewed the Medfield State Hospital Historic Resources Existing Conditions Memorandum and 2003 Medfield State Hospital Re-Use Study in Appendix C-2 of the RFP. Trinity's plan, as described in the proposal seeks to substantially rehabilitate and preserve all 33 buildings on site, consistent with the Secretary of the Interior's Standards for Rehabilitation of Historic Properties. Our plans include utilization of federal and state historic tax credit resources in

the financing structure, as well as a permitting process and schedule that includes participation with the Town of Medfield, Medfield Historic District Commission, the Medfield Historical Commission and the Massachusetts Historical Commission.

3. Incorporation of Proposed Cultural Arts Center. Proposals are to be expressly consistent with the executed CAM lease and proposed development of the Cultural Arts Center. The extent to which the developer's proposal provides for complementary site improvements and easements, co-development opportunities, post-construction programming support, and/or shared use of portions of the redeveloped Disposition Property will be considered.

Trinity anticipates a close working relationship with the proposed Cultural Arts Center of Medfield. We are a firm that uniquely recognizes the importance of robust arts programming in communities and the need for affordable housing to support artists and allow them to flourish and thrive. If designated, we are looking forward to working collaboratively with them.

4. Environmental Impact, Sustainable Development Principles, and Conservation of Resources. As a minimum, proposals must meet the Sustainable Development Principles expressed in Exhibit D of the 2014 DCAMM LDA and any continuing and new MEPA sustainability requirements for the site such as analysis and mitigation of greenhouse gas emissions and other environmental impacts. Proposals that incorporate a comprehensive approach to energy efficiency, carbon emissions reduction, and water use reduction including but not limited to on-site energy generation, district energy, high performance building standards, and landscape preservation are strongly encouraged. For all proposals that exceed the minimum MEPA sustainability requirements, a statement of the financial impact or amenity tradeoffs required to achieve enhanced sustainability and performance is to be included in the proposal response.

Incorporated in Section A: Development Intent of the proposal is Trinity's approach utilizing sustainable development principles, environmental impact, and conservation of resources, as expressed in Exhibit D of the 2014 DCAMM LDA. Our plan incorporates a strategy to address energy efficiency, carbon emissions reduction, and water use as well as high energy performance building standards and landscape preservation.

5. Housing Density/Mix of Uses. Proposals should reflect economic feasibility and need not adhere to a specific mix or percentage of uses. With respect to residential development, proposals must specify the types and amount of housing (number and units) proposed to be developed on the Disposition Property or portion thereof. As applicable, provide unit count and density details regarding housing for:

- Seniors
- Mixed-Income or Affordable Housing
- Nursing or Memory Care
- Single occupancy housing/studios
- Young professionals
- Artist Live/Work
- Group Home or other special needs housing

The Trinity plan will produce 334 units of mixed-income, multi-family housing specified in the following in the following way: 249 unrestricted units and 85 units at 80% of Area Median Income in studio through 3-bedroom units.

The extent to which the proposal incorporates non-residential commercial development and various other uses such as those listed below will be considered in pursuit of activating a vibrant town-center impression and the creation of new amenities for property and area residents. These should be fully described in the proposal.

- Commercial office space including shared office/co-working
- Retail spaces including café, restaurant or other “neighborhood
- retail”
- Senior services and activities on-site
- Event/facility spaces for cultural and other uses
- Daycare or educational uses

6. **Public Access.** Public access is a threshold criterion described in Section 4-2. Beyond that, proposals welcoming and offering meaningful continued use of the site by Medfield residents and maximizing access and enjoyment of open spaces such as the North Field and the Green will be received most favorably.

Trinity’s Public Access plan aims to create a welcoming and meaningful experience for Medfield residents to enjoy once redevelopment finishes. Our plan incorporates several ideas around improved infrastructure, community event planning, and proper Campus property management to make this possible. We are excited to discuss this plan, if designated, with Town staff and Medfield residents to make it most impactful for all.

C. Development Team. Proposals will be evaluated for quality, strength, and experience of the development team and the individuals and organizations anticipated to be involved in the redevelopment. If a proposal is a joint venture or partnership among multiple development entities, clearly describe the roles and responsibilities for each organization and identify all principals and parties having a financial interest in the proposed redevelopment. Qualifications of additional participants such as the proposed architect, general contractor, developer construction manager, property manager, legal counsel, and major consultants will be reviewed and considered.

1. **Strength of the Developer.** Demonstrated successful experience on large, mixed-use projects and public-sponsored developments will be highly valued. Proponents should provide examples of relevant project experiences and provide a brief narrative describing how the examples are similar to and/or different from the proposal submitted in response to this RFP.

Since its incorporation in 1987, Trinity Financial, Inc. has completed thoughtful and catalytic housing communities throughout the Commonwealth of Massachusetts. During its existence, Trinity has

created transformative projects in places such as Boston, Lowell, Brockton, Worcester, New Bedford, and Taunton. The company has built new construction projects and substantially rehabilitated historic structures in both single phase and multi-phase approaches. Successfully completed developments stretch the range of affordability: low-income, mid-income, workforce, mixed-income, and market rate. This has all been done with the intentional collaboration and partnership of residents, local organizations, municipal and state leaders and agencies, and additional stakeholders. Trinity will lean on its track record, existing relationships, and skill set while developing new connections and competencies to ensure the successful completion and operation of the Medfield State Hospital Campus.

2. Developer's Ability to Finance. Demonstrated financial feasibility is a threshold criterion described in Section 4-2. Documentation that the proposer has the necessary funds through its own balance sheet or alternatively has a reasonable likelihood of financing available to complete the acquisition and proposed redevelopment (such as Letters of Interest from reputable debt and equity sources) will be carefully reviewed.

Since its incorporation in 1987, Trinity Financial, Inc. has developed complex real estate transactions of over \$3.3 Billion and has always demonstrated the ability to commit sufficient financial and organizational resources to successfully complete the projects. The company is able to fund all necessary pre-development expenses, engage and fund all third-party consultants and provide any and all guarantees that may be required. Trinity maintains excellent relationships with financial institutions and syndicators such as Redstone Equity Partners, Goldman Sachs, JPMorgan Chase, Citibank, Richman's RHR Funding Group, TD Bank, Bank of America, MetLife, MassMutual, Bank of New York Mellon, RBC, Alliant, AEGON and Enterprise. Additionally, Trinity has deep familiarity and existing relationships with municipal and state agencies such as DCAMM, DHCD, MassHousing, MassDevelopment, among others that have allowed the company to finance and contemplate numerous mixed-income, service-rich developments throughout Massachusetts.

3. Project Staffing, Team Capacity and Ability to Perform. Individuals on the development team to be assigned to the proposed MSH redevelopment effort are to be clearly identified. Demonstrated experience, ability, and capacity to complete critical tasks (timely due diligence, permitting process, etc.), maintain proposed development schedules, and execute complex redevelopment activities will be evaluated.

Trinity has thoughtfully comprised a development team that includes extensive WBE and MBE participation. Trinity has identified all the appropriate disciplines required to execute a successful redevelopment plan. These team members reflect both long term relationships and are teams with whom Trinity has worked for decades, but also new relationships with firms such as Klopfer Martin (WBE).

D. Design Guidelines and Zoning. The Town adopted the 2019 Zoning Amendment to enable redevelopment of the Disposition Property and define general standards for that redevelopment. The effort was the culmination of an extensive public process over many years and indicates strong community support for the redevelopment of MSH consistent with the principles set forth in the Zoning Amendment and its Design Guidelines. Proposals will be evaluated for consistency with these requirements and any proposed deviations and/or requests for variances, special permits, or rezoning.

1. Design Guidelines. Design Guidelines are outlined in Section 13 of the 2019 Medfield State Hospital District Zoning Amendment (Appendix H) and broadly include:

- Campus Setting
- Historic Preservation
- Building Design and Massing
- Preference for Building Preservation/Rehabilitation over Demolition
- of Existing Buildings
- Architectural Material Choices
- Infrastructure
- Access and Parking
- Landscape

Trinity's design for the redevelopment of the former Medfield State Hospital Campus follows the design guidelines outlined in Section 13 of the 2019 Medfield State Hospital District Zoning Amendment (Appendix H). Our plan directly addresses Campus setting, historic preservation and preference rehabilitation of existing structures, building design and massing, architectural material choices, infrastructure, access and parking, and landscape. Specifics about these areas can be found in Section A: Development Intent and Section K: Infrastructure Plan.

2. Permitted Uses (Existing Zoning). Permitted uses under the existing MSHD zoning are outlined in Section 300-20.5. See <https://www.ecode360.com/36315504>.

All uses contained with the Trinity plan are permitted under the existing MSHC zoning.

DEVELOPMENT PLAN NARRATIVE.

1. Include a written narrative describing the Development Plan in adequate detail so as to represent the developer's vision for the project proposed. If only a portion of the Disposition Property is proposed for acquisition, describe how the proposal would leave open the possibility for future development on the remainder of the site. A conceptual site plan, schematic elevations and typical floor plans must accompany the proposal narrative.

Perched high at the northwest corner of Medfield, overlooking the Charles River and nestled amidst a bucolic landscape of trees and walking trails, sit the majestic buildings of the former Medfield State Hospital Campus. The redevelopment of the Campus is a significant and important undertaking, breathing new life into buildings that have sat dormant for many years, and reimagining the site as a destination for health, wellness and creativity.

At the end of the 19th century, the Medfield State Hospital's historic layout represented an innovative approach to mental and physical health. With an emphasis on rehabilitation and recovery, the design enabled patients to live in a light and airy home-like setting as opposed to a single central building. Today, in a post-pandemic environment, the attractiveness of the cottage plan, with its village green and wide open spaces, provided the inspiration for our reimagining of the site as "Cottage Hill", a haven for future residents who seek respite in the outdoors and the arts.

The development team's proposal draws inspiration from the site's history to design a series of places, for residents and the public alike, that transform the perception of the property from one of "institutionalization" and "confinement" to one of open air, interaction and healthy living. Much in the way that the original campus was a leader in its time in terms of progressive and humane thinking about the treatment of mental illnesses, our goal is to elevate this development into high quality multi-family housing, that welcomes the public into parts of the campus and taps into the synergies created by the interaction of residents, visitors and the arts.

Trinity's proposed redevelopment of the property, The Residences on Cottage Hill, will be tailored to meet the contemporary housing and recreational needs of the Medfield community, by preserving spectacular open space for public enjoyment, and reimagining the existing historic buildings as new homes for a wide range of residents. This hillside location, with its stately buildings, old growth tree canopy, and spectacular open space, will be embraced as an enriching environment for residents and neighbors alike, reconnecting them to a greater outdoors and creative community.

SITE PLAN



Our campus renewal plan respects and enhances the historic character of the site, while reshaping the identity of this place as a revitalized neighborhood environment. Built in a Queen Anne style typical of this generation of hospital institutions, these buildings will be renovated to offer a decidedly residential feel. Residential apartments will be combined with creative amenities to complement the new Cultural Arts Center. Open spaces will be reinvigorated to create a more accessible, inviting, and usable areas. The plan connects open space elements across the site, encouraging walking and casual, chance meetings for residents.

Key features of this renewal plan include:

- **A True Mix of Uses** –The plan proposes the adaptive reuse of thirty-three existing buildings into multifamily housing and ancillary amenity space, comprising approximately **393,000 SF**, excluding attics and basement. Trinity's plan marries complementary residential uses with the proposed Cultural Alliance of Medfield's plan for cultural and arts uses on Parcels 24 and 25. Additionally, it invites community use of open space, to anchor and sustain residents of all ages and interests. The proposed building program provides a diverse array of unit types, service space and amenity areas
 - The certified Historic Rehabilitation of Buildings 1-36
 - The Proposed demolition of Non-Contributing buildings Number 10 (Mechanic/Machine Shop) and Number 27b (Bakery/Food Service)
 - Support for Alliance of Medfield's plan for the Cultural Arts Center in the Lee Chapel and the Infirmary (Buildings 24 and 25).

- **Responsive to MSH Design Guidelines** - The proposed plan is responsive to the priorities called out in the 2018 Medfield State Hospital Strategic Re-Use Master Plan Medfield's priorities for reuses of the MSH property in the following manner:

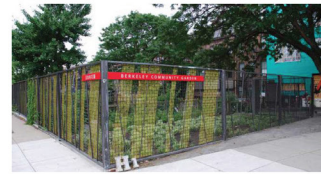
Maintains and enhance the character and values of the town of Medfield and its residents. Our plan is the adaptive reuse of all campus buildings (other than those proposed for demolition) without new construction. No new buildings are proposed. This plan assures preservation of the hilltop quadrangle and long views from it. Reuse of existing buildings will preserve viewsheds between buildings and the historic rhythm/spacing of the campus buildings.

Addresses Town housing needs. By staying within the historic footprint of the building we are providing opportunities for those individuals who are downsizing and would like to remain in the area. Our inclusion of 25% affordable housing for the site is aligned with the Town's Housing Production Plan.

Achieves reasonable economic and financial impacts on Medfield residents and Town services. Our plan is in the best financial interest of the Town, who will benefit from the new property and excise taxes that are derived from new residents. Additionally, as noted in our third-party fiscal benefits study (Please see Appendix B.) many of the expenses the town currently incurs on maintenance of the property will be assumed by the ownership of the site.

- **A Celebration of History.** We will work within the Secretary of the Interior's Standards for Rehabilitation, respecting the historic integrity of the grand buildings. Adaptive use will preserve all "character defining features" of the exterior and interior, including entries, corridors, and stairways. While we are not expecting major new additions, we may need to add some entry stoops/ramps for accessible building entry, that will complement, rather than replicate, the historic character of the site and buildings. There may be some connectors and service additions that were added on over the years that we propose to remove; we will work with the preservation consultant to determine which elements can be modified. We will reuse all the existing entry lobbies and incorporate additional exterior doors into unit entries, if they meet accessibility guidelines. Broad porches will again provide a place to sit and enjoy the outdoors. Where existing buildings offer windowed gabled ends, we may take the opportunity to create some duplex units up into building attics, if feasible.
- **Community & Art - Central Gathering Space** – Buildings at the center of the open green, will be developed with Arts and Community Uses. At the heart of the community, Buildings 24 & 25 – the former Chapel and Rectory, will be the Cultural Arts Center, inviting the broader community onto the site. Supporting that use, we propose to endeavor to create an artist preference for 10% of our affordable rental units. Located between these buildings, Building 26 will become a Community Clubhouse, an amenity destination for residents and neighbors alike. Interior streets will decoratively paved and raised to slow traffic, but allow drop off and access to parking courts. The open space created by the demolition of the Kitchen building will provide space for an open landscape, allowing an opportunity for residents to spontaneously play frisbee or lounge on picnic blankets and read a book. Widened sidewalks will be landscaped to provide places to sit and engage. Accessibility will be enhanced.

LANDSCAPE PLAN



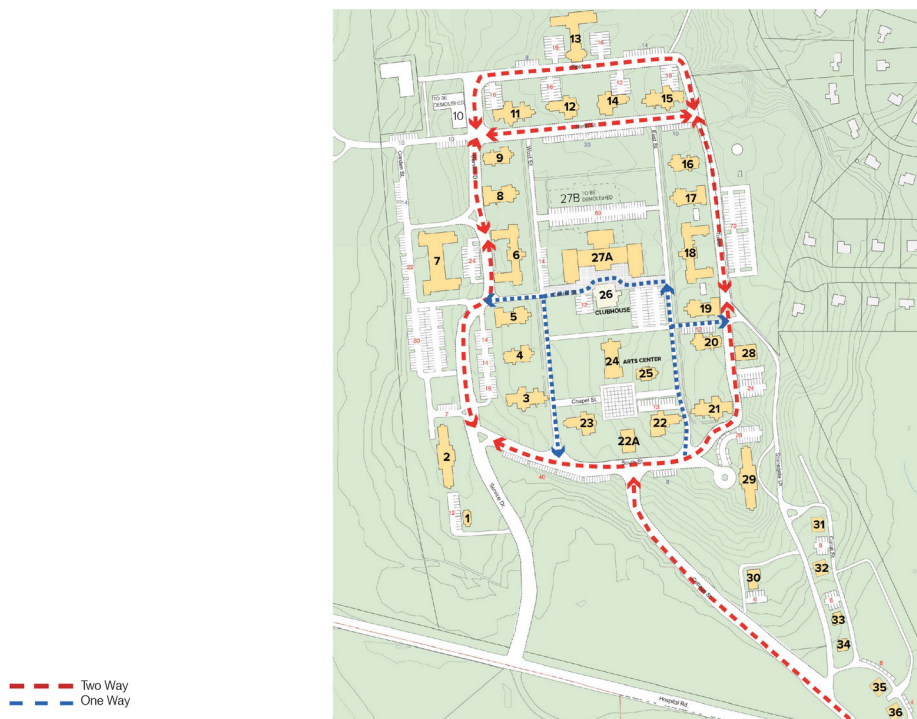
The new public open spaces created will provide significant recreational and ecological amenities for the Medfield community. Similar to the existing architecture on the site, the landscape will be designed working within the Guidelines for the Treatment of Cultural Landscapes, a component of The Secretary of the Interior's Standards for the Treatment of Historic Properties. Of the four treatments described in the guidelines, Rehabilitation is the best suited to allow site requirements for the change of use to be fit into the historic landscape fabric of the existing site. With passive and active programs, the new campus landscape will be crafted to engage residents and neighbors in social spaces while providing 'productive landscape' services. The objective of the 'productive landscape' is to create an open space that provides ecological resources (such as wildlife habitat enhancement, stormwater treatment, native seed spreading and passive cooling) while also providing recreational opportunities for the community. Some of the amenities provided in the open space will include:

- Entry Description - Arrival Sequence** -- built to capture the drama of arrival, the existing Cottage Drive approach road combines the roadway's curving geometry, the rise in topography, and the spatial definition of trees—sometimes as allée, sometimes as drift—to gradually reveal the campus. The drive and southern fields/lawn separate the public, busy world of the street and town, from the bucolic hospital grounds. The rehabilitated landscape will replace missing trees and keep the open space of the southern slope as flexible lawn areas for recreation and meadow with seasonal interest. To more safely accommodate modern vehicles and improved stormwater management down the slope, the drive will be widened, paying close attention to the details of the roadbed, to ensure it retains the parkway feel of a vehicular route that 'lies lightly on the land.' At the top of the slope, the lines of trees on both sides of the driveway that define the arrival space and the plateau on which the campus sits, will be strengthened in number and underplanted with shrubs to further define this arrival landscape space. The development team proposes consulting with CAM to collaborate on a Call for Artists to program a welcoming artistic installation at the

site entrance, announcing the new identity of the site's entry.

- **Activated Open Spaces** -- will be improved to connect to long views across the campus. Building upon the richness of the existing, historic landscapes on site, the renewal plan restores the landscape structure of the tree-lined streets and their linear view corridors, plants new specimen trees and facilitates greater social use of quadrangle and spaces surrounding the key architectural structures of the core campus. It also provides more visual interest in the courtyard spaces between the buildings on the Inner Loop Drive which are viewed from both the south-facing verandas of each of these buildings and from the center campus landscapes. Active and passive recreational elements and community garden functions are distributed across the site.
- **Improved Streetscape** -- A dramatically improved pedestrian and bicycle-oriented neighborhood will be created with a new network of access points and sidewalks throughout the site. To activate the street and create a more engaging public realm, benches and site furnishings in both shady and sunny areas will encourage social interaction among veterans.
- **New Planting** -- Many of the existing trees on campus are in decline; we will add new trees that will be carefully selected to complement the existing tree canopy and overall building character while providing a diversity of native species to enhance ecological connections. We expect new shade trees to be added throughout the campus and along the street.
- **Play & Garden Moments** -- We see the opportunity to create thoughtful play areas, incorporating natural elements into the topography. Community Gardens represent an opportunity to build community and build sustainable gardens, enhancing the natural resources of the site.

CIRCULATION PLAN



- **Traffic impacts.** By proposing a residential-only program, the potential traffic generation associated with the redevelopment is substantially reduced compared to options with a large commercial component. As such, impacts to the roadways serving the site and the surrounding residential areas are minimized, thereby allowing the development to blend in with the surrounding community. The residential program would be expected to generate approximately, 2,500 vehicles per day and between 150 and 175 vehicles per hour during the weekday morning and weekday evening peak periods, respectively. To put this in context, alternatives with a significant amount commercial component like those outlined in the Strategic Reuse Master Plan could generate approximately two to three times the amount of traffic as the residential-only program. As part of the planning process, a comprehensive traffic impact assessment will be conducted, which will identify specific impacts as well as targeted mitigation plans to accommodate new site traffic. The mitigation associated with the project will include geometric improvements at nearby intersections to improve existing safety and operational concerns. In addition, the project will include a comprehensive Transportation Demand Management (TDM) program, which will focus on promoting the use of alternative modes of transportation and providing strong bicycle and pedestrian connections on site and to the surrounding area.
- **Circulation**
 - **One-way Inner Loop** - the heart of the campus will be the restored “carriage path” system inner loop, enhanced with wider sidewalks, landscaping and areas of decorative paving, creating slow-moving streets at each historic buildings’ front door. This loop street system will provide an inviting pathway through the campus to connect many new elements, including the Arts Center and Clubhouse at its center. New parking areas to serve the new community uses will be judiciously placed so as not to interrupt the historic open space character – and a landscape parking court will be created on the site of the demolished Kitchen Building. Street treatment will further slow the light traffic on Crest Avenue, so that residents can easily and safely move between buildings and open spaces on the site.
 - **Two-way Service Road Outer Loop** – to improve site circulation for the new uses, the outer loop road will be improved to provide two-way traffic. The streets will be retained as narrow 11-foot-wide traffic lanes, with parking courts interspersed along their length. Autos will be encouraged to use this outer loop to circulate to housing and parking courts. At Cottage Drive’s intersection with Hospital Road, a vertical artistic element with graphic panels will be created to celebrate the site’s history. This marker will clearly signal entry to the campus, providing visitors with an understanding of the importance of this historic resource.
- **Vehicular and Pedestrian Networks** – are created by strengthening the differentiation between vehicular and pedestrian uses. Maintaining the intimately scaled narrow roadways of the inner campus with one-way vehicular traffic on the southern end of the site, and restricting them to pedestrian (and service/emergency use) pathways on the northern end, allows the landscape to retain its rural character. The change between these two types is signaled by a change of pavement and use of demountable bollards, making this differentiation clear to residents as well as visitors. This pedestrian realm directly and accessibly links the open spaces throughout the site. This will encourage residents, both on site and from greater Medfield, to move freely between open spaces, chasing sun or shade as the day progresses. Walkers and bikers will be able to move through a parklike setting with few interactions with vehicles.

Parking – our plan seeks to incorporate small lots throughout the campus, targeted to match parking count with adjacent building unit count. In total our plan proposes a total of 694 parking spaces. This number was determined by the following parking ratios:

- 1.5 Parking spaces for studios and 1-bedroom homes;
- 2 parking spaces per bedroom for two and three-bedroom homes;
- 1 visitor space for every three units: 112 visitor parking spaces

- **Wayfinding and Storytelling** - A strong, visually compelling graphics program, which includes a way-finding component and an educational component, will be an important part of our design. It is critical to respect the unique and historic nature of this property, and one way to accomplish this is to ensure that there is a “storytelling” component to the neighborhood which will educate residents and visitors alike about its rich history, and give them a sense of delight, whether they are taking their dog for a walk around the campus or visiting the Arts Center for a vernissage by a local artist. We anticipate signage installed at various locations around the campus, featuring text and historic photographs of the hospital in its heyday. This could be complemented by a recorded, self-guided walking tour of the property offered either by the property management, or even in a partnership with the Medfield Historical Society.

SUSTAINABILITY

- **High Performance Building Standards** -The team will actively integrate sustainability measures that reduce the environmental impact of this historic rehabilitation to the extent allowable by the National Park Service and the Massachusetts Historic Commission. Building energy use and performance will be a critical component to ensuring that the redevelopment is in alignment with and contributing to the Commonwealth’s climate and carbon neutrality goals. Team members with building science and historic expertise will work collaboratively to develop a rehabilitation plan for these historic buildings that includes comprehensive insulation and air sealing of the structures, accomplishing both energy load reduction as well as long term comfort and operating cost benefits for future residents. Historically appropriate, energy efficient replacement windows will complement the insulation approach to fully address the performance of the building envelope.

In full alignment with the Commonwealth’s goals to transition away from fossil fuel energy sources, all of the HVAC systems will be electric. Efficient heat pump technology will be deployed to provide heating and cooling at the units, and proper fresh air will be provided by unit-based energy recovery ventilation units. The market for high efficiency electric domestic hot water systems is evolving rapidly right now, and we anticipate taking advantage of those developments in the next year or so to specify an efficient approach to all-electric hot water as well. Further conservation will be encouraged by specifying unit-based HVAC systems and tying those systems directly to resident’s utility meters. Systems will be “smart”, allowing better control and conservation on the part of residents, and the potential to participate in active demand reduction programs. All appliance will be specified Energy Star, and all lighting will be LED to further reduce electrical consumption and cost. Tenants will receive an operations manual and in-person training that clearly identifies how to properly use the systems in their units, and how to engage in behaviors that save energy.

We expect that integration of renewable energy generation will be somewhat limited on the site/building roofs due to the constraints of the historic tax credit requirements, but we will work to identify areas where parking canopy photovoltaics can be deployed to produce clean electricity while simultaneously reducing the impact of heat island on site. The team will also actively evaluate resilience-related risk to the site, and identify an area on site that can act as “resilience hub”. We will evaluate the ability to support that space with emergency power provided by a battery backup system.

It is our hope and expectation that extensive enough insulation will be allowed by the historic tax credit oversight agencies to allow the project team to pursue Energy Star certifications for a majority, if not all, of the residential buildings in this development. A certification under this EPA program also ensures that there is training and oversight of the contractor and subcontractors during construction to ensure that energy conservation measures and

systems are appropriately installed. Should certification under Energy Star prove not to be possible within the context of the historic requirements on site, the team will still deploy all other design requirements of this program and the same level of construction oversight and training that is required to ensure that measures are installed properly. The team will also actively pursue utility as well as other available incentives and rebates to support any incremental cost associated with efficiency and all-electric systems, such as the SMART and Connected Solutions programs.

ATMOSPHERE

Our proposed plan calls for the re-positioning of the site, to highlight its open space and creative component and transform it into a desirable and attractive residential destination. As part of this reimagining of the site, we will be exploring a refreshed identity and branding.

- **Residential** - In total, 334 apartments are proposed, consisting of studios, and one, two, and three-bedroom apartments, and vary in size from 375 to 1400 square feet. Various housing types will be distributed across the site, and each apartment will meet or exceed the market-rate quality of housing in the Medfield area, embracing the unique features of the historic interiors, while providing modern living amenities. Once we have the ability to access the buildings and assess their condition, we may find use for basement areas as residential storage. All housing will be designed to meet the needs of "adaptability" with 5% considered Group 2 accessible under Massachusetts Accessibility regulations (MAAB) -- units will be designed to accommodate mobility issues, hearing impairment, and be supportive to all age groups and disabilities. Please see preliminary floor plan concepts at the end of this section.
- **Communal** - Our proposal designates the approximately 12,000 SF Building 26 as the central Clubhouse of the redevelopment, offering various passive and active amenities for residents such as fitness, co-working spaces, formal and informal gathering spaces, a Leasing Office, etc. Its central location on the campus, appropriate size) and large windows, make it the obvious choice for this program. It also has ample parking available nearby to accommodate guests, residents with mobility impairments or who choose to drive rather than walk, and future, prospective residents. Please see preliminary design concepts at the end of this section.



- **Dwelling** - As a strategy for interior design of the apartment units and common areas, where feasible we will leave exposed building elements as brick walls and wood trusses. Some of the inspiration imagery on the following pages illustrate how these features can be left visible and even “celebrated” in historic preservation projects in order to recall the unique history of the buildings. Of course, this is always a challenge given the insulation and seismic reinforcement requirements of modern building codes, but there are almost always creative ways to be found to keep some interior brickwork or wood trusses exposed, adding to the warmth of the spaces. Please see preliminary design concepts at the end of this section.



- **Taxable Value.** The anticipated taxable property value upon completion is \$58,625,000. For more information on the proposed fiscal benefits to the Town, please see Section M. Community Benefits and Appendix A. Fiscal Benefits Plan.

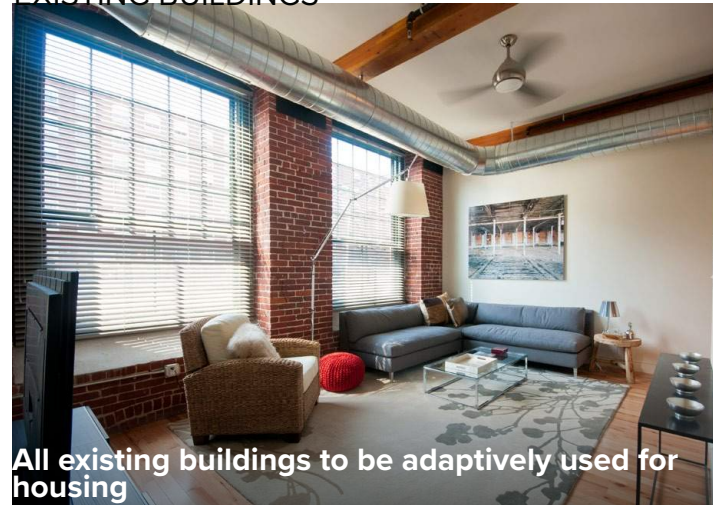
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P1	1	A	HILLSIDE HOUSE	2	1,168	2,336	0	0	0	2	2	2	0
	2	B	WEST HALL (MAIN)	3	3,500	18,900	2	8	6	0	16	15	0
			WEST HALL (WINGS)	2	4,200								
	3	C	C-2 BLDG	2	6,300	12,600	0	4	7	0	11	10	1,575
	4	D	D-2 BLDG	2	3,500	7,000	0	4	2	1	7	6	875
	5	E	E-2 BLDG	2	5,700	11,400	0	0	6	0	6	9	1,425
	6	F	F-2 WARD	2	11,300	22,600	4	10	8	0	22	18	2,825
	7		S BLDG TRAINING	2	17,000	34,000	0	30	0	0	30	27	0
	8	E	L-2 WARD	2	5,700	11,400	0	0	6	0	6	9	1,425
	9	D	D-3 WARD	2	3,500	7,000	0	4	2	1	7	6	875
	10		MACHINE SHOP (To be Demo'd	2			To Be Demolished					0	
	11	C	C-3 WARD	2	6,300	12,600	0	4	7	0	11	10	1,575
	12		B-3 WARD	2	5,000	10,000	0	10	0	0	10	8	1,250
	13		R BLDG	2	11,500	23,000	0	20	0	0	20	18	0
	14		B-4 WARD	2	5,000	10,000	0	8	0	0	8	8	1,250
	15	C	C-4 WARD	2	6,300	6,300	0	4	7	0	11	5	6,300
	16	D	D-4 WARD	2	3,500	7,000	0	4	2	1	7	6	875
	17	E	L-1 BLDG	2	5,700	11,400	0	0	6	0	6	9	1,425
	18	F	F-1 BLDG	2	11,300	22,600	4	10	8	0	22	18	2,825
	19	E	E-1 BLDG	2	5,700	11,400	0	0	6	0	6	9	1,425
	20	D	D-1 BLDG	2	3,500	7,000	0	4	2	1	7	6	875
	21	C	C-1 BLDG	2	6,300	12,600	0	4	7	0	11	10	1,575
	22		B-1 BLDG SOUTHGATE	2	5,000	10,000	0	5	4	0	9	8	1,250
	22A		ADMIN. A BLDG	2	3,800	7,600	1	2	4	0	7	6	950
	23		B-2 BLDG	2	5,000	10,000	0	5	6	0	11	8	1,250
	24		LEE CHAPEL				Arts Center						
	25		INFIRMARY										
	26		CLUBHOUSE	1	11,834	11,834	Clubhouse						0
	27-A	G	SERVICE BLDG (MAIN)	1	16,000	49,000	0	36	10	0	46	45	(3rd level)
			SERVICE BLDG (WINGS)	3	11,000								
	27-B		BAKERY/FOOD SERVICE				To Be Demolished						
	28		TB COTTAGE	1	2,500	2,500	0	0	2	0	2	2	0
	29	B	EAST HALL (MAIN)	3	3,500	18,900	2	8	6	0	16	15	0
			EAST HALL (WINGS)	2	4,200								
	30		SUPERINTENDENTS HOUSE	2	2,100	4,200	0	0	3	0	3	3	0
	31		EMPLOYEE COTTAGE 1	2	1,300	2,600	0	0	1	1	2	2	0
32		EMPLOYEE COTTAGE 3	2	1,300	2,600	0	0	1	1	2	2	0	
33		EMPLOYEE COTTAGE 5	2	1,300	2,600	0	0	1	1	2	2	0	
34		EMPLOYEE COTTAGE 6	2	1,300	2,600	0	0	1	1	2	2	0	
35		STONEGATE HOUSE COTTAGE	2	1,400	2,800	0	0	1	1	2	2	0	
36		ASST. SUPT'S HOUSE	2	2,200	4,400	0	0	4	0	4	4	0	
						392,770	13	184	126	11	334	311	31,825
							4%	55%	38%	3%			

MEDFIELD STATE HOSPITAL

SITE OPEN SPACES



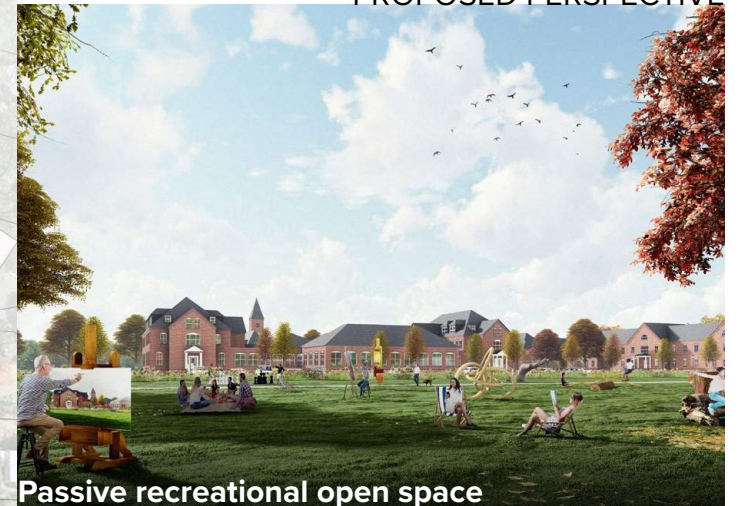
EXISTING BUILDINGS



CLUBHOUSE



PROPOSED PERSPECTIVE



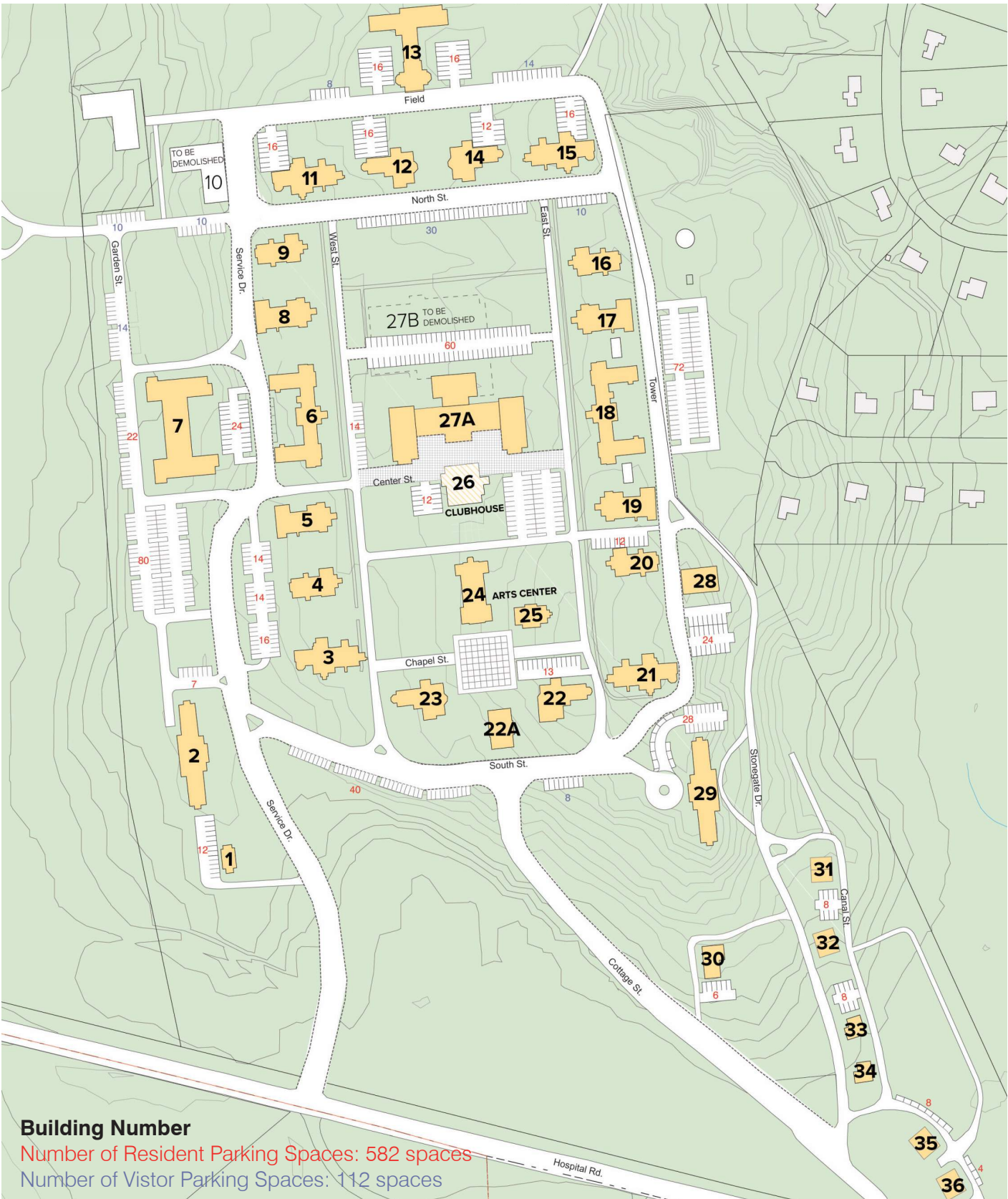
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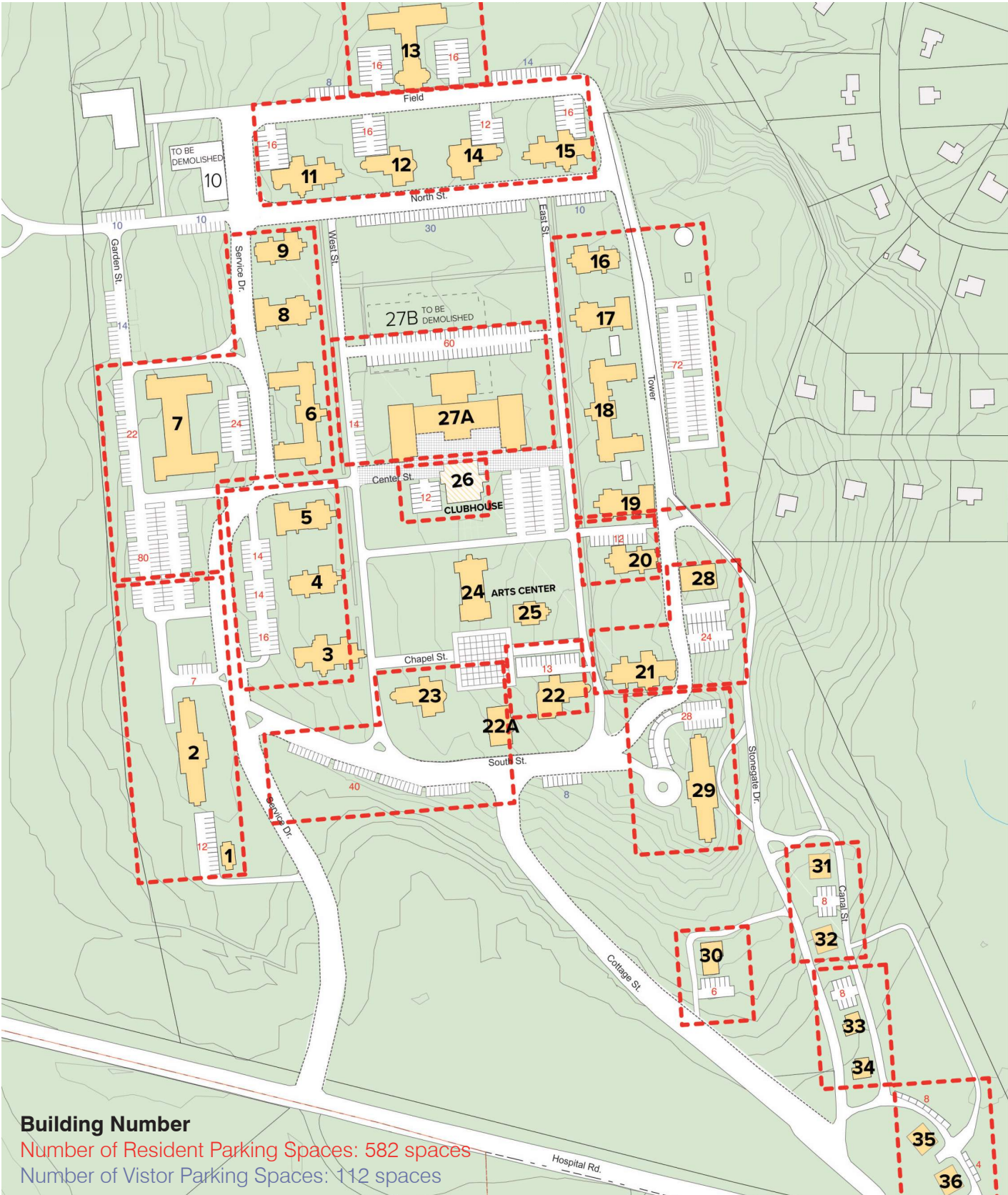


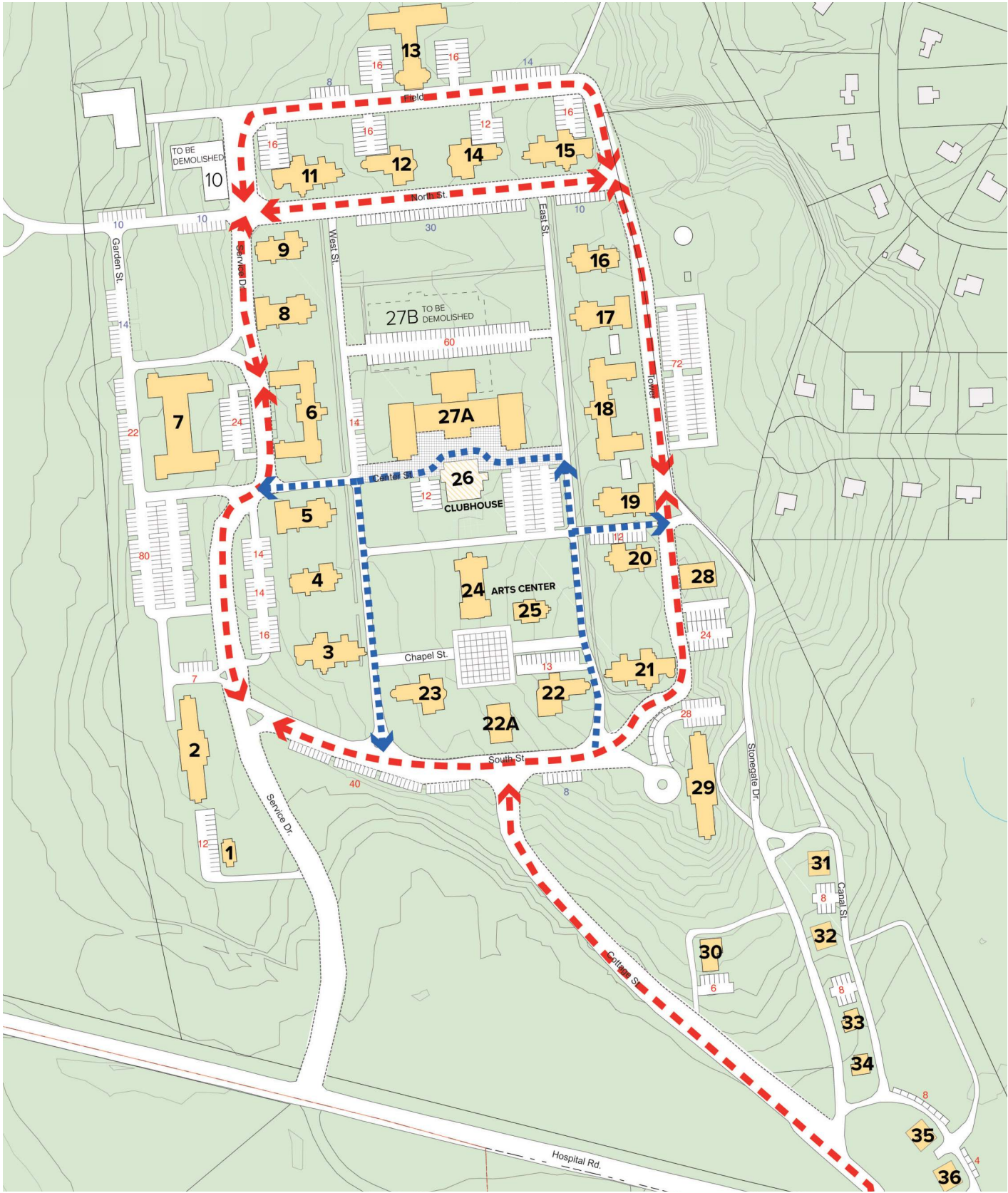
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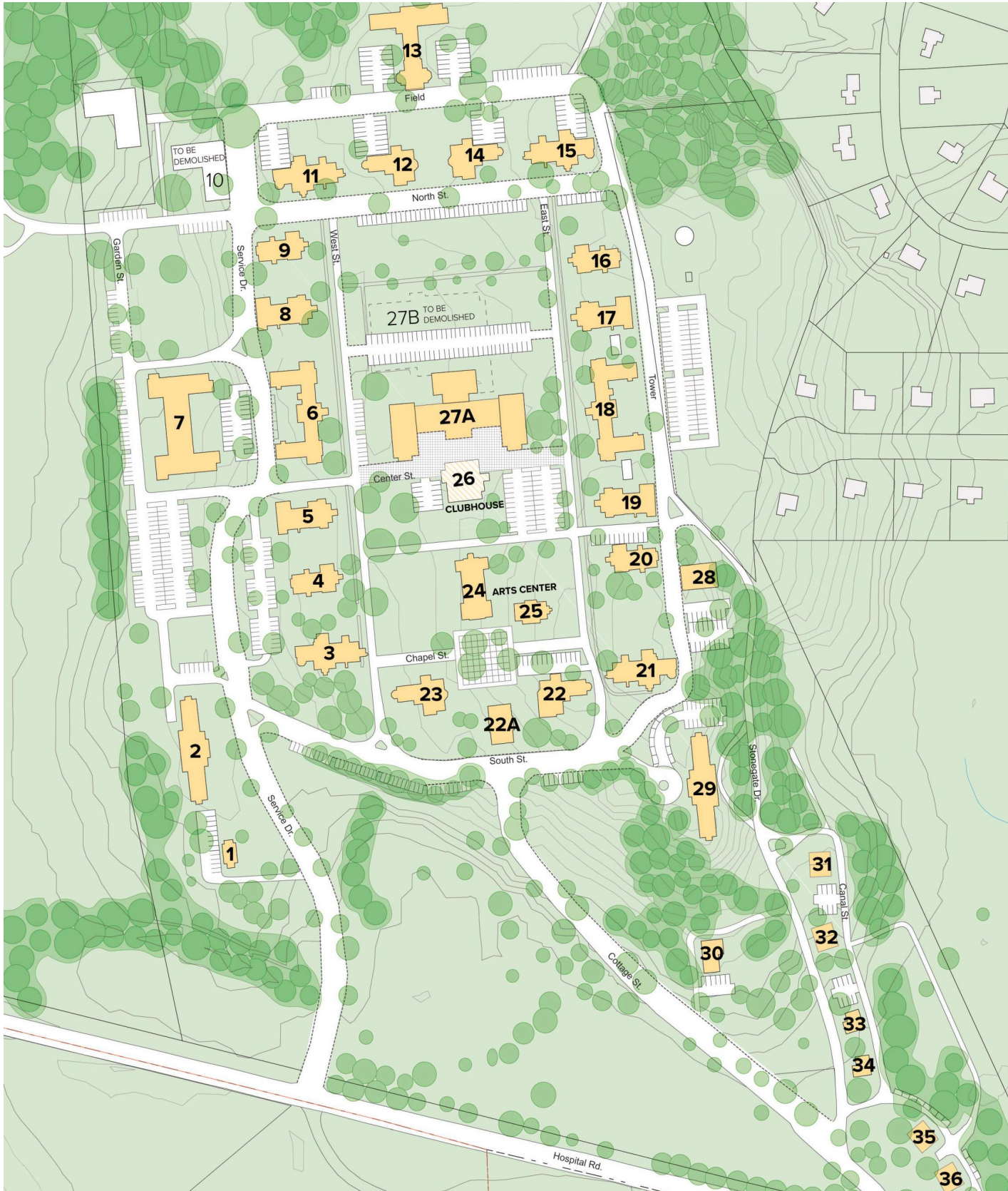


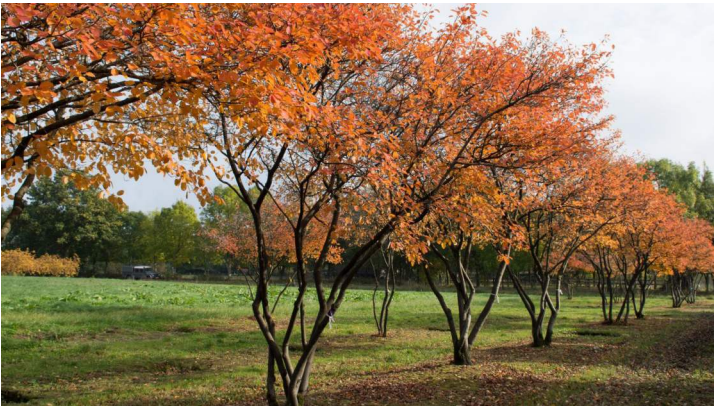


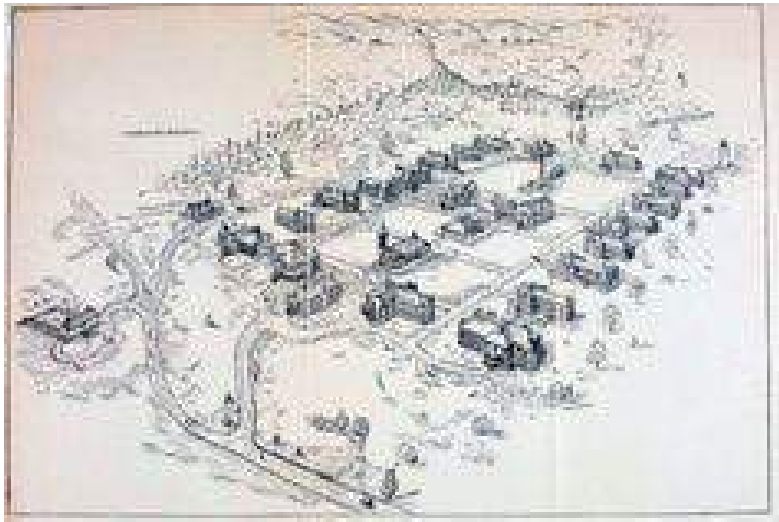




Two Way
One Way











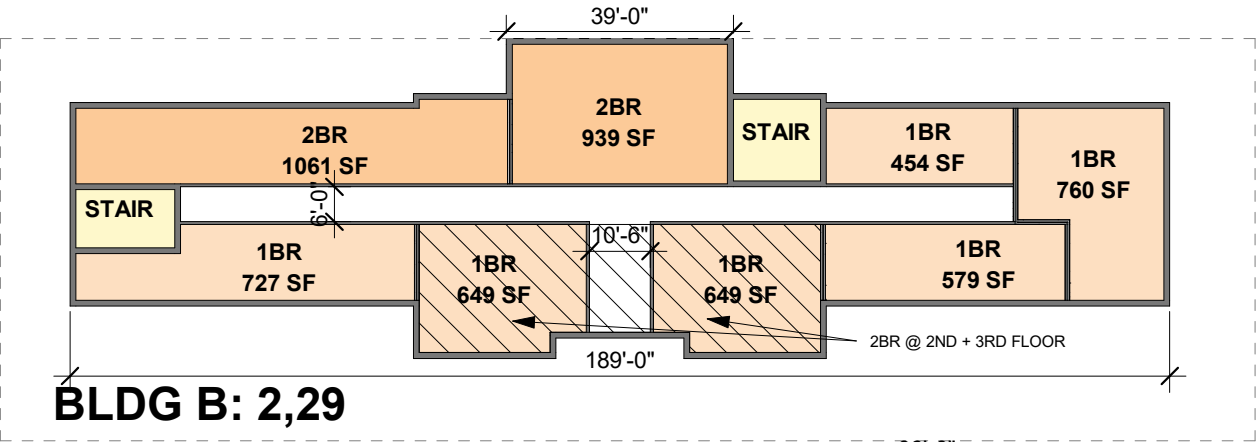
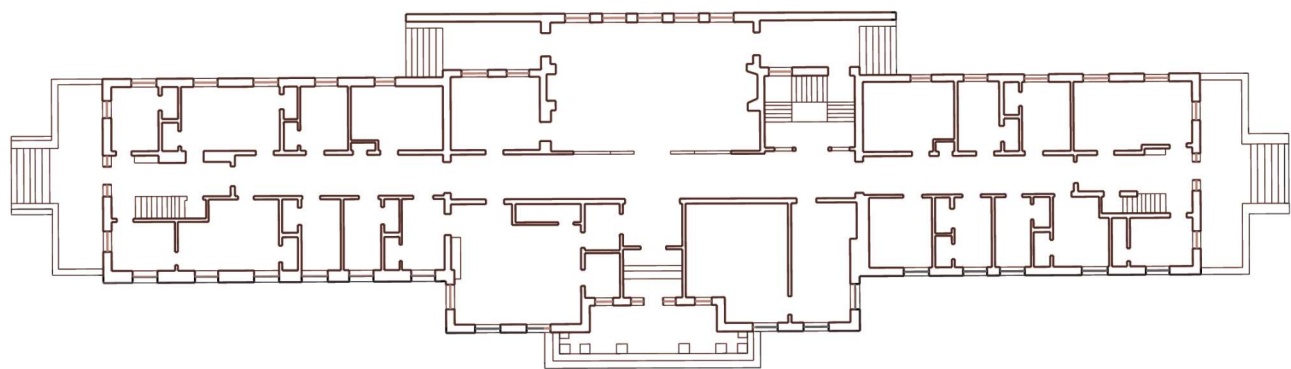




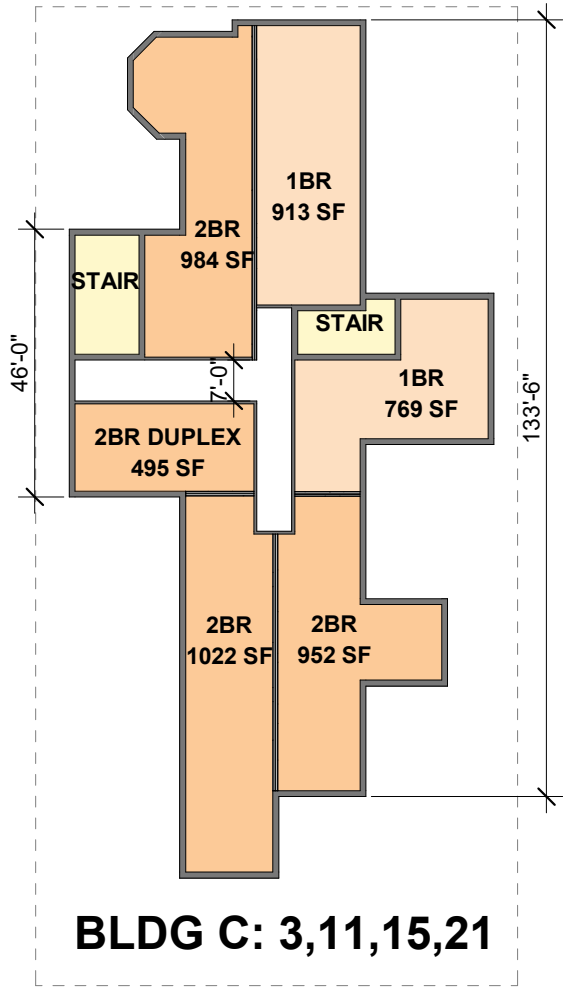
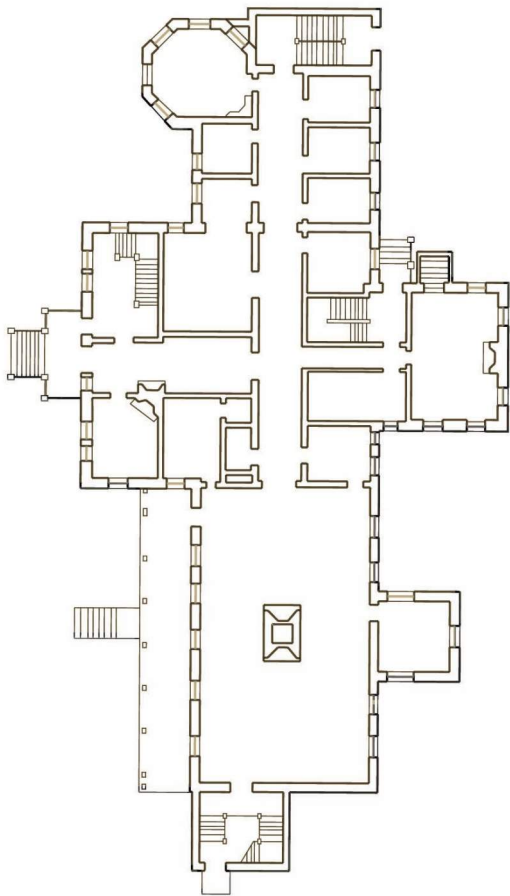




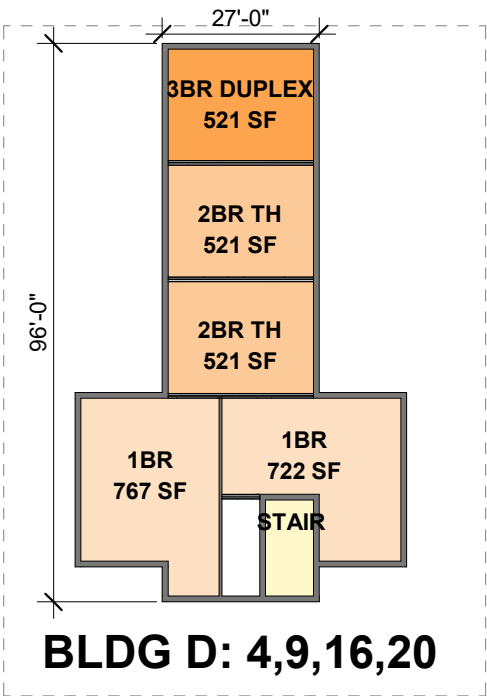
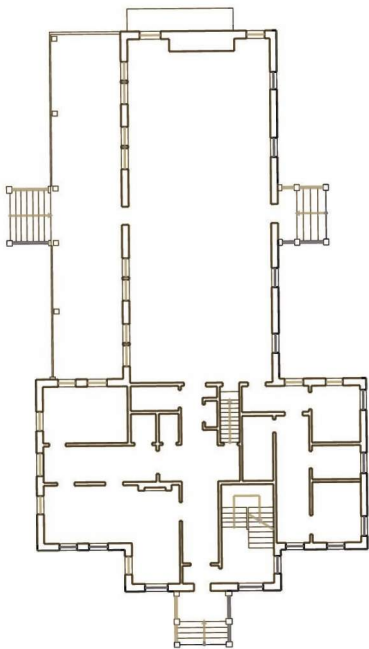


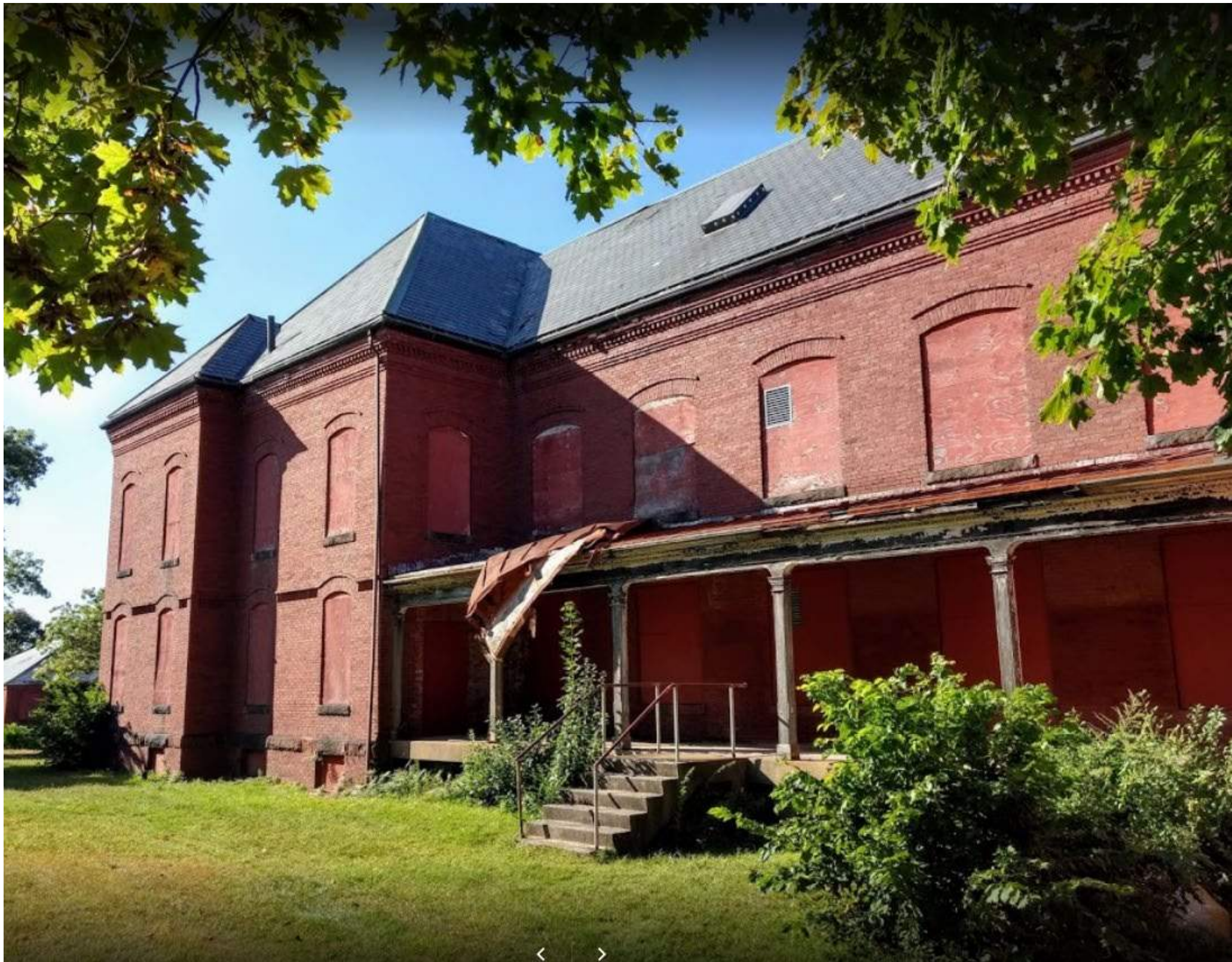


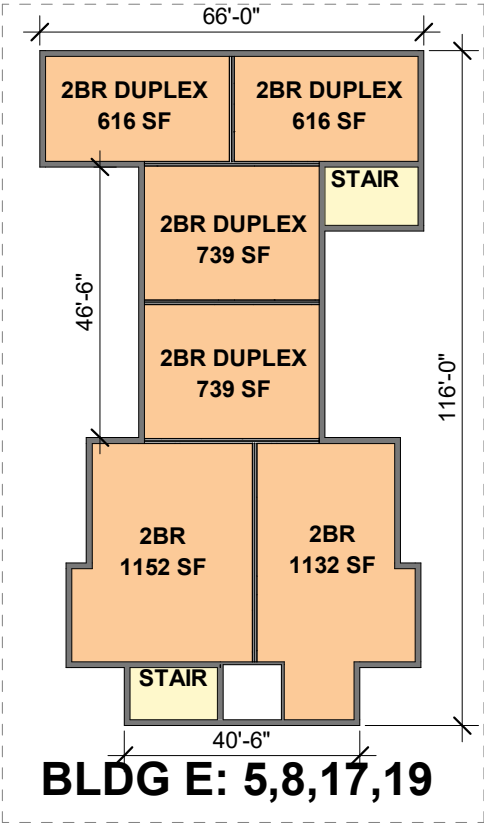
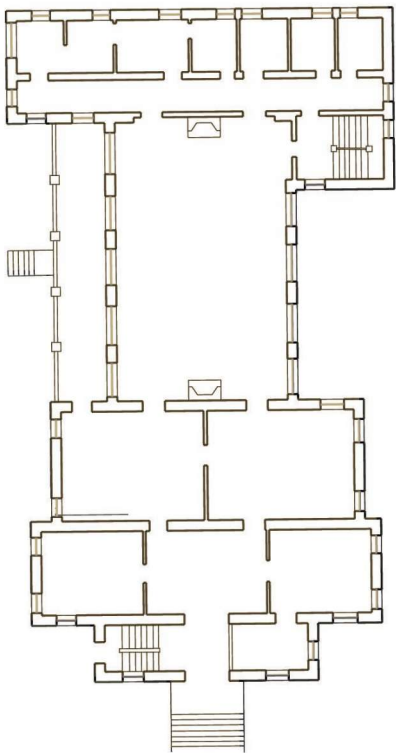




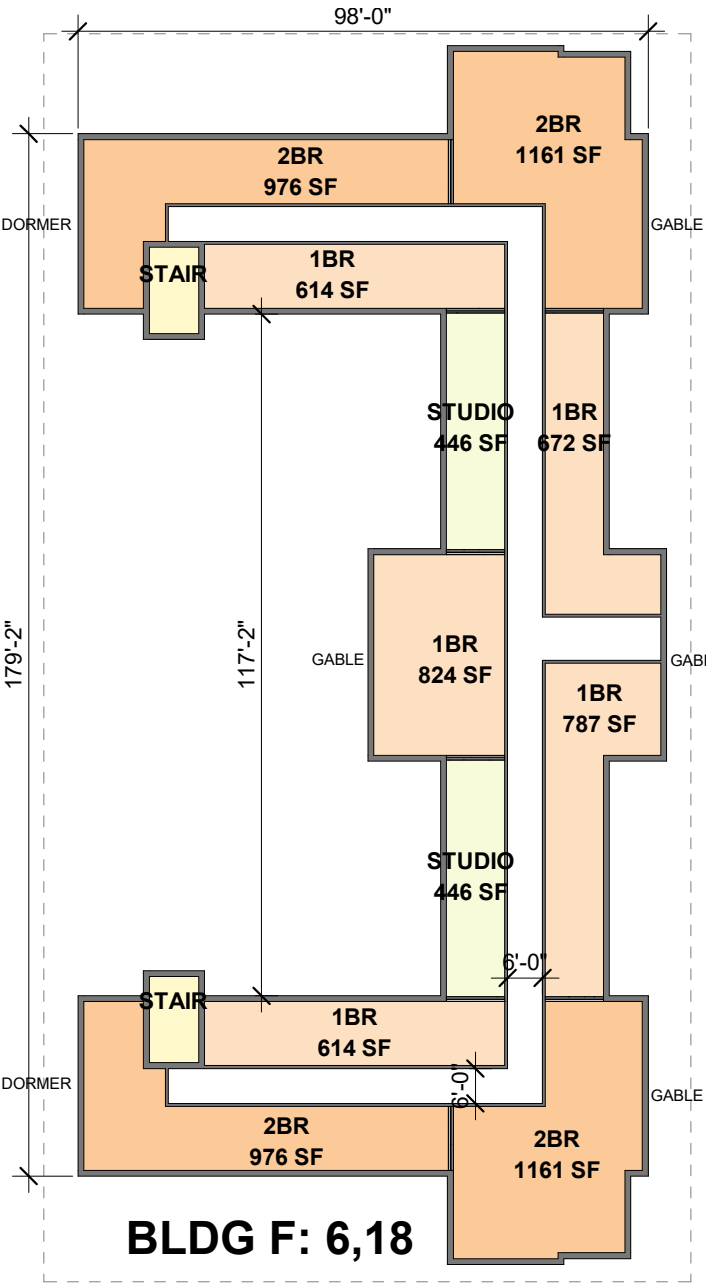
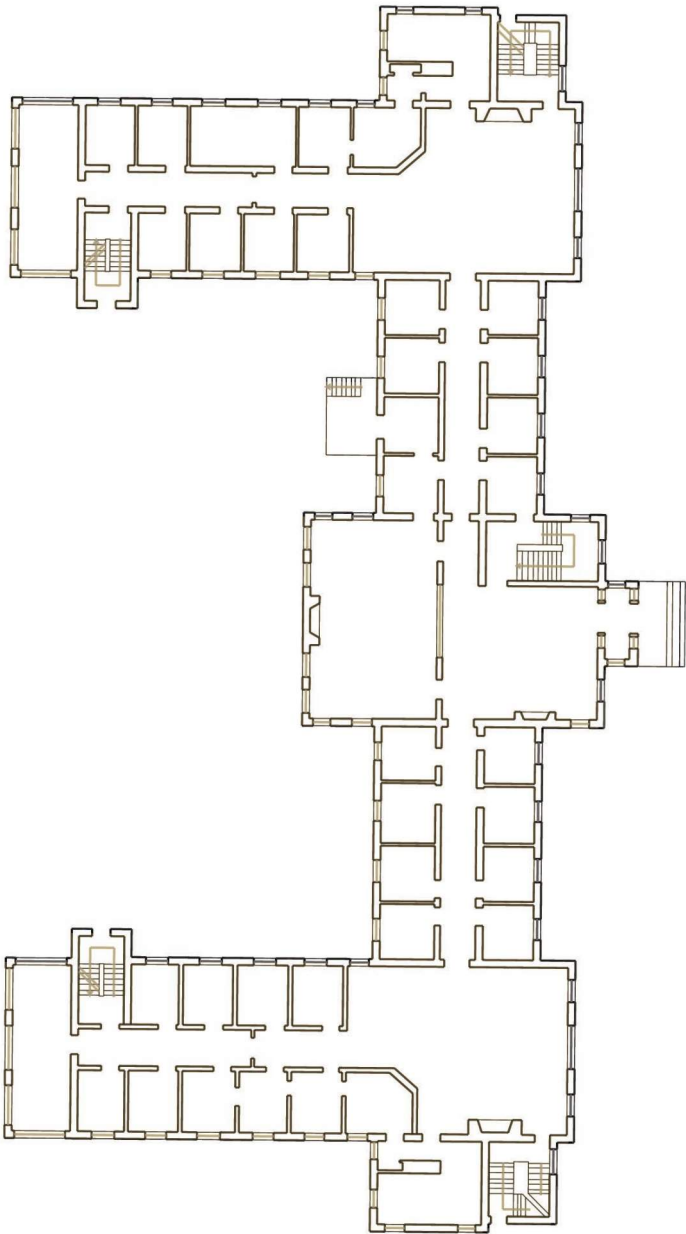






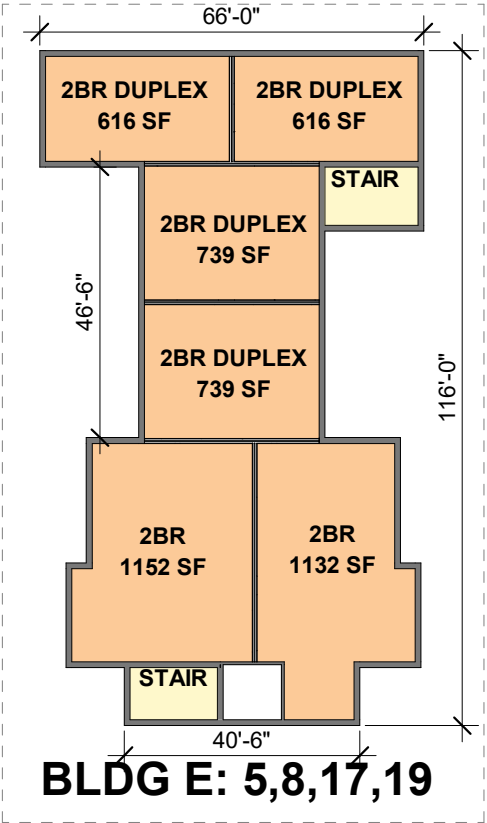
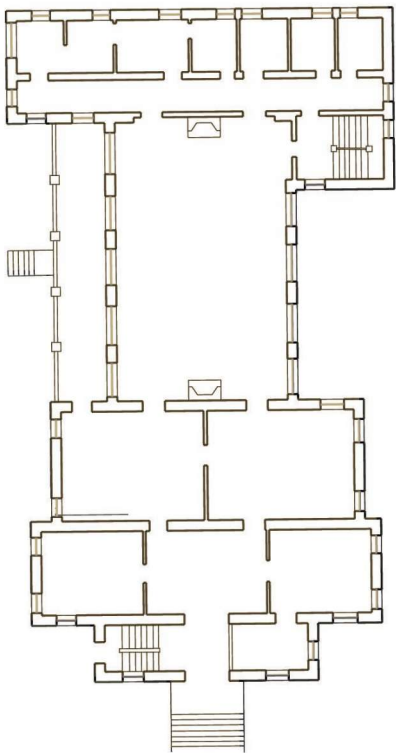




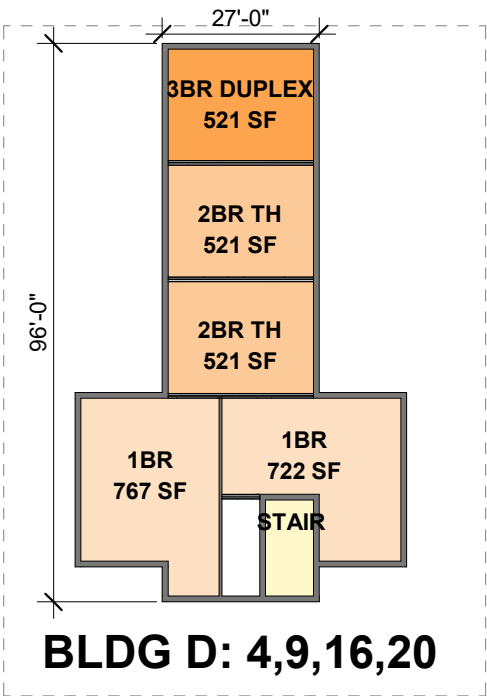
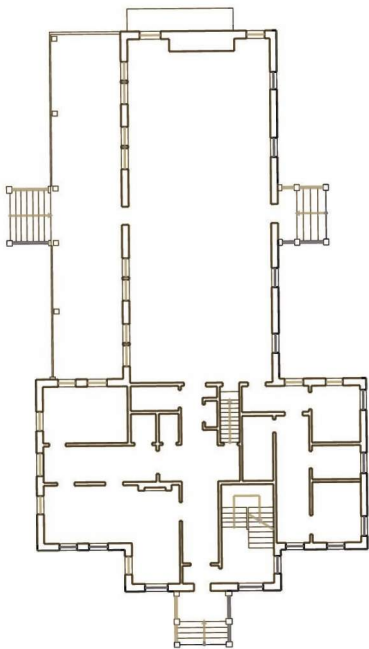






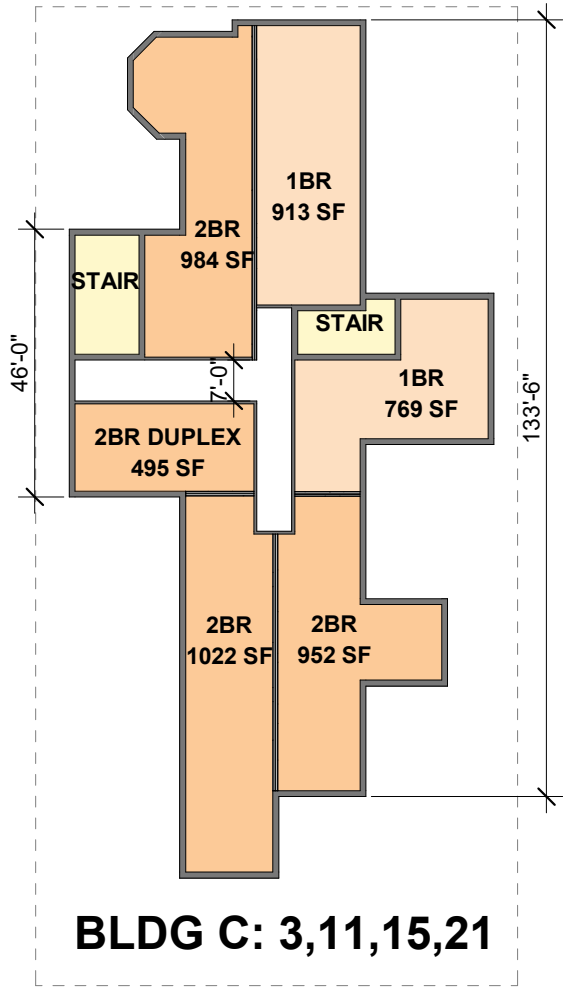
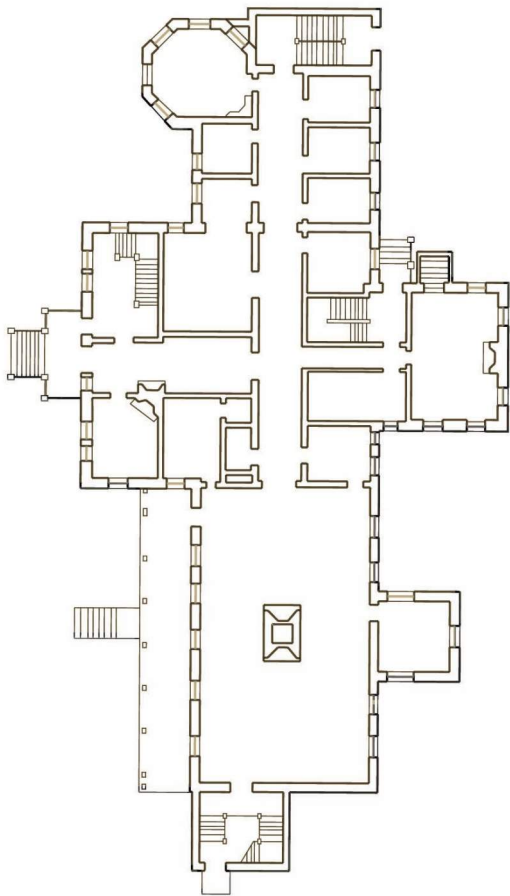
















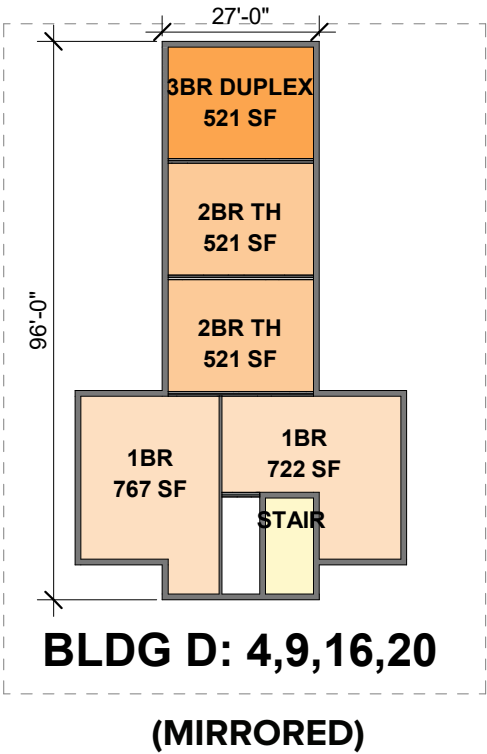
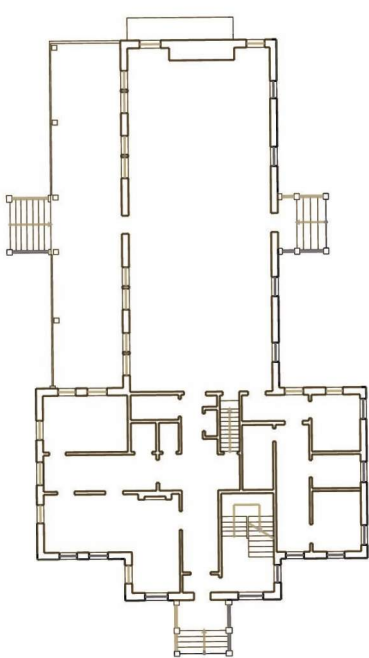
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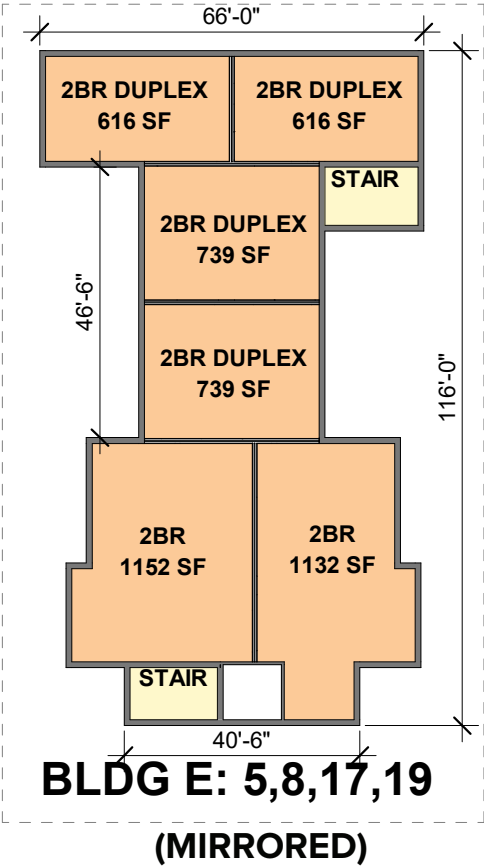
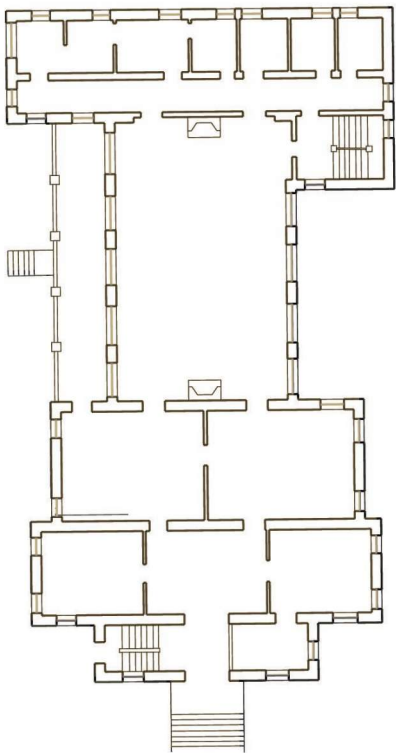




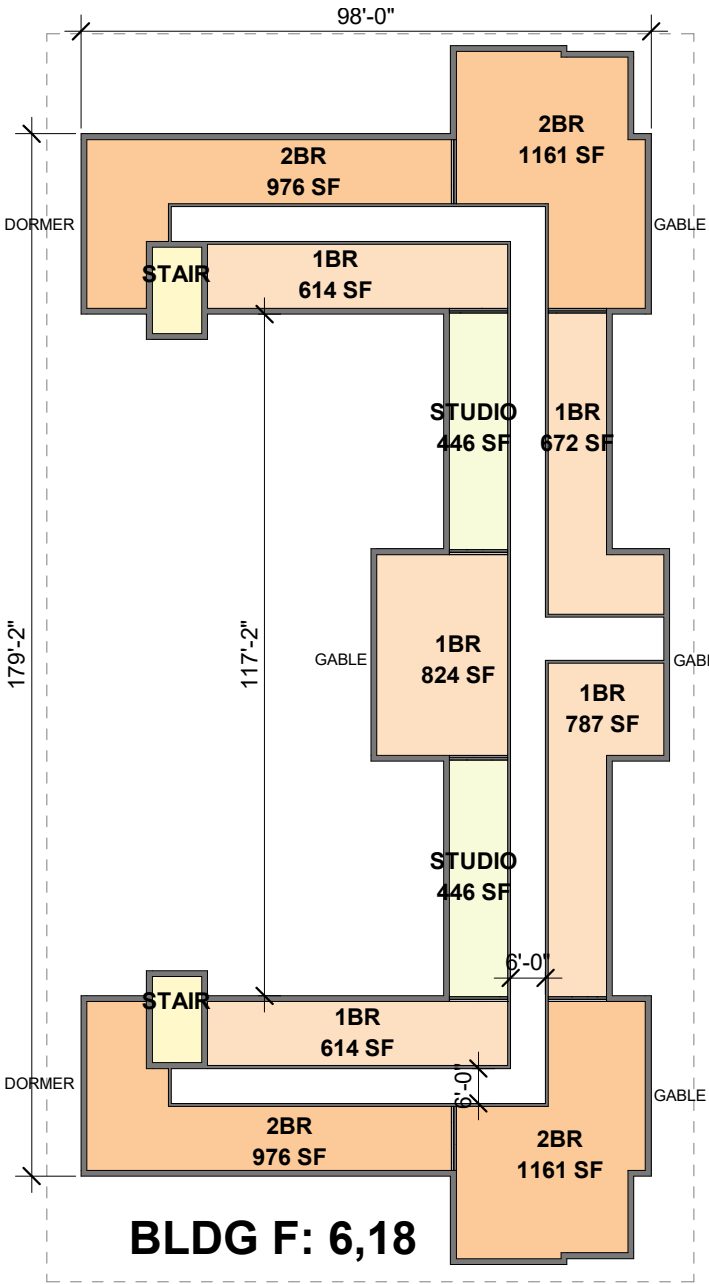
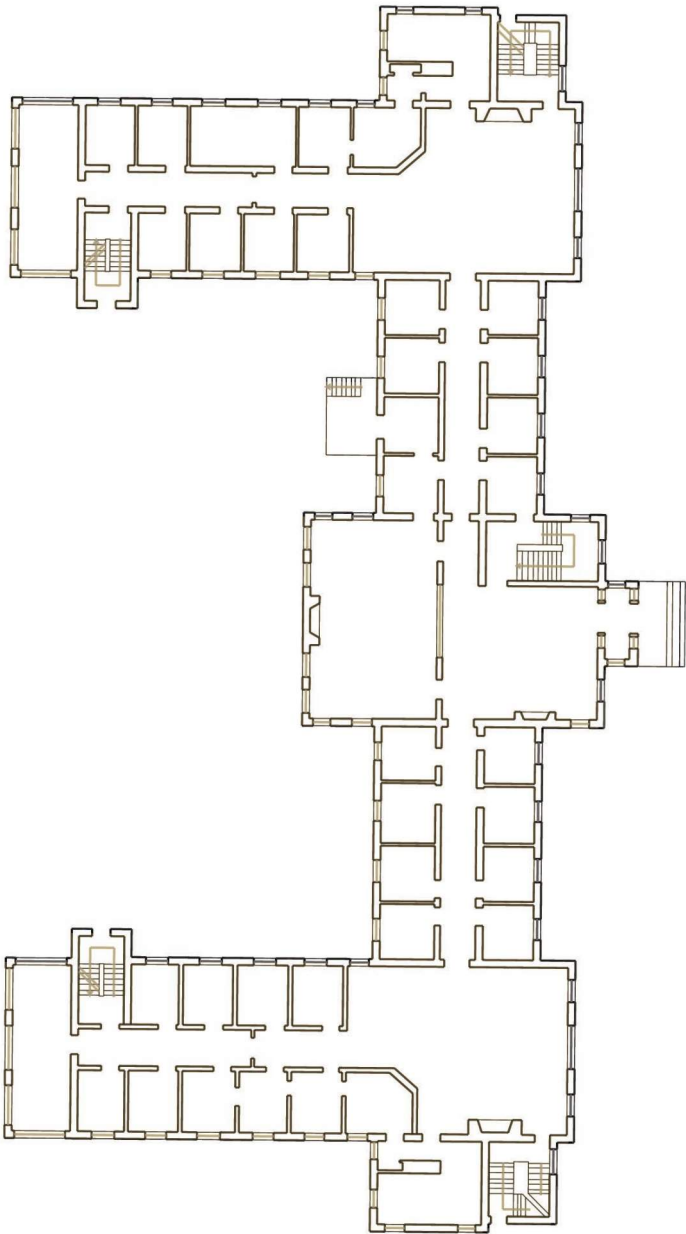




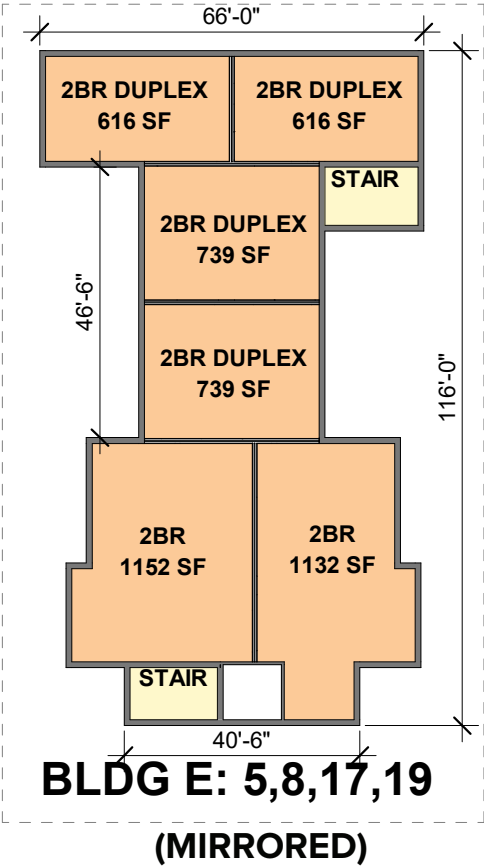
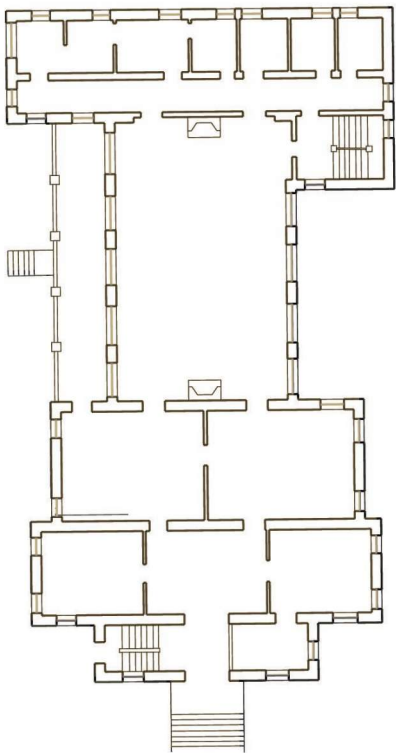




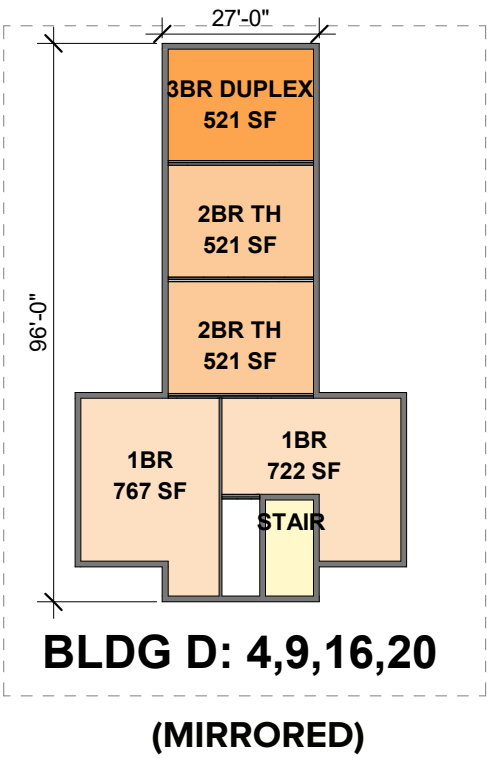
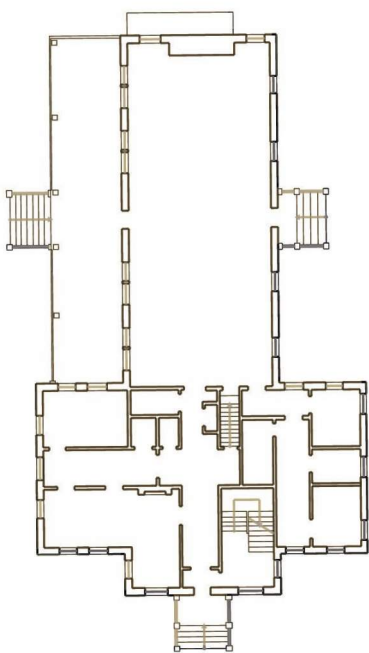




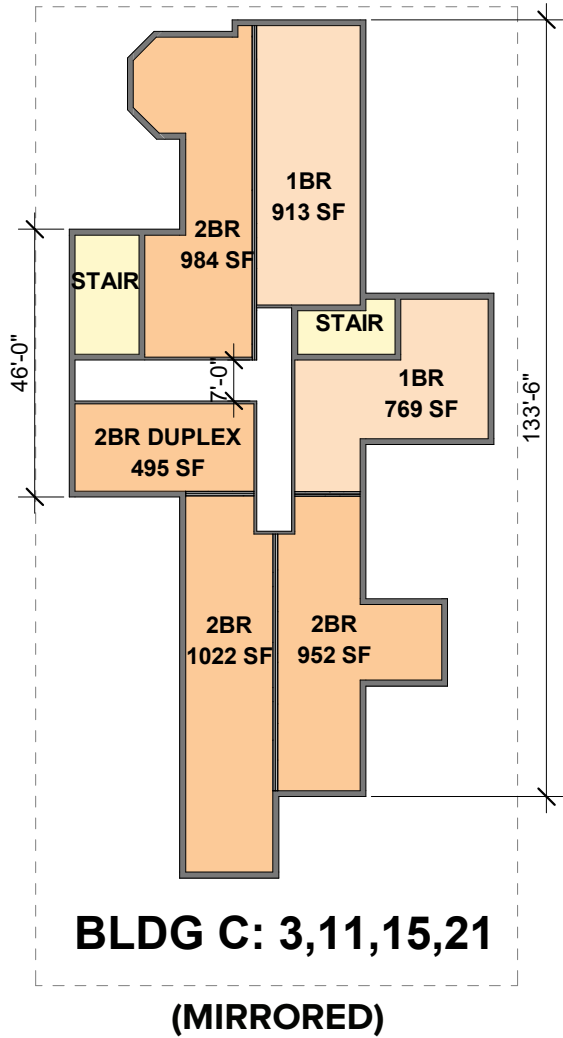
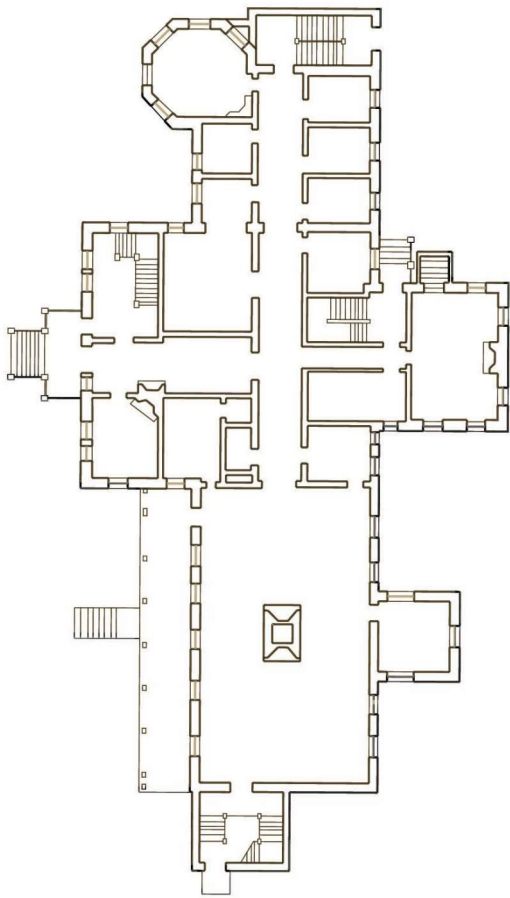








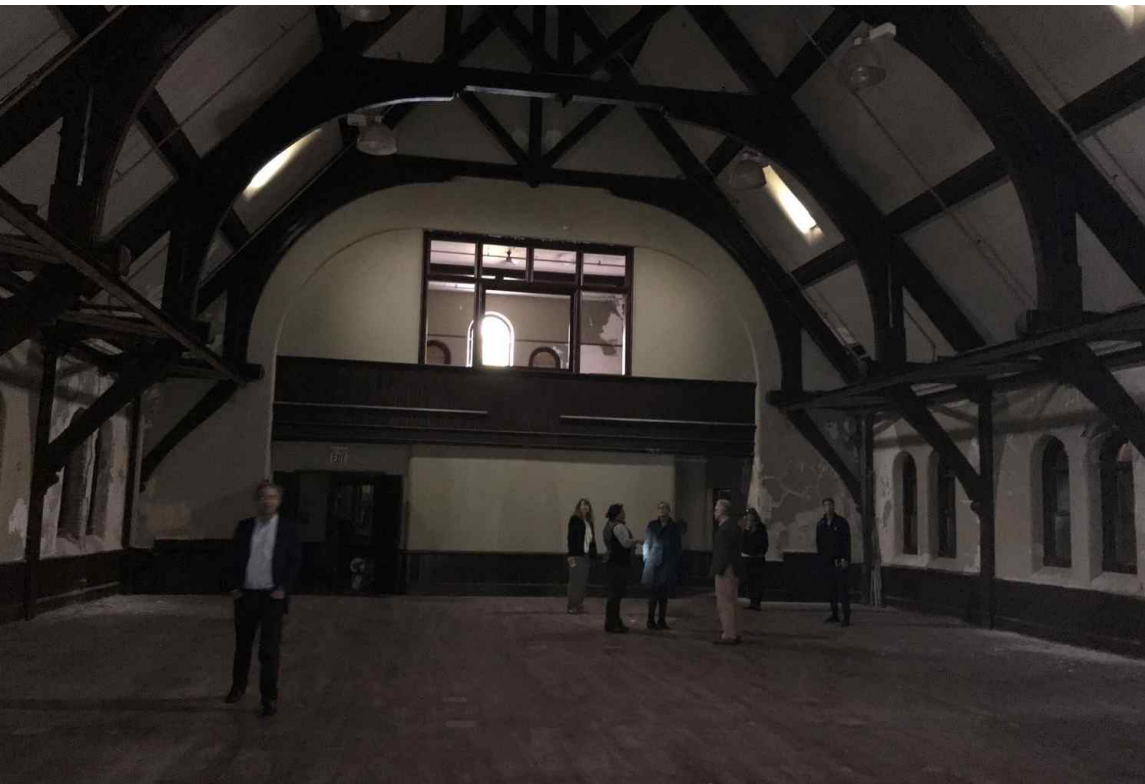






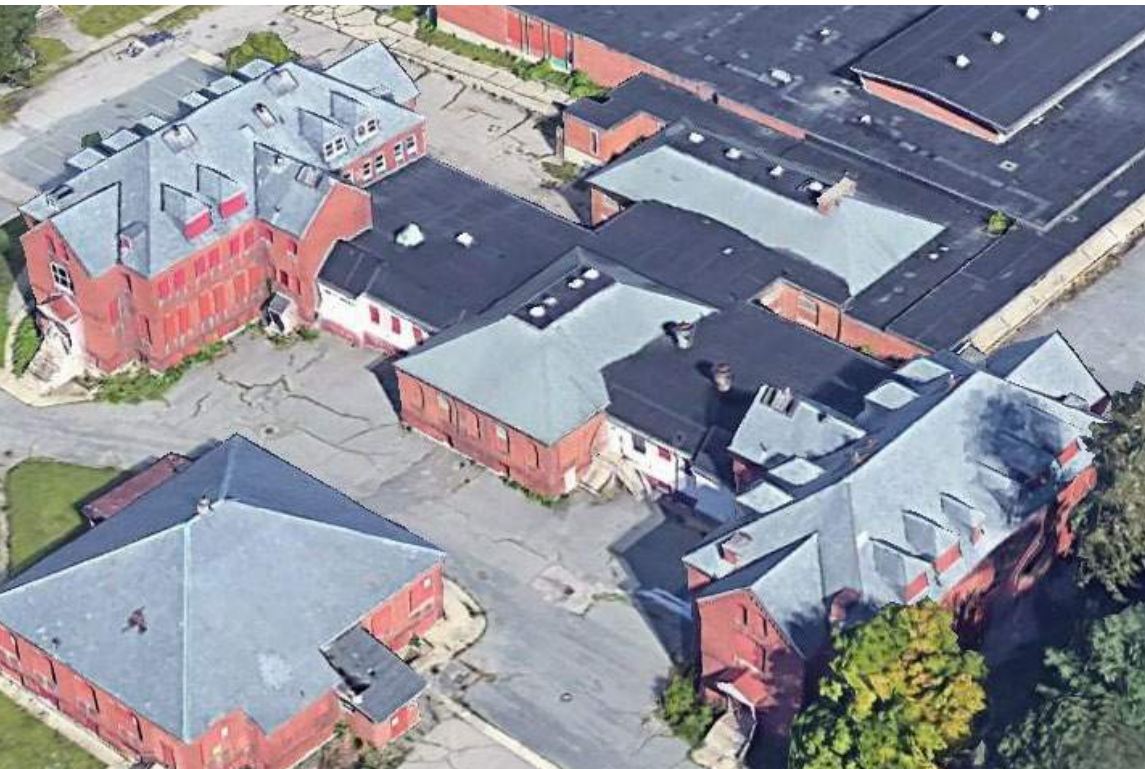


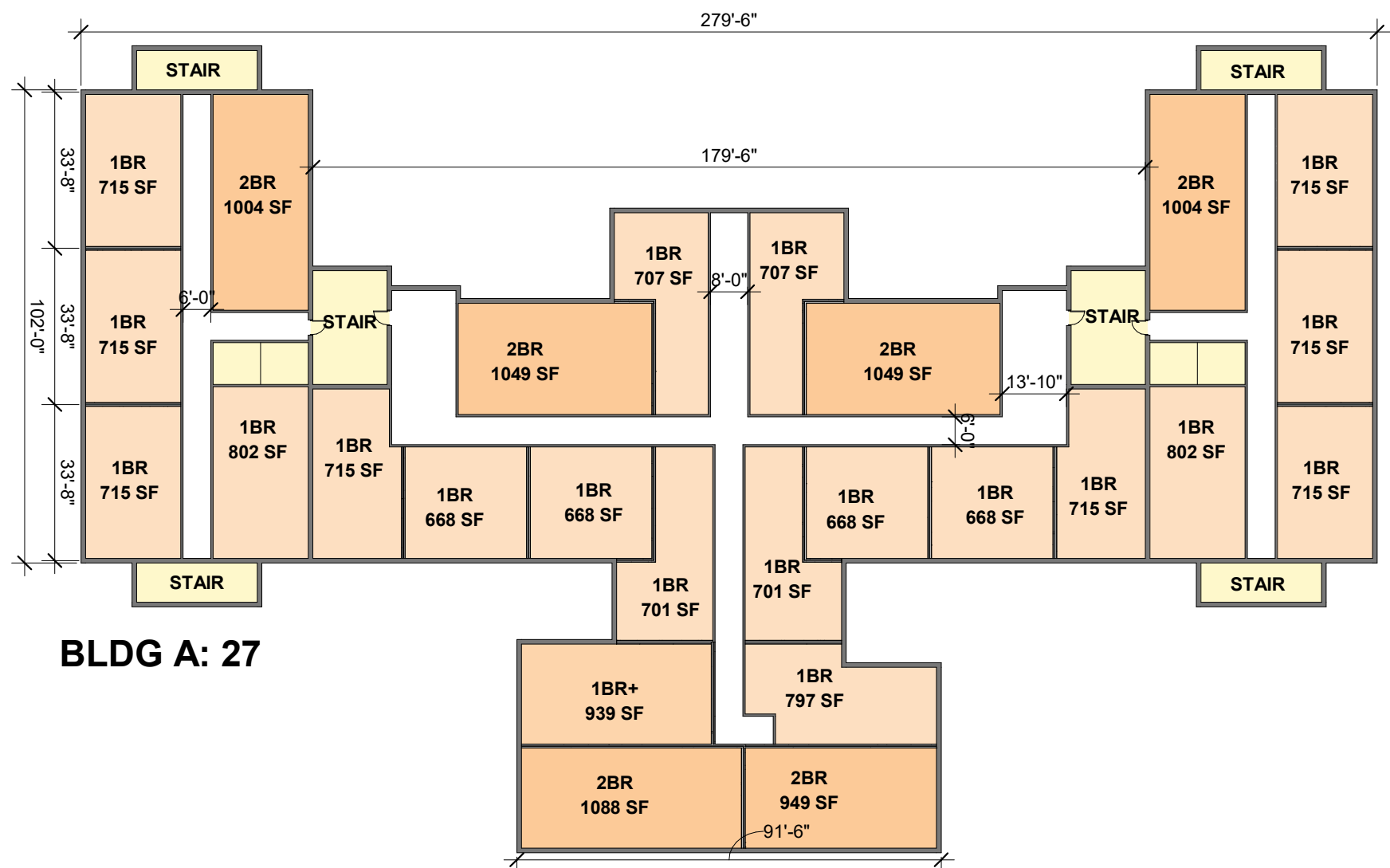






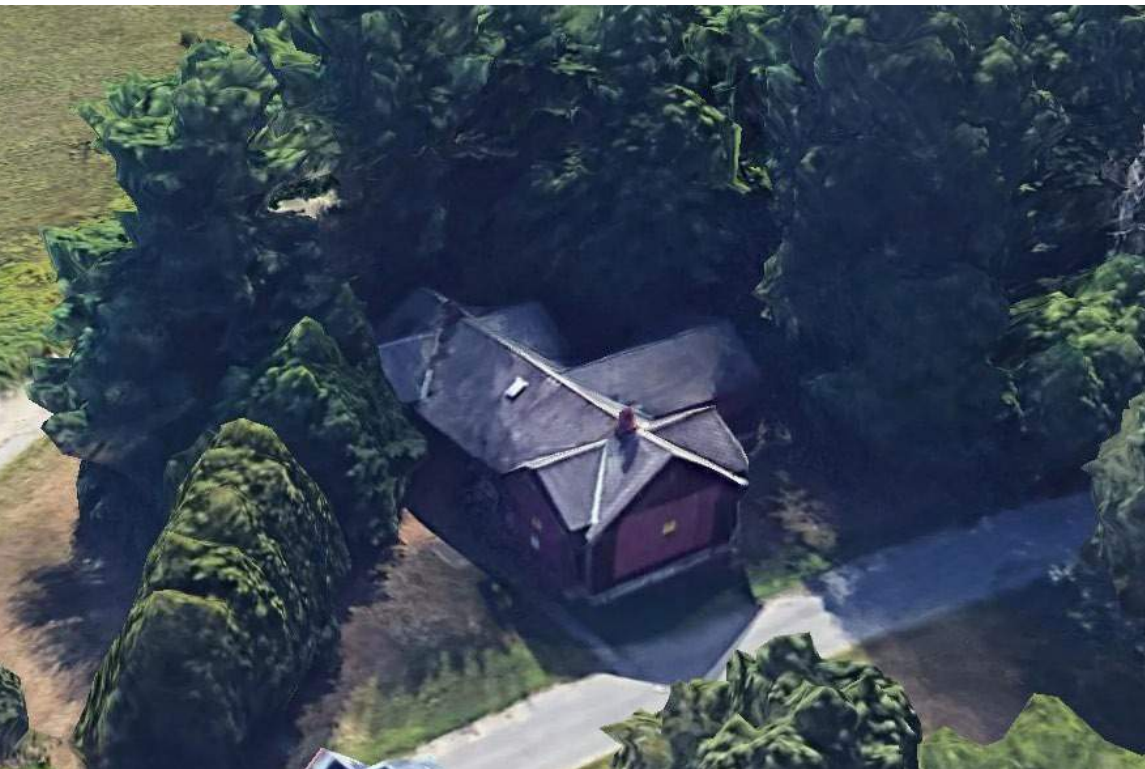




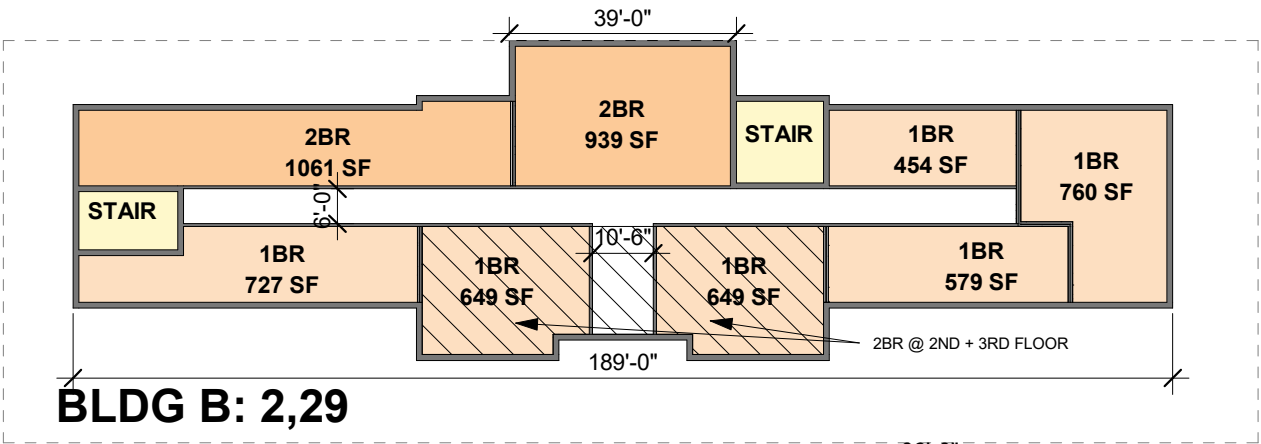
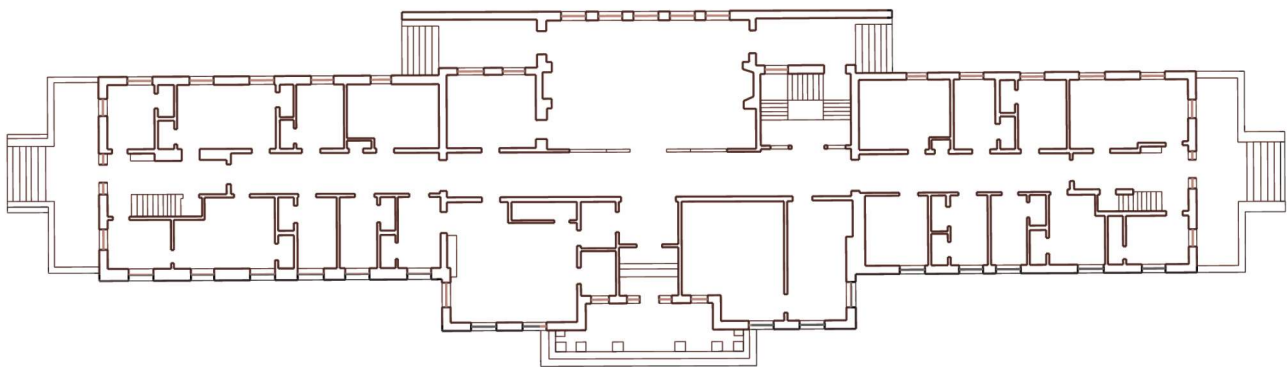


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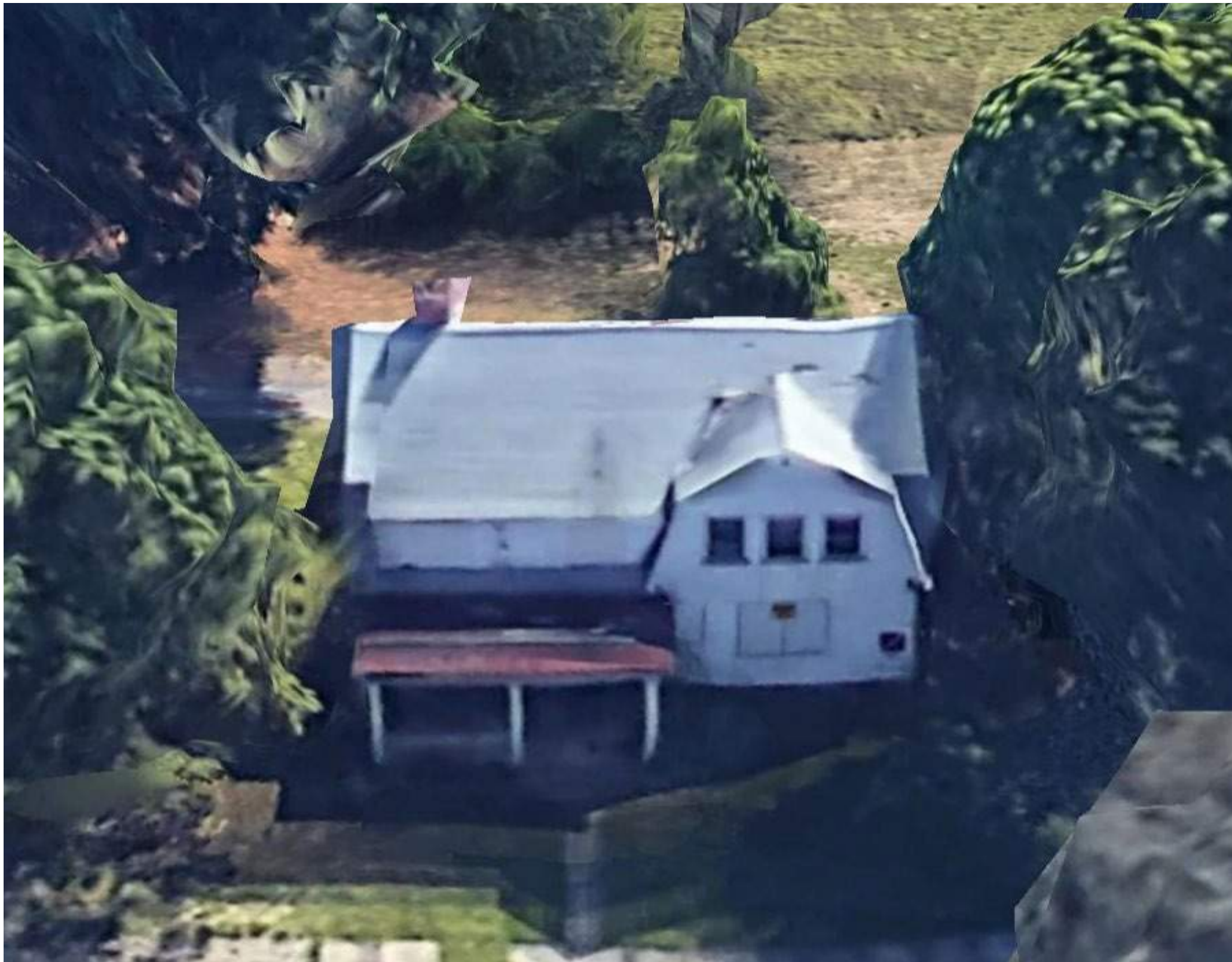




















DISPOSITION INTENT NARRATIVE

1. Include a detailed narrative description of how the proposed development will address the broad goals set forth in Section 1-2 Disposition Intent.

Goal 1: Successfully repurposes MSH to support overall Town needs and interests

Trinity's proposed redevelopment of the MSH campus thoughtfully infuses new life into the historic buildings and restores them to their grandeur. Honoring the site's historic and architectural significance, our proposed revitalization takes its direction from the existing landscape and maintains public access to the new Cottage Hill neighborhood, with its verdant surroundings, open space and vistas. We honor the desire of the Town to introduce a cultural component to the property, by creating an adjacent complementary use of housing with a preference for artists. We introduce new principals of sustainability to the development, ensuring that the redevelopment is in alignment with and contributing to the Commonwealth's climate and carbon neutrality goals.

Goal 2: Address Town housing needs including the need for senior housing, mixed income housing, and other residential options such as nursing and memory care, special needs housing and artist live/work housing

Trinity's proposed redevelopment of the historic site proposes to restore the historic buildings of the Core Campus and Arboretum, creating 334 new homes for Medfield targeting a mix of income levels. With 25% of these homes as affordable apartments in historic structures, our plan provides alternatives to Medfield's larger single-family home supply and will be an attractive option for renters and those who are downsizing. Trinity's proposed artist preference for 10% of its affordable housing units compliments CAM's efforts to develop a Cultural Arts Center on the former MSH grounds by providing the opportunity to cultivate a true artist community.

Goal 3: Attain reasonable and desirable economic financial and non-financial impacts on Medfield residents and Town services

The Trinity proposal provides a number of financial and non-financial impacts on Medfield residents and Town services.

First, the proposal provides a number of financial benefits to the Town of Medfield:

- A purchase price of \$2M for the proposed development site, 50% to be paid to the Town of Medfield at the closing of each of the two development projects;
- A payment of \$1M towards the construction of CAM's Cultural Arts Center and \$250K towards programming;
- Development assistance and construction oversight for the CAM's Cultural Arts Center;
- The assumption of landscape and maintenance costs for the Hospital District site.

The proposal calls for a number on non-financial benefits to the Town of Medfield:

- A development team with experience in large scale redevelopment and complicated historic preservation projects ensures that the development process will be thoughtfully executed;
- A plan that maintains the site as a neighborhood of Medfield; as opposed to a restricted community;
- A purposeful plan that incorporates attractive open space that is accessible and inviting to residents of Medfield;
- The restoration of historic assets of the Town of Medfield and the Commonwealth, with a celebration of their history of wellness; and
- A development proposal that fits within the parameters of the Master Plan

Goal 4: Maintain and enhance the character and values of the Town of Medfield and its residents

By intentionally focusing on the restoration of the existing buildings, the Trinity plan enhances the character of the Town and retains the focus on the property's existing character. Residents of Medfield remain able to soak in the rejuvenating benefits of the property and will be able to take advantage of new opportunities for community building on site. Trinity's focus on residential development in combination with the arts and open space, allows downtown Medfield to retain its vibrancy and appeal.

PERMITTING PROCESS

Include a narrative describing the anticipated Permitting and Entitlement processes and a list of all required local, state, and federal zoning, land use, historical commission/historic district commission, and environmental permits and approvals required. Also include any and all applicable licensing/operating permit requirements as appropriate to support the uses proposed. This information should be organized in a format that illustrates the permit strategy and related schedule in a clear, organized fashion.

Trinity has a well-documented track record of permitting complex mixed-use developments in many communities across the Commonwealth. Our approach to planning and designing all our projects – regardless of scale and location – is built upon community outreach and consensus building. Trinity typically reaches out to stakeholders in the neighboring community to get input on what they would like to see in the plan for the redeveloped Campus. Trinity recognizes that significant attention has already identified a vision for the redevelopment of the Medfield State Hospital grounds. Our approach is to facilitate input for the realization of that vision.

Working closely with the Town of Medfield, the Commonwealth of Massachusetts, elected officials, and other community stakeholders, Trinity will navigate the permitting process adeptly, with a goal of getting the project designed and approved for the use of federal and state historic tax credits and other sources of funding.

Trinity will begin the pre-development tasks including due diligence, permitting, advancing plans and specs, and securing financial commitments immediately following the Town's developer designation.

Historic Resources Approach

Medfield State Hospital (MSH) is listed in the State and National Registers of Historic Places and is designated a local historic district. Redevelopment of Medfield State Hospital is subject to a 2014 Memorandum of Agreement (MOA) among the Town of Medfield, Massachusetts Division of Capital Asset Management and Maintenance (DCAMM), and Massachusetts Historical Commission (MHC) with the Medfield Historical Commission (Medfield HC) and the Medfield Historic District Commission (MHDC) as concurring parties. The MOA outlines signatory roles and responsibilities, some of which will be delegated to the MSH designated developer.

The Project will utilize state and federal funding, so in addition to the MOA stipulations, it will be subject to MHC review in compliance with Section 106 of the National Historic Preservation Act and State Register review requirements. The Project is subject to review by the MHDC in its administration of the Medfield State Hospital local historic district, within which the Commission has review of any changes to building exteriors visible from public ways, as well as new construction. Demolition of Buildings 10 and 27B will be the subject to Medfield HC review under the Town's Demolition Delay Bylaw, with the understanding that the buildings are non-contributing to the National Register district and the 2014 MOA allows for their demolition.

Trinity proposes to undertake certified rehabilitations of all the buildings in the Disposition Area (excluding Buildings 10 and 27B) utilizing state and federal historic tax credits. The scope of work, to be reviewed and approved by the National Park Service (NPS) and MHC, will be consistent with the Secretary of the Interior's Standards for Rehabilitation of Historic Properties and the local historic district design guidelines. Trinity understands the Cultural Alliance of Medfield (CAM) is undertaking a certified rehabilitation of Buildings 24 and 25 for reuse as a Cultural Arts Center. As the property is a "functionally related complex" as defined by the NPS for the historic tax credit program, Trinity will work cooperatively with CAM to ensure that all work undertaken by both parties meets the Secretary's Standards to assure NPS and MHC approval of the finished projects.

Trinity understands an archaeological survey may be required with respect to proposed ground-disturbing activities on any previously undisturbed land. Trinity will consult with the Massachusetts State Archaeologist/MHC in advance of ground disturbing activities and conduct any required archaeological survey.

The MOA stipulates that prior to substantial new construction, demolition of any contributing buildings, structures or objects, or other major change, the Town shall require that the buildings, structures and objects on that part of the site be documented in accordance with a "Recordation Plan." Trinity will consult with the MHC and MHDC to develop and implement the Recordation Plan, as needed. The documentation will be made available to the MHDC and Medfield HC.

LIST OF PERMITS

In thinking about the permitting for this site, Trinity is ever mindful of the fact that the Medfield State Hospital is an asset to the community that has enjoyed access to the natural and historic features of the grounds for many years. The site serves as an open space amenity for the Town and as a connection to a larger collection of open spaces including the Charles River Reservation and the Memorial Fields at McCarthy Park. We believe the MSH grounds can be developed to preserve the "feel" of nature and history in a way that the community can continue to experience. Therefore, we believe it vitally important to propose a development that enhances the existing assets for continued enjoyment. We anticipate a thorough and carefully-managed community outreach process to ensure that the Town's visions and expectations are not only met, but also exceeded.

A list of the anticipated local, state, and federal permits and approvals for our proposed development follows at the end of this section. It is noteworthy that our proposal recommends limiting demolition to only two existing buildings (#10 Machine Shop and #27-B Food Service (already identified as non-contributing)) maximizing the historic rehabilitation of existing buildings on the site, which we believe is the most appropriate approach given the history of the site. We understand that preserving the character-defining features of the contributing buildings is an obligation that is important to the community.

Once designated, and through coordination with and approval from the Town, Trinity will meet with the many key stakeholders in the Medfield community, to discuss our plan for the MSH campus redevelopment. The team will work with the community and the Town during the public approvals

process and we are committed to working to resolve any issues or concerns that may arise as the project moves forward and in any stage of development.

Trinity will navigate the permitting process adeptly. Trinity has selected permitting consultant, **Fort Point Associates, Inc.**, and Legal Counsel, **Robinson & Cole LLP** with support for the **Public Archeology Laboratory, Inc.** to advise and guide the redevelopment through acquisition of all of its necessary permits, including the Town's zoning review within 19 months from the date of designation.

Previous Massachusetts Environmental Protection Act Filings

The initial Expanded Environmental Notification Form (EENF) filed in 2010 proposed a project that includes remediation and redevelopment of the 269-acre former MSH site. Redevelopment, including 440 dwelling units and approximately 41,000 sf of office and community center space, was planned for the 94.2-acre central portion of the MSH site. The Massachusetts Environmental Policy Act (MEPA) Certificate #14448 (April 2, 2010) required a Single Environmental Impact Report (SEIR) related to the redevelopment of the Disposition Property as further reviewed by MEPA Certificates issued on two subsequent Notices of Project Change on August 10, 2011 and March 7, 2014, respectively.

The first Notice of Project Change (NPC), with a request for a Phase 1 Waiver, was filed in 2011. This NPC was primarily focused on clean-up activities in the C&D Area and the Charles River. Trinity notes the influence of the community led to longer term improvements to these activities. The second NPC, filed in 2014, focused on a revised remediation approach for clean-up activities in the C&D Area and the Charles River. The activities subject to the two NPCs are off site from the proposed development and addressed remedial actions and wetland impact. The NPC for the proposed project is not expected to change any wetland or Natural Heritage impacts, or additional soil remediation – subject to due diligence review.

As noted within the 2014 Memorandum of Agreement between Division of Capitol Asset Management and Maintenance, The Town, and The Massachusetts Historic Commission, the party that subsequently acquires the property becomes the successor proponent with respect to the pertinent sections of the MEPA Certificate #14448 for the SEIR process.

The entire Disposition Property was part of an Agency Land Transfer and the proposed development intends to pursue historic tax credits; therefore, MEPA has full scope jurisdiction. We will file a third NPC to update the differences and cumulative impacts of the project program from the project previously reviewed by MEPA. The NPC would include information regarding any potential environmental impacts, including infrastructure, transportation, Green House Gas emissions, and historic structures.

It is expected that the MEPA review of the NPC will conclude that the full scope jurisdiction continues and will require a SEIR, as was previously found in MEPA Certificate #14448. Trinity, with Fort Point Associates' assistance, will then file a SEIR for the proposed development.

Below is a summary of the key Federal, State and Local permits needed for the Permits for the redevelopment. A list of anticipated permits can be found at the end of this section.



U.S. Environmental Protection Agency – Pursuant to the Clean Water Act, the Project will file a Notice of Intent to comply with the Construction Stormwater General Permit and will prepare a Stormwater Pollution Prevention Plan.

Massachusetts Historical Commission (MHC) – Under M.G.L. Chapter 9, sections 26-27c, as amended by Chapter 254 of the Acts of 1988 (950 CMR 71) (referred to as “Chapter 254”), the MHC has review authority of projects undertaken, funded, or licensed by a state body to determine whether such project would have any adverse effect on properties listed in the State Register of Historic Places. As part of the review process with MHC, the Project will seek state and federal historic rehabilitation tax credits.

Medfield Planning Board – Our proposed stakeholder outreach and involvement process will be both informal and formal. Trinity and our consultants will request a pre-application meeting to seek the advice and direction from the Medfield Planning Board and other municipal review entities, and members of the public for the proposed development in accordance with Article 20 of the Town’s Zoning By-Law – the Medfield State Hospital District. Trinity anticipates that the pre-application meetings will also provide for feedback from the Medfield Historic District Commission. This feedback will provide a level of comfort in facilitating the Demolition Delay process and advancing their review of the proposed development for the Certificate of Appropriateness. We will accordingly use the preliminary feedback to adjust the proposed development to address any identified concerns and Planning Board directions and prepare an application per Article 20 §9B for the Proposed Project and Development Plan Approval. Trinity’s approach proposes to address local concerns regarding the development in advance of the Planning Board’s Public Hearing.

Anticipated Permits

The specific list of permits and licenses will be determined upon completion of initial planning phases of the proposed development, but is expected to include the following:

Agency	Permit/Approval
Federal	
Environmental Protection Agency (EPA)	NPDES Construction General Permit for Stormwater Discharge
State	
Massachusetts Environmental Policy Act (MEPA)	<ul style="list-style-type: none"> • Notice of Project Change • Single Environmental Impact Report
Department of Environmental Protection (DEP)	<ul style="list-style-type: none"> • Notice of Construction • Notice of Demolition
Department of Public Safety	<ul style="list-style-type: none"> • Approval of Elevator Inspectors
Massachusetts Historical Commission (MHC)	<ul style="list-style-type: none"> • Design Review (Finding of No Adverse Effect) • Approval of Historic Tax Credits
Local	
Medfield Planning Board	<ul style="list-style-type: none"> • Plan Approval

Medfield Historic District Commission	<ul style="list-style-type: none">• Demolition Delay• Certificate of Appropriateness
Medfield Building Department	<ul style="list-style-type: none">• Demolition Permit Application• Medfield Building Permit Application - Commercial & Multi-Family• Application to Alter an Existing Building Permit<ul style="list-style-type: none">○ Debris Affidavit○ MA State Final Construction Control Affidavit○ MA State Initial Construction Control Affidavit• Contractor Control Form• Certificate of Occupancy
Medfield Highway Department	<ul style="list-style-type: none">• Medfield Street Opening Permit• Medfield Trench Permit
Office of Water and Sewer Board	<ul style="list-style-type: none">• License to Install Water• Sewer Installation and Inspection Permit
Water and Sewer Department	<ul style="list-style-type: none">• Sewer Connection Application Permit• Water Connection Application Permit

IMPLEMENTATION PLAN AND SCHEDULE

Include a project schedule that includes proposed timetables for permitting, design, financing, and construction. This schedule must contemplate pre-development, development, and occupancy periods. This information should be organized in a detailed critical path schedule for implementation of the proposed Development Plan, including a list of development tasks and a timeline for each task. The implementation plan should also include a schedule for obtaining financial resources necessary for the proposed development. The plan should describe the anticipated schedule for procuring required equity investment funds, debt sources, tax credits and/or other financing incentives as may be required to underwrite the proposed development. The plan should also describe any implications for delay that may be anticipated, if any, and how the developer would mitigate these delays to keep the proposed project on schedule.

Trinity has a well-documented track record of permitting complicated mixed-use developments in many communities across the Commonwealth. Our approach to planning and designing all our projects – regardless of scale and location – is built upon community outreach and consensus building. Trinity's plan, upon successful selection, is to reach out to stakeholders in the neighboring community and within town to get input on what they would like to see in the plan for the redeveloped Medfield State Hospital Campus.

Working closely with the Commonwealth of Massachusetts, the Town of Medfield, the elected officials, neighbors, and other community stakeholders, Trinity will navigate the permitting process adeptly, with a goal of getting the project approved for the use of federal and state historic tax credits in order to leverage significant resources for the rehabilitation of the buildings.

Trinity will begin the pre-development tasks including permitting, due diligence, advancing plans and specs, and securing financial commitments immediately following successful Town vote on developer designation. **We intend to close on the financing for the project within 19 months of designation.**

Design & Construction Approach

Trinity takes considerable pride in all of its developments and achieves the highest level of quality and attention to detail in their construction. In order to manage the inherent risks and challenges that large scale historic rehabilitation developments present in particular, Trinity employs a multi-layered approach to the design and construction process.

Initially, Trinity's in-house design and construction department works closely with a third-party architectural team in the planning, conceptual and design development phases of a project. With careful oversight of the architect, and attention to matters involving infrastructure, permitting and financial feasibility, Trinity's project team is then able to manage the inevitable big picture issues that can be problematic in construction.

Once the project design progresses to the construction document phase, Trinity involves the Construction Project Manager who will act as the on-site owner's representative during the construction period. The Construction Manager typically manages one to two projects at a time,

depending on the level of complexity and size of the project. While in the construction document phase, the Construction Manager gains an intimate understanding of the buildings and works with the architect and our property management team to make sure the building systems are designed effectively and efficiently.

Trinity will also have its own onsite Construction Manager oversee the job. Once construction commences, instead of depending upon the architect's inspection services only, Trinity's Construction Manager carefully monitors construction quality, schedule and contingency to make sure the project remains on schedule and on budget. The Construction Manager runs regular construction job meetings with the team, incorporating the necessary inspectors as appropriate.

Over the course of time, Trinity has established best practices in how it manages construction budgets to ensure that a project meets its financial obligations. Trinity typically uses a Guaranteed Maximum Price (GMP) construction contract with shared cost savings. This provides incentive to the general contractor to identify savings and, in combination with our on-site senior construction project manager, maximizes the ability to control costs and then manage the contingency.

Financing Approach

Trinity has well documented experience in leveraging private and public financing to develop large scale projects that will guide its approach for the Medfield campus. This process begins during the proposal stage by testing feasibility of the plan through initial construction cost estimation, reviewing market research by industry peers, and gauging project interest from trusted financial partners.

Conservative Mixed-Financing Underwriting

The financing of the project relies on a mix of sources. In addition to traditional construction debt and private equity, the project relies on the equity from the sale of federal and state historic tax credit, MassWorks funds, and MassHousing workforce funding. These additional sources reduce the amount lending and investment necessary to fund the project, making it more attractive to potential financial partners. More detail on the financing plan can be found in the Section E: Financial Plan. of the proposal.

Line of Credit Information

Trinity has a long and successful track record of raising capital in the form of both debt and equity to support large, complex, phased redevelopment projects. For the Medfield State Hospital redevelopment, Trinity is confident that through a combination of equity and debt resources, sufficient capital can be raised to implement a comprehensive revitalization strategy.

Trinity's strong balance sheet and extensive experience with complex large-scale developments will also enable us to bring the necessary equity to the redevelopment of the Medfield State Hospital site. The project's beautiful landscape and location within a stable, attractive town that is appealing to a diverse population also makes it an attractive investment. Finally, Trinity maintains a seven-figure line of credit with Bank of America (BoFA) and routinely secures eight-figure construction and permanent financing from BoFA and our other major bank, TD Bank.

Project Schedule

DATE	MILESTONE	DURATION
November 2021	Developer Designation	<i>Per RFP page 10</i>
December 2021	Execution of Provisional Designation Agreement	30 days after Designation <i>per RFP page 10</i>
December 2021 – March 2022	Due Diligence Period	120 days from PDA Execution <i>per RFP page 10</i>
April 2022	Special Town Meeting Vote	Estimated
May 2022	Execution of the Developer LDA	30 days after Special Town Meeting Vote-Estimated
May 2022 – November 2022	Commence preliminary community outreach-abutters and stakeholders, local agencies	
June 2022-September 2022	Schematic Design through Design Development	Approximately 120 Days
August 2022 – June 2023	Commence Major Permitting: MEPA, DEP, Department of Public Safety, Massachusetts Historical Commission (MHC), Medfield Planning Board, Medfield Historical Commission, and others.	
August 2022	Submit National Park Service (NPS), MHC historic tax credit applications	
October 2022	Trinity begins discussions with market rate housing partners	
February 2023	NPS approval of historic tax credit application	
March 2023	Funding award from DHCD	
April 2023	MHC state historic tax credit allocation	Anticipate state historic tax credit allocations April, August, December 2023, 2024, 2025
June 2023	Complete Major Permitting. Trinity Commences Construction Documents	
December 2023	Close all financial commitments and Commence Construction	24 months construction
December 2025	Complete Construction	

FINANCIAL PLAN/PROFORMA BUDGETS/PROPOSED SOURCES & USES

Include a financial plan to demonstrate the financial feasibility of the proposal including a summary of anticipated sources and uses of funds, development and operating proformas, and underwriting assumptions. If public capital or operating subsidies are anticipated (i.e., historic tax credits, low-income housing tax credits, MassWorks or other public resources), this information should identify the sources proposed, the amount of funding required, and a schedule for receipt of these sources.

The proposed plan is expected to create 334 units of mixed-income housing at a total development cost of \$154 million. This total cost includes full rehabilitation of existing buildings, site work and infrastructure improvements, landscaping, and mitigation. In order to realize this plan, Trinity is currently proposing to undertake the project in one phase in order to minimize time impact on surrounding residents, maximize the benefit of utilizing historic tax credits, provide an attractive opportunity that efficiently utilizes public and private resources, and complete the entire project in a timely manner.

Financial Consideration to the Town of Medfield

The Trinity plan will create \$4.5 million in direct benefits to the Town of Medfield. This includes:

- \$2 million acquisition payment for Medfield State Hospital Campus
- \$1 million direct contribution toward the construction of the Cultural Arts Center
- \$250,000 direct contribution to the Cultural Arts Center
- \$500,000 funding of Force Account for Town consultants needed during the campus redevelopment process
- \$716,000 in net tax proceeds to the Town annually

Financial Plan Overview

The program calls for the rehabilitation of 33 buildings to create 249 unrestricted rental units and 85 affordable units at 80% of Area Median Income, 9 of which we will be seeking an artist preference accommodation. The cost for this project is approximately \$154 million, inclusive of acquisition, hard costs, soft costs, and developer fee. The sources for this project contemplate utilizing a mix of resources including \$72 million in construction financing to be converted to permanent financing at the point of stabilized operations, \$30 million in federal and state historic tax credit equity, \$19 in MassWorks Infrastructure grant funds, \$8.5 million in MassHousing Workforce Funds and additional subordinate financing, and \$24 million of private equity.

As part of this plan, we have already commenced initial outreach to potential financial partners. Please find a letter of support from Berkshire Residential Investments at the end of this section.

Financial Plan Key Assumptions

The following assumptions informed the development budget and operating pro forma for the project:

Acquisition

- The proposed acquisition price is \$2 million. This sum is in addition to the proposed redevelopment work Trinity will complete for Town infrastructure and utilities on the MSH campus.

Hard Costs

- Hard costs are priced at \$300 per square foot for rehabilitation costs. These estimates are based on current historic rehabilitation projects we have under construction and were escalated to account for the complexity and expansiveness of the MSH site. We have added a 7% owner's contingency to this figure, which is customary in an historic rehabilitation.

Soft Costs

- Amounts were generated based on comparable Trinity projects of similar size and scope.
- Include \$500,000 to fund a Force Account line item to cover mutually agreed upon expenses that the Town will incur for the development
- Include \$250,000 as a contribution to the Cultural Arts Center on campus.

Sources

Construction and Permanent Debt

- The project assumes use of interest-only construction financing at an 3.5% interest rate, to be converted to permanent financing upon successful stabilization of operations.

Permanent Debt

- The permanent loan was sized at a 1.20 debt service coverage ratio of stabilized net operating income at a 4% interest rate and under a 30-year amortization period

Federal and State Historic Tax Credit Equity

- Our tax credit pricing is based on current pricing Trinity has received on recent transactions. We have assumed \$0.85 per credit pricing on all federal historic tax credit proceeds generated from all qualified historic rehabilitation work. State historic tax credit allocation is assumed to be a total award of \$8,000,000 for the project, priced at \$0.92 per credit.

Operating Pro Forma

Revenue

- Our market rate rents are based on average rents from 7 comparable developments provided by JLL.
- Affordable rents are based on rents that are targeted at 80% of AMI for Norfolk County (U.S. Department of HUD 2021 Rental Rates for Boston MSA Metro Area)

- We have trended rents and expenses at the industry trending standards of a 3% and 2% respectively.
- We have assumed a 5% vacancy rate for the market rate units and a 3% vacancy rate for the affordable units.

Expenses

- The budget assumes annual costs for general property management expenses are \$11,000 per unit. These expenses include property management and maintenance staffing, leasing and marketing expenses, administrative expenses, taxes, utilities and insurance for the property.
- The project will include a reserve in its annual operating budget to fund and implement a long-term maintenance regimen and program of capital repairs, replacements, and improvements.

Funding Schedule

Please refer to the Implementation Plan and Schedule for funding timeline.



July 28, 2021

Mr. Nicholas Milano
Director of Planning
Town of Medfield
Town Hall
Medfield, MA

Dear Mr. Milano:

On behalf of Berkshire Residential Investments (Berkshire), please accept this expression of support for the project proposed by Trinity Acquisitions LLC for the redevelopment of the Medfield State Hospital Campus in Medfield, MA.

The project, involving the creation of 334 rental apartment homes on an historic campus, will build on Trinity's stellar track record of working on complicated development sites to create attractive, sustainable developments that have a transformational effect on the neighborhoods in which they are located.

As a Boston based-real estate advisory firm that has invested in projects both nationally and locally, Berkshire has been impressed by the Trinity team and its ability to execute complex transactions. Trinity and Berkshire recently completed a luxury rental development in downtown Stamford, CT. This project, Vela on the Park, with its intricacies and challenges, was adeptly managed by Trinity from its early negotiations with the City of Stamford, to the complicated construction on an urban infill development.

Berkshire has developed a strong working relationship with Trinity and has significant respect and trust for the Trinity team. We are interested in the type of transformational projects that Trinity is attracted to, in neighborhoods that provide amenities to its residents. We look forward to leaning more about the proposed transaction and the potential to provide equity capital to support this dynamic opportunity. We are confident the Town of Medfield will find Trinity to be a flexible, creative and reliable development partner with whom to undertake this transaction.

Please feel free to reach out to me should you need any other information at this time.

Sincerely,

Heather Boujoulian
Managing Director
Chief Investment Officer - Development Investments

Medfield State Hospital RFP
Trinity Financial
Development Summary, Pro Forma, and Operating Budget
7/30/2021

Development Budget Summary	Total
Land Costs	\$2,000,000
Hard Costs	\$126,083,000
Soft Costs	\$18,944,744
Finance Costs	\$6,937,561
Total Costs	\$153,965,305
Total Sources	Total
Funded By Private Equity	\$24,185,372
Funded By MassHousing Workforce/Other	\$8,500,000
Funded By Massworks	\$19,000,000
Funded by Historic Tax Credits	\$30,387,962
Funded By Debt	\$71,891,971
Total Sources	\$153,965,305

Market Rate Units				
Unit Type	# of Units	Average NSF	Monthly/Unit	Annual Total
Studio	9	550	\$1,875	\$202,500
1 Bed	138	750	\$1,989	\$3,293,784
2 Bedroom	94	1,150	\$2,595	\$2,927,160
3 Bedroom	8	1,500	\$3,102	\$297,792
Total	249	0		\$6,721,236
Market Rate Averages		918		

*SF Estimate based on
ICON architecture
estimate*

Affordable Units				
Unit Type	# of Units	Average NSF	Monthly/Unit	Annual Total
Studio	4	550	\$1,782.00	\$85,536
1 Bed	46	750	\$1,901.00	\$1,049,352
2 Bedroom	32	1,150	\$2,265.00	\$869,760
3 Bedroom	3	1,500	\$2,612.00	\$94,032
Total	85	0		\$2,098,680
Affordable Unit Averages		918		

*SF Estimate based on
ICON architecture
estimate*

Total all Units	334	\$8,819,916
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Medfield State Hospital RFP
Trinity Financial
Development Summary, Pro Forma, and Operating Budget
7/30/2021

	# of Units	Percentage with Pets	Units With Pets	Monthly Pet Fee	Annual Total
Pet Fee	334	50%	167	\$50	\$100,200

	# of Units	# of Parking Spaces	Spaces/Unit	Monthly Parking Fee/Space	Annual Total
Parking Fee	334	249	0.75	50	\$149,400

Number of Units
334

Total

OPERATING BUDGET

INCOME

Apartment Rental Income - Market Rate		\$6,721,236
Less Market Vacancy	5%	(\$336,062)
Apartment Rental Income - Affordable		\$2,098,680
Less Affordable Vacancy	3%	(\$62,960)
Parking Fee Income		\$149,400
Less Parking Vacancy	5%	(\$7,470)
Pet Fee		\$100,200
Total Income		\$8,663,024

EXPENSES

Total Expenses	\$3,674,000
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NET OPERATING INCOME

\$4,989,024

CULTURAL ARTS CENTER

Include a description of how the proposed development will address and accommodate CAM's planned Cultural Arts Center referenced in Section 2-1, the existing lease between CAM and the Town for Buildings 24 and 25 (Appendix G) and provide for pedestrian and vehicular access to and through the CAM premises before, during and following redevelopment of the Disposition Property.

Trinity anticipates developing a close working relationship with the proposed Cultural Arts Center of Medfield. We are a firm that uniquely recognizes the importance of robust arts programming in communities and the need for affordable housing to support artists and allow them to flourish and thrive.

Cultural Arts Center

Trinity has had an initial conversation with the Cultural Alliance of Medfield and anticipates further discussions should it be designated developer of the property. In order to support the objectives of CAM, our proposal contemplates the following:

- As part of its construction, hard costs' budget, Trinity will contribute \$1,000,000 towards the historic rehabilitation of the Cultural Arts Center development;
- As part of its soft costs' budget, Trinity will fund a \$225,000 contribution to support the Cultural Arts Center;
- Trinity will offer development consultation and construction oversight for the Cultural Arts Center. As the property is a "functionally related complex", as defined by the National Park Service for the historic tax credit program, Trinity will work cooperatively with CAM to ensure that all work undertaken by both parties meets the Secretary's Standards to assure NPS and MHC approval of the finished projects;
- Trinity will work with CAM to create a Call for Artists to create a public art showpiece for the property and pursue other collaborative programmatic opportunities;
- Trinity will facilitate the creation of a sub zone, if necessary, to be subdivided from Parcel A and related vehicular, pedestrian, construction and access easements to ensure appropriate public access to the CAM premises both during and following construction activities;
- Trinity will endeavor to work with various local and state financing agencies to create an artist preference for 10% of its affordable housing units.

Trinity's Creative Experience

Trinity brings its own creative programming experience to the MSH Campus redevelopment, having successfully developed over 170 units of affordable artist preference housing, and associated gallery space, in the cities of Lowell, Brockton and East Boston, MA. The following developments charted groundbreaking opportunities for the artists in the cities in which they are located:

Appleton Mills-Lowell, MA

The Appleton Mills was the first phase of the Hamilton Canal District in Lowell. The building includes 130 units of affordable housing with a preference for artists and other creative professionals. The program was consistent with Lowell's efforts to attract and retain such individuals as part of its downtown development strategy and met the community's desire to maintain affordable housing for the artists who had helped establish the City as a flourishing arts destination. Trinity developed an artist certification process so that creative individuals received a preference over other applicants. Over 200 artists of all disciplines were ultimately certified by the Appleton Mills Artist Selection Board (comprised of a Trinity representative, a representative of its property management team and an artist representative nominated by the City).

A "Call for Artists" competition for the permanent art installation that would highlight the Mill's Atrium Gallery drew many submissions. The installed piece draws visitors' eyes up to a floating sculpture suspended from the rafters, creating a dynamic environment that constantly changes as light moves through the space. Construction on the Appleton Mills was completed in 2011 and the project is currently at stabilized occupancy. Today, the artists at Appleton Mills participate in Lowell's regular open studios events.



Appleton Mills Atrium Open Studios Show

Boston East - Boston, MA

Boston East is a community with 200 apartment homes on the East Boston waterfront. With an awareness of the burgeoning artist community in East Boston, the property's neighboring East Boston Artists Group at 80 Border Street and the Atlantic Works Gallery, Trinity recognized the need for affordable artist housing in East Boston. As part of the development of this vacant site, Trinity converted would have otherwise been vacant ground floor space, to create six innovative affordable Artist Live/Work/Sell units and a community gallery that satisfied the State's Chapter 91 Facilities of Public Accommodation requirement. Construction was completed in 2018 and today the building is occupied at 97%. The six affordable artist units are occupied by City of Boston BPDA-certified artists including musicians, emerging artists and interior artists. For more information on the artist component at Boston East, please visit: www.bostoneast.com/p/public-amenities/



Boston East Gallery Opening Show

Enzo Lofts- Brockton, MA

Enso Flats is part of the \$100 million Enterprise Center project, located at the historic site of the former Brockton Enterprise Building, which is aimed at revitalizing downtown Brockton. The 42-unit Enso Flats community meets the unique needs of artists through highly-amenitized, spacious apartments, flexible floor plans, access to a community work area and artist gallery, and an abundance of natural light. The state-of-the-art gallery space is located on the ground-level. As part of the building's opening, Trinity conducted a call for New England artists, designers and teams - including any potential collaborations with writers or musicians – to submit their qualifications for a freestanding piece of art for the building that incorporated attributes of Brockton's historic character and culture.



Gallery at Enso Flats Gallery Opening

DESCRIPTION OF USES

Include a description of the target market for tenants and other end-users identified in the Development Plan, including a strategy for marketing to these groups.

This information should be organized in a clear and organized format that includes, at a minimum:

- The square footage for each use.
- The total FAR for all buildings (total buildable area anticipated as a percentage of the total land area).
- Percentage of the site to be used for parking/pavement (impervious area calculations).
- Description of the relationship of the project to the surrounding buildings and neighborhoods.
- Description of the open spaces to be maintained in the proposed redevelopment.
- Description of public realm amenities, including passive recreation, that is accessible to the public.

Marketing Strategy

The Cottage Hill development will look to attract a variety of tenant types to the campus, both from the town of Medfield and abroad. We see the homes as appealing to three particular groups; This mix of family types, we believe, will aid in turning the former Medfield State Hospital campus into a community that will meld into the existing neighborhoods of town seamlessly. First, this new community will appeal to current residents of Medfield who are looking to downsize from larger homes, reduce personal and financial upkeep for their residences, while remaining in the town that they love. Second, young couples and young families looking to gain entry into attractive housing options would be drawn to the campus due to its beauty, concentration of amenities, and ability to form relationships with others in town as they look to establish a long-term investment in Medfield. Third, singles, including artists, would be drawn to the site, given the focus on the arts and the intensive cultural and social gatherings that will bring energy to the site. The diversity of family types will work to stabilize this development, promote a dynamic and healthy community, and ensure the attractiveness of the housing that will draw residents to Cottage Hill, and Medfield at large.

Program Uses by Square Footage

The following description lists the gross square footage of all uses contemplated in the redevelopment of the Medfield State Hospital campus. Please note we have relied on the SF provided in the RFP:

- Multifamily Housing – 393,700 square feet
- Community Space – approximately 16,300 square feet
- Parking – approximately 215,000 square feet
- Open Space – 450,000 square feet

FAR and Percentage of Site for Impervious Pavement

Total FAR for all buildings on site is 0.1. This was calculated by dividing the gross square footage of all buildings on campus (393,000 square feet) by the total acreage of the site (87 acres or 3,789,720 square feet):

393,000 square feet divided by 3,789,720 square feet equals 0.1

The same calculation was used for impervious pavement and parking (450,000 square feet), which represents an FAR of 0.11:

450,000 square feet divided by 3,789,720 square feet equals 0.11

Connection to Surrounding Buildings and Neighborhood

Our campus renewal plan respects and enhances the historic character of the site, while reshaping the identity of this place as a revitalized neighborhood environment. Built in a Queen Anne style typical of this generation of hospital institutions, these buildings will be renovated to offer a decidedly residential feel. By significantly rehabilitating the campus buildings and preserving the large swaths of open space on the site, we see the campus functioning as a dynamic and welcoming neighborhood. Upon designation, the community outreach and planning with town residents will serve as the beginning and development of this reconnection. The planned establishment of public roadways and pathways and programmatic offerings for campus and greater town residents will solidify the campus and town being one going forward.

Open Spaces and Public Realm Amenities

The new public open spaces created will provide significant recreational and ecological amenities for the Medfield community. With passive and active programs, the new campus landscape will be crafted to engage residents and neighbors in social spaces while providing 'productive landscape' services. The objective of the 'productive landscape' is to create an open space that provides ecological resources (such as wildlife habitat enhancement, stormwater treatment, native seed spreading and passive cooling) while also providing recreational opportunities for the community. Some of the amenities provided in the open space will include:

- **Call for Artist** - We envision holding for a Call for Artists to program a welcoming artistic installation at the site entrance, announcing the new identity of the site from Cottage Drive.
- **Community & Art - Central Gathering Space** – Buildings at the center of the open green, will be developed with Arts and Community Uses. At the heart of the community, Buildings 24 & 25 – the former Chapel and Rectory, will be the Cultural Arts Center, inviting the broader community onto the site. Located between these buildings, Building 26 will become a Community Clubhouse, an amenity destination for residents and neighbors alike. The Inner Loop Streets will decoratively paved and raised to slow traffic, but allow drop off and access to parking courts. The open space created by the demolition of the Kitchen building will provide space for an open landscape, allowing an opportunity for residents to

spontaneously play frisbee or lounge on picnic blankets and read a book. Widened sidewalks will be landscaped to provide places to sit and engage. Accessibility will be enhanced.

- **Activated Open Spaces** - will be improved to connect to long views across the campus. Building upon the richness of the existing, historic landscapes on site, the renewal plan restores the landscape structure of the tree-lined streets and their linear view corridors, plants new specimen trees and facilitates greater social use of quadrangle and spaces surrounding the key architectural structures of the core campus. It also provides more visual interest in the courtyard spaces between the buildings on the Inner Loop Drive which are viewed from both the south-facing verandas of each of these buildings and from the center campus landscapes. Active and passive recreational elements and community garden functions are distributed across the site.
- **Improved Streetscape** - A dramatically improved pedestrian and bicycle-oriented neighborhood will be created with a new network of access points and sidewalks throughout the site. To activate the street and create a more engaging public realm, benches and site furnishings in both shady and sunny areas will encourage social interaction among veterans.
- **New Planting** - Many of the existing trees on campus are in decline; we will add new trees that will be carefully selected to complement the existing tree canopy and overall building character while providing a diversity of native species to enhance ecological connections. We expect new shade trees to be added throughout the campus and along the street.
- **Play & Garden Moments** - We see the opportunity to create thoughtful play areas, incorporating natural elements into the topography. Community Gardens represent an opportunity to build community and build sustainable gardens, enhancing the natural resources of the site.

AFFORDABLE HOUSING PLAN

If the proposal includes housing, the proposer's plans must provide affordable housing consistent with the Town's inclusionary zoning bylaw § 300-14.16 (see table on following page). This should include identification of the number of units to be affordable by housing type (for example, the number of units proposed for senior and/or family housing), income tiers, and any subsidies anticipated. Provide a clear and organized matrix that includes: (1) anticipated total unit counts; (2) housing type (rental, homeownership, other); (3) target market (family, senior, other); and (4) number and description of what is defined as "affordable housing" including target rent/income limits as applicable.

Total Units in Project	Affordable Units
6 to 20	15%
21 to 49	20%
50+	25%

Trinity's proposal calls for the creation of 334 total units of rental housing after the complete redevelopment of the Medfield State Hospital Campus. In accordance with the Town of Medfield's inclusionary zoning bylaw, 25% of all units, or 85 units, will be designated as affordable in the plan. This amount is composed entirely of units that are affordable at 80% of Area Median Income.

Multifamily Rental Housing Plus 80% AMI Units

Below is a description of the 85 units at 80% of Area Median Income, including bedroom breakdown, income breakdown, and rental rate breakdown. All units will be rental family housing. These specific units plan on utilizing funding subsidies from MassHousing's Workforce Housing program.

Bedroom Breakdown

Bedroom Type	Number of Units
Studio	4
1 Bedroom	46
2 Bedroom	32
3 Bedroom	3
Total	85

Rental Breakdown

Bedroom Type	Gross Rent
Studio	\$1,880
1 Bedroom	\$2,014
2 Bedroom	\$2,416
3 Bedroom	\$2,792

*Information derived from the United States Department of Housing and Urban Development Rental Rates for 2021 in Boston MSA Metro Area's Norfolk County

Household Income Breakdown

<u>Household Size</u>	<u>Income Limit</u>
1 Person	\$75,200
2 Person	\$85,920
3 Person	\$96,640
4 Person	\$107,360

**Information derived from the United States Department of Housing and Urban Development Income Limits for 2021 in Boston MSA Metro Area's Norfolk County

ENVIRONMENTAL IMPACTS, CONSTRAINTS AND MITIGATION

Include a description of anticipated environmental impacts associated with the proposed development. Address the 2010 MEPA certificate constraints and any aspects of the proposal anticipated to be subject to additional MEPA review. Describe anticipated mitigation measures including but not limited to visual, noise, and traffic impacts during the construction, lease-up, and operating phases. Discuss how the proposer will address these considerations within the Permitting Process and Implementation Plan and Schedule proposed in paragraphs C and D above.

Environmental

Medfield State Hospital is a DEP listed disposal site with nine (9) Release Tracking Numbers (RTNs) assigned to the site. Of the nine (9) RTNs, three have been closed and rolled over into other RTNs, three have been addressed in Response Action Outcomes indicating that permanent solutions had been achieved and that no further action was required, and the remaining three RTNs have been combined into one RTN 2-3020799. This remaining RTN 2-3020799 has received Special Project Designation by the State and is a Public Involvement Plan Site (PIP). Specifically, RTN 2-3020799 applies to areas of the site identified as the Salvage Yard, C&D Area, Clay Containment Area and the Power Plant.

Based upon the RFP issued by the Town of Medfield, the redevelopment is confined to Parcel A. The only release site located on Parcel A is the Salvage Yard. The remaining release areas are located outside the boundaries of Parcel A. A partial Response Action Outcome statement under RTN 2-3020799 was filed for the Salvage Yard indicating that a permanent solution had been achieved for the Salvage Yard area and that no further remediation was required for that area. The remainder of the release site under RTN 2-3020799 which is located outside the boundaries of Parcel A is still considered an active release site since it has not yet achieved a Permanent Solution.

Based upon a report entitled “Non-MCP Area Investigations Report” prepared by Weston & Sampson, and date March 2011, several other areas of the Medfield State Hospital campus were investigated including former greenhouses, transformers and underground storage tanks (USTs). The results of their assessment and remedial activities related to the USTs indicated that no further action was required in these areas.

In conclusion, the records reviewed did not indicate the presence of active release sites in the Parcel A area of the site. We would recommend that a Phase I Environmental Site Assessment be completed to assess the site for the possible presence of Recognized Environmental Conditions. Based upon the results of the Phase I assessment a Phase II may be warranted which could include a subsurface investigation and chemical testing of soil and groundwater. Some possible conditions to be consider are (i) the potential presence of lead and/or asbestos resulting from chipped paint in the ground surrounding the existing buildings; (ii) underground asbestos utility piping; (iii) underground storage tanks and utility vaults; (iv) waterproofing materials on below-grade foundations and utility structures; and (v) given the former operation of a laundry at the

site, while outside the boundaries of Parcel A, the presence of chlorinated volatile organic compounds in soil and groundwater.

Noise

Existing

One of the most critical concerns about the site from a development perspective is the current level of noise experienced from the neighboring firing range. This is a threshold concern that Trinity has identified not only for eventual residents of the development but also for institutional investors and lenders considering financing the project. As part of our preliminary due diligence, the Trinity team engaged Acentech, a Cambridge, MA-based acoustical engineering firm, to study the noise levels and make a recommendation about mitigation. In order for the project to advance as we have outlined in this proposal, the Town will need to appropriately address and mitigate this significant impediment to development. Please see Appendix C for the full Acentech report.

Future

Additional air quality and noise impacts for the proposed development are primarily associated with vehicle trips of residents and visitors to the Campus. Though the Project includes activation of these abandoned buildings, it will mitigate noise and visual impacts through a variety of approaches. Potential sources of noise from the renovated buildings will be addressed by comprehensive insulation and air sealing, as well as utilizing energy efficient HVAC-mechanical systems which will meet current industry standards. As noted in the Traffic impacts summary, the predominantly residential program reduces the traffic generation compared to options with a large commercial component, limiting fuel pollution and emissions, as well as vehicular and loading-related noise impacts.

Visual

Visual improvements will be provided as identified in the Landscape summary, aimed at supplementing the existing trees to remain, and supplementing those plantings in decline with additional shade trees for enhanced screening. Large activated open spaces will also be utilized to maintain and enhance long views across the Campus. Due to the historic nature of the buildings, it is anticipated that rooftop mechanical equipment will not be provided, and any ground-mounted equipment would be screened appropriately from view.

Traffic

By proposing a residential-only program, the potential traffic generation associated with the redevelopment is substantially reduced compared to options with a large commercial component. As such, impacts to the roadways serving the site and the surrounding residential areas are minimized, thereby allowing the development to blend in with the surrounding community. The residential program would be expected to generate approximately, 2,500 vehicles per day and between 150 and 175 vehicles per hour during the weekday morning and weekday evening peak periods, respectively.

To put this in context, alternatives with a significant amount commercial component like those outlined in the Strategic Reuse Master Plan could generate approximately two to three times the amount of traffic as the residential-only program. As part of the planning process, a comprehensive traffic impact assessment will be conducted, which will identify specific impacts as well as targeted mitigation plans to accommodate new site traffic. The mitigation associated with the project will include geometric improvements at nearby intersections to improve existing safety and operational concerns. In addition, the project will include a comprehensive Transportation Demand Management (TDM) program, which will focus on promoting the use of alternative modes of transportation and providing strong bicycle and pedestrian connections on site and to the surrounding area.

Infrastructure

The infrastructure approach for the Medfield State Hospital Campus will be sensitively designed to respect the campus character. This will be accomplished in the following ways. We look to restore and improve the streets and sidewalks throughout the campus. New utilities will be installed below grade, and we will work to minimize the impact of needed contemporary venting on the facades and roofs of the existing buildings. Additionally, new site lighting will incorporate “dark sky guidelines” and be scaled to the pedestrian, residential scale of the campus

Access and Parking

Our plan incorporates small lots throughout the campus, targeted to match parking count with adjacent building unit count and provide visitor parking spaces. Building entries will continue to match current locations to minimize impact; in some cases, we may incorporate additional entries directly into units off the porch structures. We have also incorporated the larger lot as designed by the Cultural Arts Center.

Landscape

Trinity’s design seeks to enhance the site features that exist. We will incorporate landscape buffers as required to conceal infrastructure and shield views into parking areas. Many of the existing trees on campus are in decline. We will undertake a tree survey to determine health of large growth trees on the site. Those that are in decline will be addressed; additional new trees will be carefully selected to complement the existing tree canopy and overall building character while providing a diversity of native species to enhance ecological connections. We expect new shade trees to be added throughout the campus and along the street. If there is a necessity for irrigation systems as well, their design will follow appropriate guidelines.

PROPERTY MANAGEMENT PLAN

Include a description of the plan for the ongoing ownership, operation, and management of the property to be acquired. The proposal must also describe how the property will be maintained and kept secure prior to and during redevelopment.

General Property Management

It is anticipated that the Designated Developer of the Medfield State Hospital be a to-be-formed Delaware or Massachusetts limited partnership that is comprised of an affiliate of Trinity Financial, Inc. In order to execute the predevelopment activities for the redevelopment, the working capital will be provided by Trinity Financial, Inc.

During pre-development and redevelopment activities on site, Trinity will work closely with its selected general contractor to create a plan to secure the site. Strategies that have been utilized on previous Trinity developments include appropriate construction fencing, on-site security personnel during peak and non-peak hours, consistent and visible signage to reflect ongoing work, careful storage and security of materials and equipment used during construction, and constant communication with adjacent neighbors and the Town on driving routes and scheduled hours of work to mitigate disturbance to existing residents.

Once construction has commenced Trinity will determine the most appropriate property management firm to oversee the day-to-day maintenance and operation of the campus. Trinity has successfully worked with its own company, Trinity Management, as well as third-party property management firms for its portfolio of market rate developments. At properties such as Boston East in East Boston, MA and Vela on the Park in Stamford, CT, we have engaged third-party firms that have a particular market experience and expertise in incorporating services such as concierge, package delivery, and amenity-rich program offerings in addition to traditional services such as lease signings, maintenance repairs, and property tours. Using this experience, we will determine the most reputable company that will prioritize the health and safety of campus residents, the appearance and maintenance of the buildings and campus, and provide a stable presence that will reflect Trinity's commitment to creating healthy, safe, and successful properties.

Trinity Management Property Management Approach

Administrative Staffing

In consideration of the proposed program for Medfield State Hospital, it is anticipated that the property management team will likely be led by one full time Senior Property Manager, one Recertification Specialist, one Collections Specialist, one Administrative Assistant, and one Resident Services Coordinator. Campus maintenance staff will include one full time Maintenance Supervisor, and two Maintenance Technicians. The Trinity Management team will work side by side with the Owner as the property comes online. Over time, the Owner and Property Management team will

incrementally add positions and will continually assess the feasibility of sharing functions to create operational efficiencies so as to create the most cost-effective campus wide property management solutions.

The Senior Community Manager will be the senior person on the site, reporting directly to the Regional Director and/or Chief Operating Officer and responsible for the day-to-day administrative and operational activities. The Senior Community Manager is responsible for ensuring that all administrative and maintenance personnel perform their job-related tasks and that the Residents comply with the terms of their Occupancy Agreements (Lease). The Senior Property Manager is the person in charge of all other Trinity Management on-site personnel and will be the direct contact with external community organizations.

Trinity Management has an excellent tradition of employment and training programs and encourages employees to pursue self-development related courses through education assistance. Trinity Management strives to keep all employees current in all areas of property management including physical property management, financial management, social and marketing. Trinity Management is currently linked with several nationally recognized organizations that offer training for management TMLLCs including; National Apartment Association, The National Center for Housing Management, The Institute of Real Estate Management, MassHousing - Tenant Assistance Program, Rental Housing Association, Greater Boston Real Estate Board, Citizens Housing Planning Association, New England Affordable Housing Management Association, Elizabeth Moreland Tax Credit College, Nan McKay, National Affordable Housing Management Association, Community Associations Institute, National Association of Cooperative Housing, and Spectrum Seminars, Inc.

Trinity Management's employees have received many prestigious designations/certifications, such as, National Apartment Leasing Professional, Certified Community Manager, Accredited Resident Manager, Registered Cooperative Manager, Specialist in Housing Credit Management, Real Estate Salesperson, Certified Occupancy Specialist, and many more.

Marketing and Leasing

Over the past several years, Trinity Management has successfully marketed market-rate, mixed-income, and income restricted for-sale and rental housing. To further enhance its successful marketing and leasing program, Trinity Management has expanded its staff to include a Vice President of Marketing and Business Development. Trinity Management recognizes the importance of this mission to the Medfield State Hospital campus and will bring its full body of experience and the resources of its team to the planning, pre-marketing and leasing stages of the Medfield campus's marketing program.

The Trinity team will comply with all Federal, State and local fair housing and civil rights laws. In carrying out its marketing program and tenant selection process, neither the Owner, nor Trinity Management, will discriminate based on race, color, creed, religion, sex, sexual orientation, national or ethnic origin, age, disability, handicap, ancestry, legal source of income, class or marital status, or any other basis prohibited by law. This applies to accepting and processing applications, selecting

tenants from among eligible applicants of the waiting list, assigning units, and certifying and recertifying eligibility for assistance.

All marketing staff and all other persons involved in processing and/or handling applications will be trained in (1) procedures and policy matters, mindful of relevant federal, state and municipal orders, laws, and statutes dealing with civil rights and fair housing, (2) The marketing and tenant selection plans developed for Medfield, (3) applicable regulations governing the selection of applicants for this housing, including, but not limited to, Title VIII of the Civil Rights Act of 1968; Title VI of the Civil Rights Act of 1974; Executive Order 11063, November 29, 1962; M.G.L. Chapter 151B; Executive Order 11246, September 9, 1965, the Fair Housing Amendments Act of 1988 and the Americans with Disabilities Act. In addition, the appropriate complaint procedures will be explained so that applicants may avail themselves of that process if they feel discrimination has occurred. Property management and marketing staff will receive training on the use and appropriate review of the paperwork and processing required in marketing the units.

The supervisory staff of Trinity Management will be responsible for administering all training required by this Plan. Those staff members include the Regional Director and/or Vice President having direct responsibility for oversight of this community.

Administrative & Compliance Program

Trinity Management has developed and implemented a strong and successful administrative program to ensure compliance with all applicable housing laws and regulatory agencies, preserve the value of the physical asset and enhance Resident engagement and involvement.

These policies include, but are not limited to: rent collection, general rules and regulations, recertification or tenant status review following applicable regulatory requirements, move in and move out procedures and fiscal management. Policies are developed with significant Resident input and regular communications to the general Resident population.

The Senior Property Manager is the senior person on the site, reporting directly to the Regional Director and responsible for the day-to-day administrative and operational activities. The Property Manager is responsible for ensuring that all administrative and maintenance personnel perform their job-related tasks in a professional and efficient manner and that the Residents comply with the terms of their Occupancy Agreements (Lease). The Senior Property Manager and Property Manager will also devote significant time and resources fostering successful relationships with all of the Residents.

Maintenance Program

Trinity Management provides professional maintenance services to all of its clients. As we serve a varied client base, the interests and goals of each client shape the operating policies for each property. Trinity Management's Vice President of Building Operations and Systems works with the property team to achieve these goals by consistently applying the highest professional standards individualized to meet and exceed the varied needs of each community being served. Trinity Management staff will perform as much of the routine day-to-day services as possible. Whenever necessary, and in accordance with the operating budget, Trinity Management will contract for certain services including

landscaping and unit turnover. In addition, when a repair requires expertise beyond that of site staff, a contractor will be utilized.

Trinity Management delivers maintenance services to its properties through a clearly defined routine, preventative, and emergency maintenance system. The system is made up of several components that ensure deficiencies are corrected, preventive measures are taken and improvements are pursued. In addition, the system is designed to guarantee prompt and efficient response to all Resident maintenance requests. Trinity Management shall maintain a 24-hour response system, 365 days per year and will be responsible for communicating major emergencies to the Owner and any applicable public agencies, as necessary, immediately and in accordance with emergency communication protocols.

Deficiencies on the property are corrected through the work order procedure. The work order provides the maintenance staff with authorization to perform work on the property. Once a request for work has been entered into the computer, it is assigned a category, which defines the priority of the work and dictates how and when it will be dispatched for completion. Categorizing the workload offers many benefits to Residents by ensuring that Residents' maintenance issues are addressed promptly. In addition, the system allows for a continuous and accurate knowledge of the workload and what resources are available to meet the requirements of the workload. The work order system also allows our Regional Directors and/or Vice Presidents to provide our clients with accurate information about the maintenance of the property. This helps in the development of staffing and budgeting needs and allows clients to participate in and understand the needs of their property.

Many preventive measures are required on a property to ensure that the quality features of the buildings and the apartments are maintained. The approach of Trinity Management is to inspect and maintain apartments on an annual basis and building systems according to the specific Preventive Maintenance Schedule that is uniquely designed for every property. A program is also established for janitorial and grounds work on every property. These schedules will be prepared prior to occupancy. These are typically adjusted periodically and therefore are not part of the plan but are kept available in the management office.

All of Trinity Management's properties are managed with an eye toward improvements, so as to enhance the quality of life for the Residents living in the development. Trinity Management endorses a very specific plan and procedures for assessing the capital needs of every property, planning for the replacement of capital items, and contracting work.

The maintenance program for Medfield will be customized to ensure the proper upkeep, conditions and quality of the buildings, grounds, buildings systems and common areas. Systems and procedures shall include:

- Work Order System
- Preventative Maintenance
- Emergency Repairs and Response
- Inspections
- Quality Control
- Purchasing

Inventory Control

Unit Turnover

Snow Removal

Capital Improvements

Fire Safety

Ground management

Utility Purchasing

Risk Management

The components of the maintenance program will be discussed and reviewed periodically to ensure accurate, comprehensive procedures.

Reporting

To ensure clarity in communications and ensure that all related parties are aware of the operational status at the community, an extensive reporting system has been established internally at Trinity Management. In addition to the internal reporting requirements, administrative staff will provide all necessary data to the necessary regulatory agencies.

INFRASTRUCTURE

Include a plan that addresses how the anticipated utility needs (including electric, gas, water and sewer, storm water and telecommunications requirements) of the proposed development will be met. As the existing utility infrastructure will not be sufficient, the proposal must address how infrastructure be added and or upgraded along with a description of how these costs will be funded.

The Trinity team understands that since the Medfield State Hospital's utility infrastructure was abandoned in 2003 and further decommissioned in 2009, substantial improvements will be required to support the Project. Along with the aging infrastructure, it is understood that several historic issues exist and will need to be addressed, primarily:

- Inefficient energy distribution systems
- Combined storm and sanitary drainage systems
- Sources of inflow & infiltration contributing excess flows to the wastewater treatment system
- Decommissioned water distribution system

The Proposed program is understood to include predominantly residential units, with approximately 20,000 SF of combined program space for a Clubhouse and Arts Center. Through a combination of 335 residential units comprised of studios, 1-bedroom, 2-bedroom and 3-bedroom units, it is understood that the Project is targeting the creation of approximately 483 beds throughout the redevelopment.

The following infrastructure improvements are anticipated to support the Project, based on review of the Medfield State Hospital Strategic Reuse Master Plan and associated attachments.

Water Distribution

The Project team will evaluate the accepted program against the water system improvements identified in the November 14, 2019 memorandum included in the Master Plan, and utilize the Proposed Water Plan as prepared by Pare Engineering Corporation, dated September 25, 2019 for the preliminary basis of design.

Based on the proposed program, the Project is anticipated to generate a water demand of just over 60,000 GPD per Massachusetts Title V rates, which is below the projected demand of roughly 110K GPD from the water and sewer report by Pare Engineering. The report stated that the projected demand could be accommodated under current authorized limits, however, VHB will anticipate confirming these assumptions with the Town as part of the due diligence effort.

It is anticipated that the project will include installation of a new 8" ductile iron water distribution loop system with associated copper building service connections, gate valves, hydrants and a minimum of two (2) connections back to the active portion of existing 16" water main located at the eastern portion of the Site and the existing 12" main located in Hospital Road.

Water system improvements shall also include fire service connections to the renovated buildings as required to support the building life safety systems.

All systems will be installed to the latest Town of Medfield Department of Public Works Water Rules and Regulations.

Sanitary Sewer

As mentioned in the MSH Master Plan, storm and sanitary utility systems were for the most part combined, however is not as evident from review of the Existing Conditions Plan as prepared by Nitsch Engineering and last revised October 30, 2018. The priority would be identifying any sources of direct inflow from the storm drain system into the sanitary sewer, which could be identified via a flow monitoring and dye and/or smoke testing exercise, which would be recommended for the due diligence phase.

It is understood that connecting sewer systems within Hospital Road are existing 8-inch PVC pipe. While it will be verified with the existing conditions field survey, due to the age of the prior development and noted concerns with Inflow and Infiltration, it is anticipated that much if not all of the existing sanitary sewer utilities will warrant replacement, whether due to old, vitrified clay pipe or illicit connections. During the due diligence, the Team will evaluate any potential to utilize existing infrastructure, whether through limited replacements or sewer lining if resulting in a cost-efficient approach for the Town. Otherwise, the Project will advocate for replacement of the sanitary system and installation of new PVC pipe and precast sewer manholes to accommodate the activated buildings, utilizing the Proposed Sewer Plan as prepared by Pare Engineering Corporation, dated September 25, 2019, as the basis of design.

Stormwater Management

Upgrades to the Site's stormwater management system will be required to ensure positive drainage with the Site Plan modifications and bring the Project up to regulatory requirements. The Project will be designed to comply with the Massachusetts Department of Environmental Protection (MassDEP) Stormwater Management Standards.

Where feasible, the Trinity team will look to utilize existing storm drain infrastructure for conveyance of flows, supplemented with new inlets to reflect modifications to the site layout and grading. VHB will perform hydraulic calculations to support sizing of the proposed closed-drainage system and replace/up-size any infrastructure that is compromised and/or has insufficient capacity.

The redevelopment will provide water quality treatment per the Massachusetts Department of Environmental Protection (DEP) stormwater requirements. As outlined in the Landscape narrative as well, opportunities for low-impact development stormwater solutions will be prioritized where feasible. According to the Natural Resources Conservation Service (NRCS), surface soils on the Site include Woodbridge-Urban land complex and Paxton fine sandy loam, and are classified primarily as Hydrologic Soil Group (HSG) C/D and C, respectively. These soil conditions are generally not conducive to infiltration methods, but LID stormwater solutions could still be utilized to an extent for water quality purposes when supplemented with underdrainage systems.

The Project will prepare a hydrologic report to evaluate existing and proposed conditions, including a hydrologic model to determine existing and proposed peak runoff rates and volumes for storm events with recurrence intervals of 2-, 10- and 100-years, and provide stormwater attenuation BMPs to mitigate any increase in runoff associated with the Project.

Gas Distribution

The Project anticipates providing a new gas main with associated service connections and valves to support the renovated buildings, fed via the existing 4" main in Hospital Road.

Electric and Telecommunications

The Project anticipates implementing high-efficiency energy systems, cable and network connectivity. New electrical and telecommunications services will be evaluated for connection to the Site via Hospital Road. From the existing overhead wires, all new electrical and telecommunications infrastructure will be installed in below-grade ductbanks.

Funding

It is anticipated that the costs of the above infrastructure work will be funded through the redevelopment project. One of the strengths of the Trinity team is its experience in leveraging the use of public resources of funding for its redevelopments, particularly in Gateway City locations. The Trinity team anticipates working with the Town of Medfield to secure various sources of grant funding for the redevelopment, such as MassWorks funding.

PUBLIC ACCESS PLAN

Include a description of the developer's plan to accommodate safe public access for pedestrians and vehicles to and from the Disposition property during redevelopment and following completion of the redevelopment effort. Include a description of the plan for the permanent pedestrian Connector Access Easement referenced in Section 2-6.C above.

Trinity's proposed redevelopment plan recognizes the importance of the MSH site to the Medfield community. With its expansive open space, verdant landscape and access to trails and the Charles River, the site plays an important role in the lives of Medfield residents.

Our proposed plan assumes the revitalization of the former Medfield State Hospital into a new neighborhood, preliminarily called Cottage Hill, given the historic cottage plan architecture of the campus.

Given the site's expansiveness we anticipate the approximately 20-month construction period to be a full restriction of the campus in order to maintain appropriate safety and security measures for the general contractor. Our proposed construction access plans and mitigation will be documented in a full Construction Management Plan that will be reviewed by the Town prior to construction commencement. Should there be opportunities to explore any potential access to non-impacted open space during construction we will work with the Town to determine their feasibility.

Once the site has been stabilized, we are proposing the streets and sidewalks remain public. This will allow for the neighborhood to integrate into the larger community, will provide for access to the Cultural Arts Center and the opportunity for the public to attend any community events such as art fairs or farmers markets.

Trinity recognizes the need for a public access easement between Parcels A-1 to the East of the Core Campus and A-2 to the west of the Core Campus. Upon designation we will welcome the opportunity to work with the Town to determine a mutually agreeable location for this easement.

The key to the successful management and maintenance of open space will be in communication of general regulations for the property and its residential nature. We believe appropriate signage-both regulatory and wayfinding-will be critical. Below is an example of some of the principles we have sought to communicate on other developments with public access components. We will seek input from the Town as we collaborate on any proposed regulations for this new neighborhood access.

GENERAL OPEN SPACE/PUBLIC USE REGULATIONS

Obstruction

Obstruction of walkways, points of pedestrian access, or any other public areas is strictly prohibited except in case of emergencies or during construction activities and as noted above for temporary uses.

Liquor

Consumption or display of alcoholic beverages by the public is prohibited within the public areas.

Smoking

Smoking is prohibited within the public areas.

Noise

The playing of musical instruments, and televisions, radios or similar equipment with speakers by the public is prohibited. Noise shall be kept to a minimum at all times.

Vendors

Unauthorized advertising, vending, or soliciting is prohibited within any public areas.

Fire Safety

Use of open fires, stoves, and barbecues within any public areas by the public are prohibited at all times.

Security

The Open Space and other public amenities may be closed temporarily for the Owner's reasonable security purposes, and access thereto may be denied to individuals who, because of past behavior, are deemed unwelcome.

Inclement Weather

Public areas may be temporarily closed due to inclement weather. At those times, the Owner will post signs indicating such closure and when the public amenities are expected to be reopened.

Sole Risk

The Owner will not be held liable for injuries to persons or property due to public use of land opened free of charge for public recreational use, unless the Owner's conduct is determined to be willful or reckless. Use of the Open Space other public amenities offered free of charge to the general public shall be at the sole risk of the person availing themselves of the facilities.



Photo of Public Access Kayak Launch signage at Trinity's Boston East development

COMMUNITY BENEFITS AND IMPACTS

Include a description and evaluation of the benefits of the project to the surrounding area, including, without limitation, discussion of Community Benefits to be provided as part of the Total Consideration for the Disposition Property or portion of the Disposition Property that is the subject of the proposal. In addition, proposals should specifically address:

- The extent to which the proposed development successfully addresses anticipated traffic impacts of the proposed project.
- The extent to which the proposed development addresses anticipated public school system impacts of the proposed project, based on the estimated number of school-aged children expected from the proposed housing mix and the capacity of the existing Medfield public schools.
- The proposed development's anticipated impact/benefits to the local tax base and taxes to be received by the Town, including revenues from residential as well as non-residential commercial property to diversify the existing tax base.
- The extent to which the proposed development incorporates energy and water efficient building practices, conserves resources, and promotes clean energy.
- Provisions for parking to accommodate residents and visitors to the site without compromising roadway or neighborhood safety.
- The proposed development's connectivity to Harding Street, North Street, and Medfield Town Center.
- Any other local and regional benefits associated with redevelopment, including but not limited to the extent to which the redevelopment includes recreational amenities (for example, walking trails or bike paths) that will be available to the public and any proposed limitations on access during or following the redevelopment period.

The following is a description of the benefits and impacts of the Trinity plan.

Traffic Impacts

By proposing a residential-only program, the potential traffic generation associated with the redevelopment is substantially reduced compared to options with a large commercial component. As such, impacts to the roadways serving the site and the surrounding residential areas are minimized, thereby allowing the development to blend in with the surrounding community. The residential program would be expected to generate approximately, 2,500 vehicles per day and between 150 and 175 vehicles per hour during the weekday morning and weekday evening peak periods, respectively. To put this in context, alternatives with a significant amount commercial component like those outlined in the Strategic Reuse Master Plan could generate approximately two to three times the amount of traffic as the residential-only program. As part of the planning process, a comprehensive traffic impact assessment will be conducted, which will identify specific impacts as well as targeted mitigation plans to accommodate new site traffic. The mitigation associated with the project will include geometric improvements at nearby intersections to improve existing safety and operational concerns. In addition, the project will include a comprehensive Transportation Demand Management (TDM) program, which will focus on promoting the use of alternative modes of

transportation and providing strong bicycle and pedestrian connections on site and to the surrounding area

Public School Impacts

Based on preliminary findings by planning consultant Mark Fougere, which can be found in APPENDIX A: Fougere Planning and Development Fiscal Analysis, the project's potential impact to the school system is minimal; an estimated 47 to 67 students are expected to be added.

Tax Revenues and Expenses

The potential real estate taxes generated from the proposed project will consist of revenue derived from property and excise taxes. For the purposes of this analysis, we are assuming full real estate taxation based on 2021 millage rates. Additionally, upon completion of the project there will be a one-time tax payment of \$390,000 from filing a building permit.

The tax revenues residential component will consist of 334 market rate and affordable rental apartments. Based on an estimated value of \$58,625,000 for the property, residential taxes are expected to generate \$1,041,180 to the Town. It is also expected that excise taxes, based on 536 vehicles will generate an additional \$160,800 annually for a total of \$1,201,980.

The primary town expenses to be generated from this redevelopment include usage of police, fire, outreach, Council on Aging, schools, and other general funds that in total will cost the Town \$485,675.

Consequently, the redevelopment of the Medfield State Hospital Campus is expected to generate \$716,305 net of expenses, in tax proceeds to Medfield annually.

Energy and Water Efficient Building Practices

Please refer to the Sustainability portion of "Development Intent" for Sustainable Building and Site Approach.

Parking Provisions

Trinity's plan is to provide 582 parking spaces for residents of the campus. Anticipating additional traffic from visitors and the public, we have provided 112 additional visitor spaces for a total of 694 parking spaces.

Connectivity to Adjoining Streets

Hospital Road will continue to serve as the main point of entry and egress from the Medfield State Hospital Campus. There is no expectation that the redevelopment will alter the existing connectivity that the campus has to Harding Street, North Street, and Medfield Town Center via Hospital Road. Our plan is to maintain access to these important town roads and destinations.

Regional Benefits

Trinity's proposal allows the Town to retain ownership of the streets and sidewalks for the site. Our plan includes many opportunities for active and passive recreation to be enjoyed by campus residents and residents of the town at large. Trinity will work with the Town in a collaborative manner to communicate on programming opportunities that can occur on site including farmers market, arts fairs, and food truck events.

PROPOSER'S QUALIFICATIONS/DEVELOPER PROJECT EXPERIENCE

1. The name, address and telephone number of the Proposer, the name of the representative authorized to act on the Proposers behalf, and the name of the senior person designated as the primary contact to whom all correspondence should be addressed.

It is anticipated that the Designated Developer of the Medfield State Hospital (MSH) revitalization will be a to-be-formed Delaware or Massachusetts limited partnership or limited liability company that is comprised of an affiliate of Trinity Financial, Inc.

Up until designation, the legal entity (corporation) and the person authorized to represent the named Proposer is as follows:

Abby Goldenfarb, Vice President
Trinity Acquisitions LLC
75 Federal Street, 4th Floor
Boston, MA 02110
617-720-8400

2. If the proposer is not an individual doing business under the proposer's name, the proposal must describe the structure and status of the entity (whether a non-profit or charitable institution, a general, limited, or limited liability partnership, a for-profit corporation, limited liability company, unincorporated association or joint venture) and indicate the jurisdiction in which it is registered to do business. Please include the exact name and legal state of the entity to be named as Designated Developer in the PDA, if different from the proposer. Please also state the entity that will take a leasehold interest in the property and obligate itself to the terms of the ground lease(s) and how the entity will be capitalized.

It is anticipated that the Designated Developer and the entity that will take title to the Medfield State Hospital site will be a to-be-formed Delaware or Massachusetts limited liability company that is comprised of an affiliate of Trinity Financial, Inc. The working capital for this entity to execute the predevelopment activities for the redevelopment, will be provided by Trinity Financial, Inc., an affiliate of Trinity Acquisitions LLC.

The redevelopment of the site will include the historic rehabilitation of the historic buildings into residential housing. Trinity will leverage the federal and state historic tax credits, as well as other grants/loans, to help finance the project. All rehabilitation work done to the buildings will be done to the standards of the National Park Service, which will ensure that the buildings maintain their historic integrity.

Regarding the overall maintenance of the Campus we anticipate that the Owner will be responsible for the costs associated with maintaining the open space and parking areas. Our proposal assumes the streets and sidewalks continue to be owned and maintained by the Town.

Given that the legal entities described above have not been established, Trinity Acquisitions LLC is the applicant for this proposal and all of the required forms have been completed in the name of Trinity Acquisitions LLC.

3. Description of the organizational structure of the development team and a plan for project management and communications between the Town and the development team during all phases of the redevelopment project.

The Trinity project management structure allows for the best people with relevant talent and expertise to be assigned to each project we undertake. Trinity has compiled a unique five-person master development team for the MSC redevelopment, with each person specifically chosen to execute the revitalization of the property.

James Keefe, one of the principles of Trinity Financial, Inc., will oversee and support the redevelopment effort. One of the hallmark operating principles of Trinity is that the owners are intimately familiar with each project that the firm undertakes and are involved daily to input their expertise and aid in major decisions. **Kenan Bigby**, managing Director of our Development Department is an alternate to the principal-in-charge, with authority to direct the development team. **Abby Goldenfarb** will serve as the Development Manager, managing the various aspects of the development including but not limited to organization with public agencies; permitting consultants, legal counsel and property management staff; she will also lead the charge on structuring the necessary financial resources; and, acting as liaison to residents and community stakeholders. **Aaron Horne**, as Assistant Project Manager, will lend additional support to the Development Manager. **Chris Stanley**, Vice President of Design and Construction, will provide oversight of the architect and engineering consultants; act as key contact for all Green and Sustainable Design; and lead the design coordination effort with the Town of Medfield.

Principal: James Keefe is one of the Principals and founding partners of Trinity Financial, Inc. He will oversee and support the redevelopment effort. One of the hallmark operating principles of Trinity is that the owners are intimately familiar with each project that the firm undertakes and are involved daily to address complex problems and make major decisions.

Managing Director: Mr. Bigby joined Trinity Financial in 2001 and is the lead Project Manager on the completed Newport Heights HOPE VI redevelopment in Newport, RI. Working with the Housing Authority of the City of Newport, Mr. Bigby successfully developed 299 units of mixed-income housing on the former campus of the distressed Tonomy Hill public housing development. Mr. Bigby's experience also includes the Trinity Terrace project in the Four Corners neighborhood of Dorchester, MA. He successfully structured a complex financing package for the construction of 62 affordable units while conducting an extensive community outreach process. Prior to joining Trinity, Mr. Bigby worked in the field of affordable housing development and management. He worked in various capacities for Boston area non-profit organizations where his responsibilities included the management of several supported housing programs as well as property oversight ensuring compliance with state and federal housing quality standards. Mr. Bigby holds a Bachelor degree from the University of Pennsylvania.

Development Manager: Ms. Goldenfarb joined Trinity in 2004 and is a Vice President with the company. As Vice President, Ms. Goldenfarb's responsibilities have primarily included leading a team of consultants and project managers through the complex design, permitting, financing, closing and marketing phases of the development. She has served as development manager on One Canal, a 310-unit transit oriented development in the Bulfinch Triangle neighborhood of Boston, Avenir, a 241-unit, transit oriented development also in the Bulfinch Triangle neighborhood of Boston; Boston East, a 200-unit luxury residential development on the East Boston waterfront; Vela on the Park, a 209-unit luxury development in downtown Stamford, CT; the Appleton Mills, a 130-unit affordable residential development with an artist preference in Lowell; 110 Canal Street, a 55,000 square foot adaptive reuse of a mill building into commercial space and a 20-unit condominium development in Newburyport, MA. Prior to joining Trinity, Ms. Goldenfarb founded, operated

and managed the sale of her own professional organizing company. Ms. Goldenfarb received a Bachelor of Arts degree from Wellesley College and a Master of Business Administration degree from Boston University's Questrom School of Business.

Assistant Project Manager: Aaron Horne joined the Trinity team in the summer of 2017 as an Assistant Project Manager in the Development Department. He has worked on the Van Brodie Mill and Worcester Courthouse developments. His portfolio consists of Boston East, a 200-unit market rate project on the East Boston, assisting with marketing, lease-up and curating artwork for the waterfront art gallery situated in the building. Additionally, he works with Trinity's Business Development staff to assess prospective opportunities. Mr. Horne further assists with internal projects, conducting research, analysis, and due diligence. He holds a Bachelor degree in Marketing from Boston College.

Design and Construction: Chris Stanley joined the Trinity team in 2014 and is a Vice President in Trinity's Design & Construction Department. He is a registered architect with experience in housing and adaptive reuse of buildings. His most recent responsibilities at Trinity have included the Choice Neighborhoods Initiative planning effort at the Providence Housing Authority's Manton Heights project. Prior to working at Trinity Financial, Chris worked at Bruner/Cott & Associates in Cambridge MA for 12 years. His projects included the mixed-use and multi-phase Waltham Watch mill renovation and planning efforts for Peddocks Island in the Boston Harbor Islands. While at Trinity, Mr. Stanley has worked on the Boston East, 60 King, Treadmark and Van Brodie Mill redevelopments. He holds a Master of Architecture degree from Harvard's Graduate School of Design.

The Trinity team is keenly aware of the ability to maintain open, honest and frequent communications between the Town and the development team during all phases of the project. Upon Designation, the Trinity Team will schedule a kick-off meeting with the Town about established protocols and best practices for this communication. It is anticipated that regular weekly meetings will be established during the predevelopment phase and key individuals will be identified from the Town and Trinity as team leaders and will be responsible for communication going forward.

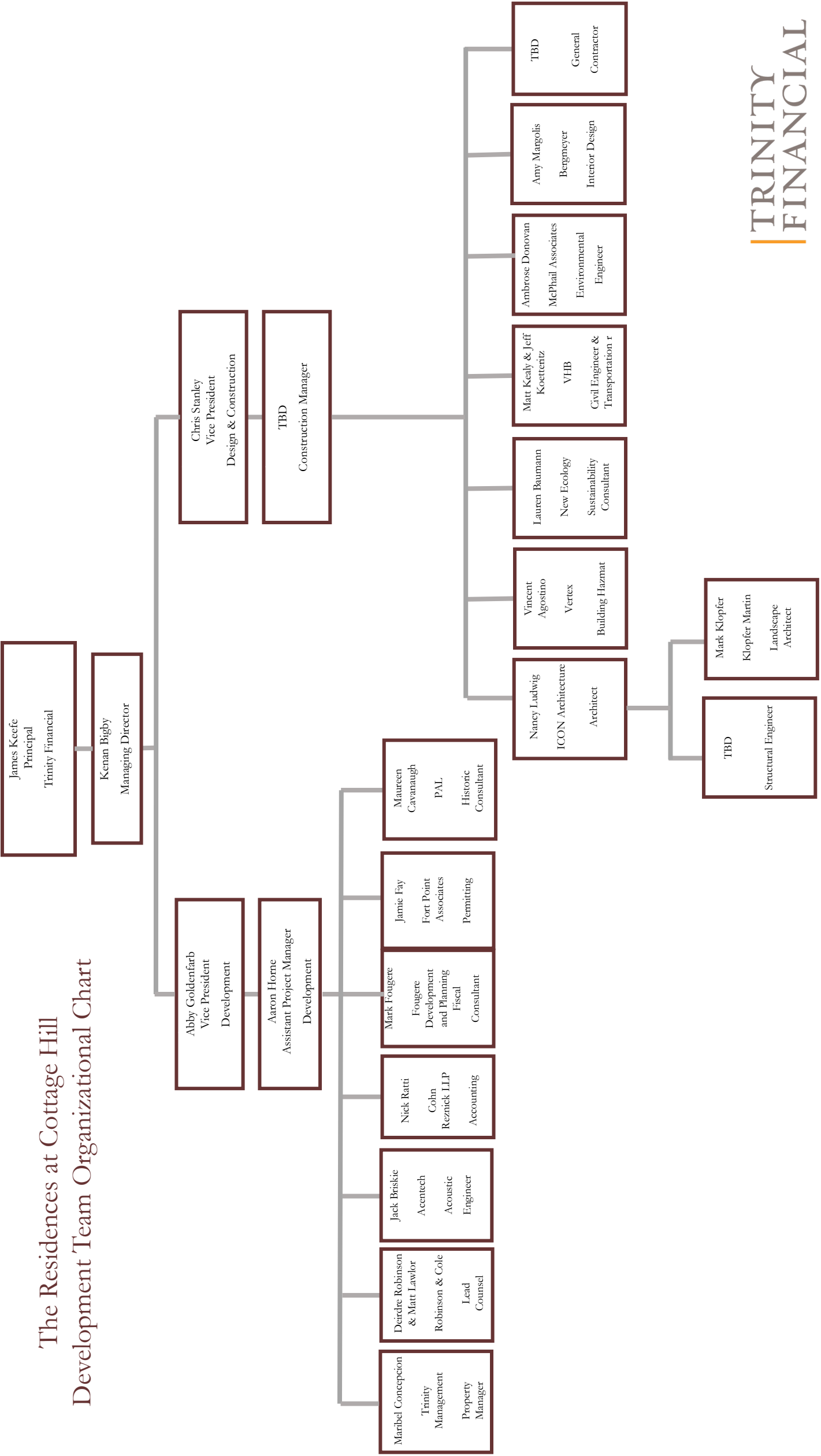
In these initial meetings we will establish the appropriate means of dialogue, and establish the frequency of meetings, as these will inevitably ebb and flow over time as the project proceeds through the life cycle of the redevelopment. Having worked closely with various state agencies, elected officials, and neighborhood groups we understand the importance of clear communication, making sure all groups have built consensus on critical issues, and making sure that we are following the appropriate protocols throughout the development process.

Over time, we anticipate that smaller working groups may be established to dive deeper into key issues related to the project, with individuals designated to lead and participate in those working groups. These working groups would be reporting back to their specific team leaders so that all communication is managed efficiently and effectively.

The Trinity Financial project staff assigned to the MSH revitalization will be led by Vice President of Development, Abby Goldenfarb. Abby reports directly to Kenan Bigby, Managing Director, and James Keefe, Principal. We believe the best practice for communication on the MSH redevelopment is for initially all communication to be conducted through Abby so that she is able to oversee and manage the various components of the project. Abby will then direct the communication to the appropriate parties, such as those named below. We believe this continuity and communication is critical so that we provide the project efficient and effective communication.

The Residences at Cottage Hill

Development Team Organizational Chart



4. Provide the qualifications and primary responsibilities of everyone on the development team. Identify MBE/WBE individual minority or women team members including details regarding their roles in the development.

The redevelopment of MHC presents a unique opportunity to revitalize outdated housing into a vibrant, new, and sustainable community that reflects the vision of the residents, community members, the Town of Medfield, and other stakeholders. The team that Trinity has assembled is experienced, committed, and capable. It includes the following firms:

<u>Role</u>	<u>Firm</u>	<u>Chief Contact</u>
Developer	Trinity Financial, Inc.	Abby Goldenfarb
Architect	ICON architecture (WBE)	Nancy Ludwig
Interior Designer	Bergmeyer	Amy Margolis
Landscape Architect	Klopper Martin (WBE)	Mark Klopfer
Acoustic Consultant	Acentech	Jack Briskie
Accountant	Cohn Reznick LLP	Nick Ratti
Permitting Consultant	Fort Point Associates	Jamie Fay
Fiscal Consultant	Fougere Planning & Development	Marc Fougere
Environmental Engineer	McPhail Associates	Ambrose Donovan
Sustainability Consultants	New Ecology, Inc. (NEI)	Lauren Baumann
Historic Consultant	Public Archaeology Lab (PAL)	Maureen Cavanaugh
Legal Counsel	Robinson & Cole	Deirdre Robinson
Transportation Engineer	Vanasse Hangen Brustlin, Inc. (VHB)	Matt Kealey
Civil/Survey	Vanasse Hangen Brustlin, Inc. (VHB)	Jeff Koetteritz
Building HazMat	The Vertex Companies	Vincent Agostino
Property Manager	Trinity Management, LLC	Maribel Concepcion

This team has an established reputation for developing real estate that transforms urban neighborhoods, including commercial districts and mixed-income residential communities. We bring decades of experience in engaging with communities to build consensus and implement plans that are viable and reflect the vision of the stakeholders. **Please find the qualifications of the team in APPENDIX B. Qualifications.**

5. Identification of any project partners or team members who are participating in the proposal; a description of the nature and degree of their involvement and commitment to the project described in the proposal; and the names of principals in charge. This should include property management and services partners as well as development partners

It is anticipated that the Designated Developer of the Medfield State Hospital revitalization will be a to-be-formed Delaware or Massachusetts limited partnership or limited liability company that is comprised of an affiliate of Trinity Financial, Inc.

Developer: Established in 1987, Trinity Financial, Inc. is a 280-person development and management firm doing development throughout the Northeast, with headquarters in Boston and Manhattan. The company's development experience over the past 33 years includes over 9,500 units of housing and more than 600,000 square feet of retail and commercial space, costing more than \$3.3 billion. The company specializes in the kind of transformative revitalization that is envisioned for the MSH revitalization.

Trinity and its team specialize in the transformation of complicated real estate, excelling in our:

- Experience in, and enthusiasm for, an inclusive and effective public process in diverse communities;
- Appreciation for the value of forging enduring relationships with public agencies, officials and other stakeholders;
- Knowledge of the local and regional development environment including market conditions and trends;
- Commitment to high quality urban design as well as sustainable green design, building strategies and technologies;
- Established relationships with the investment community and conservative underwriting to ensure financial feasibility

The Trinity Team is comprised of firms and individuals with extensive residential development experience, including historic revitalization and green and sustainable building design. The team is also comprised of professionals with specific experience in the adaptive reuse of historic buildings. These professionals have a range of experience and expertise that puts us in a strong position to implement a redevelopment plan tailored to the MSH revitalization.

Contact Information: Abby Goldenfarb
Vice President
Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110
617-720-8400
agoldenfarb@trinityfinancial.com

Architect: **ICON Architecture (WBE)** will serve as the lead architectural firm and provide planning, design, and architectural services for the MSH redevelopment. ICON Architecture is a 40-person, Boston-based, women-owned (WBE) architectural practice focused on sustainable, transformative projects that create new paradigms for living. Our designs range from infill transit-oriented development to innovative adaptive reuse, creating sustainable communities that energize residents and neighbors alike. ICON's projects creatively reposition aging buildings to celebrate their rich history while embracing contemporary life. A leader in innovation, ICON work engages sustainable building practices, such as Passive House and Fitwell, and efficient construction methods, such as modular and mass timber.

ICON has designed and built over 15,000 housing units. We have deep experience designing for special populations, including independent senior living and "service rich" housing under DHCD's design requirements.

ICON's projects have been case studies for nationally distributed books on urban housing, published by the Urban Land Institute, Harvard University Press, and Global Green. The firm's work has won

numerous awards, multiple Builders Choice Design Awards, a Governor's Smart Growth Leadership Award, and multiple Preservation Achievement Awards from the Boston Preservation Alliance and the Massachusetts Historical Commission. ICON Architecture has worked extensively with Trinity Financial, designing and building multi-family projects across New England.

Trinity Financial will contract directly with and oversee ICON Architecture. **Nancy Ludwig** (FAIA LEED AP) will serve as Principal-in-Charge for the MSH redevelopment effort. **Kevin O'Neil** (AIA LEED AP) will serve as Senior Project Manager, and **Bethany Moody** (AIA) will serve as Project Architect. Janis Mamayekl (AIA LEED AP) will serve as Advising Principal.

Contact Information: Nancy Ludwig FAIA, LEED AP
President
ICON Architecture
101 Summer Street
Boston, MA 02110
(617) 451 - 3333
nludwig@iconarch.com

Interior Design: **Bergmeyer** will be the interior designer for the MSH redevelopment. Bergmeyer was founded in Boston in the early 1970s's. For over forty years, the company has excelled in projects throughout the US across market sectors. In 2020, Bergmeyer reintroduced our brand as a design collaborative with a renewed focus and approach. Creative. Connected. Curious. We are a design collaborative; inspired through partnership, thoughtfully creative, inherently curious and driven to fulfill our clients' needs. Our approach to design is empowering and ego-free, forming proactive partnerships with our clients and project teams to create a shared sense of ownership throughout the entire creative process. We design for our clients' clients, the people whose lives and experiences are enhanced by our work. We challenge ourselves to focus first on understanding the end user - the customers, students, employees, visitors, residents - while delivering on our clients' vision and return on investment. Trinity Financial will contract directly with and oversee Bergmeyer. **Amy Margolis** will serve as the primary point of contact.

Contact Information: Amy Margolis
Design Practice Lead
Bergmeyer
51 Sleeper Street
Boston, MA 02210
617.542.1025
amargolis@bergmeyer.com

Landscape Architecture: **Klopfert Martin Design Group (KMDG) (WBE)** will be the landscape architect for the MSH redevelopment. The firm is an award-winning Massachusetts-certified Women Business Enterprise (WBE). Since 2006, KMDG has worked on a broad range of projects, operating at the seam of landscape, architecture, infrastructure and urban design. KMDG's work emerges from the contemporary integration of a site's history and cultural context and the creation of a compelling, lasting narrative. The firm has worked on a wide range of projects such as China's celebrated Shanghai Bund for the 2010 Expo, the landscape master plan for Abu Dhabi's Al Maryah Island, and the memorialization of a holocaust burial site in Puchovichi, Belarus. Closer to home regional expertise extends from urban squares and parks in Boston, Brookline, Portland, Providence and Cambridge, to campus and educational spaces, nature centers and private gardens. KMDG's work has been recognized with awards from the American Society of Landscape Architects, the Rudy Bruner Award of Urban Excellence, and the Environmental Design Resource Association, and published in the United States, China, Spain, Germany, Switzerland, and Hong Kong.

Contact Information: Mark Klopfer, ASLA, AIA
Principal
Klopfert Martin Design Group
69 Canal Street, 2nd Floor
Boston, MA 02114
617.227.2560
mark@klopfertmartin.com

Sustainability: **New Ecology, Inc. (NEI)** will be responsible for sustainable consulting for the MSH development in partnership with Icon architecture. Founded in 1999, New Ecology, Inc. (NEI) is an innovative, mission-driven non-profit. The firm is nationally recognized for its work on affordable and multifamily housing, community and government buildings, educational facilities, renewable energy and local infrastructure and for the positive effect it has on the people who live and work in these places.

Trinity will contract directly with NEI and be responsible for all oversight of the team members. **Lauren Baumann** will serve as lead contact for the MSH redevelopment. Ms. Baumann has over 15 years of experience providing technical assistance for clients developing and rehabilitating green affordable housing, educational and cultural facilities.

Contact Information: Lauren Baumann
Vice President
New Ecology, Inc.
15 Court Square, Suite 420
Boston, MA 02108
617-557-1700 x7023
baumann@newecology.org

Permitting: **Fort Point Associates** will be responsible for identifying and securing the federal, state and local permits for the MSH redevelopment. Fort Point Associates, Inc. (FPA) is a multi-disciplinary professional firm that provides urban planning, environmental consulting and permitting, and project management services to public and private sector clients. Over the past 35 years, FPA has established itself as a leader in managing urban and waterfront master plans, institutional expansions, private real estate developments, and complex public infrastructure improvements. FPA enjoys an enviable reputation with its clients for its professionalism and adeptness in dealing with the many federal, state, and local agencies relevant to planning and development.

In 2018, FPA was acquired by Tetra Tech, an international leader in consulting, engineering, and technical services. With 20,000 employees located in 450 offices worldwide, Tetra Tech's technical expertise greatly complements FPA's own and bolsters its ability to offer comprehensive solutions to clients' needs. Although acquired in full, FPA continues to operate as Fort Point Associates, Inc., a Tetra Tech Company, a stand-alone entity within the Tetra Tech organization.

Trinity will contract directly with FPA and be responsible for all oversight of the team members. **Jamie Fay** will serve as lead contact for the MSH redevelopment. Mr. Fay has worked on a number of complicated Trinity developments including the Hamilton Canal District, Orient Heights, Northampton Square and Boston East.

Contact Information: Jamie Fay, AICP, CP
President
Fort Point Associates
31 State Street
Boston, MA 02109
jfay@fpa-inc.com

Historic Consultant: **The Public Archaeology Laboratory, Inc. (PAL)** will be responsible for providing historic consulting services for the MSH redevelopment. PAL will be the principal liaison between the Developer and federal, state and local agencies such as the National Park Service, Massachusetts Historical Commission and Medfield Historical Commission. PAL is a cultural resources management firm based in Pawtucket, Rhode Island. PAL assists clients in successfully navigating complex historic preservation review and planning processes by providing expert consultation services and historic resources documentation.

Trinity Financial will contract directly with PAL and will be responsible for all oversight of the team members. **Maureen Cavanaugh**, Senior Planner, will serve as Principal-in-Charge for this project.

Contact Information: Maureen Cavanaugh
Senior Planner
PAL
26 Main Street
Pawtucket, RI 02860
401.288.6305 direct
mcavanaugh@palinc.com

Environmental: McPhail Associates, Inc. will be responsible for all environmental engineering services, including geo-technical and geo-environmental services. McPhail's professional staff consists of approximately sixty (60) individuals with backgrounds in Civil Engineering, Geotechnical Engineering, Environmental Engineering and Geology. The senior engineering staff has advanced degrees in the geotechnical or geoenvironmental engineering disciplines. Our key engineers have had extensive experience in subsurface explorations, geotechnical analysis and design, geoenvironmental site evaluation and remediation, design assistance to structural engineers and architects, and construction monitoring for more than 6,000 building, environmental, waterfront, and heavy construction projects.

Trinity Financial will contract directly with McPhail Associates and will be responsible for all oversight of the team members. **Ambrose Donovan**, P.E. and L.S.P, will serve as Principal-in-Charge for this project, **Eric Hinds**, will serve as Project Manager.

Contact Information: Ambrose Donovan, P.E., L.S.P.
Principal
McPhail Associates, Inc.
(617) 868-1420
AJD@mcphailgeo.com

Transportation, Civil Engineer & Survey & Traffic: Vanasse Hangen Brustlin, Inc., VHB, is a multidisciplinary American civil engineering consulting and design firm headquartered in Watertown, Massachusetts with offices throughout the country. The company was founded in 1978 by Bob Vanasse, Rich Hangen, Robert S. Brustlin, William J. Roache, and John Kennedy. The company primarily focuses on transportation and land development. VHB was a finalist in the US DOT Safety Visualization Challenge. VHB works on a variety of transportation civil engineering projects in the Northeast and along the east coast.

Trinity Financial will contract directly with VHB. **Jeff Koerreritz** will be the lead on Civil, and **Matt Kealey** will be the lead on Traffic.

Contact Information: Jeff Koerreritz (Civil)
Matt Kealey (Traffic)
VHB, Inc
101 Walnut Street
PO Box 9151
Watertown, MA 02472
617.607.0094
jkoetteritz@VHB.com

Lead Counsel: Robinson & Cole will be lead counsel providing corporate and financing legal services to the Medfield State Hospital redevelopment. Robinson & Cole's real estate practice encompasses a spectrum of real estate transactional and related matters. We represent a range of clients, including multinational corporations; institutional, public, and private lenders; retailers; state agencies; bonding authorities; schools; commercial and multifamily developers; health care institutions; hotel chains; and manufacturers. The senior attorneys in the Affordable Housing Practice Group each have over 25 years of experience in the affordable housing industry and have developed long standing working relationships

with housing agencies, bond issuers, Freddie Mac, Fannie Mae, HUD and various governmental agencies.

Trinity Financial will contract directly with Robinson & Cole and will be responsible for all oversight of this team member. **Deirdre Robinson** will serve as Lead Counsel for the MSH effort. Deirdre has worked on a number of complicated Trinity Financial transactions including 60 King, Boston East, and our Brockton redevelopment. **Matt Lawlor** will serve as permitting and land use counsel for the redevelopment effort.

Contact Information: Deirdre Robinson
Partner
Robinson & Cole LLP
201 Washington Street, 26th Floor
Boston, MA 02108
(617) 557-5928
dmrobinson@rc.com

Accounting: **Cohn Reznick LLP (Reznick)** will provide accounting services and will assist in the financial structuring of the project. Reznick has extensive experience with the historic tax credit program and has worked with Trinity on all of its developments in Connecticut, New York, Rhode Island, and Massachusetts. Trinity will contract directly with Reznick. **Nick Ratti**, Principal, will serve as the Principal-in-Charge for this project.

Contact Information: Nick Ratti
Principal
CohnReznick
One Boston Place, Suite 500
Boston, MA 02108
(617) 648-1400
Nick.ratti@cohnreznick.com

Building HazMat: **Vertex** (Reznick) will provide building hazardous materials consulting for the historic buildings. Since its founding in 1995. VERTEX offers forensic consulting services throughout the globe on matters that involve construction claims, construction defects, restoration projects and property damage caused by weather events.

Contact Information: Vince Agostino
The Vertex Companies, Inc.
398 Libbey Parkway
Weymouth, MA 02189
vagostino@vertexeng.com

Property: **Trinity Management, LLC** will be responsible for property management services. Trinity Management manages 7,400 units, of which over 4,500 are owned by Trinity affiliated entities. Trinity Management has significant experience in the management of affordable housing, mixed-income and market-rate communities.

Trinity Financial will contract directly with Trinity Management and be responsible for all oversight of the management company. Maribel Concepcion, COO of Trinity Management, will serve as Principal-in-Charge for the MSH redevelopment.

Contact Information: Maribel Concepcion
Chief Operating Officer
Trinity Management LLC
75 Federal Street, 4th Floor
Boston, MA 02110
(617) 398-2591
mconcepcion@trinitymanagementcompany.com

Other Consultants: In order to be responsive to the RFP, Trinity has engaged two third-party consultants for their expertise. Fougere Planning and Development has provided an analysis of the fiscal benefits to the Town as a result of our proposal. Acentec has provided a study of the sounds from the nearby firing range. Additional information on these team members and our full development team our team is included in **Appendix C: Team Qualifications**.

6. Provide a summary of the development team's experience, collectively and individually, with similar projects including the use of historic tax credits.

Trinity is committed to working with development team members who have demonstrated excellence on previous projects. As the matrix that follows displays, key members of the assembled team for the MSH revitalization have a long history of working together on projects similar in scope, size, and complexity and will provide for an effective and integrated development effort at this site.

Members of the team have worked with Trinity on multiple complex, large-scale projects. Trinity has collaborated with Icon on a multitude of historic rehabilitation projects as well as multiple private luxury housing and affordable developments. Trinity also has long standing relationships with the team of sustainability and environmental consultants and engineers, many of whom worked on the revitalization of Washington Village in Norwalk with us. Deirdre Robinson, now of Robinson & Cole, has worked with Trinity for years, including serving as lead counsel on a number of Massachusetts developments including 60 King, Brockton and Boston East. Trinity Management provides management services at many of Trinity's developments, including public housing, affordable, and mixed-income properties in Massachusetts, Connecticut, New York and Rhode Island.

The chart below identifies all projects completed or currently in development by Trinity over the past 20 years on which at least three proposed MSH team members collaborated. Descriptions of a number of these developments follow

Project	Trinity	ICON Architects	McPhail	Reznick	Robinson and Cole	Trinity Management	STATUS
Appleton Mills	X	X	X	X		X	Completed 2011
Arlington Point	X	X		X	X	X	Completed 2019
Mariner Mills	X			X	X	X	In Pre-Construction
One Canal	X	X	X	X		X	Completed 2016
Avenir	X	X	X	X			Completed 2009
Boston East	X	X	X	X	X		Completed 2018
Vela on the Park	X	X		X			Completed 2018
66 Summer Street	X	X		X		X	Completed 2015
Centre 50 & Enso Flats	X	X	X	X		X	Completed 2015
Orient Heights	X	X	X	X		X	Completed Phases 1 and 2. Phase 3 in Closing
Sixty King	X	X	X	X		X	Completed 2018
Quinnipiac Terrace	X	X	X	X		X	Completed 2011
Rowe							
Redevelopment	X	X	X	X		X	Completed 2011
Washington Beech	X	X	X	X		X	Completed 2011
Soundview Landing	X	X	X	X		X	Completed Phases 1 and 2. Phase 3 In Construction
Newport Heights	X	X	X	X		X	Completed 2007
Maverick Landing	X	X	X	X		X	Completed 2006
Carlton Wharf Condos	X	X	X	X		X	Completed 2005

Representative Developments

Trinity has successfully completed a number of multi-phased historic rehabilitation projects. These complicated redevelopment projects involved working closely with our architecture and historic consultant teams to understand the important historical features of the properties, craft adaptive reuse revitalization plan and determine an appropriate phased approach. Often times, to increase affordability, these developments have also involved the pairing of historic tax credits with Low Income Housing Tax Credits or New Markets Tax Credits, increasing the complexity of the project's financial structures. Additionally, over the course of its thirty-four year history, Trinity has adeptly overcome various historic tax credit challenges such as the need to get the site placed on the National Register (Randolph Houses), the need to save enough historic fabric to allow a highly deteriorated historic mill to qualify for historic tax credits (Appleton Mills) and the need to navigate, while in development, significant changes to the historic tax credit program that were created by the Tax Cuts and Jobs Act of 2017 (Worcester Courthouse).

Relevant **multi-phased historic projects** include the Mattapan Heights Campus Redevelopment, in Mattapan, MA; the Hamilton Canal District Development (Appleton Mills and 110 Canal Street buildings) in Lowell, MA; Arlington Point/608 Broadway in Lawrence, MA and the Randolph Houses in Harlem, NY. A more detailed description of these developments can be found below.

Mattapan Heights- 221 River Street, Mattapan, Massachusetts

Similar to the Medfield State Hospital Campus, the revitalization of Mattapan Heights included the redevelopment of the 52-acre former Boston Consumptive and Chronic Disease Hospital set in the Mattapan neighborhood of Boston. Portions of the former 52-acre hospital campus had been abandoned for more than 20 years and the few remaining campus buildings were in an advanced state of disrepair.

Mattapan Heights is a multi-phased comprehensive redevelopment project that is transforming the former 52-acre hospital campus in the Mattapan neighborhood of Boston. Portions of the grand campus were abandoned for more than 20 years and the few remaining campus buildings were in an advanced state of disrepair.

Phase 1 commenced in November 2001 and was completed and occupied in March 2003. This first phase encompassed the rehabilitation of the Foley Building into 98 mixed-income elderly assisted and independent living units, and 18 units for Latina women in recovery and their children in the E Building. Mattapan Heights Phase 2 was completed in late 2006 and consists of the rehabilitation of five historical buildings into 83 affordable family housing units. Mattapan Heights Phases 3 and 4 were completed in February 2008 and created 73 affordable family housing units. Phases 3 and 4 included both new construction and historic restoration. Phase 5A was completed in late 2012, creating a newly constructed building on the upper portion of the campus. This building, which is designed to be LEED Silver certifiable and Energy Star Multifamily High Rise Certified, contains 60 affordable units. With the completion of the fifth phase of Mattapan Heights, more than 330 new units of mixed-income housing have been created, eight historic hospital buildings saved from demolition and more than 27 acres of campus landscape reclaimed and restored.

Notable awards received for Mattapan Heights included the 2004 Massachusetts Historical Commission Preservation Award, the 2004 Charles L. Edson Affordable Housing Tax Credit Excellence Award and the 2000 Boston Preservation Alliance – Significant Rehabilitation/Restoration Award.

Appleton Mills – 219 Jackson Street, Lowell, Massachusetts

The Appleton Mills revitalization was the first phase of the Hamilton Canal District in Lowell. The building includes 130 units of affordable housing with a preference for artists and other creative professionals. The program was consistent with Lowell's efforts to attract and retain such individuals as part of its downtown development strategy and met the community's desire to maintain affordable housing for the artists who had helped establish the City as a flourishing arts destination. Trinity developed an artist certification process so that creative individuals received a preference over other applicants. Over 200 artists of all disciplines were ultimately certified by the Appleton Mills Artist Selection Board (comprised of a Trinity representative, a representative of its property management team and an artist representative nominated by the City).

The project financing included a number of unique challenges including;

- **High Unit Costs.** Since the project was situated between two canals and required a significant amount of infrastructure including pedestrian and vehicular bridges unit costs were high. Additionally, the historic mill's floor plates were extremely inefficient and subsequent consultation with the National Park Service determined that reducing the floor plate would jeopardize the federal historic tax credit. Finally, the abandoned building was in such a state of deterioration that the interior structure had to be completely removed and put back together during construction.
- **Limited Funding Commitments.** Although a special line item to specifically benefit the Appleton Mills project and other projects in Targeted Growth Districts was added to the Massachusetts State Transportation Bond Bill that was approved by the Legislature and signed by the Governor in July 2008, there were no major sources of funding committed to the project in at the time the project was seeking an equity investor.

In the fall of 2008, concurrent with the national financial meltdown, Trinity sought a tax credit investor for the project. With the financial crisis looming in the background, Trinity worked with Red Stone Equity Partners to attract an investor to the complicated investment. Although the project's capital budget relied significantly on multiple sources of financing, primarily tax credit equity and soft debt, \$42 million in federal and state housing and historic tax credit equity was needed to make the project financially feasible. Given the uncertain financial climate few, if any, institutional investors were proceeding with investment in development projects. MetLife expressed interest in purchasing all of the tax credits for the property, which included federal and state historic credits and federal and state housing credits. In October 2009, Trinity closed the Appleton Mills transaction with a \$42 million equity investment from MetLife, making the investment MetLife's single largest tax credit investment in its history. The development was successfully completed and occupied in 2011 and was the recipient of a number of prestigious awards including:

- 2013: Preservation Award from the Massachusetts Historical Commission
- 2012: Boston Society of Architects, Housing Design Award
- 2012: Paul E. Tsongas Award from Preservation Massachusetts
- 2011: Award for Excellence in Heritage Preservation by Lowell National Historical Park and Lowell Heritage Partnership
- 2011: National Housing & Rehabilitation Award: A Timmy Award for Excellence in Historic Rehabilitation
- 2011: Builder's Choice Design Award
- 2011: Novogradac Journal of Tax Credits Developments of Distinction

*Appleton Mills***Van Brodie Mill – 590 Broadway, Lawrence, Massachusetts**

Van Brodie Mill is a project within the multi-phase redevelopment effort of Lawrence's 34-acre Arlington Mills Smart Growth Overlay District. This adaptive reuse project, which is also located in the federally designated Arlington Mills Historic District, transformed a vacant mill into 102 units of mixed-income rental housing, while remediating a Brown-fields site. Initially constructed in 1919, the Van Brodie Mill was originally home to a facility that manufactured yarn for wool and flannel products. By the 1950s, the Van Brodie Mill was operated by a different company that shifted production to food products, including packaged breakfast cereals and rations for the military. Van Brodie Mill is Trinity's first project in Lawrence.

Van Brodie Mill, now known as Arlington Point, serves residents with a broad range of incomes. Of the property's 102 units, 16 are for very low-income households earning at or below 30% of the area median income (AMI), 67 for low-income families earning at or below 60% of AMI, and 19 for Workforce Housing units for households earning between 61% and 80% of AMI. The completed project contains a mix of studio apartments, one-, two- and three-bedroom apartment homes.

Trinity leveraged a combination of tax credit equity sources – 9% low-income housing tax credits (LIHTCs), 4% LIHTCs, state LIHTCs, federal historic tax credits, and state historic tax credits – to finance the majority of the cost of redeveloping Van Brodie Mill. The balance of the funding package included a permanent mortgage and Workforce Housing funds from MassHousing, as well as Affordable Housing Trust Fund and Housing Stabilization Funds from DHCD. TD Bank provided the project's construction financing.



Van Brodie Mill/ Arlington Point

Courthouse Lofts – 2 Main Street Worcester, Massachusetts

The Worcester Courthouse Project is the certified historic rehabilitation and adaptive re-use of the approximately 214,000 square-foot Old Worcester County Courthouse, originally built in 1845, into a new multifamily mixed income residence, with ancillary amenity space throughout. Upon construction completion, the repurposed building will contain roughly 114 residential units in the form of Studio, 1-, 2-, and 3-bedroom units. Located at 2 Main Street, the re-development of the Courthouse is part of a larger revitalization of the Historic Lincoln Square district, which sits just north of Downtown Worcester and the City center.

The primary design approach for Courthouse Lofts is to preserve the character and beauty of the existing building while creating an efficient layout and maximizing the residential square footage within. The design team has created floor plans that contain new comfortable, character-rich apartments while preserving the building's most impressive public spaces. These spaces include two of the most grand historic courtrooms that will be converted into amenity spaces, as well as the main entry hall of the building with its stunning marble columns and curving stone staircases.

The project includes a fitness center, clubhouse lounge, gallery space, and interior bicycle and resident storage. The site will also feature ample parking, landscaping restoration, and outdoor resident gathering spaces. An approximately 2,500 square foot retail/gallery space is also planned.

The income mix of the project is expected to be 50% market-rate (with some units unrestricted and some at a workforce tier of 120% of AMI) and 50% affordable to households below 60% of area median income.



Rendering Courthouse Lofts

Randolph Houses-204 West 114th Street, New York, New York

In order to access historic tax credits at its two-phased Randolph Houses project in New York City, Trinity hired a reputable historic consulting firm to guide the development team through the application process with New York State SHPO (State Historic Preservation Office) and the National Park Service. The three step process included the actual designation as certified historic structures, the Part 1, the description of the historically appropriate rehabilitation intervention in conformance with federal preservation guidelines in Part 2, and finally the submission of the Part 3 establishing the substantial completion of the intervention in accordance with the guidelines.

For the two-phased gut-rehabilitation project at Randolph Houses, this meant preserving and restoring the historic exterior walls as well as the interior circulation of the 5-story tenement buildings that dated from the last decade of the 19th century. Trinity's design team creatively introduced a new circulation path and connected the individual tenement buildings through an internal corridor bypassing the historic stairs that didn't allow for mobility-impaired access of the apartments and were not up to code. The unit layouts that were previously not accessible and not up to current living standards were entirely redesigned, partially even spanning beyond their original building's footprint, to better serve the existing population. Remarkably, the original very tight and inaccessible 450 units in the 36 tenements buildings, now combined into 3 new buildings that yield 283 comfortable and state-of-the-art apartments -- while generating roughly \$55 Million in historic tax credit equity.

Notable Awards include Preservation League of New York State-Project Excellence 2017 and the Lucy G. Moses Preservation Award 2017.



A. Philip Randolph Houses

Trinity has also successfully completed a number of properties that have involved the creation of market rate housing in neighborhoods that had previously not been known for residential development. These developments involved not only getting financial participants comfortable with the market but also ensuring that the end product would attract residents.

Avenir - 101 Canal Street, Boston, Massachusetts

Located in the heart of Boston's historic Bulfinch Triangle, Avenir is a 10-story mixed-use, transportation-oriented development with ground level retail, a 121-space parking garage, and 241 residential units, including 17 affordable units. The site sits directly above the Massachusetts Bay Transportation Authority's (MBTA) North Station Green and Orange Line Superstation train stop. Along with several adjacent surface parcels, this site became available through the depression of the Central Artery as part of Boston's Big Dig. The parcels were the subject of a joint RFP by the MBTA and the Massachusetts Turnpike Authority. Trinity was one of four developers awarded rights to the parcels through a competitive RFP process. Trinity was the first development of the parcels to successfully close on its financing.

Initially Avenir was planned as a condominium building, with Lehman Brothers as its joint venture partner. However on account of the sharp decline of the condominium market, and thus a lack of condominium pre-sales, Trinity shuttered the marketing center it had constructed in the Fall of 2006 and Lehman Brothers withdrew its commitment from the deal, forgoing its \$4 million investment in the project. In order to maintain its development rights, Trinity then re-positioned the project as luxury rental therefore enabling construction to commence eight months later in accordance with the MBTA's mandated closing date of June 2007 with then investor, Archstone Smith. Trinity repaid Lehman its foregone investment and was responsible for the successful on-schedule completion of the building in July 2009. Today, Avenir is owned and operated by Equity Residential and has set the standard for luxury rental apartments in downtown Boston and is one of the highest performing properties in Downtown Boston.

*Avenir***Boston East – 126 Border Street, East Boston, Massachusetts**

Located strategically on the East Boston waterfront between bustling Central Square and the Maverick Square T station with striking views of the City, Trinity's Boston East development encompasses a unique combination of public and private uses unprecedented in East Boston.

The revitalization of the Boston East parcels has been a significant undertaking. Trinity and its development partner, the East Boston Community Development Corporation, were designated developer of the parcels in December 2006 by the City of Boston's Department of Neighborhood Development.

In order to create a developable site, the team needed to overcome several significant permitting challenges including amending the East Boston Municipal Harbor Plan and reconfiguring the site to allow for the consolidation of the Designated Port Area (DPA parcels) into the southerly portion of the site. This created two contiguous parcels of developable land to the north for a residential building, and relocated the DPA parcel in a location in which it would take better advantage of the water's edge. Working with the City of Boston, the team completed the Land Court deregistration process, resolving many years of complicated and substantial title work. Finally, the team was successful in making the case for DEP to allow for the inclusion of affordable artist live/work/sell space as meeting the Facilities of Public Accommodation (FPA) requirement under Chapter 91.

The northern portion of the site is designated for housing. Boston East residents enjoy breathtaking views from a build-

ing designed to evoke the sense of the historic wharfs of East Boston. With arched entryways and open spaces, the building is aesthetically appealing from both Border Street and the Harborwalk that runs along the water edge of the site. Boston East consists of 200 units of rental housing, 26 of which will be much needed affordable housing, including 6 artist live/work/sell units on the ground floor. These units are open to the public for open studios and are located near the building's gallery space, which serves as an inviting venue for art exhibitions and community events.



Boston East

7. Provide at least three professional references from previously completed projects, including at least 1 from municipal or governmental partners on similar prior projects.

Reference

Municipal Reference

Adam Baacke

Director, Campus Planning and Development

University of Massachusetts Lowell

Adam_Baacke@uml.edu

Adam is the former Director of Planning and Development for the City of Lowell. He was the main liaison between the City and Trinity for the Appleton Mills and 110 Canal Development in the Hamilton Canal District.

Construction Lender

Elizabeth Gruber

Bank of America Merrill Lynch

225 Franklin Streets

Mail code MA1-225-02-02 Boston, MA 02110

(617) 346-1060

elizabeth.gruber@bofa.com

Trinity enjoys a long-standing relationship with Bank of America. Additionally, Bank of America has participated in a number of development projects including Brockton Phase I and Phase II and Newburyport.

Financing Agency

Kirk Helgeson

Chief Investment Officer

American Realty Advisors

515 S. Flower Street, 49th Floor

Los Angeles, CA 90071

213.233.5779

khelgeson@aracapital.com

Trinity worked successfully with ARA on its Boston East Development

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

This is confirmation that no local, state or federal taxes are due and outstanding for the proposer, the development team or any constituent thereof.

9. Information regarding any legal or administrative actions, past, pending or threatened that could relate to the conduct of the Proposer's (or its principals, business, and/or affiliates) and/or its compliance with laws and other governmental requirements or its ability to execute the PDA, Developer LDA and other legal documents required to close.

There are no legal or administrative actions, past, pending or threatened that could relate to the conduct of the Proposer's (or its principals, business, and/or affiliates) and/or its compliance with laws and other governmental requirements or its ability to execute the PDA, Developer LDA and other legal documents required to close.



July 30, 2021

Board of Selectmen
Medfield Town House, 2nd Floor
459 Main Street
Medfield, MA 02052
Attn: Nicholas Milano, Assistant Town Administrator

RE: Financial Declaration

Dear Mr. Milano

Please accept this letter as a financial certification confirming that Trinity Financial, Inc., and/or its related affiliates, has the financial strength to close the sale with the Town and to develop the Disposition Property to completion in accordance with the proposed development plan. We recognize that after the submission of proposals, we may be asked to submit additional financial information for review in form and substance acceptable to the Town in its sole discretion.

Thank you,

A handwritten signature in blue ink, appearing to read "Rebecca Hemenway".

Rebecca Hemenway

Chief Operating Officer



July 30, 2021

Board of Selectmen
Medfield Town House, 2nd Floor
459 Main Street
Medfield, MA 02052
Attn: Nicholas Milano, Assistant Town Administrator

RE: Expenses

Dear Mr. Milano

Please accept this as an acknowledgement that Trinity Financial, Inc. will pay for all costs incurred by the Town in connection with the disposition of the Medfield State Hospital Property. The proposed costs will be detailed in a mutually-agreed upon budget that the town and Trinity will establish during the Due Diligence period and will document in the Land Disposition Agreement. Any costs that are anticipated to exceed the established budget will need to be approved in advance by Trinity prior to authorization.

Sincerely,

A handwritten signature in blue ink, appearing to read "Rebecca Hemenway".

Rebecca Hemenway

Chief Operating Officer

Certificate of Tax Compliance

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

80-0859340

*Social Security Number or
Federal Identification Number*



Signature of Individual or Corporate Name

Rebecca Hemenway

Authorized Signatory

Corporate Officer (if applicable)

Certificate of Non-Collusion

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

Rebecca H. [Signature] ~~authorizes~~ signatory
Signature of person submitting contract/bid

7/30/2021
Date

Trinity Acquisitions LLC
Name of Business

**MEDFIELD STATE HOSPITAL
REDEVELOPMENT**

RESIDENTIAL REUSE PROGRAM

FISCAL IMPACT ANALYSIS

Prepared For: Trinity Acquisitions, LLC
July 28, 2021



FOUGERE PLANNING & DEVELOPMENT, Inc.

Mark J. Fougere, AICP

FISCAL IMPACT ANALYSIS

Medfield State Hospital Redevelopment: Residential

July 28, 2021

I. Introduction

Fougere Planning and Development has been engaged by Trinity Acquisitions, LLC to estimate the net fiscal impact to the Town of Medfield, MA from the proposed redevelopment of 36 existing historic buildings located on the grounds of the former Medfield State Hospital into 334 apartment units, with 25% set aside as affordable. Table One outlines the apartment mix contemplated by the development proposal, with 59% of the units will be studio and one bedroom.

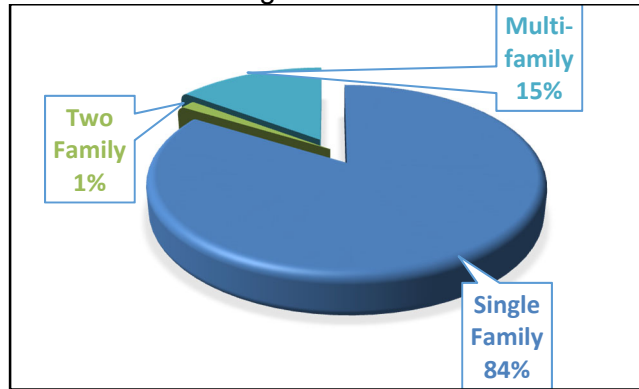
Table One Apartment Unit Mix	
Studio - Market	9
Studio - Affordable	4
One Bed - Market	138
One Bed - Affordable	46
Two Bed - Market	94
Two Bed - Affordable	32
Three Bed - Market	8
Three Bed - Affordable	3
Total	334

II. Local Trends

Census figures¹ report that from 2010 to 2018 Medfield's population increased from 12,024 to 12,748, representing a 6% growth rate over the 8-year period. A majority of Medfield's housing stock consists of single family homes, with the most recent Census data (2017) reporting 3,720 units out of a total housing stock of 4,440 units as outlined in Figure 1.

¹ US Census, Factfinder 2013-2017.

Figure 1
Housing Unit Breakdown



The reuse proposal is consistent with the residential goals of the Medfield State Hospital Strategic Reuse Master Plan. In addition, this project proposal is consistent with a number of Housing Goals outlined in the Housing Production Plan, including:

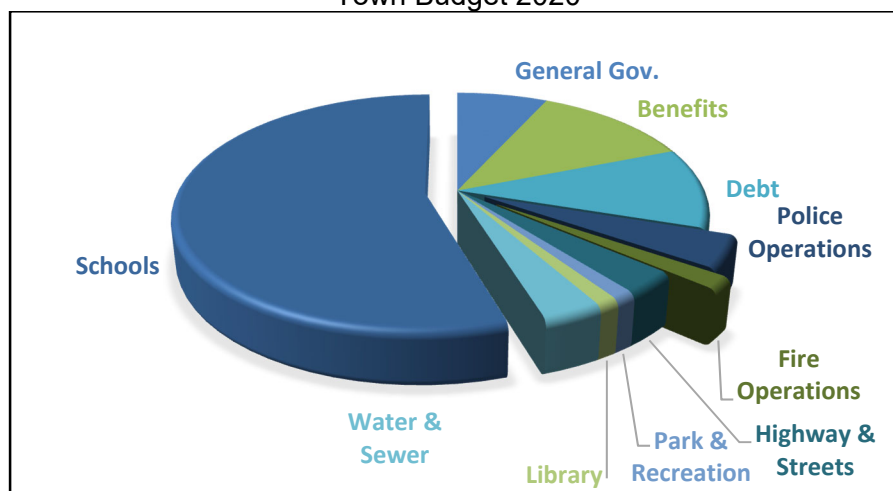
- *“Medfield’s housing stock is relatively homogenous, and there is a need for more diverse housing options in town suitable for households of all ages, sizes, and incomes. Increasing the diversity of housing options in Medfield will enable seniors, younger adults, and people who work in town to establish and maintain long-term residence in the community.*
- *There is a need for more rental housing for households of varying incomes and sizes. Demand for the existing rental properties in town is high. Conversations with social service providers in the region suggests that there is a need for rental housing for all types of households, including young adult households, single parents, traditional families, seniors, and single individuals. Also, the existing rental units in town are very small - the median number of rooms is only 3.4 – which suggests a need for larger units suitable for families, as well as rental units for seniors and small households.*
- *Medfield’s homes are large, and there are few options for seniors and empty-nesters to downsize and remain in the community. Medfield’s relatively small proportion of senior households reflects the fact that many who wish to downsize cannot find housing in town that is suitable or affordable, resulting in their leaving Medfield for other communities. Smaller single family homes or*

condominiums and rental housing would allow residents an opportunity to stay in Medfield as they age.”

Budget

Education, along with the Public Safety, are some of the largest department cost centers in the community as outlined in Figure Two and therefore will be the primary focus of this analysis as they relate to the proposed development program.

Figure Two
Town Budget 2020



III. Per Capita Methodology & Marginal Cost Approach

There are a number of methodologies that are used to estimate fiscal impacts of proposed development projects. The Per Capita Multiplier Method is the most often used analysis to determine municipal cost allocation. This method is the classic “average” costing method for projecting the impact of population growth on local spending patterns and is used to establish the costs of existing services for a new development. This method uses the current revenue/cost ratios per person and/or per unit as an indicator for future revenue/cost impacts occasioned by population growth. New capital expenditures required for provision of services to a development are not added to current costs; instead, the present debt service for previous improvements is included to represent ongoing capital projects. The advantage of this approach is its simplicity of implementation and its wide acceptance by both consultants and local officials. The downside of this approach is that the methodology calculates the “average” cost as being the expected cost, which is often not the case as costs are exaggerated - significantly in some instances. (For example, if one student is added to a school system, limited cost impacts will occur; however based on

an “average” cost to educate one student the cost could be noted as \$15,000/year, which includes such costs as existing debt, building maintenance, administrative and other factors, all of which will be minimally impacted by the addition of one student. The “true cost” could be significantly less, especially in those communities with declining enrollment.) Focusing on those departments where measurable impacts may occur refines this approach and its findings.

The Marginal Cost Approach is a more realistic methodology that can be used to estimate and measure developmental impacts based on actual costs that occur in the community. At this time, a “level of service” exists in Medfield to serve the community. This existing service level, for the most part, addresses the needs of the community through existing tax collections. As new development occurs, pressures are placed on some departments to address increased demands, while other departments experience negligible, if any impacts. In reviewing the potentially impacted town departments specifically, a truer picture of anticipated cost impacts can be determined.

At this preliminary stage of the Town’s review of redevelopment options, engaging in detailed discussions with Department Staff was not encouraged by Town Administration Officials. Therefore, for this analysis, Average Costing will be used to measure potential municipal impacts, along with Marginal cost findings detailed in the Medfield State Hospital Strategic Re-use Master Plan.

Given the nature of the contemplated residential development, as will be shown by the analysis below, measurable impacts will be limited to a few Town departments. Any required off-site traffic and roadway improvements are expected to be addressed during the approval process. Solid waste generated by new buildings will be removed by a private hauler. Water and sewer expenses associated with the new apartment use will be offset through user fees. This report does not intend to infer that no costs will occur as a result of this project. Measurable impacts of the redevelopment are expected to result to a few Town departments, most notably the School Department along with the Police and Fire Departments. Other Town agencies are projected to experience little or no measurable impacts from this proposal.

IV. Local Revenues from Development

1) Revenue

Local property taxes provide the bulk of general fund revenues for the Town, with fiscal year 2021 figures showing that 63.5% will be generated from this revenue source, with the remaining income being received from state aid, local receipts and other financing sources. The 2021 Residential Tax Rate for the Town is \$17.76.

Table Two outlines the estimated municipal tax revenue that may be generated by the redevelopment, based upon the anticipated assessed value² Based upon these values, the new apartment complex is estimated to generate \$1,041,180 in annual property tax revenue

Table Two Estimated Property Tax Revenue		
Units	Total Value	Property Taxes
334	\$58,625,000	\$1,041,180

2) Miscellaneous Yearly Revenues

Another major revenue source for the community is from motor vehicle excise taxes. In fiscal year 2020, the Town received a total of \$2,297,603³ from this revenue source. Table Three outlines the projected excise tax revenue stream for the redevelopment project, which is estimated to be \$160,800 annually

Table Three Motor Vehicle Excise Taxes		
Vehicles ⁴	Avg. Value	Excise Taxes ⁵
536	\$12,000	\$160,800

3) Total Revenues from Redevelopment

The planned development of the apartment complex is expected to generate \$1,201,980 in annual tax revenue as outlined in Table Four.

Table Four Estimated Gross Revenues	
Property Taxes	\$1,041,180
Vehicle Excise	\$160,800
Total	\$1,201,980

² Assessments are based on preliminary Income Approach analysis, using a 7.8% Cap Rate recommended by the Assessing Department.

³ Management's Discussion and Analysis Report.

⁴ Estimated 1.6 vehicles per unit.

⁵ 536 vehicles x \$12,000 = \$5,628,000, tax \$25/\$1000.

Other income sources were reviewed for this analysis but not included in the income figures. The Town receives state aid from a number of sources based upon the Town’s population and school enrollments (Chapter 70). The anticipated new residents will create demand for local services, thereby creating a positive impact on the local economy. In addition, one- time building permit fees will be paid to the Town, and the construction economy will be enhanced from this new development project.

V. Town Departments

As noted above, the Police, Fire and School Departments account for a significant percentage of the Town’s operating expenses. These Departments employ the largest number of personnel and have the most noticeable impact on Medfield’s municipal budget.

Police & Fire

Both the Police and Fire Departments will see measurable increases in demand for services which can be attributed to the new apartment community. To assess the degree of impact this project would have on these departments, comparable apartment complex emergency call data from over 2,500 apartment complexes⁶ were analyzed. The emergency call data was obtained and averaged to determine the annual number of calls per unit. These ratios were then totaled to derive an average call volume per unit, which was then used to generate projected emergency calls for each Department. Extrapolating from the comparable call data, increases in calls are projected for both the Town’s Police and Fire Departments. Table Five and Six outline the findings from this research.

Table Five		
Estimated Annual Police Emergency Calls		
Units	Police Call Ratio Per Unit	Estimated Calls
334	.402	135

⁶ Complete list of emergency calls located in Appendix.

Table Six Estimated Annual Fire		
Units	Fire Call Ratio Per Unit	Estimated Calls
334	.071	24

EMS Emergency Calls		
Units	EMS Call Ratio Per Unit	Estimated Calls
334	.112	38

Police Department

Police Department calls are estimated to increase by 135 calls annually or an average of 2.5 calls per week. To put the call volume into perspective, the Department received approximately 5,451 totals calls for service in 2018 (105 per week).

To assign some expense to the proposed project, a cost per call was derived from reviewing total annual police calls and the Department's budget. As outlined in Table Seven, a cost of \$91,800 will be carried in this analysis.

Table Seven Estimated Police Cost ⁷	
<u>\$3,706,245/5,451 = \$680 a Call</u>	
135 calls @ \$680 = \$91,800	

Fire Department

Fire Department calls are estimated to increase by 62 calls annually or an average of 1.1 calls per week. The Department responded to 1,474 total calls in 2018 (28 calls/week), of which 703 were EMS related. To allocated Fire Department costs, as with the Police Department, a cost per call was calculated to cover potential expense as detailed in Table Eight.

Table Eight Gross Estimated Fire Cost	
<u>\$1,973,995/1,474 = \$1,340 a Call</u>	
62 calls @ \$1,340 = \$83,080	

⁷ FY21 Budget was increased by 40% to cover insurance and benefit costs for both Police and Fire.

The Town of Medfield obtains revenue from ambulance activity and in 2018 received a total of \$422,411. In 2018 the Department responded to 703 EMS related calls, resulting in an average of \$601 collected per call. Taking this revenue source into consideration, as outlined in Table Nine, the estimated Gross fiscal cost to the Fire Department is \$60,247.

Table Nine Net Fire Department Cost	
2018 Ambulance Revenue	\$422,411
2018 Ambulance Calls	703
Revenue Per Call	\$601
Estimated EMS Calls	38
Estimated EMS Revenue	\$22,833.03
Est. Net Department Cost	\$83,080
Est. Gross Dept. Cost	\$60,247

Other Departments

Medfield Outreach

Medfield Outreach provides services to those 18 and under. Based upon 2018 Census data, this age bracket consists of approximately 33% of the population (4,245). The Outreach budget for FY21 totaled \$175,270, which translates into a cost per capita of \$42. It is estimated that there will be 90 individuals under the age of 18 residing within the apartment community, resulting in an estimated cost of **\$3,780**.

Council on Aging

Medfield's Council on Aging (COA) serves those within the community over the age of 60 and based upon Census data, it is estimated that this population group totals 2,400. The FY21 Budget for COA totaled \$238,269 or \$99 per capita. It is estimated that the new apartment community will have 152 persons over the age of 60, resulting in an estimated cost of **\$15,048**.

Misl. Departments

Given the minimal impacts associated with the proposed apartment community, few financial impacts are expected on other Town Departments. All on site trash disposal will

be privately disposed of. Public water and sewer will serve the site and costs will be addressed through user fees. Building permit fees will offset any costs to the Building Department. No new public roads are proposed in association with the development and any required off site public roadway improvements will be addressed in the course of review. The Town will continue to maintain the onsite road system and as such, no new costs are created. To assign some costs to miscellaneous expenses that may incur to the Town, we have allocated a general government impact of \$100 per unit, or **\$33,400** for this development.

It should be noted that at this time Medfield is maintaining roads within the subject site that total approximately 2.7 miles (14,400 feet). Based upon existing expenditures within the Public Works Department related to roads, it is estimated the Medfield is expending approximately \$38,000 annual⁸ to maintain the noted road length within the Medfield State Hospital property.

⁸ The Town expends approximately \$5.30 per foot to maintain its roads (\$2,174,047/77.59 miles). As this costs includes static overhead that may not changes as the result of new roadways in the community, we assumed a cost of \$2.65 per foot, ½ of the noted actual cost.

School Department

The School Department's budget is the largest in the Town, with a fiscal year 2021 expense totaling \$36,877,290, representing 57.9% of the total Town budget.

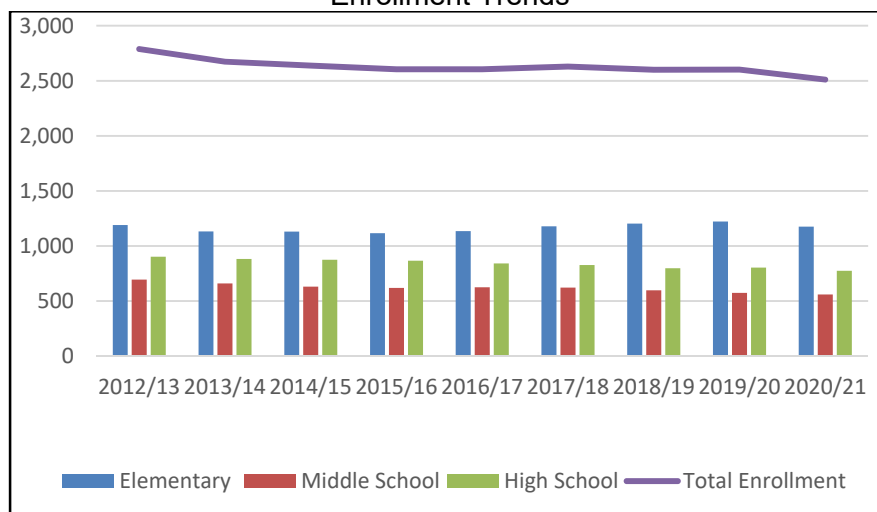
Enrollment Trends

Table Ten and Figure Three illustrate an eight-year enrollment trend for the schools along with total school enrollment. (Enrollments from the 20/21 school year should be discounted given the impact of the pandemic). Enrollments at the elementary level have been relatively even, with decreases seen at the middle and high school level. Based upon discussions with the School Superintendent in 2019, capacity issues are not presently an issue. Also, plans continue to move forward on a new elementary school which will serve grades 4 & 5.

Table Ten
School Enrollments

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Elementary	1,190	1,132	1,131	1,117	1,136	1,179	1,203	1,222	1,176
Middle School	695	660	631	620	626	622	598	575	560
High School	903	882	876	867	842	828	799	804	775
Total Enrollment	2,788	2,674	2,638	2,604	2,604	2,629	2,600	2,601	2,511

Figure Three
Enrollment Trends



To allocate expected costs associated with the proposed apartment complex, the number of children that may live in the multi-family community must be calculated. For this analysis, two methodologies will be used. As outlined in Table 1 above, the proposed apartment community is expected to be comprised of 13 studio units, 184 one bedroom units, 126 two bedroom units and 11 three bedroom units.

Option One

To estimate the potential generation of school aged children (SAC), data from 1,153 comparable 40B apartments were reviewed. The proposed development will have a high percentage of studio/one bedroom units, 59.1%. Studio and one bedroom units rarely generate school age children. Reviewing the number on two and three bedroom units provides a clearer understanding on the potential number of new school children that may reside within the development. As outlined in Table Ten, a per unit SAC ratio of .492 has been calculated from the 1,153 comparable apartment complexes, resulting in an estimated 67 school age children as detailed in Table Eleven. As a comparison, the Parc apartment complex⁹ has a SAC ratio of .515 which is understandable given the project has only 26% one bedroom units and is 100% affordable.

Table Eleven
Estimated School Age Children – Option One

Complex	Total Units	# Two/Three Bedrooms Units	Total SAC	SAC per 2/3 Unit Apt.
Concord Mews	350	176	85	0.483
Newton (Three Complexes)	678	467	239	0.512
Lincoln Woods	125	85	34	0.400
Average:	1,153	728	358	0.492
State Hospital	334	137		
		Est. School Age Children	67	
The Parc (100% Affordable)	92	68	35	0.515

⁹ 2019 enrollment from School Department.

Option Two

The SAC ratios outlined in Table Twelve, Option Two are derived from a data base of over 1,000 apartments where school enrollment is known based on bedroom type and if the unit is market rate or affordable. Based on this data set, an estimated 47 school age children may reside within the apartment community.

Table Twelve			
Estimated School Age Children – Option One			
Studio - Market	9	0	0
Studio - Affordable	4	0	0
One Bed - Market	138	0.009	1.242
One Bed - Affordable	46	0.021	0.966
Two Bed - Market	94	0.18	16.92
Two Bed - Affordable	32	0.57	18.24
Three Bed - Market	8	0.812	6.496
Three Bed - Affordable	3	1.19	3.57
Total	334		47

Based on these two SAC estimating Options, a range between 47 and 67 school age children may reside within the proposed new residential community.

The Medfield State Hospital Strategic Re-use Master Plan estimated a per student Marginal Costs ranging from \$3,800 to \$4,200. If the higher of these two cost figures is applied to the range of new school age children, an estimated school cost range of \$197,400 - \$281,400 is derived.

SUMMARY

As outlined in Table Thirteen, this fiscal impact analysis indicates that there will be a net positive annualized impact related to construction of the proposed development.

Table Thirteen
Fiscal Summary

Gross Projected Revenues	\$1,201,980	\$1,201,980
Estimated Municipal Costs		
Police	-\$91,800	-\$91,800
Fire	-\$60,247	-\$60,247
Outreach	-\$3,780	-\$3,780
Council on Aging	-\$15,048	-\$15,048
Other General Fund Impacts	-\$33,400	-\$33,400
Schools	-\$197,400	-\$281,400
Total Costs	-\$401,775	-\$485,675
Net Positive Fiscal Impact	+\$800,305	\$716,305

Key findings supporting this development include:

- ✚ The planned redevelopment will generate approximately \$1,201,980 in gross revenues per year. Taking into consideration estimated municipal costs, the redevelopment will yield a positive net tax revenue range of \$716,305 to \$800,305. Excess funds will be available to the community to address current and future needs.
- ✚ All on-site property maintenance and trash collection will be private, no new public roads are proposed.
- ✚ Calls to the Police Department are projected to increase by 135 a year (2.5 week), compared with an annual Town wide call volume of approximately 5,500.
- ✚ The Fire Department is expected to receive approximately 62 calls a year (1.19 week) from the proposed project, adding to the 1,474 calls a year that are presently received by the Department. In addition, an estimated \$24,510 of ambulance revenue may be realized.
- ✚ It is estimated range of 47 – 67 school age children may reside at the former hospital site;

- ✚ Both short-term and long-term positive economic benefits are anticipated to occur, with construction related jobs being created and local business activity enhanced by the new residential community.
- ✚ Additional community benefits will be realized through proactive planning to make progress in the goals of the Town's Housing Production Plan, thereby enabling the community to take greater control over future development.
- ✚ The Building Permit Fee¹⁰ of approximately \$390,000 will be paid for the residential project.

¹⁰ \$1 per square foot.

Appendix

Apartment Calls 40B Complexes

Police Department Calls Estimated Annual Apartment Police Calls¹¹

Project	Town	Units	Avg. Police Calls Per Year	Avg. Call Per Unit	Projected Yearly Calls
The Lodge	Foxborough	250	74	0.296	
Union Place	Franklin	297	73	0.247	
Fairfield Green	Mansfield	200	146	0.728	
Pembroke Woods	Pembroke	240	92	0.385	
Blue Hills	Randolph	274	148	0.540	
Avalon Newton Highlands	Newton	294	153	0.520	
Avalon Chestnut Hill	Newton	204	67	0.328	
Arborpoint Woodland	Newton	180	22	0.120	
Cloverleaf	Natick	183	82	0.448	
The Gables	Westwood	350	155	0.442	
Hastings Village	Wellesley	52	3	0.058	
Totals		2,524	1,015	0.402	
Proposed Apartments		334			135

¹¹ The noted projects are all 40B apartment complexes, with 25% of the units affordable.

Fire Department

Estimated Apartment Fire Calls¹²

Project	Town	Units	Avg. Fire Call Per Year	Avg. Call Per Unit	Projected Yearly Calls
The Lodge	Foxborough	250	26	0.105	
Union Place	Franklin	297	19	0.063	
Fairfield Green	Mansfield	200	43	0.213	
Pembroke Woods	Pembroke	240	9	0.036	
Blue Hills	Randolph	274	10	0.035	
Avalon Newton Highlands	Newton	294	26	0.088	
Avalon Chestnut Hill	Newton	204	11	0.053	
Arborpoint Woodland	Newton	180	12	0.064	
Cloverleaf	Natick	183	7	0.038	
The Gables	Westwood	350	17	0.049	
Hastings Village	Wellesley	52	2	0.031	
Totals		2,524	180	0.071	
Proposed Apartments		334			24
Project	Town	Units	Avg. EMS Call Per Year	Avg. Call Per Unit	Projected Yearly Calls
The Lodge	Foxborough	250	24	0.096	
Union Place	Franklin	297	44	0.148	
Fairfield Green	Mansfield	200	25	0.123	
Pembroke Woods	Pembroke	240	70	0.293	
Blue Hills	Randolph	274	28	0.101	
Avalon Newton Highlands	Newton	294	26	0.088	
Avalon Chestnut Hill	Newton	204	9	0.044	
Arborpoint Woodland	Newton	180	7	0.036	
Cloverleaf	Natick	183	24	0.131	
The Gables	Westwood	350	26	0.074	
Hastings Village	Wellesley	52	2	0.038	
Totals		2,524	284	0.112	
Proposed Apartments		334			38

¹² Call data obtained from 40B apartment complexes in the region, 25% affordable.

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Over \$3 billion in development work

9,500 units / over 600,000 sf retail + commercial

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260 employees

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unfolds, we translate this energy and understanding into structures and relationships that succeed financially, respect every constituency and enhance life for everyone they touch.

Revitalizing
neighborhoods

Strengthening
cities

Fostering
opportunity



Our Projects

60 King - Providence, RI



Total Development Cost: \$22.7 million

Units: 60

Completed: 2018

Trinity's 60 King is an adaptive reuse project which converted a vacant historic mill building in the Olneyville neighborhood of Providence into 60 units of mixed-income rental housing. Originally constructed in 1923, 60 King was the home of the Rochambeau Worsted Wool manufacturing facility until the 1950s when the complex was acquired by the Imperial Knife Company.

The redevelopment of 60 King breathes new life into an architecturally significant structure, remediated a contaminated Brownfields site and helped to reconnect this isolated building to the rest of the Olneyville neighborhood. Trinity undertook 60 King in collaboration with two Providence-based community development corporations: ONE Neighborhood Builders and SWAP, Inc. (Stop Wasting Abandoned Property).

60 King features a total of 60 affordable and market-rate apartments, including studio, one-, two- and three-bedroom units. The rents for the project are targeted to a range of different income levels: 47 units available at 60% of area median income, 7 units with rents set at 30% of area median income, and 6 unrestricted, market-rate units. 60 King was financed with a blend of low-income housing tax credits, federal historic tax credits,

state historic tax credits, soft debt from Rhode Island Housing and the City of Providence, as well as RIDEM Brownfields Remediation grant funding.

60 King is the second project in the multi-phase redevelopment of Olneyville that is contemplated in the Build Olneyville Plan, a community-based planning process that was led by the Providence Housing Authority, ONE Neighborhood Builders and Trinity in 2014, and which was financed through a HUD Choice Neighborhoods Initiative (CNI) planning grant.

The Build Olneyville Plans lays out a holistic vision for the future of Olneyville across several different elements, including housing, education and people. Moving forward, Trinity hopes to leverage the 60 King project and the work of the Build Olneyville Plan into a \$30 million HUD CNI implementation grant, which would help to catalyze the redevelopment of a portion of the adjacent 330-unit Manton Heights public housing development, and the construction of new mixed-income housing on and around the 60 King site.

66 Summer Street - Stamford, CT



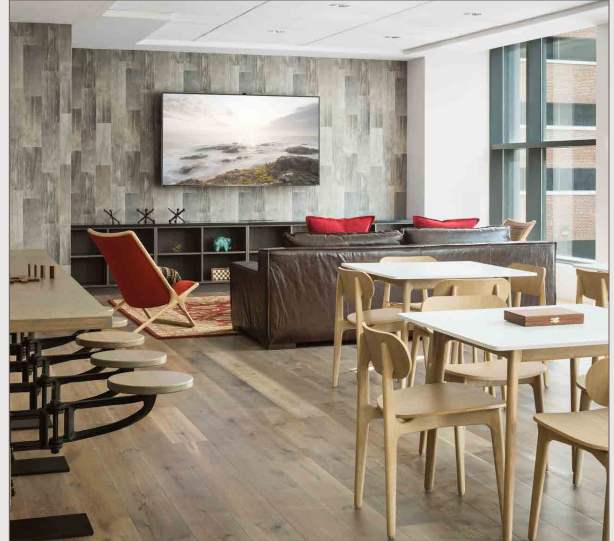
Total Development Cost: \$79 million

Units: 194/Retail - 6,800 SF

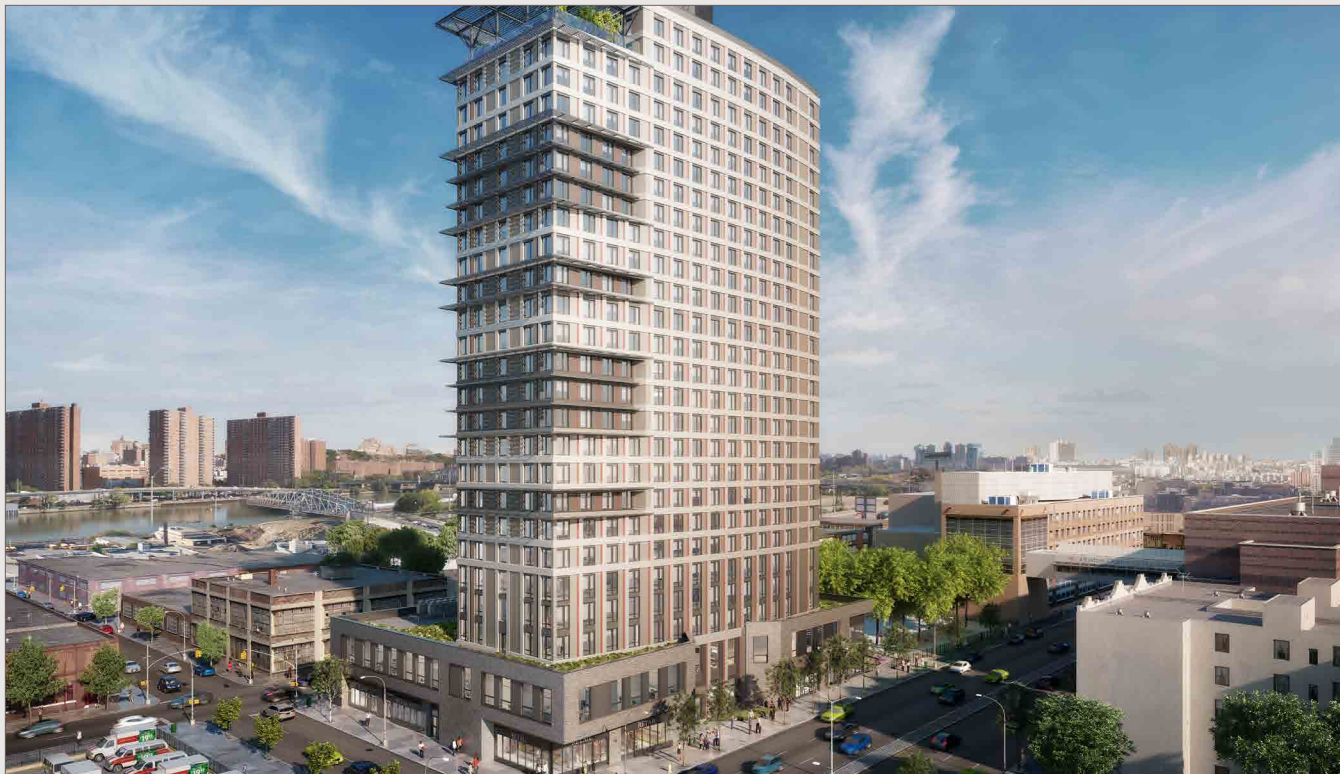
Completed: 2015

Centrally located in the heart of downtown Stamford, Trinity's Park Square West – Phase 2, known as 66 Summer Street, is a luxury, high rise mixed-use development consisting of 194 residential units in a 15-story structure with approximately 6,800 square feet of ground floor retail, and a structured parking garage. The property consists of a mix of studios, one, two, and three bedroom units. Building amenities include a main lobby area with a security and concierge desk, and a breakfast bar. The second floor features a fitness center and a community lounge with a kitchen area. Each unit boasts a full appliance package with a washer and dryer, granite counter tops, stainless steel appliances including an electric range/oven, a built-in microwave with vent-hood, and a dishwasher.

The immediate neighborhood has lively retail and active entertainment establishments, including the Palace Theatre, the Rich Forum, the Majestic Bow-Tie Cinema, Stamford's Restaurant Row, Target department store, the Stamford Town Center (an 860,000 sf super-regional mall anchored by Saks Fifth Avenue and Macy's), and the 115-room Courtyard Marriott hotel. The University of Connecticut's Stamford Campus is on an adjacent block to the site, serving approximately 1,200 students seeking various four-year degrees, MBA, and executive MBA (EMBA) degrees. The site is a 10-minute walk from the Stamford Transportation Center, where commuters can easily connect to Manhattan via a 45-minute train ride.



425 Grand Concourse - Bronx, NY

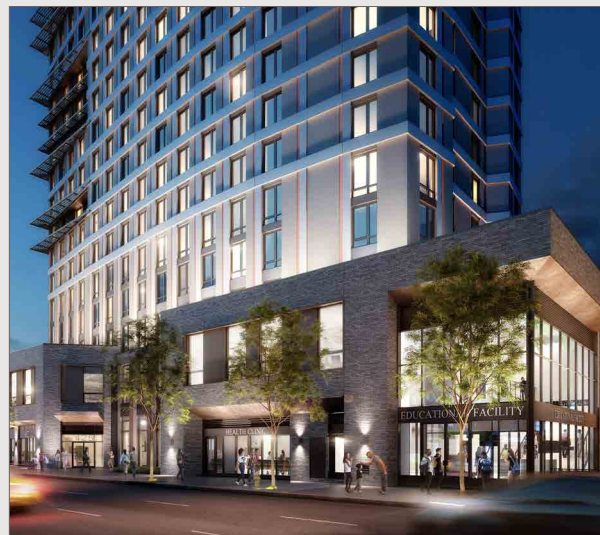


Total Development Cost: \$175 million
Units: 277/Commercial + Retail - 47,000 SF
Anticipated Completion: 2022

The 425 Grand Concourse project is a 27-story, mixed-use, and mixed-income building located in the Bronx, N.Y. When completed, the project will consist of 277 units of housing affordable to households from 30% to 100% of the Area Median Income. In addition to the residential component, the project will also consist of a Supermarket, a Community Health Clinic, an Educational Facility and a Cultural Center. On-site

resident amenities will include a fitness center, tenant lounge, community room, a package delivery room, and an accessible roof deck.

The 425 Grand Concourse Project is also designed to meet Passive House Standards - aimed at providing superior energy efficiency within the building and helping to greatly reduce the project's carbon footprint. When completed 425 Grand Concourse will be one of the largest Passive Houses in North America and a major example of innovative and energy efficient development.



110 Canal Street - Lowell, MA



Total Development Cost: \$8.5 million - core and shell rehabilitation

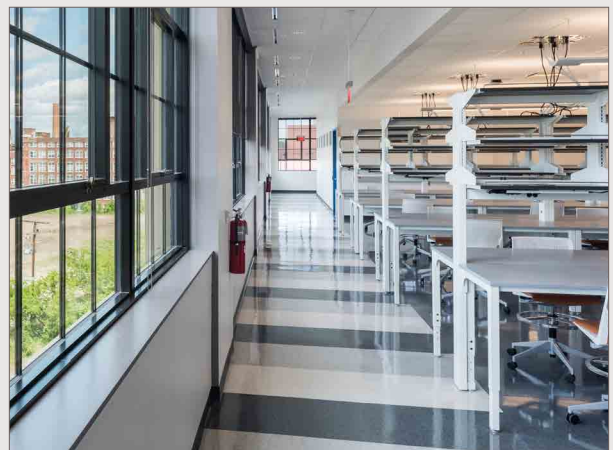
Total Commercial: 55,000 SF

Completed: 2013

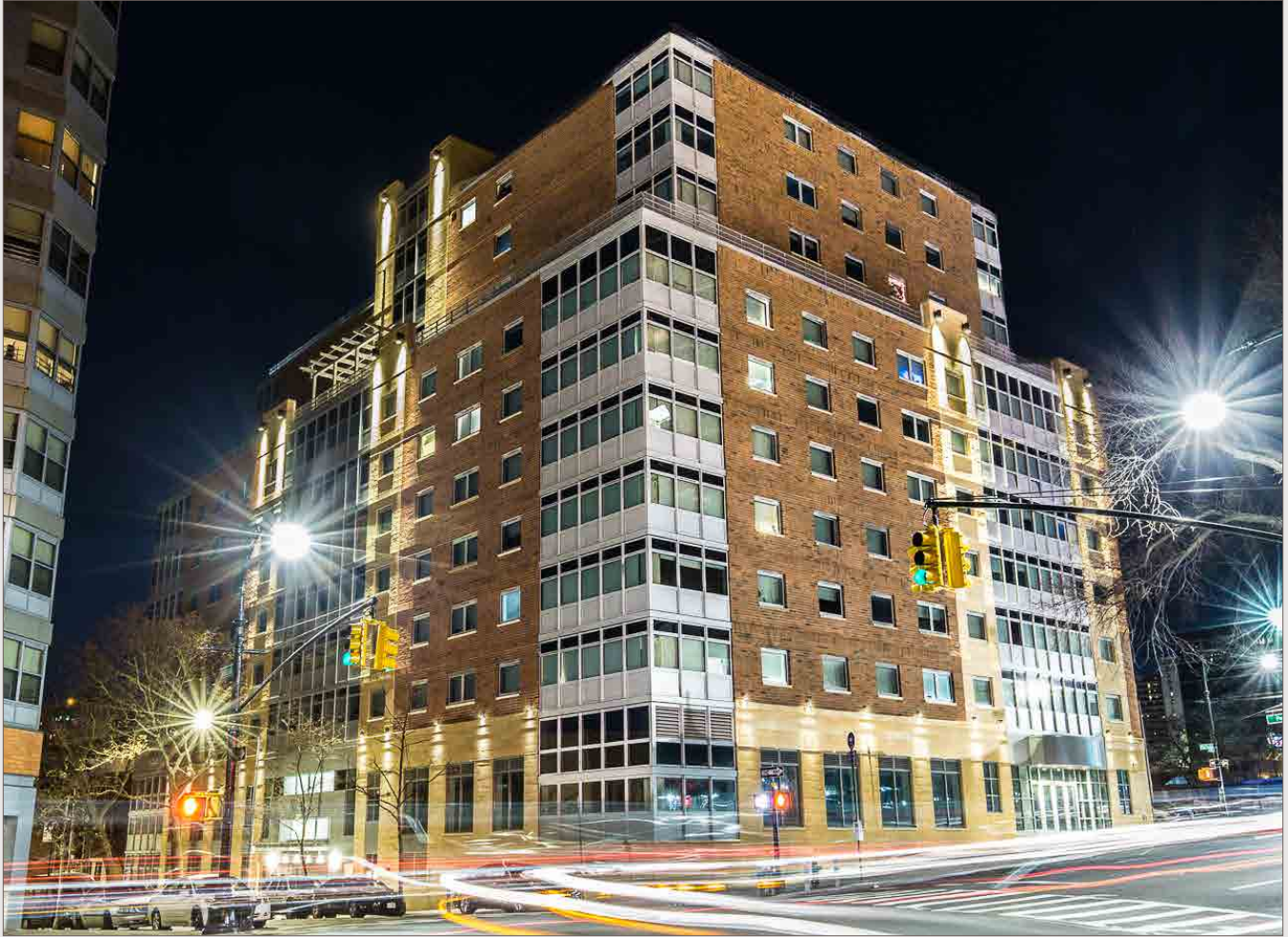
Historic texture. Downtown convenience. Flexible layouts. Unexpected interior design. It all comes together at 110 Canal Street, an exciting venue for office and commercial tenants of varying sizes. Located at the intersection of three historic waterways, 110 Canal offers five open-plan floors of approximately 11,000 square feet. Visually stunning and intensely practical, it's a perfect setting for technology companies, service firms, research and development organizations or brand-new ventures. Vigorous architecture, stylish amenities and fun details make 110 Canal attractive on its own. But it's even better as part of the Hamilton Canal District, a 13-acre site currently being transformed into a vibrant, mixed-use district. When complete, the District will include up to 425,000 square feet of commercial/office space, 55,000 square feet of retail space, and 725 units of housing. Right next door to 110 Canal is Appleton Mills, whose 130 units of loft-style housing for artists are already fostering a growing creative community.

Just steps away from Lowell's restaurants, entertainment and arts venues, 110 Canal offers superior, energy-efficient office space in a unique urban environment. 110 Canal will be accessible via Lowell's historic trolley system and is just three blocks from the Gallagher Transportation Terminal with access to MBTA commuter rail service.

The building is less than 10 minutes from I-495 and Route 3, 30 minutes from Manchester-Boston Regional Airport in New Hampshire, and just 40 minutes from Boston's Logan International Airport.



855 Courtlandt - Bronx, NY



Total Development Cost: \$66 million

Units: 152/Retail - 21,400 SF

Completed: 2016

The 855 Courtlandt (formerly known as 3160 Park Ave.) project is an exciting mixed-use, mixed-income development that has turned a vacant and underutilized parcel in the Bronx into a vibrant and economically impactful addition to the community by providing apartments affordable to households from 40% to 100% of the Area Median Income. The site is located within the Melrose Commons Urban Renewal Area established by the New York City Department of Housing Preservation and Development (HPD) with its community partners. The site was one of the last undeveloped parcels within the Urban Renewal Area and offered a unique opportunity to put the finishing touches on this ambitious planning effort. 855 Courtlandt is a highly energy-efficient building that exceeds Enterprise Green Communities Criteria.

Avenir - Boston, MA



Total Development Cost: \$150 million

Units: 241/Retail - 30,000 SF

Completed: 2009

Located in the heart of Boston's historic Bulfinch Triangle, Trinity developed Avenir as a 10-story mixed-use, transportation-oriented development.

The development is built directly above the North Station Green and Orange lines, and is the subject of a ground lease with the MBTA. The block-long building features retail on the ground floor, a 121-space parking garage on the second and third floors wrapped with housing, and 241 residential units, including 17 affordable units.

Although originally conceived of as a condominium building, Trinity re-positioned the project as luxury rental in the fall of 2006 enabling construction to commence in June 2007. Trinity was responsible for the successful on-schedule completion of the building in July 2009. Originally owned and operated by Archstone Smith REIT, Avenir is now operated by Equity Apartments.

With its stylish interiors and links to public transportation, Avenir Apartments has become one of Boston's most appealing places to live.



Arlington Point - Lawrence, MA



Total Development Cost: \$46 million

Units: 102

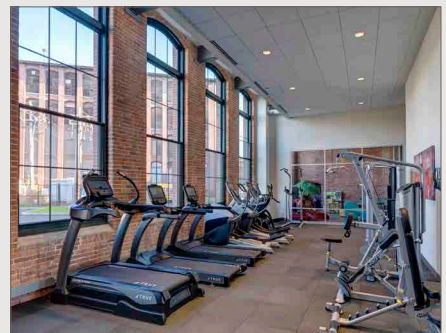
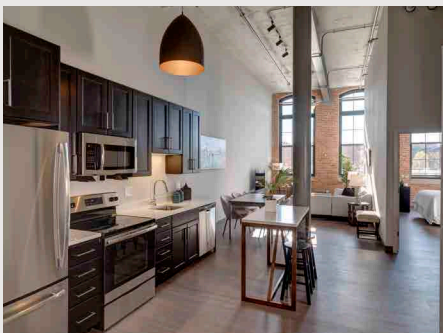
Completed: 2019

Van Brodie Mill is a project within the multi-phase redevelopment effort of Lawrence's 34-acre Arlington Mills Smart Growth Overlay District. This adaptive reuse project, which is also located in the federally designated Arlington Mills Historic District, transformed a vacant mill into 102 units of mixed-income rental housing, while remediating a Brownfields site. Initially constructed in 1919, the Van Brodie Mill was originally home to a facility that manufactured yarn for wool and flannel products. By the 1950s, the Van Brodie Mill was operated by a different company that shifted production to food products, including packaged breakfast cereals and rations for the military. Van Brodie Mill is Trinity's first project in Lawrence.

Van Brodie Mill, now known as Arlington Point, serves residents with a broad range of incomes. Of the property's 102 units, 16 are for very low-income households earning at or below 30% of the area median income (AMI), 67 for low-income families earning at or below 60% of AMI, and 19 for Workforce Housing units for households earning between 61% and 80% of AMI. The completed project contains a mix of studio apartments, one-, two- and three-bedroom apartment homes.

Trinity leveraged a combination of tax credit equity sources – 9% low-income housing tax credits (LIHTCs), 4% LIHTCs, state LIHTCs, federal historic tax credits, and state historic tax credits – to finance the majority of the cost of redeveloping Van Brodie Mill. The balance of the funding package included a permanent mortgage and Workforce Housing funds from MassHousing, as well as Affordable Housing Trust Fund and Housing Stabilization Funds from DHCD. TD Bank provided the project's construction financing.

For more information visit www.arlingtonpoint.net



Appleton Mills - Lowell, MA



Total Development Cost: \$64 million

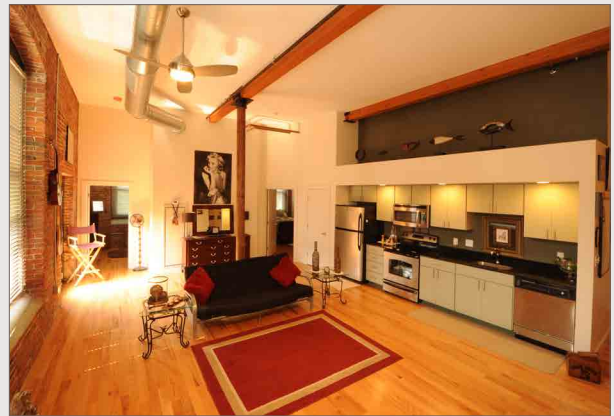
Units: 130

Completed: 2011

Phase One of the Hamilton Canal District commenced with the \$64 million historic restoration of the Appleton Mills complex into 130 units of affordable artist housing. For years, the deteriorated, vacant structure loomed ominously over the gateway to the City, and set a negative tone for visitors to the Downtown and other Lowell venues, including the Lowell National Historic Park. Accordingly, its restoration was a high priority for the City, the local office of the National Park Service, and the Patrick Administration, which designated the Hamilton Canal redevelopment area as a priority Growth District Initiative (GDI).

While the building was significantly deteriorated, the masonry walls were sound and much of the structure was salvageable. In areas where masonry had previously been demolished, new infill walls were designed with clearly contemporary cladding in contrast to historic materials. The restored building includes a five-story, 30-foot wide atrium, to draw sunlight into common areas and create a dynamic architectural feature. The building's green components include a green roof, highly efficient mechanical system components and energy star appliances.

The building was designed and marketed to appeal to artists and other creative professionals, consistent with the City's efforts to attract and retain such individuals as part of its downtown development strategy. A preference for artists was established, subject to Fair Housing guidelines, and units are available to all households meeting income limitations and credit requirements. The loft style units range in size from 500 to 1,400 square feet, and include a mix of unit types and layouts, including studios,



one bedroom flats, one bedroom townhouses, two bedroom flats and two bedroom townhouses. A number of units with ground floor access include artist sell-space. While the units feature high ceilings and considerable light, the unit finishes are simple and durable.

The atrium is designed as a gallery/exhibit space and is conducive to community events such as open studios, film screenings and readings. Common areas in the building include a fitness area, laundry/community lounge, roof deck, artist workshop space and a landscaped mill yard. The elevators, doorways and loading docks are specified to accommodate larger items. The City allocated parking for Appleton Mills residents in the City's new Early Garage, which is across Jackson Street. Today the Appleton Mills is home to a thriving creative arts community and represents the largest affordable artist housing development in the Commonwealth.

Boston East - East Boston, MA



Total Development Cost: \$75 million

Units: 200

Completed: 2018

Boston East is a 200-unit luxury multifamily building on the East Boston waterfront. Trinity and its development partner, the East Boston Community Development Corporation, were designated developer of the vacant, city-owned site in December 2006 by the City of Boston's Department of Neighborhood Development. After undertaking a complex permitting process and weathering the financial recession, Boston East commenced construction in 2015.

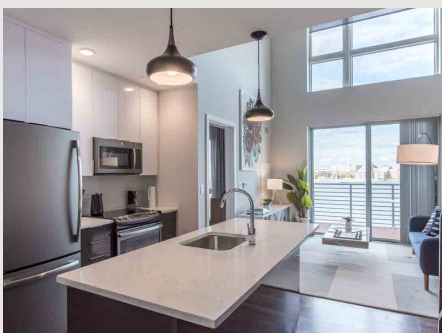
Formerly a Brownfields waterfront site that was inaccessible to the community, Boston East is now a showcase property with private residences and public amenities available to the East Boston neighborhood. Boston East sits one block away from Central Square which offers commercial and retail uses, and four blocks away from Maverick Square and the MBTA's Blue Line to Downtown and Logan Airport.

The northern portion of the site is designated for housing. With highly designed finishes, striking amenities, and access to the water, Boston East continues the renaissance of the East Boston waterfront with thoughtfully

designed and programmed luxury apartments. Boston East residents enjoy breathtaking views from a building designed to evoke the sense of the historic wharfs of East Boston. With a welcoming entryway and gracious open spaces, the building is aesthetically appealing from both Border Street and the new Harborwalk that runs along the water edge of the site. The building includes a rooftop lounge, fitness center, pup spa, underground parking and outdoor amenities, including a generous landscaped yard that is programmed with outdoor lawn games, grills and a fire pit. A unique amenity of the building is its inclusion of a community art gallery that hosts public events and art shows and six affordable artist live/work/sell units on the ground floor. In 2017, Boston East was voted Boston's Best New Building by Curbed Boston.

The southern portion of the site will be dedicated to meeting the state's Designated Port Area (DPA) requirements. The East Boston Community Development Corporation is marketing the site to potential marine industrial users.

For more information visit www.bostoneast.com



Bristol Commons & Lenox Green - Taunton, MA



Total Development Cost: \$65 million

Units: 160

Completed: 2014

In May 2011, the Taunton Housing Authority (THA) and Trinity were successfully awarded a \$22 Million HOPE VI Revitalization grant from the U.S. Department of Housing & Urban Development (HUD). In addition to the HOPE VI Grant, private equity resources and other public funds were used to rehabilitate the distressed 150-unit Fairfax Gardens public housing development.

Fairfax Gardens was built in 1951 as an isolated, 150-unit barracks-style development in the middle of a low density, single-family neighborhood. The units were clustered on a third of the 43-acre site, leaving the remaining acreage open as meadows and wetlands. The development's infrastructure, utilities, and many building components are original to the site and were outdated and in need of complete replacement. The buildings were neither energy-efficient nor accessible; the units cramped and much smaller than current space standards dictated; and mold, pests, and deteriorated finishes were problems throughout. The distressed conditions at Fairfax Gardens not only negatively impacted residents' health and quality of life, but had also brought down the property values of nearby homes. The award of the HOPE VI grant allowed for the complete demolition and reconstruction of the existing Fairfax Gardens.

The new project, renamed Bristol Commons, de-densified the existing site replacing the 150 units across two distinct sites for a newly redeveloped total of 160 units. The redeveloped site contains 80 townhomes and eight duplex units, as well as new site infrastructure, a new community center, community gardens, green space, a basketball court and other community amenities. The 88 units in the Bristol Commons phase include one-, two-, three-, and four-bedroom units and 78 of the units are affordable to households earning between 0-60% of the Taunton area median income. Returning residents were given first priority to return to the newly created



development. The majority of the families are considered to be extremely low income and require operating subsidies from the THA. These operating subsidies allow all residents to pay only 30% of their income as rent. The remaining ten units are market rate units and have no income restriction assigned to them.

The second site developed is located in downtown Taunton in a transit oriented development (TOD) overlay district. The Parcel 6A-2 site is adjacent to public transit and other services. The Parcel 6A-2 site, named Lenox Green, has new site infrastructure, eighteen townhomes, a three story 54-unit mid-rise building with community space/management offices, raised community planting beds, walking paths connecting to local services, a playground and other community amenities. The 72 units in the Lenox Green include one-, two- and three-bedroom units and all 72 of the units are affordable to households earning between 0-60% of the Taunton area median income. The same operating subsidies offered to residents of the Bristol Commons site are also available to the residents of the Lenox Green site.

The project had its financial closing in July of 2012 and was completed in the spring of 2014.

Brookfield Commons - White Plains, NY



Total Development Cost: \$61 million

Units: 130

Anticipated Completion: 2021

Brookfield Commons will consist of the redevelopment of the 9.3 acre Winbrook Houses public housing development located in downtown White Plains, NY. Trinity Financial and co-developer, the White Plains Housing Authority have partnered to undertake the redevelopment of the site. Brookfield Commons will consist of high quality, modern apartments and will introduce mixed income tiers, including workforce housing units, to promote a diversity of incomes. The project will be built in phases to ensure that existing Winbrook Houses residents are not involuntarily displaced or relocated outside of the Brookfield Commons campus. The existing tenants, community stakeholders, and the City of White Plains were all engaged and provided essential feedback during the planning process.

The current phase, The Overture at Brookfield Commons (Brookfield Commons Phase II), consists of the new construction of a 9 story, 147,229 sq ft mixed-use building with 129 units, and 2,074 square feet of community facility space. The project will also contain 77 at-grade parking spaces. This multi-family building will have 40 one bedrooms, 63 two bedrooms, 23 three bedrooms, 2 four bedrooms and 1 superintendent's unit. There will be a fitness room, children's playroom and a tenant lounge and terrace. When constructed, the subject building will include units for existing Winbrook Houses residents, LIHTC units and workforce housing units. There is a vacant, existing Winbrook building which will be demolished clearing the way for the construction of the Phase II building.

The Overture will be constructed with a block and plank structural system for the typical floors. The architectural vocabulary aims to be sensitive to buildings surrounding the site and also gives the site a new sense of identity. The façade will feature a modern design composed of 3 tones of brick veneer with colored metal panel accents in strategic locations. The building will be designed to exceed New York State, Enterprise Green Communities, NYSERDA and Energy Star minimum energy performance requirements. The mechanical system will feature the highly efficient refrigerant based VRF heat pump system for heating and cooling.

The Overture at Brookfield Commons represents a unique opportunity to preserve and modernize an existing affordable housing resource while physically and economically reintegrating the site with the surrounding community. The \$64 million project will be financed with funding that includes LIHTC equity and resources from the New York State Housing Finance Agency, the County of Westchester and the City of White Plains.

Carlton Wharf - East Boston, MA



Total Development Cost: \$7 million

Units: 30

Completed: 2005

Carlton Wharf was developed by Trinity Financial with development partner East Boston Community Development Corporation. This project played a critical role in the revitalization of the East Boston waterfront with 30-units of for-sale workforce housing available to households earning between 80% and 120% of area median income.

The project involved the complex Chapter 91 waterfront permitting process that Trinity completed in less than ten months. The seven story building has elevator access to all units and includes a mix of one-, two- and three-bedroom floorplans with magnificent views of Boston Harbor and the city skyline.

Carlton Wharf site - before



View of Boston skyline from Carlton Wharf



The Carruth - Dorchester, MA



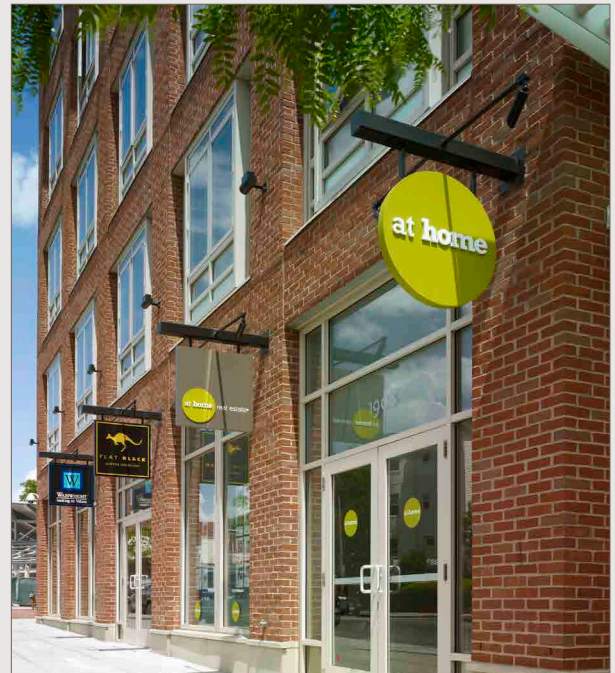
Total Development Cost: \$52.6 million

Units: 74 rental, 42 condominium/Retail - 10,500 SF

Completed: 2008

The Carruth is a transit-oriented development that involves the construction of 116 units of mixed-income housing and approximately 10,000 square feet of neighborhood retail on a site directly adjacent to the MBTA's Ashmont Peabody Square Station in the heart of historic Peabody Square. The development parcel is the subject of a long-term ground lease between Trinity and the MBTA. The building is a six-story structure with one floor of neighborhood retail and five stories of housing. Floors 2-4 include 74 affordable rental units and floors 5 and 6 include 42 market rate condominiums. The first floor retail is occupied by Tavolo, an Italian restaurant, a Chiropractic office, a college preparatory program for urban youth, and an innovative banking concept in which a branch of Eastern Bank is integrated with Ripple Cafe, an independent coffee shop.

Construction was completed in the summer of 2008.



Courthouse Lofts - Worcester, MA



Total Development Cost: \$57 million

Units: 115

Anticipated Completion: 2020

The Worcester Courthouse Project is the certified historic rehabilitation and adaptive re-use of the approximately 214,000 square-foot Old Worcester County Courthouse, originally built in 1845, into a new multifamily mixed income residence, with ancillary amenity space throughout. Upon construction completion, the repurposed building will contain roughly 114 residential units in the form of Studio, 1-, 2-, and 3-bedroom units. Located at 2 Main Street, the redevelopment of the Courthouse is part of a larger revitalization of the Historic Lincoln Square district, which sits just north of Downtown Worcester and the City center.

The primary design approach for Courthouse Lofts is to preserve the character and beauty of the existing building while creating an efficient layout and maximizing the residential square footage within. The design team has created floor plans that contain new comfortable, character-rich apartments while preserving the building's most impressive public spaces. These spaces include two of the most grand historic courtrooms that will be converted into amenity spaces, as well as the main entry hall of the building with its stunning marble columns and curving stone staircases.

The project includes a fitness center, clubhouse lounge, gallery space, and interior bicycle and resident storage. The site will also feature ample parking, landscaping restoration, and outdoor resident gathering spaces. An approximately 2,500 square foot retail/gallery space is also planned.

The income mix of the project is expected to be 50% market-rate (with some units unrestricted and some at a workforce tier of 120% of AMI) and 50% affordable to households below 60% of area median income.



Davenport Commons & Shawmut Estates - Boston, MA



Total Development Cost: \$50 million

Units: 125 student housing, 75 condominium/retail - 2,100 SF

Completed: 2001

In 2001, Trinity and a local community development corporation completed Davenport Commons, a 200-unit, \$50 million housing program in Lower Roxbury.

The project consisted of 125 units of housing that are leased to Northeastern University as student housing and 75 units of homeownership housing, and 2,100 square feet of ground floor commercial space.

The project was sold out nearly eight months ahead of schedule including the market-rate homes that were sold to households with incomes up to 175% of area median income.

The homeownership units are accessed from the street, with the lower duplex units having individual entries complete with stoops reflective of the surrounding South End neighborhood. The first floor duplex units have some backyard space. All of the homeownership units have at-grade parking spaces.



Enterprise Center - Brockton, MA



Total Development Cost: \$100 million

Units: 215 rental housing

10,000 square feet of retail space

52,000 square feet of commercial space

Completed: 2015 (phase one)

The Enterprise Center project is a vibrant, mixed-use development re-creating a significant city block and its street edges in downtown Brockton. The transit-oriented development sits within walking distance of the commuter rail station in downtown Brockton, and within walking distance of the city's center. The new development is occurring in two phases and will restore several historic buildings for retail, commercial and housing uses. The block is bounded by Centre Street, Main Street, Montello Street and Petronelli Way and has suffered from considerable blight and physical deterioration.

Trinity's development will be the catalyst to bring significant reinvestment back to downtown Brockton and reinvigorate what was once a bustling downtown location. The project is designed to comply with the goals of the Downtown Brockton Smart Growth Overlay District (DBSGOD) and was permitted using the Commonwealth's 40R Permitting Process. The project consists of two phases of housing and the historic rehabilitation of an existing commercial building. The project is funded using Historic Tax Credits, Low Income Housing Tax Credits, private tax credit equity and other public and private resources.

Trinity has worked with the community to develop a multi-phase development program reflective of the goals of the City and its residents. The first phase of development consisted of 113 units of housing in new construction along Centre Street. A section of the new construction, named Enso Flats, includes 42 artist live/work units which are affordable to artists earning up to 60% of the Area Median Income (AMI). The remaining 71 units of new construction, named Centre50, include a mix of affordable and market rate units. In addition to the housing there is space for ground floor retail, artist gallery space, green space and parking.

Enterprise Main (the existing Enterprise Building) has been historically rehabilitated to create 52,000 square feet of new commercial and office space.

The second phase of development consists of 111 units of housing, again a mix of affordable and market rate units and additional green space.

Upon completion this project will consist of 226 units of housing, 10,000 square feet of retail and artist exhibition space, and 52,000 square feet of commercial space.



Foundry Square - Newburyport, MA



Total Development Cost: \$7.2 million

Units: 20

Completed: 2006

In 2002, the City of Newburyport designated Trinity Financial developer of the former Newburyport Department of Public Works site with the goal of bringing affordable home ownership opportunities to the city. Trinity devised a plan to transform the blighted and vacant site into a vibrant community consistent in design, material and landscaping with the finest neighborhoods in Newburyport.

Foundry Square entailed the development of 20 units of for-sale housing, 13 of which are affordable to first time homebuyers earning below 80% of the area median income. The remaining seven units were sold at market rates. The plan called for one-, two-, and three-bedroom units in four townhouse structures built around a landscaped common. The building on the north side of the square is evocative of the former Albert Russell & Sons Foundry, a landmark building in Newburyport which was once located on the site.



Glenark Mills & Glenark Oaks- Woonsocket, RI



Total Development Cost: \$13 million

Units: 89

Completed: 2013

Glenark Mills and Glenark Oaks are sister properties located approximately a half-mile from one another in the Constitution Hill neighborhood of Woonsocket, Rhode Island. Situated along the banks of the Blackstone River, Glenark Mills was built in 1865 as a textile mill and was later converted to 67 units of residential housing. Glenark Oaks was built in 1990 and contains a total of 22 units.

In 2011, Trinity Financial was selected by Rhode Island Housing as the developer to acquire, renovate and revitalize both Glenark Mills and Glenark Oaks. Working with Rhode-Island-based contractors, Trinity invested \$13 million in redeveloping and modernizing both properties. The buildings' common areas were updated and the apartment interiors were refurbished with new kitchens and bathrooms.

The redevelopment of Glenark Mills and Glenark Oaks were financed through the sale of low-income housing tax credits and historic tax credits. All 89 of the project's units are affordable to households earning up to 60% of area median income. Other financing sources include HOME Funds and state housing resources from Rhode Island Housing.

completed in December of 2013, Glenark Mills and Glenark Oaks represents Trinity's first project in Rhode Island since the completion of Newport Heights HOPE VI in 2006.



Franklin Hill - Dorchester, MA



Total Development Cost: \$95 million

Units: 266

Completed: 2009

Franklin Hill was a 366-unit family public housing development located in Dorchester, MA that was severely physically distressed and, arguably, one of the least safe developments in the Boston Housing Authority portfolio. The BHA applied for, but did not receive, a HOPE VI implementation grant for the redevelopment of this site and decided to move forward in redeveloping Franklin Hill without HOPE VI funds.

Trinity Financial was selected to be the developer for this project in the summer of 2005. The first phase of redevelopment was completed in February 2008 and created 114 units of affordable rental housing. Trinity closed on the second phase of development in April 2008 and completed construction in October 2009. Phase 2 created an additional 152 units of affordable rental housing. The total development program called for the new construction of 157 replacement public housing rental units, 67 Section 8 project-based voucher rental units and 42 low income housing tax credit only units for total of 266 rental units. Funding for this 266-unit public housing redevelopment effort included \$17 million of Replacement Housing Factor funds from the BHA, \$71 million in LIHTC equity and additional funding from the Commonwealth of Massachusetts and the City of Boston. The redevelopment plan reconfigured the site with a new street layout, resulting in more traditional city blocks and better integration with the neighboring community. Additionally, the new development offers a variety of housing types better suited for this diverse population. Residents are now able to choose from larger townhouse style units with individual backyards or the modern convenience of an elevated mid-rise building. The redeveloped property includes offices for on-site property management, community meeting space, and program space for both the Boys and Girls Clubs of Boston and the Greater Boston Food Bank.



The Mattapan Campus - Mattapan, MA



Total Development Cost: \$100 million

Units: 332

Completion Dates: Phase 1 - 2003/Phase 2 - 2006

Phases 3/4 - 2008/Phase 5A - 2012

Mattapan Heights is a multi-phased comprehensive redevelopment project that is transforming the former 52-acre hospital campus in the Mattapan neighborhood of Boston. Portions of the grand campus were abandoned for more than 20 years and the few remaining campus buildings were in an advanced state of disrepair.

Phase 1 commenced in November 2001 and was completed and occupied in March 2003. This first phase encompassed the rehabilitation of the Foley Building into 98 mixed-income elderly assisted and independent living units, and 18 units for Latina women in recovery and their children in the E Building. Mattapan Heights Phase 2 was completed in late 2006 and consists of the rehabilitation of five historical buildings into 83 affordable family housing units. Mattapan Heights Phases 3 and 4 were completed in February 2008 and created 73 affordable family housing units. Phases 3 and 4 included both new construction and historic restoration.

Phase 5A was completed in late 2012, creating a newly constructed building on the upper portion of the campus. This building, which is designed to be LEED Silver certifiable and Energy Star Multifamily High Rise Certified, contains 60 affordable units.

With the completion of the fifth phase of Mattapan Heights, more than 330 new units of mixed-income housing have been created, eight historic hospital buildings saved from demolition and more than 27 acres of campus landscape reclaimed and restored.

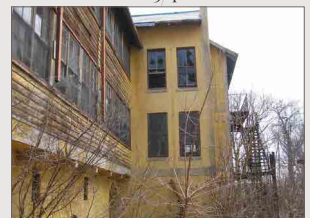
Awards Received: "Massachusetts Historical Commission Preservation Award," 2004; "Charles L. Edson Affordable Housing Tax Credit Excellence Award," 2004; "Boston Preservation Alliance - Significant Rehabilitation/Restoration Award," 2009.



Phase 2 - before & after



Phase 3/4 - before & after



Maverick Landing - East Boston, MA



Total Development Cost: \$109 million

Units: 396

Completed: 2006

Maverick Landing is a mixed income neighborhood located on the East Boston waterfront. In 2001, the Boston Housing Authority was awarded a \$35 million HOPE VI award for the complete renovation of Maverick Gardens, a deteriorated public housing development. Working with development partner, the East Boston Community Development Corporation, Trinity devised a four phase redevelopment plan calling for demolition of all 413 units to be replaced with 396 units in newly constructed buildings including, 20 townhouse buildings and six six-story mid-rise buildings and a community center.

The new development was the first LEEDs certified multi-family housing development in New England and includes energy efficient lighting, appliances, and structural elements including photovoltaic panels. Maverick Landing is a mixed income community with 77% of the units affordable to households earning up to 60% of area median income and the remaining 23% as market rate rentals.

The reconfiguration of the historic street pattern provides a new corridor to Boston Harbor, and reconnects Maverick to the surrounding East Boston community. A new non-profit, Maverick Landing Community Services, Inc. provides on-going supportive services for residents of the development.

Maverick has received national recognition for its focus on energy efficiency and earned the honor of Affordable Housing Magazine's 2006 "Best Affordable Housing Development".



Newport Heights - Newport, RI



Total Development Cost: \$74 million

Units: 299

Completion Dates: Phase 1 - 2004/Phase 2 - 2006/Phase 3 - 2007

Located in the North End neighborhood of Newport, RI, the Tonomy Hill housing development was one of the most distressed public housing projects in the state of Rhode Island. Originally constructed in 1939 as temporary housing for Navy personnel, the property was suffering from major structural deficiencies and outdated and inadequate mechanical systems. Additionally, the site configuration isolated residents from their neighbors and the larger community, exacerbating the already high rates of poverty, crime, substance abuse, domestic abuse and illiteracy prevalent at the site. In 1999, Trinity Financial was selected as the developer for the site and put together a multi-phase mixed finance plan to transform Tonomy Hill into a new, mixed-income community called Newport Heights.

Completed in 2004, Newport Heights Phase 1 replaced 64 units of distressed public housing with 81 newly constructed units of mixed-income rental housing, new public streets and other public infrastructure improvements. The 81 units of housing serve a range of income categories including units subsidized with PB Section 8 or Public Housing subsidies, tax credit units (40%-60% AMI), moderate units (60%-80% AMI) and market rate units (greater than 80% AMI) without income restrictions. The \$16 million Phase 1 project was financed with a mixed-finance package that includes nearly \$7.8 million of equity raised through the sale of low income housing tax credits. Other resources include Housing Authority Capital Grant Program funds, City of Newport contributions and state housing resources from Rhode Island Housing.

Completed in 2006, Phase 2 of Newport Heights replaced 120 units of distressed public housing with 147 newly constructed units of mixed-income rental housing as well as continuing the public infrastructure



improvements begun in Phase 1. Phase 2 also serves a mixed-income population. The \$33 million Phase 2 project was financed with a mixed-finance package that includes nearly \$17 million of equity raised through the sale of low income housing tax credits. Other resources include Housing Authority HOPE VI and/or Capital Grant Program funds, City of Newport contributions, and state housing resources from Rhode Island Housing.

Completed in 2007, phase 3 of Newport Heights replaced 91 units of distressed public housing with 71 units of mixed-income rental housing and continued the public infrastructure improvements of the first two phases. Phase 3 also serves a mixed-income population. Additionally, the Phase 3 project includes residential and program space for the Winslow Place program serving formerly homeless women and their children. The \$24.3 million Phase 3 project was financed with a mixed-finance package that includes nearly \$13 million of equity raised via the sale of low income housing tax credits. Other resources include Housing Authority HOPE VI and/or Capital Grant Program funds, City of Newport contributions, Federal Home Loan Bank AHP funds and state housing resources from Rhode Island Housing.

Northampton Square - Boston, MA



Total Development Cost: \$91 million
Units: 347
Completed: 2016

The Northampton Square complex is located in the South End/Lower Roxbury neighborhood of Boston, one block away from the Boston Medical Center and the Boston University Medical Campuses. The complex consists of a 29-story residential and commercial building at 35 Northampton Street and a 12-story residential building at 860 Harrison Avenue. The Northampton Square project involved three main components - (1) the renovation of 35 Northampton Street, (2) the renovation of 860 Harrison Avenue, and (3) the new construction of a shared lobby and connector corridor that wrap the existing facade of the building. In total, the project will create or preserve 347 units of housing, 60% of which will be maintained as affordable and below market rent. The complex includes an existing 539-space parking garage with sufficient capacity for the renovated housing as well as the commercial uses also housed in the development.

The original complex was built between 1969 and 1973 to house the Boston City Hospital School of Nursing. The Boston Public Health Commission (BPHC) acquired the site on July 1, 1996 and has managed the property since. In December of 2010, the BPHC selected Trinity Financial to redevelop various components of the site.

One Canal Street - Boston, MA



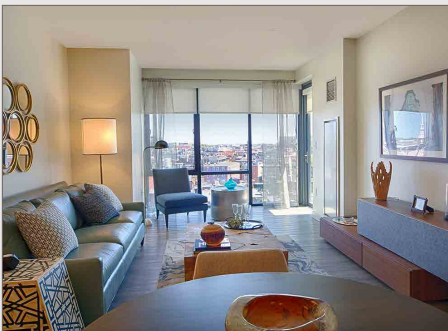
Total Development Cost: \$195 million
Units: 310 rental housing/retail - 21,000 SF
Completed: 2016

Located at the tip of the Rose Kennedy Greenway, the One Canal Project involves the development of surface and air rights on three parcels in the Bulfinch Triangle area of Boston. These parcels are among the development sites in the Bulfinch Triangle created by construction of the Central Artery/Tunnel Project and submersion of the Massachusetts Bay Transportation Authority (MBTA) Green Line. In August 2010, both agencies designated Trinity Financial as the developer for these Parcels: 2A, 2B and 2C.

The removal of the elevated Central Artery and Green Line structures has allowed for new development and pedestrian scaled streets that reconnect the North End to government and entertainment uses at Government Center and the TD Garden, as well as the residential historic mixed uses of the Bulfinch Triangle and residential West End.

Designed to emulate the historic patterning of the historic Bulfinch Triangle, while providing a stunning capstone to the Rose Kennedy Greenway, the One Canal project includes the development of approximately 435,000 square feet of residential and retail space. The lobby entrance on Canal Street includes visual and historic references to the Middlesex Canal and its extension that once flowed through the site. The second and third floors contain state-of-the-art amenities including a fitness center, community room, outdoor plazas, leasing space, and a 147-space parking garage for the residents of the building. The fourth through twelfth floors contain 310 luxury apartment homes, including exceptional penthouse level finishes and designs on the upper two floors. One Canal also provides 20 affordable apartment homes on-site.

One Canal, adjacent to the Avenir building (completed by Trinity Financial in 2009), continues the transformation of the Bulfinch Triangle area into a mixed-use district that complements its surrounding areas and brings vitality to an area once in shadow from the elevated highway and Green Line structures.



Orchard Gardens - Roxbury, MA



Total Development Cost: \$58 million

Units: 331

Completed: 1999

Orchard Gardens consists of the development of 331 units of rental housing on 15 acres of land in the Roxbury neighborhood of Boston. Completed in three phases, the development includes a new park, six new streets, and new offices for the resident association and on-site property management team. The team included Trinity, a local community development corporation and a local resident association.

Selected in May 1996, Trinity Financial and company achieved two closings for a total of \$57.67 million of financing, including \$27.3 million of private equity. With these closings, nine buildings containing 126 rehabilitated housing units were acquired; 162 new townhouses were constructed; and the former Dearborn school building was converted into 42 units of housing using historic tax credits. In December 1999, all 331 units were completed and occupied. Housing units are affordable to households in six different income categories.

Overlook Terrace at Orient Heights - East Boston, MA



Total Development Cost: \$52 million

Units: all phases - 373

Completed: phase one - 2018

The Orient Heights development comprises 331 units of state-funded public housing terraced into a steep hillside at the northern edge of East Boston's Orient Heights neighborhood. The 15-acre site is comprised of thirteen three-story buildings, seven two-story townhouse blocks, a Community Center and a Central Boiler Plant.

The Boston Housing Authority (BHA) undertook a planning process in 2008, funded by the Massachusetts Department of Housing and Community Development (DHCD), to look at redevelopment options for the site, and prepared a master plan with an overall design concept. This process resulted in a framework for selecting a development team with the collective goal of transforming the site into a modern mixed-income community modeled on the successful transformations of the BHA's Federal HOPE VI sites and recent redevelopment at West Broadway, Washington Beech and Old Colony.

In January of 2015, the BHA selected the Trinity Financial and East Boston CDC development team to work with the BHA and DHCD to finalize a redevelopment strategy for the site. Since that time, the development team has conducted due diligence at the site and met with the residents and broader neighborhood to understand the needs and desires of the community. All of this work resulted in the preparation of a draft Architectural and Engineering Study (A/E Study) by the development team. This A/E Study evaluated three conceptual options for the redevelopment of Orient Heights: Option 1 explored existing building rehabilitation, Option 2 combined rehabilitation with limited new construction, and Option 3 evaluated total new construction. DHCD rendered the decision for the redevelopment to be all new construction. Based on the current design, the redevelopment will consist of 373 units, of which 331 are replacement state public housing units.

Orient Heights is being redeveloped in phases: the newly completed Phase 1 consists of 120 units and construction plans for Phase 2 are underway.



Quinnipiac Terrace - New Haven, CT



Total Development Cost: \$69 million

Units 193

Phase 1 Completed: 2006

Phase 2 Completed: 2008

Phase 3 Completed: 2011

Quinnipiac Terrace, New Haven, Connecticut Trinity was the development partner selected by the Housing Authority of the City of New Haven (HANH) for the HOPE VI redevelopment of Quinnipiac Terrace. In March 2003, HANH was awarded a \$20 million HOPE VI grant for the redevelopment of Quinnipiac Terrace. As part of this effort, Trinity transformed a severely distressed public housing development into a vibrant new mixed-income community that will reconnect to the larger Fair Haven neighborhood and create an exciting new riverfront community in New Haven.

The new Quinnipiac Terrace provides housing that meets the needs and lifestyles of today's families with appropriate kitchens, living areas, and outdoor spaces. The design maximized private, individual entries and created private backyards in almost all units. The redevelopment occurred in three phases and consists of 193 new units of housing with a mix of public housing and rental housing. Financial closing for the first rental phase occurred on April 15, 2005. Phase 1 consisted of the demolition of seven existing public housing buildings and the construction of 81 new family apartments. The total development costs for Phase 1 were approximately \$22 million and were financed through a combination of HOPE VI funds, 9% Low Income Housing Tax Credits and City of New Haven funds. In 2006, Trinity was

awarded \$2.2 million in 9% credits by Connecticut Housing Finance Agency for Phase 2, twice the amount of credits in a single allocation than had been anticipated. Phase 2 construction began in September 2006 and was completed in March 2008. Phase 2 created an additional 79 units of affordable rental housing. The third phase of development, which includes 33 units of mixed income rental housing, closed in July 2010 and was completed in May 2011 for a total development cost of \$15 million.



Randolph Houses - Harlem, NY



Total Development Cost: \$164 million

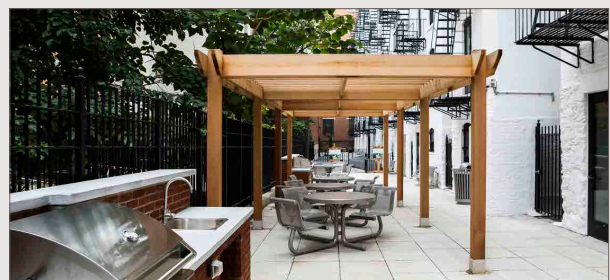
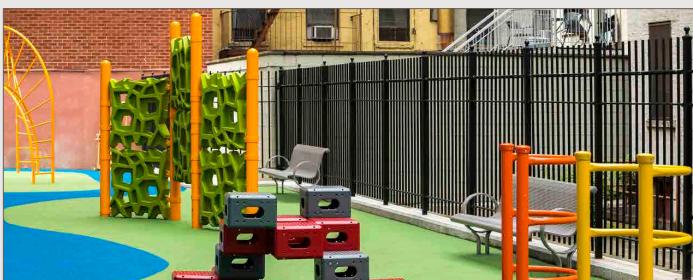
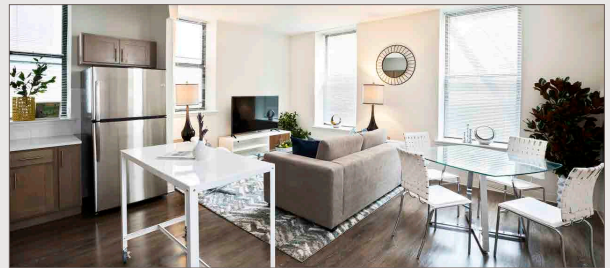
Units: 283

Completed: phase one - 2016; phase two - 2018

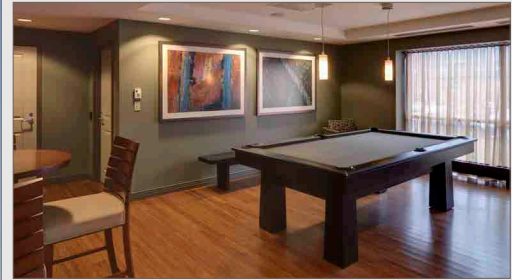
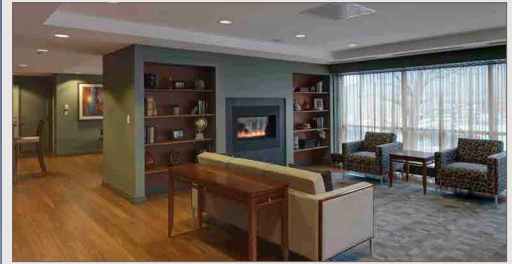
The Randolph Houses project is comprised of 36 five-story Old Law tenement buildings, 14 of which are on the north side of the street and 22 on the south side. This exciting project involved the historic rehabilitation and consolidation of the existing structures into three interconnected and fully handicapped accessible buildings. As part of the substantial rehabilitation of Randolph Houses, building facades were restored and the building interiors were completely demolished and rehabilitated.

The redevelopment of Randolph Houses – as a HUD mixed finance and LIHTC project – included the gut-rehabilitation of 452 housing units. The rehabilitated buildings on the south side of the street contain 168 units in what are now two interconnected buildings with central circulation and elevator access. The north side contains 115 units in what is now one interconnected building with central circulation and elevator access.

The newly reconfigured units are a mix of Studio, 1, 2, 3 and 4 bedroom apartments designed to accommodate family living. The rehabilitated buildings contain community spaces, a teaching kitchen, computer lab, fitness room, yoga room after school/arts room and storage units and bicycle storage for residents. There are also site improvements which include two children's play areas for different age groups and active and passive outdoor spaces for residents to enjoy, including barbecue areas, ping pong, chess tables and resident garden plots.



The Regency - New Bedford, MA



Total Development Cost: \$30 million

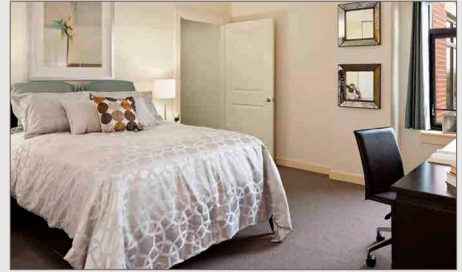
Units: 129

Completed: 2011

Standing 16 stories tall with commanding harbor views and located steps from the historic downtown district, The Regency is the most prominent building in downtown New Bedford. It was completed in 1988 as a luxury apartment complex. The property suffered from serious façade deterioration and water damage because no major capital investments had been made since its opening.

MassHousing foreclosed on the property in 2005 and in 2009 Trinity Financial was selected to acquire and redevelop the building. Trinity made a total capital investment of \$32 million converting underutilized commercial space into new apartments, increasing the total number of units from 123 to 129. The unit mix includes 33 affordable units, 10 "workforce" units and 86 market-rate units. The façade was replaced on floors 5-16, and additional repairs were made to floors 1-4, including new windows and patio doors. The building's common areas and apartment interiors were renovated with new kitchens, bathrooms and HVAC systems. The building is now fully leased at rents above pro forma levels. This property commands the highest rents in the area and is arguably the best high-rise apartment property in the area.

Rowe Apartments - New Haven, CT



Total Development Cost: \$36 million

Units: 104

Completed: 2011

Completed in 2011, the William T. Rowe (Rowe) redevelopment transformed a blighted property into high-quality housing for residents with a mix of incomes. The existing Rowe property (old Rowe) was physically distressed, required structural repairs, and a complete overhaul of existing building systems. After evaluating the existing structure it became apparent the old Rowe building was not salvageable and had to be demolished. The new Rowe has been repositioned so that it maintains the sense of community established during the old Rowe's 37-year history while still taking advantage of the positive changes occurring in the downtown area of New Haven.

The redevelopment of the Rowe Apartments consisted of the new construction of 104 units of one- and two-bedroom apartments in a nine-story building on land that is adjacent to the existing Rowe building. The adjacent property was acquired via a unique land swap agreement with the Yale-New Haven Hospital. The building also includes off-street parking for 88 vehicles, approximately 2,000 square feet of first floor retail/commercial space, and approximately 2,000 square feet of community and supportive service space. Of the building's 104 units, 78 of them are set aside to households earning at or below 60% of the area median income (AMI). The remaining 26 units are market rate, targeted towards people working in the nearby medical district.

Soundview Landing - Norwalk, CT



Total Development Cost: \$44 million

Units: 80

Completed: phase 1 - 2018

Soundview Landing, formerly named Washington Village Phase One, is the new construction of 80 rental residences on two vacant parcels in the South Norwalk Neighborhood of Norwalk, CT. The project is the initial phase of a larger multi-phase redevelopment effort that will replace the existing, obsolete 136-unit Washington Village public housing project with a new 273-unit, mixed-income community.

The Norwalk Housing Authority, the Norwalk Redevelopment Agency, and Trinity Financial are working together on this exciting Choice Neighborhoods Initiative that will benefit the existing residents of Washington Village and the broader South Norwalk section of the city.



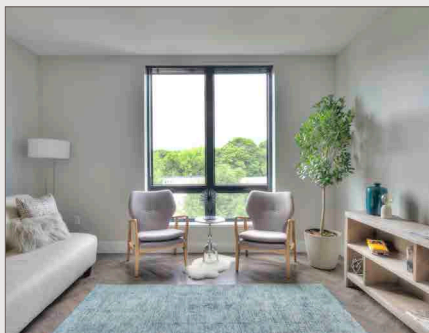
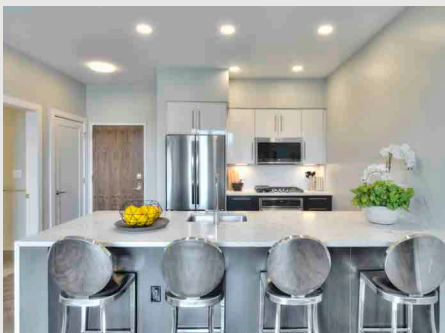
Treadmark - Dorchester, MA



Total Development Cost: \$45 million
Units: 83
Completed: 2018

Treadmark is an 83-unit, six-story building located at the end of the southern end of the MBTA's Red Line, at Ashmont Station. The site was formerly the home to Ashmont Tire shop for the past 40 years and was an underutilized site. The unit mix includes 51 Low Income Housing Tax Credit (LIHTC) rental units, affordable up to 60% of the Area Median Income (AMI) and 32 for sale condominiums. Four of the condominiums meet the requirements of the City of Boston's Inclusionary Development Policy (80-100% of AMI), 16 units are affordable to individuals making up to 110% of AMI (workforce units) and the balance are market rate.

The building also includes 5,000 square feet of ground floor neighborhood retail and 32 spaces for parking (30 garage spaces and 2 surface spaces). The project enhances the streetscape with the addition of street trees and street furniture down the block as well as the creation of 8 on-street parking spaces in front of the building. Following its sister property directly across the street, The Carruth, Treadmark is the second new construction building to be built in and around the Ashmont/Peabody Square area over the past 10 years. The building adds to the vibrancy and growth that is already well underway in the Ashmont/Peabody Square neighborhood. The building is designed by The Architectural Team with interiors by celebrity firm, Taniya Nayak Design.



Trinity Terrace - Dorchester, MA



Total Development Cost: \$17.2 million

Units: 62

Completed: 2004

Trinity Terrace is a 62 unit, affordable housing development in the Four Corners neighborhood of Dorchester. The project began in 2003 with the acquisition of one privately owned parcel of land, and twenty-two parcels owned by the City of Boston. For many years the vacant lots served as dumping grounds for refuse, adversely affecting the surrounding community. The development process entailed construction of twelve townhouse structures and the rehabilitation of a 19th century commercial building that had been vacant for 30 years. The three-story commercial building provides first floor retail space, with eight housing units above. Trinity Terrace also includes a community center that provides space for property management and recreation activities for residents. Key design elements include: front porches, private outdoor space, surface parking, and a new street featuring a linear urban park.



Before Images



Van Dyke III - Brooklyn, NY



Total Development Cost: \$101.3 million

Units: 180

Anticipated Completion: 2020

Van Dyke III is a 12-story, mixed-use, affordable housing project located in the Brownsville area of Brooklyn, N.Y. on the site of the Van Dyke Houses NYCHA development. When completed, the project will consist of 180 units of housing affordable to households from 30% to 60% of the Area Median Income. In addition to the residential component, the project will also consist of an Early Childhood Educational Center, a Community Health Clinic and a Wellness Center. On-site resident amenities will include a resident library, a computer lab, a fitness room, a tenant lounge, a community room, an accessible roof deck, tenant roof gardening plots, a package delivery room, and a ground floor outdoor recreational area.



VELA on the Park - Stamford, CT



Total Development Cost: \$79 million
Units: 209/Commercial: 3,800 SF
Completed: 2018

As the fourth development phase of Park Square West, Vela on the Park features 209 units and offers residents hotel inspired service and convenience. Amenities include a 19th floor roof deck space, cutting edge health and wellness facilities, pet amenities, and unprecedented park and water views.

Vela is located in downtown Stamford at the top of Restaurant Row, steps away from arts, entertainment, and gourmet food options. The development features studio, one and two-bedroom units located an eight-minute walk from Metro North and Amtrak.



Washington Beech - Roslindale, MA



Total Development Cost: \$100 million

Units: 206

Completion Dates: phase 1 - 2010; phase 2 - 2011

The HOPE VI redevelopment of Washington Beech includes demolition of the existing 266 units and creation of 206 new rental units. The new site design reduces density to be more in keeping with the surrounding neighborhood. A variety of unit types replace the existing institutional walk-ups including a low-rise elevator building, garden apartments, duplexes over flats, and townhouses. New roads were built so that all unit entries front on a street and residents can park nearby. A central green space with play facilities and park benches is provided for young children and adults.

Construction of Washington Beech occurred in two stages to accommodate the relocation and re-housing of existing residents. Residents began relocation of the first phase buildings in the summer of 2008. Lease up of the new buildings was completed in December 2011, three months ahead of schedule.

Redevelopment of Washington Beech cost approximately \$100 million, with \$20 million provided through federal HOPE VI funds and \$10 million through federal American Recovery and Reinvestment Act funding. Other funders include the Commonwealth of Massachusetts through the HOME, HSF and AHT programs, the City of Boston's Neighborhood Housing Trust Program, Department of Public Works, and Department of Neighborhood Development, the Boston Water and Sewer Commission and private equity generated from the syndication of Low Income Housing Tax credits through RBC Capital Markets.



Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
Mariner Mill Lawrence, MA	\$36.6m (P)	\$26.7m (P)	Mixed Income	84	Tax Exempt Bonds, LIHTC, DHCD, HSF, HTC	Owner Developer	2020 (P)
							2022 (P)
Orient Heights Phase 3 East Boston, MA	\$63.5m (P)	\$22.7m (P)	Public Housing, Mixed Income	123	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2020 (P)
							2022 (P)
425 Grand Concourse Bronx, NY	\$175m (P)	\$45m (P)	Mixed Income Rental Housing, Commercial	277	Tax Exempt Bonds, HDC, HPD, LIHTC	Owner Developer	2019
				47,000 SF			2022 (P)
Washington Village CNI Phase 3 Norwalk, CT	\$57.5m (P)	30.7m (P)	Mixed Income Rental Housing	108	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECED, NRA CTDOH	Owner Developer	2019
							2021 (P)
Enterprise Center Phase 2 Brockton, MA	\$60m (P)	TBD (P)	Mixed Income Rental Housing	111	LIHTC, Tax Exempt Bonds	Owner Developer	2020 (P)
				414+ Parking Garage			2022 (P)
Brookfield Commons White Plains, NY	\$61m (P)	\$30.5m (P)	Public Housing, Mixed Income	130	Tax Exempt Bonds, Private Debt, LIHTC, HCR, HFA, Westchester County Funding	Developer	2019
							2021 (P)
Van Dyke III Brooklyn, NY	\$101.3m (P)	\$38.8m (P)	Mixed Income Rental Housing	180	Tax Exempt Bonds, HDC, HPD, LIHTC	Developer	2018
				24,000 SF			2021 (P)
Courthouse Lofts Worcester, MA	\$57m (P)	\$40m (P)	Mixed Income Rental Housing	115	LIHTC, Historic Tax Credits, Tax Exempt Bonds, AHT, HOME, Workforce Funds	Owner Developer	2018
							2020 (P)
Orient Heights Phase 2 East Boston, MA	\$51.8m (P)	\$19.6m (P)	Public Housing, Mixed Income	88	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2018
							2020 (P)

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
Washington Village CNI Phase 2 Norwalk, CT	\$51.6m (P)	25.4m (P)	Mixed Income Rental Housing	85	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, CHFA, CTDOH	Owner Developer	2018
							2020 (P)
Washington Village CNI Phase 1 Norwalk, CT	\$44m	20.6m	Mixed Income Rental Housing	80	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECD, CHFA, CTDOH	Owner Developer	2016
							2018
Treadmark Dorchester, MA	\$45m (P)	\$22.4m (P)	Mixed In- come Rental, Homeownership, Commercial	83	LIHTC, State LIHTC, Private Debt & Equity, Tax Exempt Bonds, DHCD, DND	Owner Developer	2016
				5,000 SF			2018
Orient Heights Phase 1 East Boston, MA	\$52m	\$18m	Public Housing, Mixed Income	120	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2016
							2018
60 King Street Providence, RI	\$22m (P)	\$19m (P)	Mixed Income Rental Housing	60	LIHTC, Federal HTC, State HTC, HOME, HPP, RIDEM, Brownfields	Owner Developer	2017
							2018
Arlington Point Lawrence, MA	\$48m (P)	\$37m (P)	Mixed Income Rental Housing	102	LIHTC, Federal HTC, State HTC, AHT, HSF, MassHousing Work Force Housing Fund	Owner Developer	2017
							2019
Randolph Houses Phase 2 Harlem, NY	\$67m (P)	\$44m (P)	Affordable Rental Housing	115	LIHTC, Tax Exempt Bonds, HPD, HDC, His- toric Tax Credits	Owner Developer	2016
							2018
Boston East East Boston, MA	\$71.4m	\$23.1m (P)	Market Rate Rental, Marine Related Commercial	200	Private Debt & Equity	Owner Developer	2015
				50,000 SF			2017
VELA on the Park Stamford, CT	\$79m	\$21m	Mixed Use Market Rate Rental, Commercial	209	Private Debt and Equity	Owner Developer	2016
				3,699 SF			2018

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
3160 Park Avenue Bronx, NY	\$66m	\$31m	Mixed Income Rental, Commercial	152	LIHTC, Tax Exempt Bonds, HDC, HPD, NMTC	Owner Developer	2014
				21,000 SF			2016
Randolph Houses Phase 1 Harlem, NY	\$99m (P)	\$57m (P)	Affordable Rental Housing	168	LIHTC, Tax Exempt Bonds, NYCHA Capital Funds, HPD, HDC, Historic Tax Credits	Owner Developer	2013
							2016
35@Eight Sixty Phase 2 Boston, MA	\$35m	\$18m	Mixed Income Rental Housing	102	Federal and State LIHTC, City of Boston, DHCD	Owner Developer	2014
							2016
One Canal Boston, MA	\$196m	N/A	Market Rate Rental, Mixed Use	310	Private Equity/ Debt	Developer	2013
				21,000 SF			2016
66 Summer Street Stamford, CT	\$73m	\$7m	Mixed Use, Market Rate Rental Housing	209	Private Debt and Equity	Owner Developer	2013
				6,600 SF			2015
Enterprise Center Phase 1: Enso Flats and Centre50 Brockton, MA	\$62m	\$34m	Mixed Use, Mixed Income Rental Housing, Commercial, Office, & Retail	113	LIHTC, TEB, NMTC, State LI- HTC, MassWorks DHCD	Owner Developer	2013
				62,000 SF			2015
35@Eight Sixty Phase 1 Boston, MA	\$56m	\$28m	Mixed Income, Rental Housing	245	Federal and State LIHTC, City of Boston, DHCD	Owner Developer	2013
							2014
Bristol Commons and Lenox Green HOPE VI Taunton, MA	\$69m	\$52m	HOPE VI Mixed Income Housing	160	Federal and State LIHTC, HOPE VI, Construction Bridge Loan, Section 108 Loan, HUD BEDI Grant	Owner Developer	2012
							2014
Glenark Mills/ Glenark Oaks Woonsocket, RI	\$14m	\$5m	Affordable Rental	89	LIHTC, Tax Exempt Bonds, HOME, Rhode Island Housing	Owner Developer	2012
							2013

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
Mattapan Heights Phase 5-A Mattapan, MA	\$24m	\$15m	Affordable Rental	60	LIHTC, Tax Exempt Bonds, HSF, HOME, NHT, AHT	Owner Developer	2012
							2012
Lucerne Gardens Dorchester, MA	\$11.9m	\$5m	Mixed Income	45	LIHTC, Tax Exempt Bonds, Exempt HSF, AHT, CBH, HOME, NHT	Owner Developer	2011
							2012
Quinnipiac Terrace Phase 3 New Haven, CT	\$15m	\$4.5m	Affordable Rental Housing	33	LIHTC, Tax Exempt Bonds, City of New Haven, HANH, State, HUD	Owner Developer	2010
							2011
Rowe Apartments New Haven, CT	\$36m	\$7.7m	Mixed Income Rental Housing	104	LIHTC, Tax Exempt Bonds, City of New Haven, HANH, State, HUD	Owner Developer	2010
				2,300 SF			2011
The Regency New Bedford, MA	\$30m	\$11m	Mixed Income Rental Housing	129	LIHTC, MassHousing, MHP, City of New Bedford	Owner Developer	2010
							2010
Appleton Mills Lowell, MA	\$64m	\$42m	Affordable Rental	130	LIHTC, HOME, Tax Exempt Bonds, PDF, MassHousing, HTC, AHT	Owner Developer	2009
							2011
110 Canal Lowell, MA	\$15m	\$11m	Commercial		HTC, NMTC, Massworks	Owner Developer	2009
				55,000 SF			2012
Washington Beech HOPE VI Roslindale, MA	\$90m	\$45m	Affordable Rental, Affordable Home Ownership	206	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2009
							2011
Avenir Boston, MA	\$150m	\$148.4m	Market Rate Rental, Transit Oriented Development, Commercial	241	Private Equity	Developer	2007
				29,000 SF			2009

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
Franklin Hill Dorchester, MA	\$106m	\$71m	Affordable Rental	266	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2007
							2009
The Carruth Dorchester, MA	\$52m	\$28.2m	Transit Oriented Development, Mixed Income Rental and Home Ownership Hous- ing, Commercial	116	State LIHTC, LIHTC, HOME, NHT, PDF, TOD, Tax Exempt Bonds	Owner Developer	2006
				10,000 SF			2008
Mattapan Heights III Mattapan, MA	\$27.7m	\$16m	Mixed Income, Limited Equity Cooperative and Home Ownership	73	HTC, LIHTC, HSF, HOME, NHT, PDF, AHT, Tax Exempt Bonds, State LIHTC	Owner Developer	2006
							2008
Foundry Square Newburyport, MA	\$7.2m	N/A	Mixed Income, Home Ownership	20	HSF, AHT, HOME, North Shore - HOME, City of Newbury- port	Developer	2005
							2006
The Riverway Dorchester, MA	\$7.92m	N/A	Commercial		Private Financing	Owner Developer	2005
				61,000 SF			2006
Quinnipiac Terrace HOPE VI New Haven, CT	\$62m	\$19.2m	Mixed Income Rental	160	HOPE VI, LIHTC, City of New Haven	Owner Developer	2004
							2008
Mattapan Heights II Mattapan, MA	\$28.9m	\$21.3m	Mixed Income Rental	83	Tax Exempt Bonds, HTC, LIHTC, CDBG, NHT, AHT, State LIHTC	Owner Developer	2004
							2005
Maverick Landing HOPE VI East Boston, MA	\$105m	\$50m	Mixed Income Rental	396	LIHTC, Tax Exempt Bonds, BHA, City of Boston, State	Owner Developer	2003
							2006
Carlton Wharf East Boston, MA	\$7m	\$12m	Workforce Home Ownership	30	HOME, HSF, AHT, NHT, CDBG, MTC, Construction Loan Linkage Sources	Developer	2003
							2005

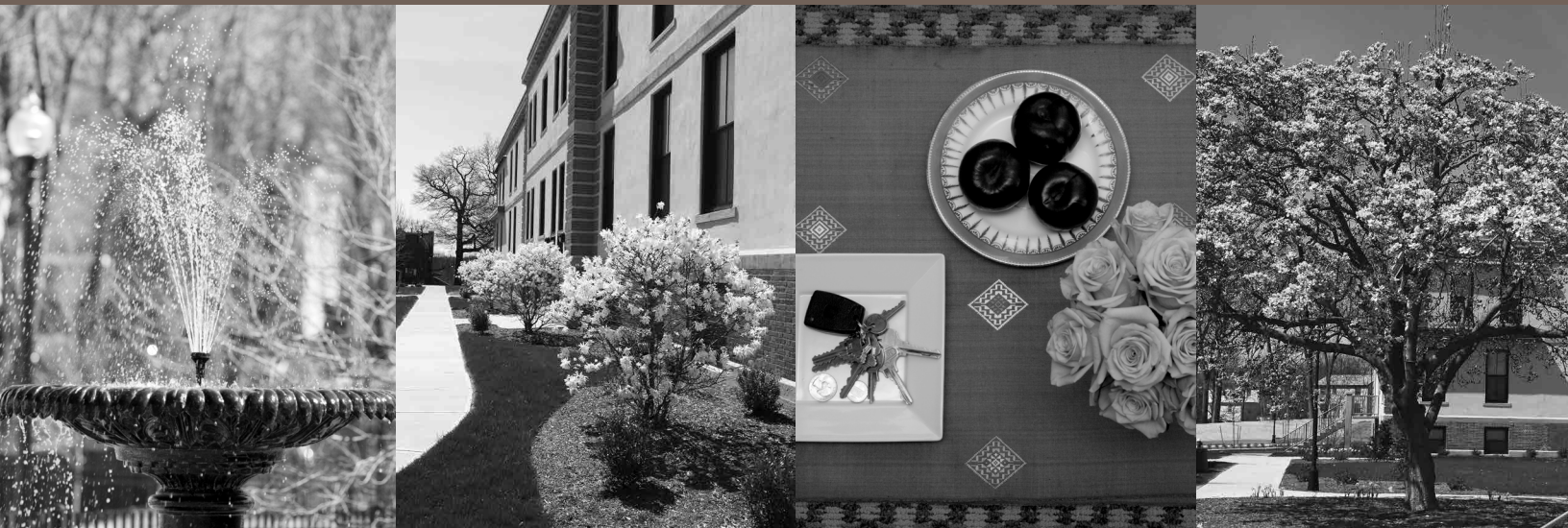
<div> <div> <div>TRINITY</div> <div>FINANCIAL</div> </div> <div>Current and Completed Projects</div> <div>In order by completion year (P) = Projected</div> </div>							
Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Trinity Terrace Dorchester, MA	\$17m	\$11m	Mixed Income Rental	62	LIHTC, HOME, CDBG, HTC	Owner Developer	2003
							2004
Newport Heights HOPE VI Newport, RI	\$73m	\$37.8m	Mixed Income Rental	299	HOPE VI, LIHTC, HOME, FHLB, Tax Ex- empt Bonds	Owner Developer	2002
							2007
The Foley Mattapan, MA	\$20m		Affordable, Assisted & Inde- pendent Living, Supportive Housing	116	LIHTC, HTC, HOME, CDBG, FHLB	Owner Developer	2001
							2003
Shaw's Supermarket Lower Mills Dorchester, MA	\$24m	N/A	Commercial Supermarket		Private Financ- ing, HTC	Owner Developer	2001
				59,800 SF			2003
Winchester Park Ipswich, MA	N/A	N/A	Open Space Subdivision		Private Financing	Owner Developer	2001
				20 Lots			2002
Harborlight House Beverly, MA	\$3.5m	\$1.8m	Assisted Living	35	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	2000
Mass Pike Towers Boston, MA	\$19.7m	\$4.7m	Mixed Income Rental	200	Tax Exempt Bonds, HOME, LIHTC 4%, HOME, Sec. 236	Owner Developer	2000
				10,000 SF			2000
Davenport Commons Boston, MA	\$50m	\$0	Mixed Income Home Owner- ship and Student Residences, Neighborhood Retail	200	Tax Exempt Bonds, HOME, Taxable Bonds, FHLB Linkage, HOPE VI	Developer	1999
				2,100 SF			2001
Southwark Plaza Philadelphia, PA	\$57m	\$18m	Mixed Income Rental	470	Tax Exempt Bonds, LIHTC 4%, HOME, CDBG, HUD Mixed Finance	Development Manager	1998
							2000

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Countryside Village Marlborough, MA	\$6.9m	\$2.9m	Mixed Income Rental	118	LIHTC, HOME, Sec. 236	Owner Developer	1999
Orchard Gardens HOPE VI Roxbury, MA	\$58m	\$27.3m	Mixed Income Rental	331	HOPE VI, LIHTC, CGP, HTC	Owner Developer	1998 1999
Camfield Gardens Roxbury, MA	\$16m	N/A	Mixed Income Rental	131	HUD Demo Disposition	Development Consultant	1998 1998
Beverly YMCA Cabot Street House Beverly, MA	\$3.8m	\$2m	SRO/Efficiency	45	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	1998 1998
Springfield YMCA Chestnut Street Residence Springfield, MA	\$3.8m	\$1.9m	SRO/Efficiency	104	LIHTC, HOME CDBG	Development Manager	1997 1998
Sonoma, Maple, Schuyler Dorchester, MA	\$9.8m	N/A	Mixed Income Rental	102	HUD Demo Disposition	Development Consultant	1997 1998
Beryl Gardens Roxbury, MA	\$3.3m	\$1.4m	Mixed Income Rental	20	LIHTC, HOME, CDBG, FHLB	Development Manager	1997 1998
Madison Park IV Roxbury, MA	\$12.4m	\$2.6m	Mixed Income Rental	143	LIHTC, HOME, CDBG, FHLB	Development Manager	1996 1997
Smith House Roxbury, MA	\$5.9m	\$2.3m	Mixed Income Rental	132	LIHTC, HOME, CDBG, FHLB	Development Manager	1995 1996

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
Haynes House Roxbury, MA	\$9.6m	\$2m	Mixed Income Rental	136	LIHTC, HOME, CDBG, FHLB	Development Manager	1995
							1996
Boston YMCA Boston, MA	\$7.8m	\$5.4m	SRO/Efficiency	88	HTC, HOME, CDBG, FHLB	Development Manager	1995
							1996
Mason Square Springfield, MA	\$3.6m	N/A	Commercial		CDBG, Private Financing	Development Consultant	1994
				30,000 SF			1995
Cape Ann YMCA Cape Ann, MA	\$2.2m	\$1.2m	SRO	52	LIHTC, HTC, HOME, CDBG, FHLB	Development Manager	1994
			Commercial	8,099 SF			1995
Joslin Court Syracuse, NY	\$3.1m	\$1.2m	Mixed Income Rental	22	LIHTC, NYHTF, NYHDF, HOME	Development Manager	1994
							1995
Orchard Hill Estates Oxford, MA	\$19.5m	\$5.4m	Mixed Income Rental	215	LIHTC, HOME, Flex Sub, Sec. 236	Development Manager	1994
							1995
Abyssinian Development Corporation New York, NY	\$2.7m	N/A	Mixed Income	30	FHLB	Development Consultant	1994
			Commercial	5,250 SF			1995
Lucerne Gardens Dorchester, MA	\$5.4m	\$3.4m	Mixed Income Rental	45	LIHTC, HOME, CDBG, FHLB	Owner Developer	1993
							1994
Cambridge YMCA Cambridge, MA	\$4.2m	\$2.2m	SRO/Special Needs	134	LIHTC, HTC, CDBG, HOME, FHLB	Developer	1993
							1994

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units SF Commercial	Financing	Role of Trinity	Year Closed Year Completed
Trinity House East Boston, MA	\$1.5m	\$700k	SRO	15	LIHTC, HTC, CDBG, FHLB	Development Manager	1992
							1993
Lithgow Block Dorchester, MA	\$3.5m	\$1.5m	Mixed Income Rental	33	CDBG, Private Financing	Development Manager	1991
			Commercial	33,000 SF			1992
Egleston Center Boston, MA	\$2.2m	N/A	Commercial		CDBG, Private Financing	Development Consultant	1991
				10,000 SF			1992
1734 Washington Boston, MA	\$2.2m	\$1.1m	SRO	24	LIHTC, HTC, CDBG	Development Manager	1990
							1991
Bowditch School Boston, MA	\$5.2m	\$2.9m	Apartments/SRO	45	LIHTC, HTC, CDBG	Development Manager	1990
			Commercial	4,000 SF			1991
398 Park Street Boston, MA	\$1.3m	\$550k	SRO/Special Needs	18	LIHTC, CDBG	Development Manager	1989
							1990
300 Shawmut Avenue Boston, MA	\$2m	\$650k	SRO	20	LIHTC, CDBG	Development Manager	1989
							1990
438 Warren Street Boston, MA	\$1.1m	\$500k	SRO/Special Needs	15	LIHTC, HTC, CDBG	Development Manager	1988
							1989
Totals	\$3.3b	\$1.4b		9,521 units			
				616,100 SF			

Innovative Real Estate · Transformative Results



Trinity is a community-driven, diverse team of real estate professionals with a proven track record of developing urban sites from New York to Greater Boston. We have the unique ability to complete complex, mixed-use projects overseeing all aspects of real estate – from finance to development to property management – on urban sites, especially those challenged by politics, infrastructure, environment or market profile.

Our work spans half a dozen residential and commercial specialties, from multi-family housing to transit-oriented development. With over \$3 billion in transformative development work, we have a reputation for delivering high-quality multifamily projects resulting in a stronger urban fabric – with a commitment to people, place and partners. We care about the communities where we invest because we live and work there too.

Our projects reflect a distinctive urban focus, combining community sensitivity with financial acumen to create truly transformative projects.

If this combination appeals to you,
please contact us.

TRINITYFINANCIAL.COM
info@trinityfinancial.com

New York

1350 Broadway, Suite 1700 · New York, NY 10018
Telephone: 212-267-8400

Boston

75 Federal Street, 4th Floor · Boston, MA 02110
Telephone: 617-720-8400

ICON

ARCHITECTURAL DESIGN
SERVICES FOR THE
**REDEVELOPMENT OF
THE FORMER MEDFIELD
STATE HOSPITAL**

Hospital Road, Medfield, Massachusetts

June 30, 2021

SUBMITTED BY:

ICON Architecture, Inc.

101 Summer Street

Boston, MA 02110





ICON Architecture is a 40-person, Boston-based, women-owned (WBE) architectural practice focused on sustainable, transformative projects that create new paradigms for living. Our designs range from infill transit-oriented development to innovative adaptive reuse, creating sustainable communities that energize residents and neighbors alike. Our projects creatively reposition aging buildings to celebrate their rich history while embracing contemporary life. A leader in innovation, ICON work engages sustainable building practices, such as Passive House and Fitwell, and efficient construction methods, such as modular and mass timber.

ICON delivers projects that not only meet program and budget goals, but deliver enduring value. We have extensive experience working with municipalities and community development corporations throughout New England. ICON has designed and built over 15,000 housing units including many with Trinity Financial across New England.

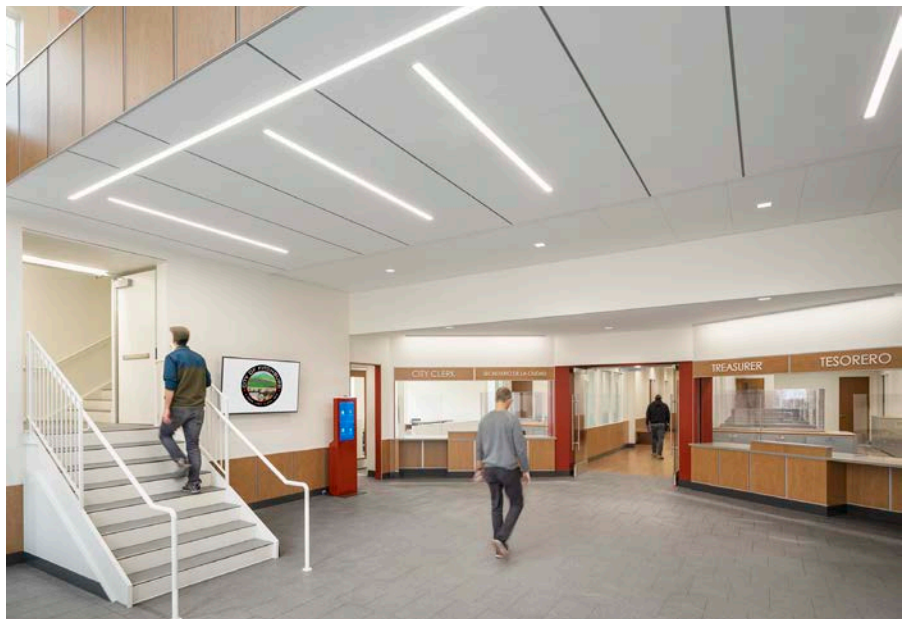
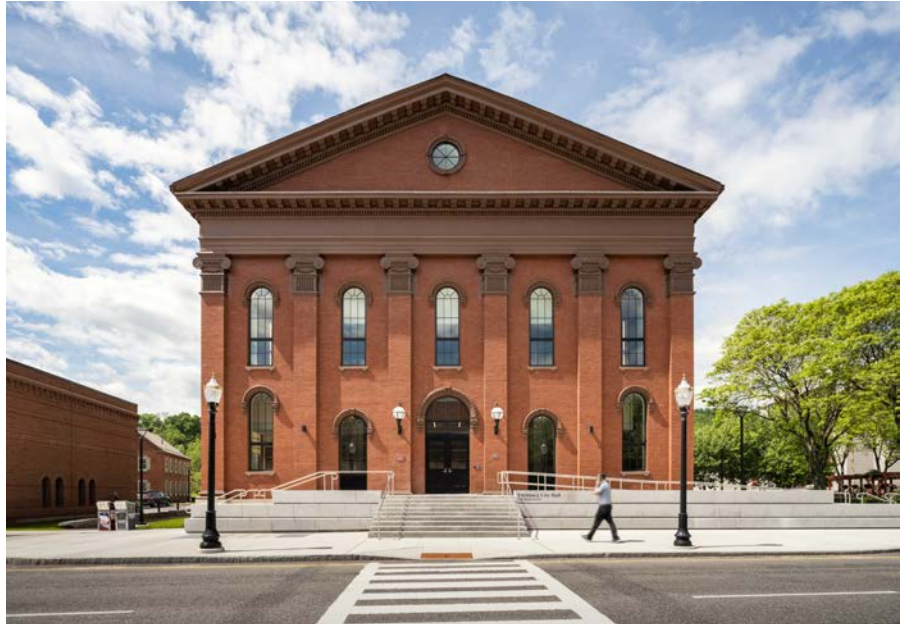
We like the healthy dialogue that preservation creates between rich history and contemporary life. Whether completely transformed or strategically optimized, we believe that reinvigorated, historic resources can become catalysts for community revitalization and creatively meet contemporary needs and sustainability goals. Our thoughtful, modern interventions transform historic buildings into lively compositions revealing their story of change.

ICON's projects have been case studies for nationally distributed books on urban housing, published by the Urban Land Institute, Harvard University Press, and Global Green. Our work has won numerous awards, multiple Builders Choice Design Awards, a Governor's Smart Growth Leadership Award, and multiple Preservation Achievement Awards from the Boston Preservation Alliance and the Massachusetts Historical Commission.

CITY HALL RENOVATION FITCHBURG, MA

Fitchburg City Hall was built in 1853. The two story Italianate design featured brick walls on a granite foundation with brick pilasters and granite lintels, and a slate roof. The building had offices on the first floor and a large auditorium with balconies on the second floor. In 1879, four stories were added to the rear of the building, with an intricate stair enclosure connecting the two structures. City Hall is a local historic landmark in Fitchburg, and listed in the Massachusetts Cultural Resource Information System within the “Downtown Architecture of H.M. Francis, Fitchburg, MA”, and recommended for listing in the National Register of Historical Places as part of the Upper Commons Historic District.

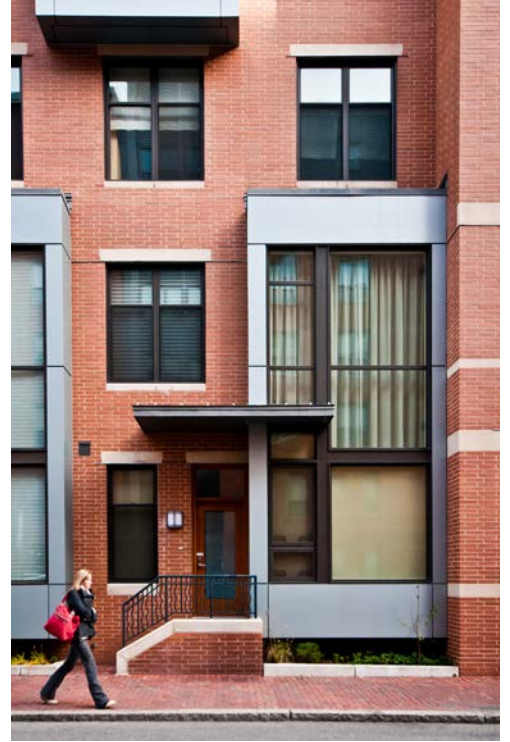
While the exterior is being restored, the building interior is being redesigned to provide three clearly defined floors, ample public and meeting space, and will reassert the entry from Main Street as the focal point of the building. It will accommodate 14 municipal departments, meeting modern workspace requirements.. Expected occupancy is September 2020. Additionally, a neighboring Sullivanesque bank building (3500 GSF) is being adapted to house the Fitchburg’s City Council. The Main Street frontage of both buildings and the surrounding site are being redesigned to create a City Hall Campus to serve as an anchor on a revitalized Main Street.



ARTBLOCK 731

Boston, MA

Catering to Boston's "Artist Space Initiative," ArtBlock 731 creates two new live / work loft buildings wrapped around the historic Joshua Bates School converted to artist work space. The contemporary exterior emulates the surrounding rhythms and materials of the historic South End and expresses the community-of-arts within. The public experience of ArtBlock 731 revolves around the Gallert at ArtBlock at street level with its terrace and sculpture garden – curated to showcase the works of the artist residents and enrich the neighborhood's public art.



COADY SCHOOL RESIDENCES

Bourne, MA

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



SIMPKINS SCHOOL RESIDENCES

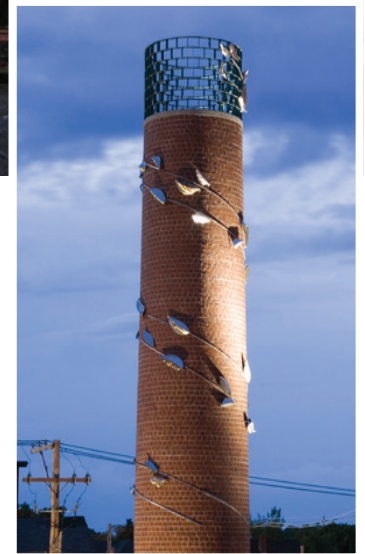
SOUTH YARMOUTH, MA

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



THE PLANT + CUBAN REVOLUTION PROVIDENCE, RI

The Plant and Calender Mills mix a new blend of commercial and restaurant space with residential and live/work lofts into two 19th century industrial buildings. Live/work units range from affordable 500 SF studios with a wall of windows, to multi-story lofts with “wow,” and full floor-thru communal “nests.” Adaptive reuse is redefined through a blend of artistic integrity with aplomb. Via selective demolition, the underutilized and overbuilt site was opened up to create parking areas and an award-winning dance courtyard. Although in some areas the internal structure was deteriorated beyond repair, exterior walls were selectively preserved, maintaining the traditional street wall at the back of the sidewalk. New construction is clearly identified in contemporary materials and details.



HIBERNIAN HALL ROXBURY, MA

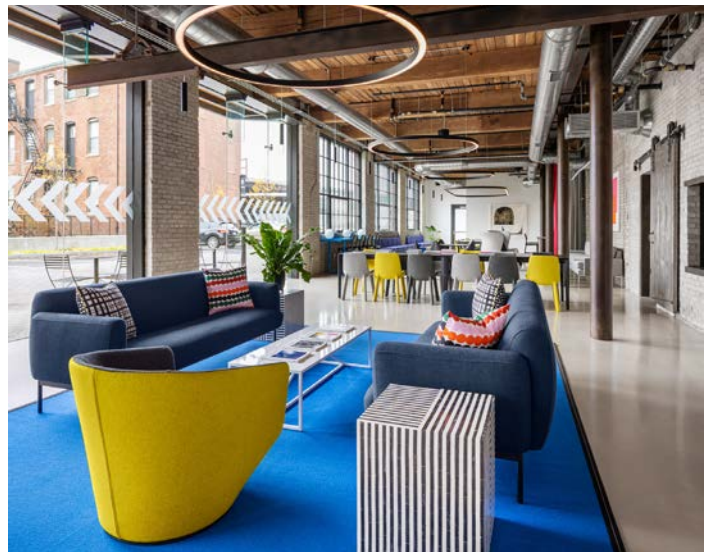
Restored to its former glory, the Roxbury Center for the Arts combines retail and arts-allied offices with a meeting and performance arts venue. Constructed in 1913 as the home of The Ancient Order of Hibernians, the building was on track to be demolished until recognized as a Boston Landmark. Extensive renovation transformed the 32,000 SF building, now the permanent home of the Arts Culture Trade Roxbury Consortium (ACT Roxbury), and returned it to its rightful place in the rebirth of Dudley Square.



THE GRAPHIC LOFTS

Cambridge, MA

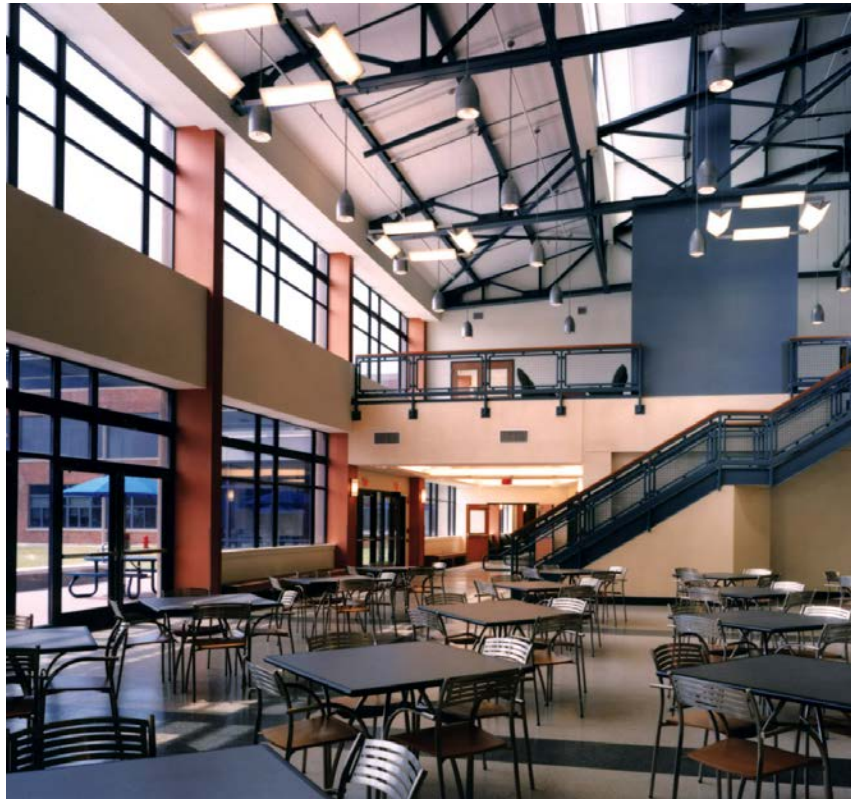
The Graphic blends old and new, combining the adaptive reuse of an industrial graphic arts factory with a new modular residential building for 171 new apartments. Located in the heart of Sullivan Square, across the street from a major MBTA Station, the complex offers a mix of retail and amenity areas at the ground floor, engaging the robust brick and steel framework of the historic shell. The new modular building has been designed to play on the industrial vibe, employing corrugated metal panels, masonry screen walls and large, multi-lite windows. The new “U-shaped” building wraps a south-facing landscaped courtyard, adding 4 stories over a podium of parking. A roof deck located on the east wing boasts magnificent views to downtown Boston. Currently the largest modular construction development in the city of Boston, its innovative construction method offered real cost advantages, reducing construction time, minimizing disruption to this urban community, and providing a high level of quality control. The bonus is a LEED Gold certified building with amazing sound and thermal isolation.



SALEM STATE LIBRARY

Salem, MA

ICON teamed with Ann Beha Architects under the direction of the Division of Capital Asset Management and Maintenance (DCAMM) to undertake a fast track renovation of the eastern end of the central campus academic building – an area partially vacant and partially used by the Facilities Department. Exterior shell renovations consist of masonry and cast stone repairs and replacement, new windows, new infill composite metal panel systems, and roof repairs. Reuse and renovation of two existing stairwells, restoration and acoustical treatment of the steel framed clerestory skylight and roof system, and new mechanical and electrical distributions were included in the renovation.



ARLINGTON POINT

Lawrence, MA

With Trinity Financial

Arlington Point is the adaptive reuse of a historic 1919 mill building within the Arlington Mills along the Spicket River. Working closely with the National Park Service and Massachusetts Historic Commission, ICON adapted the 130,000 SF warehouse into 102 affordable mixed income apartments of family housing. The units retain historic fabric through restored masonry walls, steel and concrete interior structure, historically sensitive energy efficient windows, and exposed wood plank roof framing. Amenity spaces cater to families and include a lounge with kitchenette, a fitness center, a kid's center and tot lot.



DARTMOUTH HOTEL

Roxbury, MA

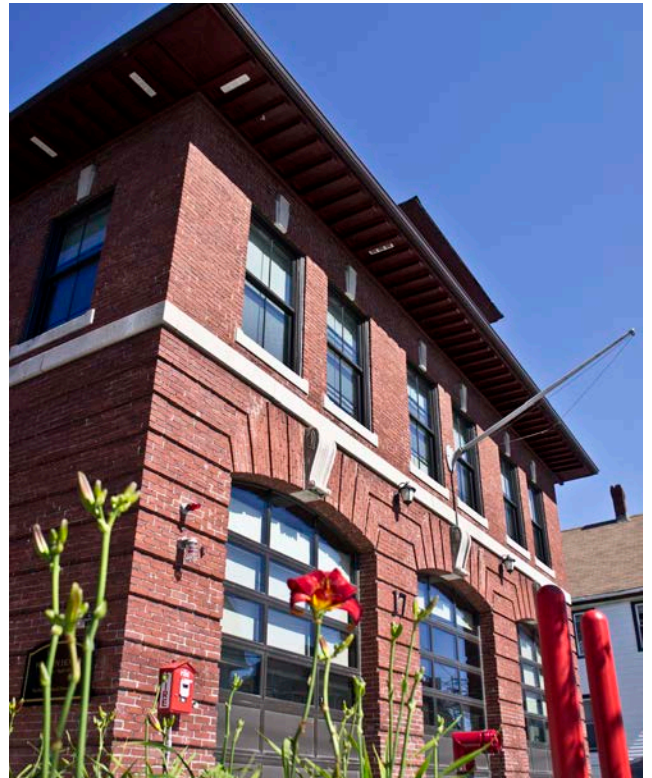
Melding the restoration of this neglected 1871 National Register hotel with the new addition of artist live/work housing, the Dartmouth Hotel has regained its elegance at the heart of Roxbury's Dudley Square. After sitting vacant for 30 years, restoration required painstaking renewal of the rare marble façade and meticulous rebuilding of ornate wood-trimmed dormers and slate roofing. Combined with its contemporary addition, this mixed-use project has acted as a catalyst for new development in the Dudley Square area, including substantial new retail and restaurant space in its ground floor.



WALDEN FIRE HOUSE RESIDENCES

Revere, MA

Built in 1907 in a restrained Classical Revival style, this former Fire Station now provides home to seven units of senior housing. Former fire truck bays now serve as a first floor community space for the broader neighborhood. Original staircases were retained, and still wrap around the Firehouse pole that had been used for quick passage. Original wood wainscoting and trim have been retained and replicated, while historic images have been reproduced as artwork in the hallways. Funded by both historic and low-income housing tax credits, this new use helps rejuvenate a historic TOD neighborhood, within a walk of both the Blue Line MBTA station and the Revere Beach waterfront.



Appleton Mills

Lowell, MA

With Trinity Financial

The 130 artist live/work lofts at Appleton Mills establish the 15-acre, mixed-use Hamilton Canal District as one of Massachusetts preeminent creative communities. Located on an “island” bounded by canals that powered former industries, this adaptive reuse restores the extant masonry mill remains, reuses the cast iron columns, and reengages bridges linking across canals. Site walkways trace the historic mill worker paths.

At the heart of the complex lies a light-filled, four-story atrium serving as a communal gallery. Units offer a range of open loft layouts, including those that array along the “loading dock” terrace, allowing residents to roll up “garage doors” to open their studios to view. The space also features a community lounge, fitness center, a green roof and collaborative raw workshop space.

Appleton Mills has won multiple awards, including the following; BSA Housing Design Award, the Award for Excellence in Heritage Preservation, the Timmy Award for Excellence in Historic Rehabilitation, and the Massachusetts Historical Commission Preservation Award.



60 King Street

Providence, RI

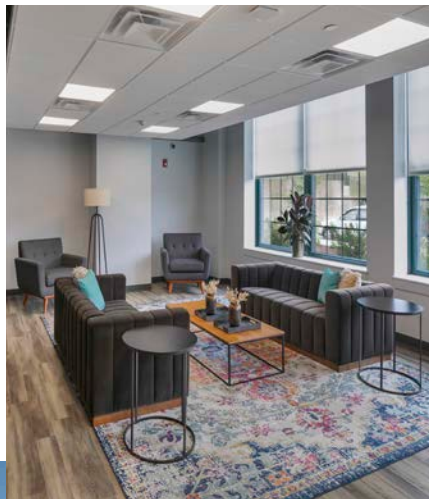
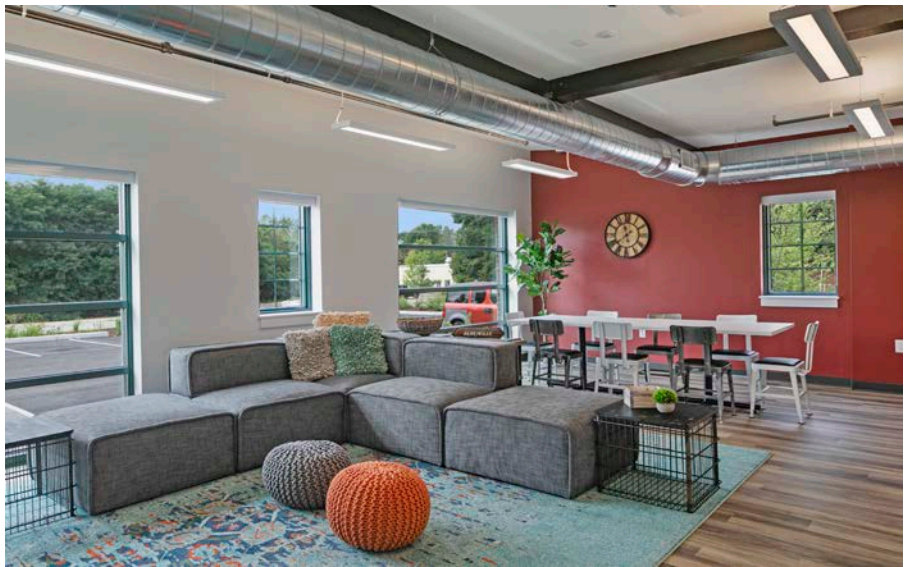
With Trinity Financial

Trinity Financial and its partners were designated developers of this site historically known as the Rochambeau Worsted Mill and more currently as The Imperial Knife Factory. This is designed as a mixed income housing development and the First Phase of a larger community redevelopment plan for this area of the Olneyville neighborhood. The development is partially funded with Historic Tax Credits and Low Income Housing Tax Credits.

The main building was built in 1923 and is three stories with a flat roof. The exterior is broken up into regular spaced bays with large window openings. There were additions, now removed, that were added over the years. The first in 1937 and the last being in 1980.

The building is deep and not conducive to the typical unit layout, but it had large windows that let in a lot of light. ICON took advantage of this and designed narrow and deep units to increase the amount of units per floor. The second and third floors have a tall floor to floor height where we designed units with a mezzanine bedroom to increase the bedroom count for the buildings overall unit mix.

The project included remediating the Brownfields site. The interior of the building was covered in lead paint that needed to be removed following very strict state procedures.



BEFORE



North Point Lofts

Lawrence, MA

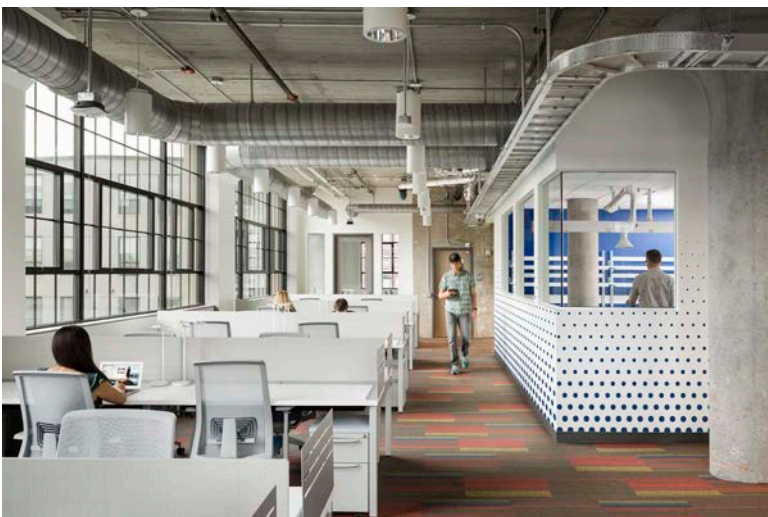
This rehab of a former industrial building creates 103 new “micro” lofts, an emerging new housing prototype for urban dwellers. Conveniently located near the new Lechmere station on the Green Line Extension, these microlofts range in size from 330 to nearly 700 square feet, each with floor-to-ceiling windows and contemporary loft interiors. Units are designed to make use of every square inch, and incorporate smaller appliances and sliding doors to make efficient use of limited space. The project is designed to meet LEED-NC silver criteria.



110 CANAL

Lowell, MA
With Trinity Financial

As part of the Hamilton Canal District redevelopment, this reuse of a 1930's former industrial building provides a mix of office and commercial space while combining historic appeal with downtown convenience. Located at the intersection of three historic waterways, 110 Canal offers open floor plans and visually stunning interiors profiling the raw, concrete frame of the original structure. The historic renovation of the exterior envelope replaced the original factory window sashes with energy-efficient contemporary windows, providing excellent daylighting for the commercial space on five floors. ICON later fitted out the interior for the University of Massachusetts Lowell.



ADDITIONAL ADAPTIVE REUSE EXPERIENCE

SIMPKINSSCHOOLRESIDENCES

SOUTH YARMOUTH, MA

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



Simpkins School Residences | South Yarmouth, MA

ENTERPRISE BLOCK

BROCKTON, MA

With Trinity Financial

Built in 1890, the original Enterprise Building housed the Brockton Enterprise Newspaper and later expanded into the adjacent building in 1894. In the 1970's, a modern steel and concrete addition was completed and the historic facades were covered. By 2000, the building was empty and the Brockton Enterprise Newspaper had left. ICON's renovation restored the building's original historic facade and upgraded the building's envelope. As part of the larger redevelopment of this transit-oriented city block, this adaptive reuse included installation of a new elevator, building systems, and window replacements. The interior has been fit-out for new government office and retail use, along with restaurant space on the ground floor.



Enterprise Block | Brockton, MA

FULTON SCHOOL RESIDENCES

WEYMOUTH, MA

The 1928 National Registered Alice E. Fulton School has been reborn as the Fulton School Residences. The adaptive reuse and historically sensitive addition to the Colonial Revival structure provides 63 apartments for active seniors. Many original details were preserved, including broad corridors with wood wainscoting, high ceilings, and large windows. Original classroom cloak closets were incorporated into the residential units as niches for resident display.



Fulton School Residences | Weymouth, MA

THE PLANT

PROVIDENCE, RI

The Plant and Calender Mills mix a new blend of commercial and restaurant space with residential and live/work lofts into two 19th century industrial buildings. Live/work units range from affordable 500 SF studios with a wall of windows, to multi-story lofts with "wow," and full floor-thru communal "nests." Adaptive reuse is redefined through a blend of artistic integrity with aplomb. Via selective demolition, the underutilized and overbuilt site was opened up to create parking areas and an award-winning dance courtyard. Although in some areas the internal structure was deteriorated beyond repair, exterior walls were selectively preserved, maintaining the traditional street wall at the back of the sidewalk. New construction is clearly identified in contemporary materials and details.



The Plant | Providence, RI

REPRESENTATIVE LIST OF: HISTORIC TAX CREDIT PROJECTS

- **SIMPKINS SCHOOL RESIDENCES**, SOUTH YARMOUTH, MA
- **DARTMOUTH HOTEL**, ROXBURY, MA
- **SCHOOL STREET RESIDENCES**, ATHOL, MA
- **COADY SCHOOL RESIDENCES**, BOURNE, MA
- **FULTON SCHOOL RESIDENCES**, WEYMOUTH, MA
- **APPLETON MILL**, LOWELL, MA
- **60 KING**, PROVIDENCE, RI
- **ARLINGTON POINT**, LAWRENCE, MA
- **HIBERNIAN HALL**, BOSTON, MA
- **WALDEN FIRE HOUSE**, REVERE, MA

FUNDING PART II ALLOCATION/ON THE BOARDS:

- **SALEM HISTORIC SCHOOLS**, SALEM, MA
- **OXFORD SCHOOL (In Construction)**, FAIRHAVEN, MA
- **MARRINER MILL (Starting Construction)**, LAWRENCE, MA
- **COYLE SCHOOL RESIDENCES**, TAUNTON, MA
- **DYE WORKS + MOVEMENT CITY**, LAWRENCE, MA

NEWMARKET TAX CREDITS/LOCAL HISTORIC /NPS REVIEW:

- **FITCHBURG CITY HALL**, FITCHBURG, MA
- **FITCHBURG MAIN STREET THEATER**, FITCHBURG, MA
- **NASHUA PERFORMING ARTS CENTER (Local Review)**,
NASHUA, NH

For more information regarding ICON Architecture's
Historic Tax Credit projects, please visit us on the web at
www.iconarch.com



Simpkins School Residences



Dartmouth Hotel



Appleton Mills



Fitchburg City Hall



Arlington Point

E- INNOVATIONS

We integrate **innovative** design and construction methods with exceptional building **performance**.



PASSIVE HOUSE | LOW ENERGY LOADS

As one of the first multifamily Passive House buildings in New England, including the first and largest in Massachusetts, The Distillery North in South Boston is designed to meet the world's most energy efficient performance standard, with dramatically lower energy loads over conventional construction.

Unit Count: 65 Units



MODULAR | UNLIMITED DESIGN POTENTIAL

The Graphic residences blends old and new, combining the adaptive reuse of an industrial graphic arts factory with a new modular residential building for 171 new apartments. As the largest of its kind in Boston, the new modular building consists of 129 modules, each taking approximately 20 minutes to lift into place.

Unit Count: 171 Units



RESILIENCY | PLANNING FOR THE FUTURE

Projects designed for environmental resiliency in coastal New England areas.

(L to R): **Beach House Residences**, Revere, MA; **Boston East Residences**, Boston, MA; **Washington Village Phase 1**, Norwalk, CT.

For more information on our **Innovative** housing projects, visit us on the web at www.iconarch.com/our-work/live

LIST OF RECENT DESIGN AWARDS



2020 Best Affordable Community

Arlington Point | Lawrence, MA
BRAGB - PRISM Awards

2020 Best Rental Community

The Graphic | Cambridge, MA
BRAGB - PRISM Awards

2020 Best Affordable Community

Finch Cambridge | Cambridge, MA
BRAGB - PRISM Awards

2020 Best Clubhouse: Community

The Buckley | Framingham, MA
BRAGB - PRISM Awards

2019 Best Affordable Community

Overlook Terrace | Boston, MA
BRAGB - PRISM Awards

2019 Best Club Room Space

Beach House | Revere, MA
BRAGB - PRISM Awards

2018 Best Mixed-Use Community Development

Boston East | Boston, MA
BRAGB - PRISM Awards

2018 Best Multi-Unit For-Sale Community

Port 45 | Boston, MA
BRAGB - PRISM Awards

2017 Boston's Best New Building

Boston East | Boston, MA
CURBED, Boston

2017 Best Mixed-Use Community Development

One Canal | Boston, MA
BRAGB - PRISM Awards

2017 Best Net-Zero/Passive House

The Distillery North | Boston, MA
BRAGB - PRISM Awards

2015 Paul E. Tsongas Award

110 Canal | Lowell, MA
Preservation Awards Massachusetts

2015 Paul E. Tsongas Award

Simpkins School Residences | Yarmouth, MA
Preservation Awards Massachusetts

2014 Jack Kemp Award

The Box District | Chelsea, MA
Urban Land Institute (ULI)

2014 Best Historical Renovation

Appleton Mills | Lowell, MA
BRAGB - PRISM Awards

2013 Best Affordable Community

Washington Beech | Roslindale, MA
BRAGB - PRISM Awards

2013 Best Rental Community

Maxwell's Green | Somerville, MA
BRAGB - PRISM Awards

2013 Preservation Award

Appleton Mills | Lowell, MA
The Massachusetts Historical Commission

2013 Best of Boston Real Estate - Residential

Oak Grove Village | Malden, MA
Boston Business Journal (BBJ)

2012 Housing Design Award

Appleton Mills | Lowell, MA
Boston Society of Architects (BSA)

2011 Clancy Award for Socially Responsible Housing

Maverick Landing | Boston, MA
Boston Society of Architects (BSA)

2011 Timmy Award for Excellence in Historic Rehab

Appleton Mills | Lowell, MA
The National Housing + Rehabilitation Society

2011 Builder's Choice Design Award

Appleton Mills | Lowell, MA
BUILDER Magazine

2011 AGC Build New England Award

Avenir | Boston, MA
AGC Boston

2011 Award for Excellence in Heritage Preservation

Appleton Mills | Lowell, MA
Lowell National Historic Park + Heritage Partnership

2010 Builder's Choice Design Award, Grand Award

Avenir | Boston, MA
BUILDER Magazine

2010 Community Milestone Award

Avenir | Boston, MA
The Downtown North Association

2009 Turner Prize for Innovation + Leadership Housing

Maverick Landing | Boston, MA
College of Environmental Design, UC Berkeley



Education

Bachelor of Architecture,
University of Cincinnati
Magna Cum Laude

Registration

Massachusetts (6048)

Affiliations

HomeStart:

Board of Directors, Gala Co-Chair

Boston Society of Architects:

Former Editorial Board AB,
Former Board Commissioner, Education
Former Chair, Awards Committee

AIA New England

Board Member FAIA

Urban Land Institute:

Advisory Board Member
HED Product Council

NESEA

Board Member

Boston Architectural College:

Board Member
Former Thesis Committee Rep

Design Juries

ULI Jack Kemp Excellence in
Affordable Housing Awards
Reviewer

AIA Housing Awards Chair, 2014

AIA Memphis Design Awards, 2011

ACES Engineering Excellence, 2010

AIA Wash. DC Design Awards, 2009

AGC Build New England, 2009

Relevant Experience

Principal-in-Charge, **Appleton Mills**, Lowell, MA: Award winning adaptive reuse of a historic mill building on the Hamilton Canal into a 130-unit, mixed-income, artists' live/work development.

Principal-in-Charge, **110 Canal**, Lowell, MA: Adaptive reuse of a 1930's former industrial building that provides a mix of office and commercial space and combines historic appeal with downtown convenience.

Principal-in-Charge, **60 King**, Providence, RI: Originally known as the Rochambeau Worsted Mill, and later as the Imperial Knife Factory, this 1923-built mill has been redesigned for mixed-income housing as the first phase of a larger community redevelopment plan for Providence's Olneyville neighborhood.

Principal-in-Charge, **Dartmouth Hotel**, Roxbury (MA): Renovation of an historic hotel listed on the National Register of Historic Places at the MBTA Dudley Station Silver Line node. The \$12M project includes the rehabilitation of an existing hotel and construction of an addition, totaling 70,000 SF.

Principal-in-Charge, **One Canal**, Boston, MA: Transit-oriented development in Boston's Bulfinch Triangle, including retail and parking below 310 rental apartments built over the MBTA Orange and Green Lines and the Central Artery Tunnel.

Principal-in-Charge, **Avenir**, Boston, MA: Avenir elegantly combines 241 upscale apartments with vibrant retail and transportation links in Boston's Bulfinch Triangle sports and entertainment district. The 10-story building's varied massing and texture respond to the historic Bulfinch Triangle context of individual buildings aggregated over time.

Principal-in-Charge, **Vela on the Park**, Stamford, CT: Vela on the Park features 209 luxury apartment homes and offers residents boutique hotel-inspired service and convenience. Amenities include a 19th floor roof deck with a private dining space, a cutting edge health and wellness facilities, pet amenities, an arcade room, and unprecedented park views, including views that extend up to Lower Manhattan.

Principal-in-Charge, **Beach House**, Revere, MA: The new six-story residential building along beautiful Revere Beach features 234 luxury apartment residences ranging from studio to two-bedroom configurations. Resident amenities at Beach House include a rooftop pool and terrace featuring scenic ocean views, a 2,000-square-foot gym and a movie room.

Principal-in-Charge, **Port 45**, Boston, MA: Port 45 responds to its location at the intersection of Boston's most vibrant neighborhoods -- where South Boston, Seaport and South End meet. The 105 cutting edge homes range from one- to three-bedrooms, with a ground level, enclosed parking garage complete with electric car charging stations.

Principal-in-Charge, **Maxwell's Green**, Somerville, MA: Project for the redevelopment of a former industrial site to house a new transit-oriented community along the Green Line extension's Lowell Street Station. Four buildings house 184 market rate units surrounding the largest open space in the City of Somerville, accommodating residents and the larger community. Maxwell's Green is LEED for Homes Gold certified.

Principal-in-Charge, **Hub 25 Residences**, Boston, MA: Included in the Columbia Point Master Plan at the JFK MBTA Station, this transit-oriented development includes two five-story buildings offering a total of 278 units (studio, one, two and three-bedroom units), resident clubroom, landscaped courtyard and 140 covered parking spaces on a 2.35-acre site.

Principal-in-Charge, **Chroma**, East Cambridge, MA: This 96 unit development, which is currently under construction, consists of a four story wood-framed residential structure over a private garage. Duplex units line the neighborhood edges of the development to connect together. Additionally, a large courtyard provides spectacular views.



Education

Bachelor of Architecture,
University of Minnesota, 1985

Bachelor of Environmental Design,
University of Minnesota, 1985

Registration

Massachusetts (7399)

Affiliations

AIA MA Government Affairs
Committee, Member

Boston Society of Architects

BSA Renovate for Recovery
Registered Design Professional

U.S. Green Building Council

Speaking Engagements

ABX 2012: Survival Strategies for
Existing Buildings

ABX 2012: Living on Track

Relevant Experience

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

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

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

Principal-in-Charge, **BF Brown School Residences**, Bourne, MA: The BF Brown School renovation, as part of the greater Fitchburg Arts Community, is providing approximately 60 units of mixed income rentals along with artist live/work spaces within three historic former municipal buildings. The site is located in downtown Fitchburg, directly adjacent to the Fitchburg Art Museum. A variety of living unit configurations will be provided including 1, 2 and 3-bedroom apartments, along with studio/workspaces and other artist amenities for the greater community.

Principal-in-Charge, **North Point Lofts**, Cambridge, MA: Adaptive Reuse of 1926 concrete meat packing plant into 103 units of transit-oriented microloft housing as part of the Northpoint District. Includes floor-to-ceiling windows and contemporary interiors designed to meet LEED-NC Silver criteria.

Project Manager through Construction, **Spencer Row**, Provides 32 units of affordable rental housing on a 1/2-acre site that sits one mile from downtown with multiple bus routes available just blocks away. The development consists of a three-story building above parking, with a community room for residents on the first floor. Townhouses with stoops offer private entries to several of the residences and create an active streetscape.

Principal-in-Charge, **Franklin Highlands**, Dorchester, MA: A 270 unit, 14 building development in Dorchester. This scattered site development is an occupied rehab and modernization project. Focused on envelope repairs, exterior recladding, and masonry restoration.

Principal-in-Charge, **MSBA's Green and Accelerated Repair Program**: 26 different projects across 11 districts, 19 schools. Sustainable energy saving measures that include mechanical system upgrades, window and door replacement, roof and insulation repairs. All projects incorporate principles and standards of sustainable design ranging from \$400k to \$2M in construction cost.

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

Principal-in-Charge, **Veterans Transition House**, The redesign and rehabilitation of an existing three buildings, which will serve to help homeless and at-risk veterans along with their families in the Massachusetts South Coast area. This project entails the preservation of affordability and program services, which includes outreach programs for the greater veterans community.



Education

Bachelor of Architecture,
University of Arkansas, Fayetteville,
AR, 1998

Bachelor of Arts, (Fine Arts)
Hendrix College, Conway, AR, 1993

Registrations

Massachusetts (50554)

Affiliations

American Institute of Architects

Boston Society of Architects (BSA)

FHLB Affordable Housing
Competition, Design Mentor

Modular Building Institute

Urban Land Institute
Urban Design Product Council

JPNC Zoning Committee

Relevant Experience

Project Manager, **The Graphic**: Blending old and new, this redevelopment combines the adaptive reuse of an industrial graphic arts factory with a new modular residential building for 171 new apartments. The new modular building has been designed to play on the industrial vibe, employing corrugated metal panels, masonry screen walls and large, multi-lite windows. Currently the largest modular construction development in the city of Boston, this innovative construction method offers real cost advantages, reducing construction time, minimizing disruption to this urban community, and providing a high level of quality control. The bonus is a LEED Gold certified building with amazing sound and thermal isolation.

Project Manager, **Orient Heights**, East Boston, MA: With long views from the hilltop, but limited vehicle and pedestrian access due to the slope, the redevelopment team evaluated options to transform this challenging site. Phases One and Two of the redevelopment are complete and Phase Three is anticipated to begin construction in the spring of 2021, overall providing a mix of apartment types and sizes, in both townhomes and midrise buildings. Phase One achieved LEED for Homes Platinum certification, while Phase Two is on track to achieve LEED Gold.

Project Manager, **25 Amory and 250 Centre Street, Site III**, Roxbury, MA: This transit-oriented redevelopment at the Jackson Square MBTA Station includes two buildings, comprising 44 apartments for families with community meeting space and 110 mixed-income apartments with street level retail space. This ambitious redevelopment includes multiple city agencies and the construction of a new private drive and public improvements, enabling greater access to the train station and open space amenities.

Project Manager, **Forest Hills**, Boston, MA: The Residences at Forest Hills transforms a surface parking lot across from Forest Hills Station into a vibrant new mixed-use community, creating retail space and 250 new apartment homes in a range of unit sizes and types. Framing the edge of the improved Arborway Parkway, these new buildings create a courtyard oasis in the center of the site. Invoking a textured treehouse-like character, bold window patterns and inset decks will blur the line between outside and inside.

Project Designer, **Maxwell's Green**, Somerville, MA: Project for the redevelopment of a former industrial site creating a new transit-oriented community along the Green Line extension. Four buildings house 184 market rate units surrounding the largest open space in the City of Somerville, accommodating residents and the larger community. Project achieved LEED-H Gold certification.

Project Manager, **Putnam Green**, Cambridge, MA: Creation of 40 units of 100% affordable family housing, in two new buildings in Cambridge. The apartments surround a sunny, landscaped courtyard to maximize passive solar design. The LEED Platinum rated development incorporates a super-insulated building envelope, 96% efficient mechanical systems, heat recovery ventilation, and energy-producing photovoltaic and solar thermal rooftop systems.

Project Designer, **The Box District**, Chelsea, MA: This former industrial box manufacturing district has been transformed into a new 250+ unit, multi-block residential neighborhood. ICON has designed four new infill developments positioned amidst existing residential and retail structures, and worked with the City of Chelsea to design and build new streets and public parks including Highland Homes, Janus Homes, Spencer Row and Highland Terrace, which achieved LEED for Homes Platinum.

Project Designer, **Hub 25 Residences**, Boston, MA: Included in the Columbia Point Master Plan at the JFK MBTA Station, this transit-oriented development includes two five-story buildings offering a total of 278 units (studio, one, two and three-bedroom units), resident clubroom, landscaped courtyard and 140 covered parking spaces on a 2.35-acre site.

Project Designer, **Washington Beech**, Roslindale, MA: A mid-rise apartment building marks the primary corner of the site with one- and two-bedroom units and a community center open to view. The development is certified LEED for Homes Gold, with the midrise building achieving LEED-H Midrise Gold.

**Education**

Bachelor of Architecture, Boston
Architectural Center, 1998
Received High Honors for Thesis

Associate of Science in
Architectural Technology, Hartford
State Technical College, 1982

Registration

Massachusetts (20683)

Relevant Experience

Project Manager, **Appleton Mills**, Lowell (MA): Award winning adaptive reuse of a historic mill building on the Hamilton Canal into a 130-unit, mixed-income, artists' live/work development.

Project Manager, **Van Brodie Mill**, Lawrence, MA: Renovation of an existing historic mill building into 100+/- family-oriented lofts and a ground-level amenity center for residents. The renovation totals 145,488 GSF.

Project Manager, **Marriner Mill**, Lawrence, MA: Marriner Mill is located in the Arlington Mills Historic District in Lawrence. ICON will carry out a substantial rehabilitation of the structure to national Park Service standards. 84 apartments of low to moderate income housing will be created with a focus on 2 and 3 bedroom units. The renovation will be a companion to the neighboring Van Brodie Mill currently under construction in this historic district.

Project Manager, **Boston East**, East Boston (MA): The revitalization of a vacant piece of land into 200 apartments. The project provides public access to the waterfront and bridges two important centers of East Boston.

Project Team Manager, **The Plant & Cuban Revolution**, Providence (RI): An adaptive reuse project that includes the conversion of a 19th century Fabric Dying and Bleaching calendaring facility into artist live/work housing and a mixed use office park.

Project Manager, **Enterprise Office Building**, Brockton (MA): Adaptive reuse of a 55,000 SF former newspaper plant for commercial office space.

Project Manager, **Centre 50 & Enzo Flats**, Brockton (MA): Enzo Flats and Centre 50 are the first residential phase of a new multi-acre, mixed-used downtown redevelopment in the Gateway City of Brockton. This new, mixed use district includes the restored Enterprise Block, 200,000 SF of new office space, and restaurant and retail area. The residential component includes 250 apartments located within a one-block walk of the Brockton Commuter Rail Station.

Project Team Manager, **Fulton School Residences**, Weymouth (MA): Adaptive reuse of 1928 historic school with new construction, 63 units of affordable senior housing.

Project Manager, **110 Canal**, Lowell (MA): Renovation of the historic Freudenberg Nonwovens mill building renovation into modernized commercial space, a key piece in the city's \$800M Hamilton Canal District revitalization project.

Architectural Designer, **Olmsted Green**, Boston (MA): Design development / construction documentation for the design of 520 units of new mixed-income housing on the former Boston State Hospital Site. Focused on bathroom, kitchen, and unit interior compliance with MAAB and FHA.

Project Manager, **MSBA's Green and Accelerated Repair Program**: 26 different projects across 11 districts, 19 schools. Sustainable energy saving measures that include mechanical system upgrades, window and door replacement, roof and insulation repairs. All projects incorporate principles and standards of sustainable design ranging from \$400k to \$2M in construction cost.

Project Team Manager, **Emerson College Atrium**, Boston (MA): Design of an infill project for the existing light well in Emerson College's Walker Building.

Project Team Manager, **Vine Street Community Center**, Boston (MA): Rehabilitation and adaptive reuse of a 26,000 SF historic masonry structure resulted in a modern community center. New uses included a neighborhood childcare center, senior center, fitness and game rooms, community meeting rooms and a gymnasium.



Education

Bachelor of Architecture, Penn
State University, 2014

Design Studio Abroad, The
Pantheon Institute, Rome, Italy,
2012

Registration

Massachusetts (951189); 2017

Affiliations

American Institute of Architects
(AIA)

Boston Society of Architects
(BSA)

Greenbuild 2017

Boston Preservation Alliance
Chair of Young Leaders

HomeStart Fundraising Captain
(iCycle, Boston Marathon)

Relevant Experience

Project Manager, **Salem Historic Schools**, Salem, MA: Contributing to the historic significance of Salem, MA as standing examples of Catholic schools and historic architectural styles of the neighborhood: the 1906 St James School and the 1941 Saint Mary's school will be sensitively adapted to provide 33 units of mixed income senior housing and 29 units of affordable artist live-work housing, respectively. The Saint Mary's school in downtown Salem will also provide a sanctuary for the creative community and public art within the rehabbed auditorium.

Project Manager, **Van Brodie Mill**, Lawrence, MA: Renovation of an existing historic mill building into 100+/- family-oriented lofts and a ground-level amenity center for residents. The renovation totals 145,488 GSF.

Project Manager, **Riverbend and Bigelow Schools**, Natick, MA: The development will preserve the original 1912 Ellen Bigelow School and the 1907 and 1937 portions of the Riverbend school. The historic school buildings will be sensitively adapted in accordance with the Department of Interiors and MA Historic Commission standards to provide 33 units of affordable family housing. Situated between both schools is a new social core articulated in a proposed new addition. This building will extend off a central lobby extending to a wing of 20 new apartments designed for aging in place.

Project Manager, **Rindge Commons**, Cambridge, MA: is a 2 Phase urban intervention to add 102 new affordable family housing units to an occupied 273 unit site. All new construction will be designed to meet passive house standards. Located within a flood zone, the new construction will explore resiliency strategies including locating all residential units and building electrical rooms on upper floors and the first floor located above the 2070 100 year flood elevation. Phase 1 mixed use building involves strategic programming amongst several stakeholders and will support a variety of community programming including Cambridge Pre-K and Just-A-Start's Youth Build and Education & Training.

Project Architect, **Wing School Residences**, Bourne, MA: The Commons at Wing is a proposed multi-phased development envisioned as a new senior living community. The initial phase of development will preserve the original 1927 portion of the Henry T Wing School and auditorium as the cornerstone of the new community—with services provided for both resident seniors and those in greater Sandwich. A new addition and subsequent new construction phases will provide a total of 126 units of affordable senior housing.

Assistant Project Manager, **Smith House**, Boston, MA: Renovation and modernization of 132 one-bedroom affordable apartments in a 12-story, 1970's era concrete high-rise for seniors. New Entry addition, Reprogrammed Amenity spaces and tiered unit renovations developed to meet growing needs of elderly population and current accessibility code while the building is occupied.

Assistant Project Manager, **The Coyle School**, Taunton, MA: Adaptive reuse of 1933 historic Gothic Revival-style School and redeveloped site will be transformed into 50 units of affordable family housing. The historic school will house 32 families within the classroom wings and historic gymnasium; with another 18 families residing in a lower addition stepping down behind the auditorium.

Assistant Project Manager (through CA Phase), **The Coady School Residences**, Bourne, MA: The Coady School main building will be sensitively renovated per National Park Service Guidelines for Historic Renovation, and expanded to provide a total of 58 units of new housing and support services for active senior residents. The new construction portion will be a 3 story, wood framed plus basement with masonry fiber cement siding which will add an additional 38,000SF.

Construction Administration, **The Residences at Canal Bluffs**, Bourne (MA): High efficiency Energy Star Rated wood-frame, four-story buildings housing 117 mixed-income units and community spaces.



THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION

One Ashburton Place, Suit 1017
Boston, MA 02108-1552

Charles D. Baker

Governor

Karyn E. Polito

Lieutenant Governor

Michael J. Heffernan

Secretary

Gary J. Lambert

Assistant Secretary for Operational Services Division

January 13, 2021

Ms. Janice Marinello

ICON Architecture, Inc.

101 Summer St

5th floor

Boston, MA 02110

Dear Ms. Marinello:

Congratulations! Your firm has been renewed as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of **ARCHITECTURE FOCUSED ON URBAN, MIXED-USE, TRANSIT-ORIENTED DEVELOPMENT; LEADING EDGE SUSTAINABLE & LEED CERTIFIED DESIGN; CAMPUS PLANNING AND DESIGN OF ACADEMIC FACILITIES**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification.** Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is December 24, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,

A handwritten signature in blue ink that reads "William M. McAvoy". The signature is fluid and cursive, with the first name "William" and last name "McAvoy" clearly legible.

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

BERGMEYER

Bergmeyer



Multifamily Housing Design + Architecture

BOS

51 Sleeper St.
6th Floor
Boston, MA 02210
617.542.1025

LA

800 South Figueroa St.
Suite 1080
Los Angeles, CA 90017
213.337.1090

We are a design collaborative;

Inspired through partnership,
thoughtfully creative, inherently
curious and driven to fulfill our
clients' needs.

Creative. Connected. Curious. We are a design collaborative; inspired through partnership, thoughtfully creative, inherently curious and driven to fulfill our clients' needs.

Our approach to design is empowering and ego-free, forming proactive partnerships with our clients and project teams to create a shared sense of ownership throughout the entire creative process.

We design for our clients' clients, the people whose lives and experiences are enhanced by our work. We challenge ourselves to focus first on understanding the end user - the customers, students, employees, visitors, residents - while delivering on our clients' vision and return on investment.

Services include Architecture, Interior Design, Program Management, Placemaking, Strategy, Sustainability Consulting, Branding, Graphic Design, Event Design + Activation, and Visual Merchandising.

Markets include: Multifamily Housing, Hospitality, Retail, Restaurant, Workplace, Commercial, Academic, Cultural, Healthcare, Pop-Up + Temporary Experiences.



Services

Services

Architecture | Interior Design |
Graphic Design | Branding | Strategy |
Placemaking | Visual Merchandising |
Sustainability Consulting | Event Design |
Program Management

Architecture

Our architectural approach is driven by a desire to support and enhance a user’s experience and activities. We design by responding to context, not just the physical environment of the project but the forces around the project, which starts with understanding our client’s needs and goals. The project’s process, from collaborative meetings with clients and consultants, to evaluation of scheduling and budget, informs the architectural design and results in real built work that achieves the appropriate balance between functionality and beauty. Our design methodology goes beyond form-making into a realm that creates emotional connections, inspires activity, and creates a sense of place..

Interior Design

Bergmeyer is well known for our extensive expertise in the design of interior environments. Effective interior design has the enormous potential to positively affect people in every type of space they inhabit, improving their productivity and impacting business performance. We see interior design as an extension of an organization’s brand identity and an opportunity to elevate the user experience. Interior spaces are physical and experiential embodiments of the organization’s values, beliefs, and qualities. Each brand we work with is unique, and each design we embark on is distinctive.

Branding

In our branding approach, methodical research of an organization’s values, culture, and aspirations form the basis to create a brand with unique qualities. The goals of our branding efforts often include creating competitive market differentiation through the creation of unique and distinctive identities and the formation of strong emotional connections with a target audience. We create suites of ownable brand assets, standards, and positioning strategies that effectively combine to bring a brand to life.

Graphic Design

We translate brand values into communications and spatial experiences. From brand communications to environmental graphic design, our graphic design approach is rooted in context and married with our complimentary design services from concept through final execution in a cohesive package with collateral that can guide and delight users. This takes shape in many forms, including logo and packaging, uniforms, building interiors, and wayfinding.

Program Management

Many of our Clients who oversee large programs require coordination of multiple concurrent schedule driven efforts. In managing programs, we bring together our multi-disciplinary expertise to provide the technical and administrative oversight that allows our clients to meet their business objectives. We aim to understand their position in the market, advocate on their behalf in alignment with their business goals for the future, and effectively collaborate with our clients’ business partners.

Sustainability Consulting

Bergmeyer’s holistic view of design means we take a different approach to our sustainability consulting services. We literally think outside the box of a client’s physical space and work with them to connect their organization’s internal sustainability mission to their own clients through a comprehensive, customized program. Our expertise in areas such as energy efficiency, optimizing the relationship between the built environment and occupant health, reducing greenhouse gas emissions, and water conservation provides our clients with a wide range of available strategies. And if pursuing a green building certification is the goal, we can help with that too.

Visual Merchandising

Bergmeyer believes that visual merchandising impacts every aspect of a customer experience. It connects a store’s layout and the planning of its customer flow to the product itself, creating a cohesively branded environment. Incorporating all of the senses, visual merchandising brings a brand’s story to life, driving sales and customer engagement.

Strategy

We research a client’s competitors in their industry, understand their position in the market, and uncover their business goals for the future. In order to design effective solutions, we must first understand an organization’s true intentions and vision. Preliminary research, auditing, analysis, and development are critical first steps in defining the basis of any project.

Placemaking

Placemaking is about identifying aspects of a community that makes it unique and then creating spaces that leverage these unique characteristics to enliven and enhance the public experience. Placemaking engages all stakeholder groups – building owners and tenants, residents, workers, and visitors, as well as pubic agencies – in the creative process. Bergmeyer’s senior staff have provided design assistance to cities and town across the US and internationally to help them envision sustainable growth. Our placemaking client have included commercial building owners, business communities, college and university campuses, and municipal governments.

Event Design

Creativity and brand building expertise translate seamlessly into event creation -Every event is an extension of a brand, creating a memorable experience to align with a specific campaign, marketing objective, or milestone. In our role as an event designer, we align the strategic goals of the event with the aesthetics, program, and each of the guest touchpoints. We bring together the resources that you will need to execute on your vision and partner with industry

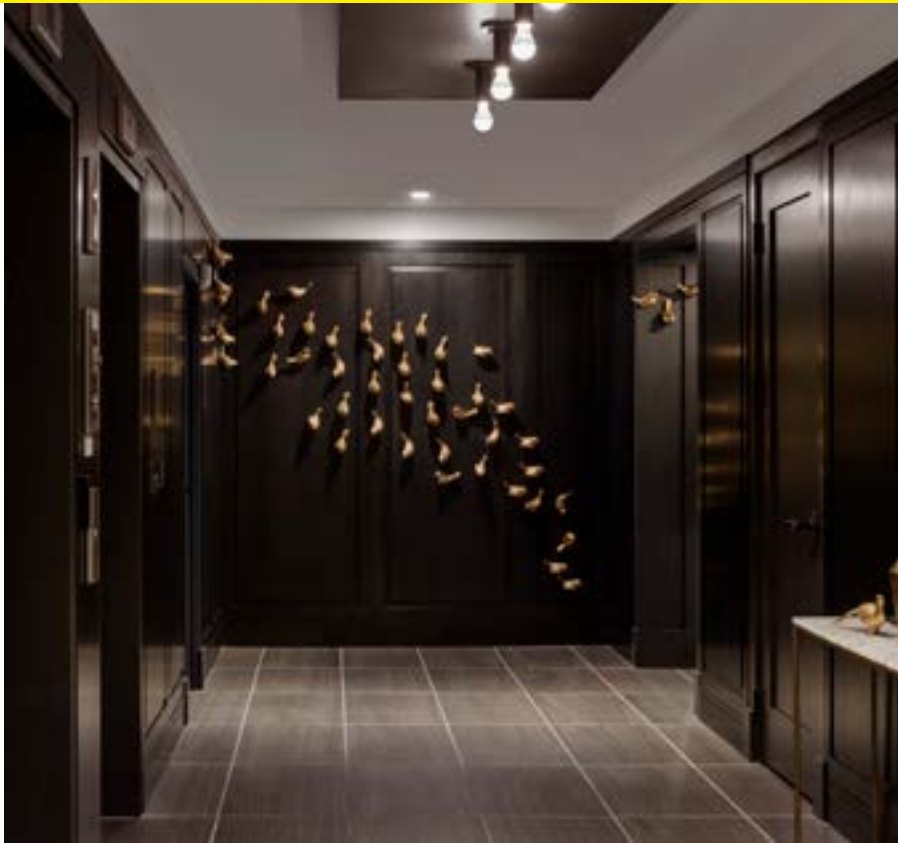
The Kendrick

Toll Brothers Apartment Living
Needham, MA

Toll's plan – to develop regionally-themed properties that focus on the unique comforts and essential characteristics of a specific community – required that they find a design partner that could give each project a distinct and meaningful identity. For that, they hired Bergmeyer.

The 390-unit building – known as The Kendrick – enhances familiar design elements inspired by New England tradition with a distinctly modern twist. The over 27,000 square feet of amenity space including a resident lounge, pub and game room, demonstration kitchen, media lounge, gym, fitness studio and dog spa has the feel of a boutique hotel.



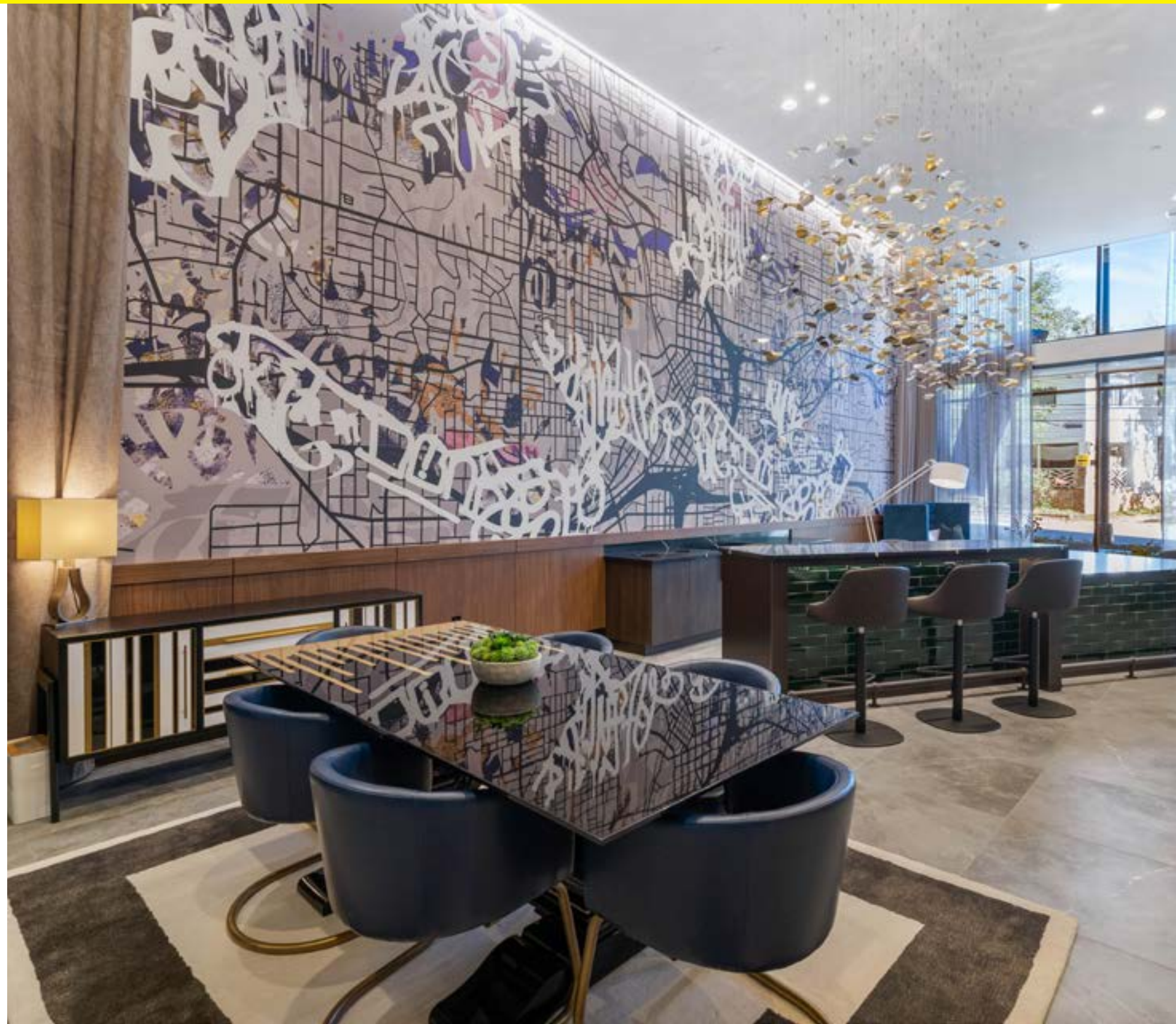


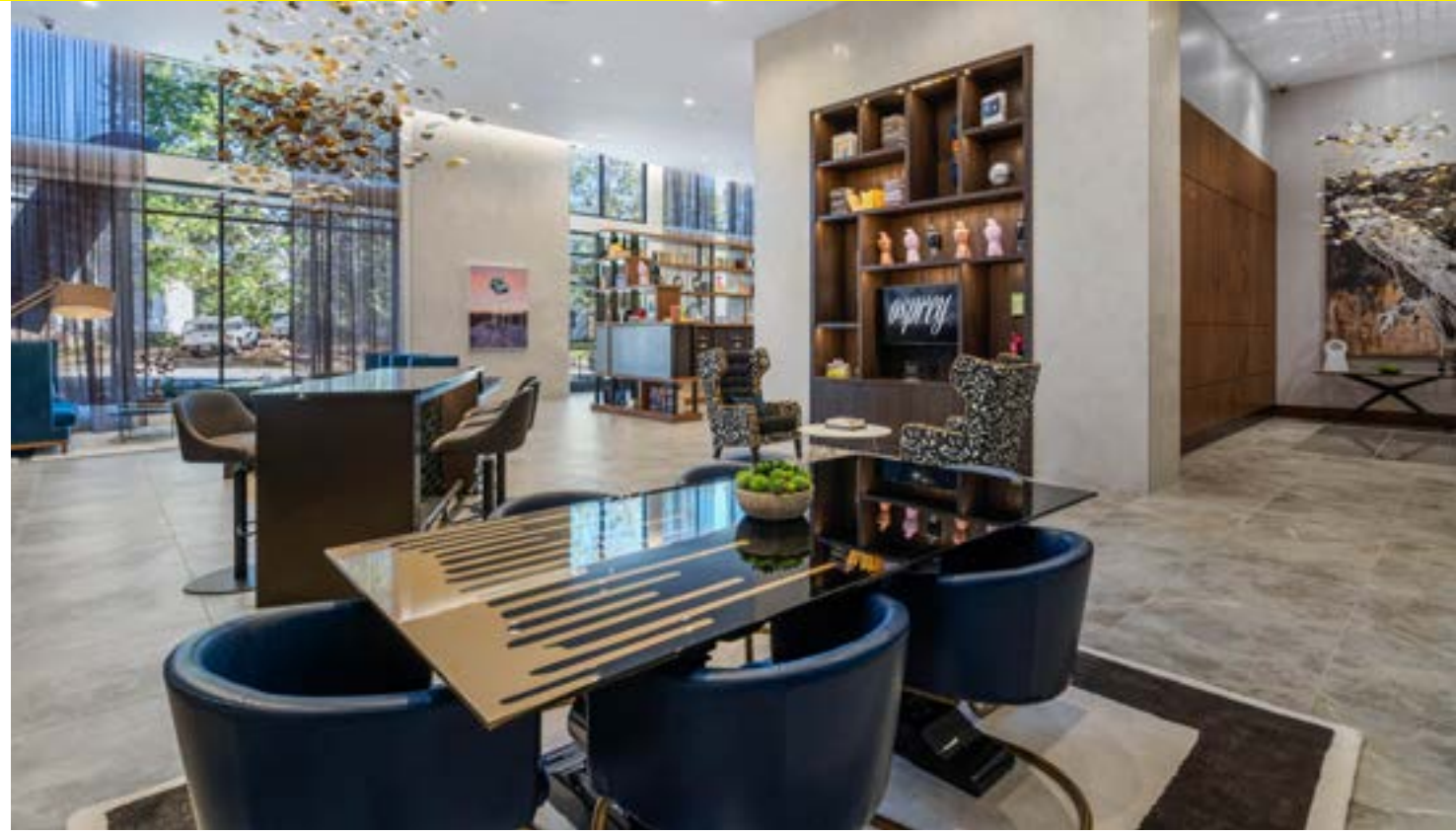
Osprey

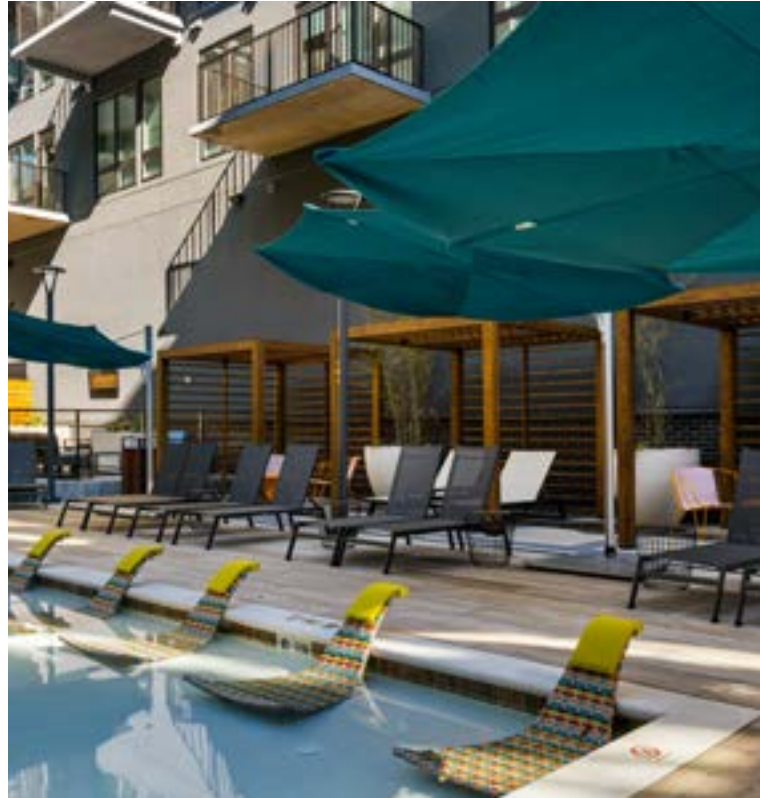
Toll Brothers Apartment Living Atlanta, GA

Building on our established design relationship with Toll, Bergmeyer was brought on board to deliver a unique and out-of-the-box experience for Osprey within Toll's trusted brand expectations. The scope included the interior design of amenity spaces, corridors, and design directions for finishes in the units. Our design team's concept for Osprey's identity and programming focused on art, culture, creative connections, and the neighborhood's hip urban surroundings.

Sophisticated yet down-to-earth, Osprey's design aligns with the expectations of its anticipated residents who seek a tailored environment that captures the activity and creative energy of the surrounding community. The 12-floor tower and two-liner buildings offer penthouse, studio, 1- and 2-bedroom housing units. The ground floor features a hospitality lounge, leasing center, and a mailroom that connects to the main lobby to encourage social interactions. The main wellness center hosts an indoor/outdoor fitness area, juice bar, access to the outdoor pool, and an on-demand cycling studio. Residents also have access to a pet spa and a gear garage with rentable items such as branded bikes and scooters. We partnered with the Toll Brothers team to develop the gear garage concept with convenient amenities unique to this community – and to this type of development – with a library of useful objects for residents to use. The Sky lounge on the 11th-floor has connecting workspaces and a bespoke lounge where Residents can enjoy a private dining experience, including a wine room and an outdoor balcony. These areas are connected by a coworking gallery that features a rotating art exhibition in partnership with a local community arts center.





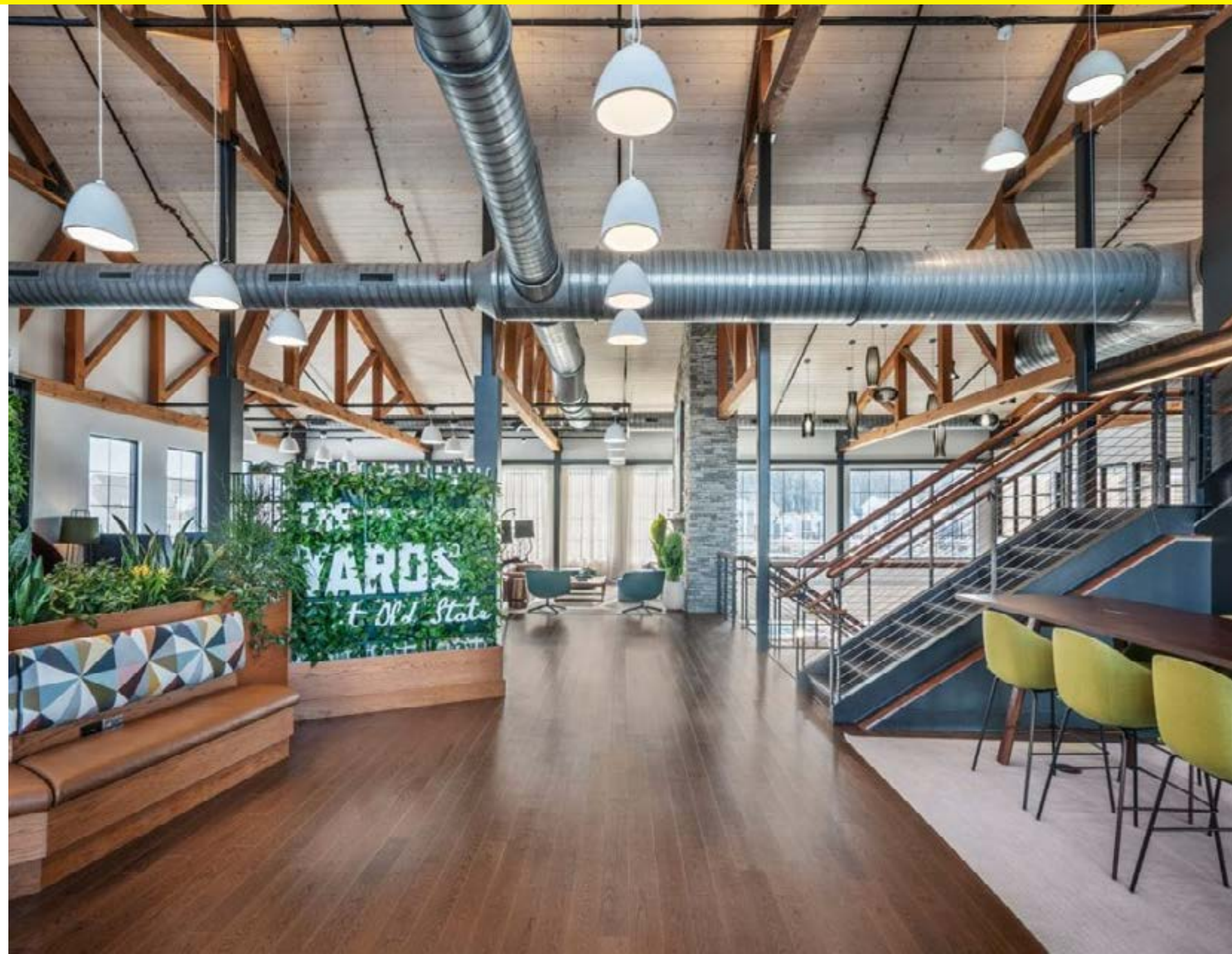


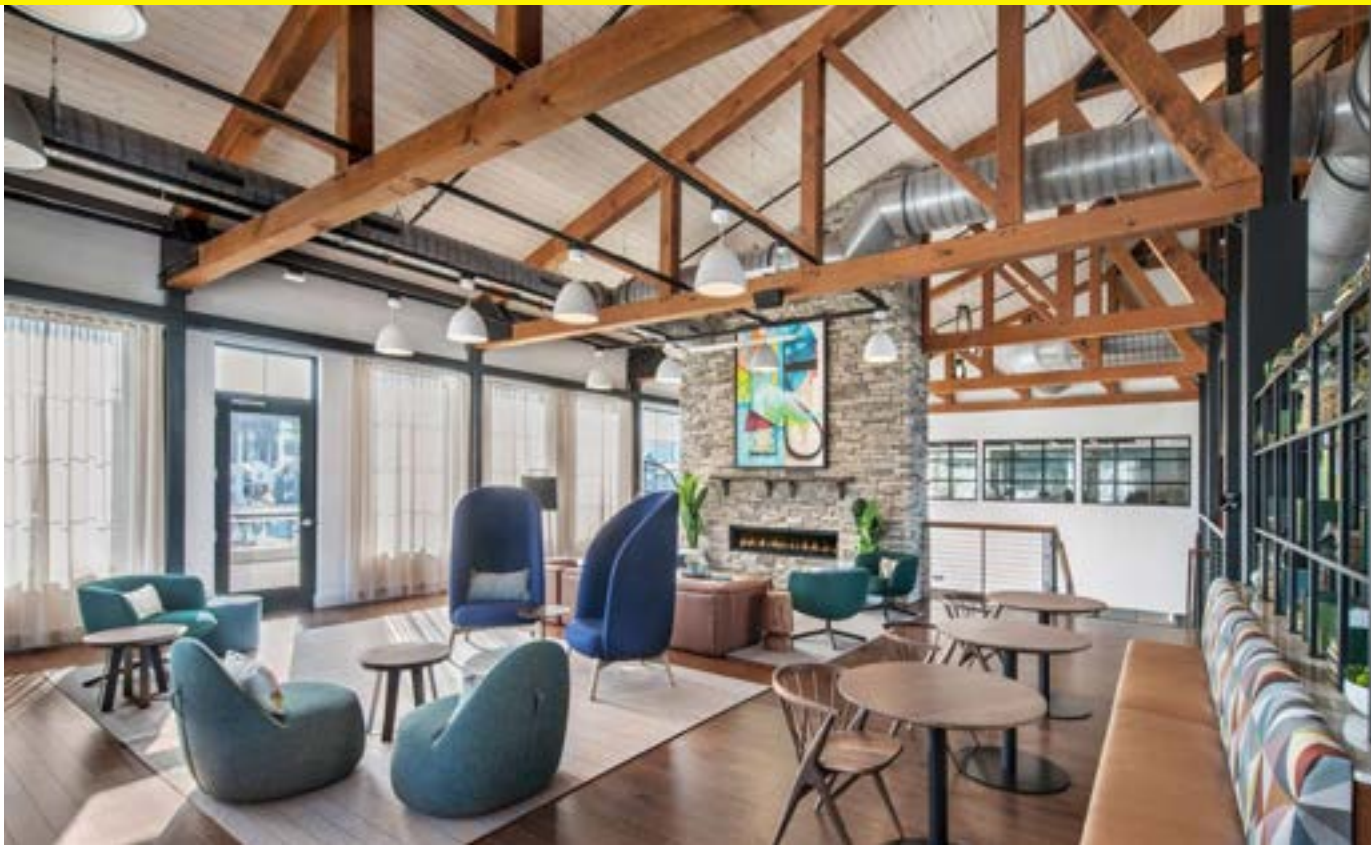
The Yards at Old State

Toll Brothers Campus Living
State College, PA

Having already worked with Toll Brothers over the past few years on other luxury multi-family housing communities, they asked us to partner with them to create an elevated student living experience. Together we set out to bring the energy of student life into branded environments and touchpoints that resonate.

Our approach to designing the student experience was all-encompassing and included brand strategy, brand identity, naming for the property and floor plan types, marketing, interior design and environmental graphic design for the clubhouse, and interior design for the yardhouses.





Cameo

Toll Brothers Apartment Living Orange, CA

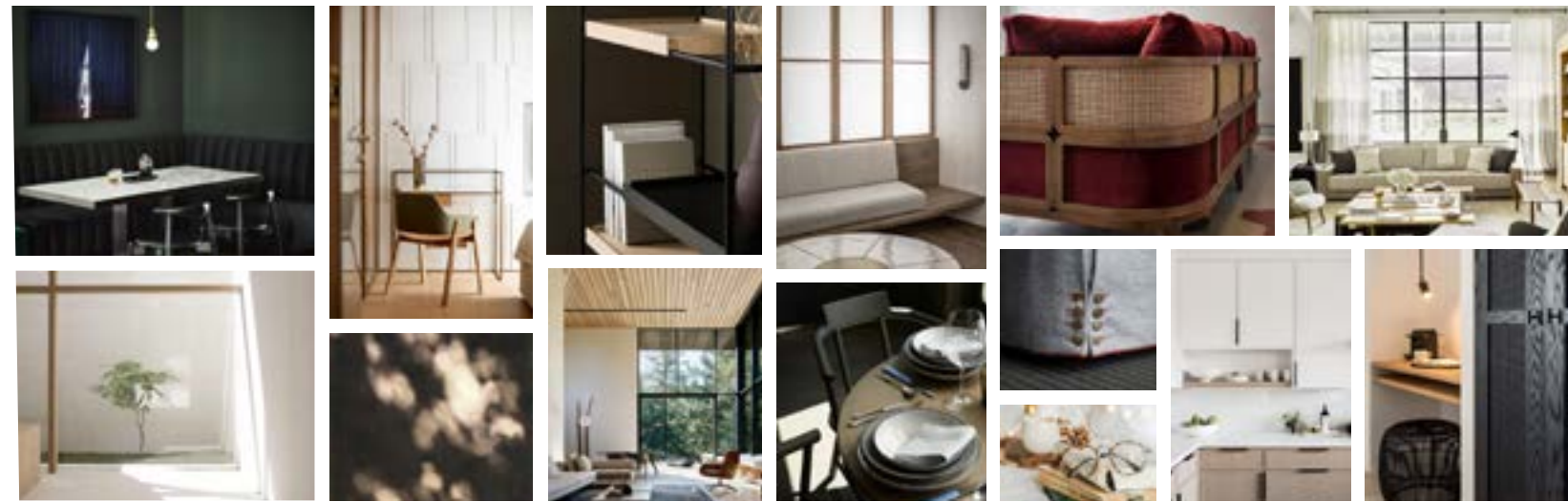
We partnered with our client, Toll Brothers Apartment Living, on their first development located in Southern California. Cameo is a modern escape exhibiting well-curated design, a rejuvenating color palette, community-building spaces and programming that support a resident's healthy and active lifestyle. A mix of natural materials, plush textures, and accents of bold colors and artwork create an atmosphere that is warm, inviting and invigorating while maintaining a sense of calm and respite. Cameo offers a fresh take on Southern Californian living and builds upon Toll's existing portfolio while standing out in unique ways that are appropriate to its surrounding neighborhood and specific residents' needs.





Multifamily In Progress

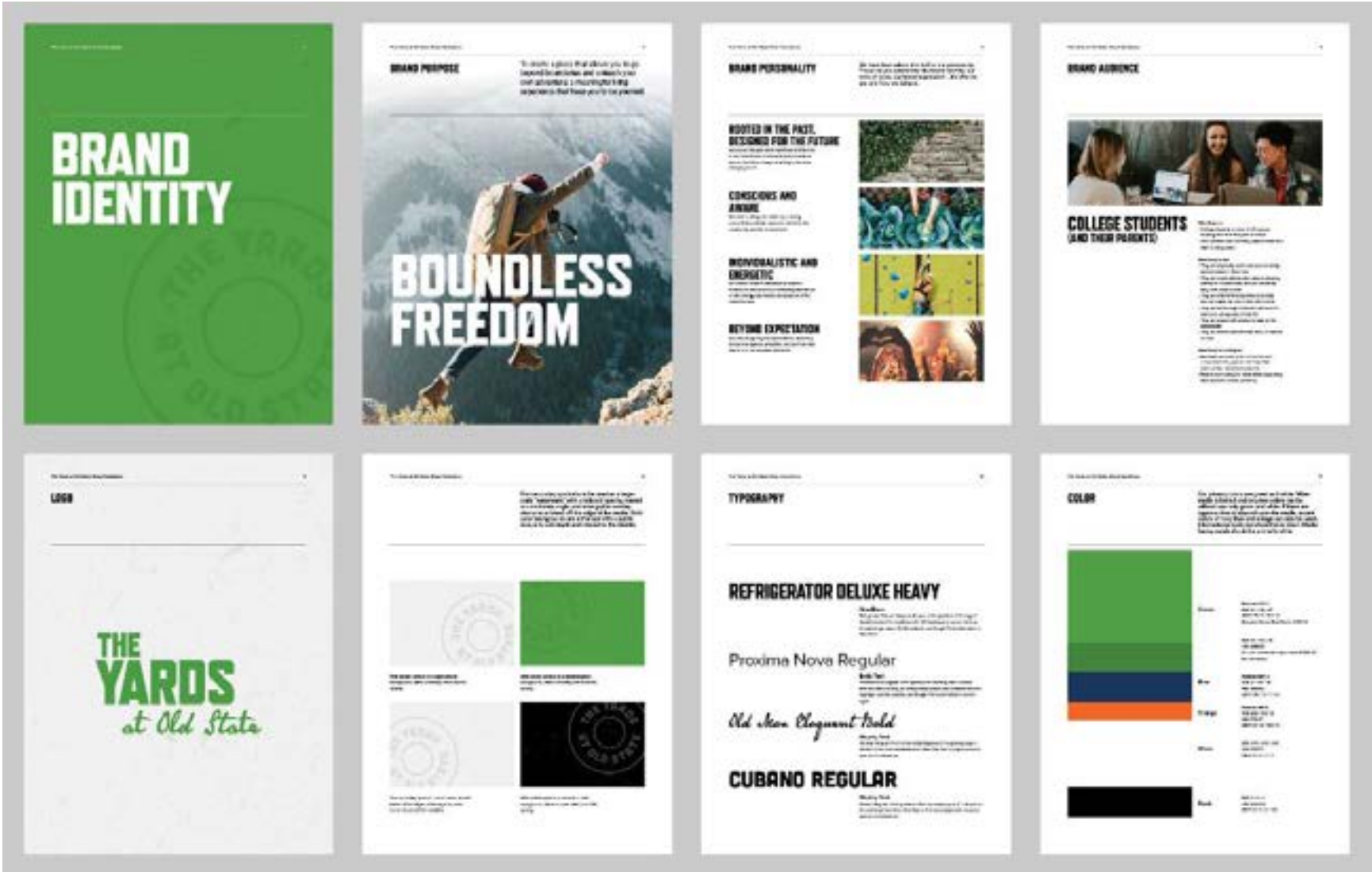
ATLANTA, GA
BELMONT, MA
BOSTON, MA
CAMBRIDGE, MA
DALLAS, TX
JERSEY CITY, NJ
NORWALK, CT



Branding & Identity

The Yards at Old State

Toll Brothers Campus Living
State College, PA







Benton

Toll Brothers Apartment Living
Fremont, CA

Offering a full experiential design service to clients, Graphic Designers and Interior Designers at Bergmeyer often work alongside each other from initial project kick-off to help develop brand & property identity as a cohesive team.

The collaboration & internal communication helps to drive and inspire the environment and brand forward together as a cohesive experience for end-users.

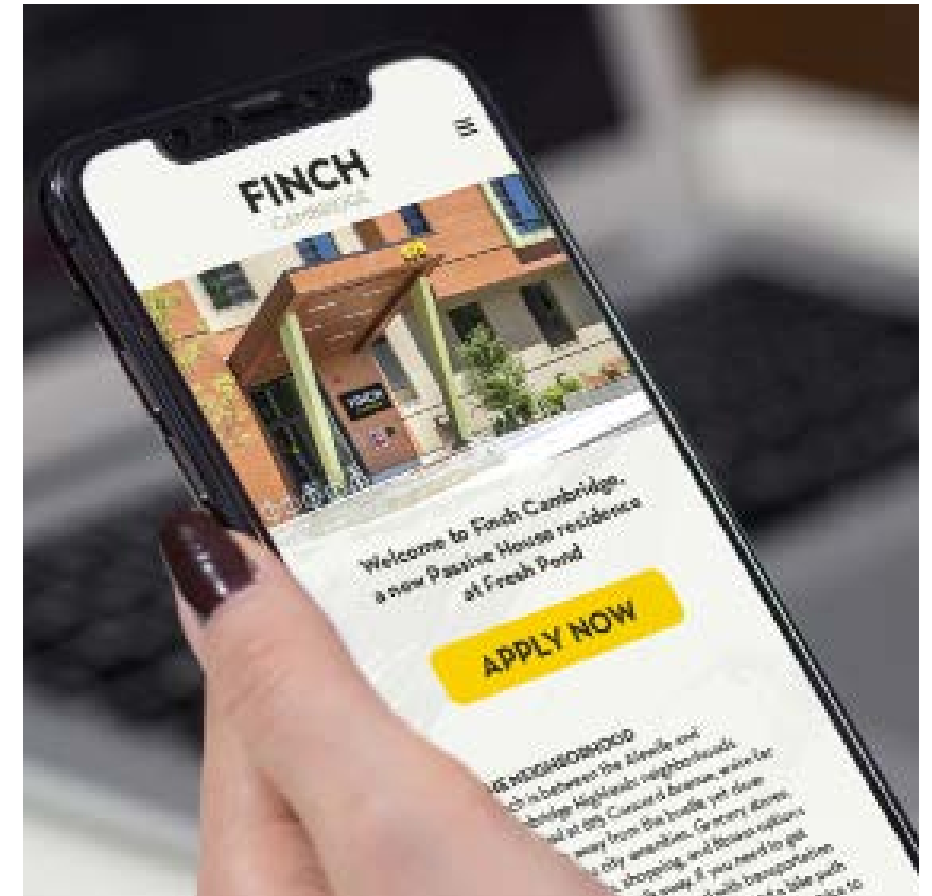


Finch Cambridge

HRI
Cambridge, MA

Finch Cambridge is a collection of residences situated at the edge of Fresh Pond. The name and brand identity is inspired by the wildlife sanctuary, with its natural tones, and accented with the yellow of the American Goldfinch. Services included naming, brand identity, marketing collateral, copywriting, environmental graphic design, and interior furnishings for the residential development.





We are thinkers and doers.

We are visionary and grounded.

We are design-focused and
results-oriented.

Project Team



Brian Perlow

AIA | LEED AP

Associate Principal, Treasurer

As a senior account manager, Brian guides the firm’s largest national retail design group through standards development, prototype design, and site-specific design solutions. By relying on more than a decade of experience in retail program leadership, Brian is driven to achieve the alignment of his clients’ design and sustainability goals. He balances this client dedication with considerate design strategies that promote healthy communities. His passion for sustainability and high performance buildings has resulted in approximately twenty five LEED Certified projects to date at the Platinum, Gold and Silver levels.

Professional Experience

Bergmeyer, Boston, MA

- 2011 - Present

Lickel Architecture, Kansas City, MO

- 2009-2011

Populous (formerly HOK Sport), Kansas City, MO

- 2007-2009

Starbucks Coffee Company, Seattle, WA

- 2006-2007

Dawson Wissmach Architects, Richmond Hill, GA

- 2005-2006

Education

San Francisco Institute of Architecture

- Master of Architecture

Boston Architectural College

- Bachelor of Architecture

Professional Affiliations

- American Institute of Architects
- United States Green Building Council
- Yestermorrow Design/Build Program
- Retail Design Institute
- Creative Council, Shop!

Select Project Experience

Boston Bruins + Boston Celtics

- Pro Shop at the Hub on Causeway

Boston Beer Company

- World Headquarters office renovation
- Downtown Boston Taproom
- Jamaica Plain Brewery Improvements
- Angry Orchard Cidery Improvements
- Dogfish Brewery Taproom

TD Bank

- Retail Banking Projects: Greater Boston and New York City (LEED Program)
- Retail Standards Projects

SONOS

- Berlin, GER Concept Store
- London, UK Concept Store
- Prototype Shop-in-Shop Design + Program Management

Fatface, UK

- Store Development Standards + Various New England Locations

Peet’s Coffee & Tea

- Prototype Design and Store Development Standards

Amway Center/Orlando Arena*

- New multi-use facility for the Orlando Magic NBA franchise (LEED NC Gold Certified)



Jason Cohen

LEED AP

Associate, Design Practice Leader

Jason brings a wealth of diverse experience and technical knowledge to Bergmeyer. He has worked on a wide range of project types including retail, commercial interiors and hospitality, but his specialty remains both academic and multi-family housing. He also has an expertise in historic preservation, having worked on three significant projects that won prestigious state and national preservation awards. Jason has worked at several firms in the Boston area since moving from Montreal in 1999, and has established himself as a strong mentor and technical resource. He is a member of the Zoning Board of Appeals in Watertown, where he uses his knowledge to give back to his community.

Professional Experience

- Bergmeyer, Boston, MA
 - 2016 – present
- Prellwitz Chilinski Associates, Cambridge, MA
 - 2007 – 2016
- Elkus Manfredi Architects, Boston, MA
 - 2004 – 2006
- Olson Lewis Dioli & Doktor, Manchester, MA
 - 2003 – 2004
- Einhorn Yaffee Prescott, Architecture & Engineering, Boston, MA
 - 2001 – 2003
- Finegold Alexander + Associates, Boston, MA
 - 2000 – 2001
- The Arcop Group, Montreal, QC
 - 1995-1998

Education

- McGill University School of Architecture
 - Bachelor of Architecture and Bachelor of Science

Professional Affiliations

- U.S. Green Building Council, Passed examination and received LEED accreditation (version 2.1), 2006
- Construction Specifications Institute, Passed examination and received Construction Documents Technologist Certification, 2003
- Order of Architects of Québec, Received professional architectural license, 2001

Select Project Experience

- UMass Boston, Boston, MA
 - Wheatley & McCormack Halls: 120,000 sf renovation project
- Endicott College, Beverly MA
 - Design services for 110,000 sf new academic center including classrooms, office, an auditorium and café
- Toll Brothers, Multiple Locations, U.S.
 - Interior Design Services for Amenity and Public spaces in new high-end multi-family residential projects, ranging from 10,000 to 25,000 s.f.
- Massachusetts Maritime Academy, Bourne, MA
 - Feasibility study for expansion of existing gymnasium and addition of a new Fieldhouse
 - Harrington Hall: Design and Construction Services for complete window system replacement
 - Study for addition of 2 floors of Cadet Rooms to Companies 3 & 5, including new elevators and amenities spaces
- 1975 Massachusetts Avenue, Cambridge, MA
 - The Rand at Porter: Conceptual design through construction documents services (including zoning analysis) for a 26,000 sq. ft. mixed-use project including ground-floor retail, 20 apartment units and a single-family house
- Ames Shovel Works, North Easton, MA
 - Conceptual design through construction administration services for an 8-acre, 113-unit, LEED Silver-certified residential historic rehabilitation of a former shovel factory, via the Article 40B process and utilizing historic and low-income housing tax credits.
- Station Lofts Apartments, Brockton, MA
 - Conceptual design through construction administration services for the conversion of a historic factory building in downtown Brockton into a 25-unit mixed income residential project, utilizing historic and low-income housing tax credits.
- Wilber School Apartments, Sharon, MA
 - Conceptual design through construction administration services for the rehabilitation of an abandoned high school in the center of Sharon into a LEED Gold-certified 75-unit multi-family housing project including a 4-story addition adjacent to the historic building.
- L.L. Bean Outlet Store, North Conway, NH
 - Schematic design through construction



Amy Margolis

NCIDQ | NEWH

Design Practice Leader

Amy has focused her practice on spaces where people dwell, or visit. Her portfolio ranges from hotels, to restaurants and private clubs, to multi-unit residential and high-end private residential projects throughout the United States. As a designer, her experience in varying project size and type, has given her the skills to effectively work with teams to define design strategy, implement creative solutions, and execute down to the last detail. In addition to design, Amy brings a depth of experience in design, specification and procurement.

Professional Experience

Bergmeyer, Boston, MA

- 2018 – Present

Amy Margolis Design, Boston, MA

- 2015 – 2018

University of Michigan - Knight Wallace Fellowship Partner, Ann Arbor, MI

- 2014 – 2015

Group One Partners, Boston, MA

- 2011 – 2014

Duffy Design Group, Boston, MA

- 2007 – 2011

Brayton Hughes Design Studios, San Francisco, CA

- 2004 – 2006

The Wiseman Group Interior Design, San Francisco, CA

- 2002 – 2004

Backen Gillam Architects, Sausalito, CA

- 2001 – 2002

Lowe, Lintas and Partners Advertising, San Francisco, CA

- 1998 – 2001

Foote, Cone and Belding Advertising

- 1995 –1998

Education

California College of the Arts, San Francisco, CA

- Bachelor of Fine Arts, Interior Architecture

University of California at Davis, CA

- Bachelor of Arts, International Relations
- Minor in Spanish

Cornell University, Ithaca, NY

- Hotel Planning & Design Certificate

Professional Affiliations

- The Hospitality Industry Network (NEWH)
- The National Council for Interior Design Qualification (NCIDQ)
- Boutique & Lifestyle Leaders Association (BLLA)

Select Project Experience

Toll Brothers - Philadelphia, PA and Atlanta , GA

- Interior Design Services for Amenity and Public spaces in new high-end multi-family residential projects, ranging from 10,000 to 25,000 s.f.

The Finch - Cambridge, MA

- Brand development and positioning, Furniture design public spaces.

Envoy Hotel (Autograph), Boston, MA

- Property brand development, public space and guest room design

Vela on the Park, Stamford CT

- Multi-unit residential-design and implementation of amenities spaces, FF&E and model unit, oversee procurement

Boston East, Boston, MA

- Multi-unit residential—Design and project management of amenities Spaces, FF&E and model unit

Charlesmark Hotel, Boston, MA

- Lobby FF&E Refresh—Design and specifications

Ora Trattorizza, Boston MA

- Restaurant—Design of renovated restaurant space, finishes and FF&E

Hall Winery, St. Helena, CA

- Members Patio—Furniture design and selection

Onyx Hotel (Kimpton), Boston, MA

- Guestroom, model unit prototype and corridor renovation—Design and specifications

Marriott Hotels Columbia, SC and Houston, TX

- Renovation of lobby, restaurant, bar, and meeting spaces—Design and FF&E selection

Yellowstone Club, Big Sky, MT

- American Spirit Cabins—Design and selection of turnkey FF&E lighting and furniture package for private cabins

Archstone Avenir, Boston, MA

- Multi-unit residential—Design of amenities spaces, FF&E and model Unit

45 Province, Boston, MA

- Multi-unit residential—Amenities Spaces FF&E design and implementation model unit, oversee procurement

KLOPPER MARTIN DESIGN GROUP

FIRM OVERVIEW

The **Klopfert Martin Design Group** is a MA-SDO Certified WBE landscape architecture firm providing developers, non-profit organizations, municipalities, colleges and institutions, and architects with high quality site design and collaboration since 2006. We work across scales, from the parcel to campuses to the urban design of city districts. The firm was founded by Mark Klopfer, who is both a licensed landscape architect and architect. In 2007 Kaki Martin joined the firm as a principal, bringing her extensive public landscape and public process experience to the group. Our work reflects this interest in landscape and architecture, building and site. Our approach balances the aspirations of our clients with a respect for the needs of site, community, and sustainability.

For over twenty years, Mark Klopfer and Kaki Martin have led complex teams that set new design vision for public and campus landscapes. At KMDG, Mark and Kaki combine their design, programming, and technical skills to create a team that is rich in aesthetic vision, experienced at project delivery, and stimulated by creative clients who face real-world, bottom-line constraints. In addition to their design leadership, Mark and Kaki each teach. Mark is a tenured professor at Wentworth Institute of Technology in the Department of Architecture where he leads curriculum focused on the interface of architecture and landscape or site. Kaki has taught in the Landscape Architecture Department of RISD for several years in various capacities from design studios to thesis advising.

Multi-family and mixed-use projects pose unique opportunities. These center on the need to create common gathering space in support of the project community as well as the public at large. Such projects draw from our experience in the public realm with creating places in streetscapes and small urban spaces, to the creation of common landscape areas that serve a development or campus. In creating semi-public landscapes that serve a particular community, which sometimes are separated from the public realm for security reasons, we propose means for shared views to occur whether it be from the community outward, or from the public realm inward. Physical connectivity to the public realm for residents is also a critically important part of our approach whether it be connecting to public transit, local commercial district or pedestrian network, the livability of the housing will be highly dependent on successful connections to the greater context. Klopfert Martin's work with these project types span the globe including the Middle East and China, and work closer to home in Cambridge, Quincy and East Boston.

Lastly, our firm has a commitment to strive for works of beauty in landscape. For us, aesthetics lie in formal beauty and a belief that a designed landscape can reveal and inform the site's history or larger contextual (ecologic, urban, hydrologic) connections.



Gove + Frankfort, East Boston, MA

ASHLAR PARK

Site Plan



Main Program Areas

The Passage (30000sf)

PROGRAM	CAPACITY
Pavilion	est. 10
Lower Terraces	est. 12
Games	8
Pet Terrace	est. 2
Cafe Seating	12
Work Space	12

The Common (14000sf)

Open space that can be used for a variety of activities such as; Frisbee, flying kites, picnics, concerts, small gatherings, etc.

Small Gathering Deck
Additional Grill Space

The Veranda (12600sf)

PROGRAM	CAPACITY
Grill Deck	est. 12
Outdoor Yoga	est. 22
Pool Deck (chairs)	66
Terrace	est. 24

The Foyer (7200sf)

PROGRAM	CAPACITY
Bocce Ball Court	4
Grill & Picnic	est. 6
Trellis Swings	4
Outdoor Living Room	est. 40
Ceremonial Steps	est. 20
Food Truck Space	

The Passage (30000sf)



The Common



Client
FoxRock Properties

Location
Quincy, Massachusetts

Architect
Arrowstreet

Landscape Architect
KMDG

Status
In Design Development

For four years the Quincy Medical Center and its 10-acre site have been largely vacant, except for an operational Emergency Department slated to close in 2020. Undermaintained for decades the site sheds stormwater onto its neighbors, and the vacant hospital buildings and on-site power plant pose problems for the immediate neighbors and city as a whole.

In 2018 FoxRock Properties purchased the site and proposes to build 400 homes in six buildings with the hospital's former Administration Building reimagined as its core architectural feature. Working with the project architects, kmdg has developed the landscape both as an important exterior environment for those living there, as well as new landscape spaces for the neighborhood, effective screening of the new development to the abutting homes, and preservation of nearly 40% of the site as a defacto conservation space for the city. To achieve the robust open space goals of the project, a majority of the parking is located under the cluster of buildings at the center of the site and central green defined by those buildings, freeing up as much space as possible to be enjoyed as landscape.

The project underwent an extensive public approvals process, and the integrated process of the design team between architecture, civil engineering and landscape, has been a key element of its success in furthering the project.

FINCH CAMBRIDGE AFFORDABLE HOUSING



Location
Cambridge, Massachusetts

Client
Homeowner's Rehab, Inc.

Architect
ICON Architecture

Landscape Architect
KMDG

Status
Completed 2019

KMDG is working with ICON architecture on the largest new affordable housing project in Cambridge in the last 40 years – featuring 98 new units built to Enterprise Green Communities certification. The one-acre site is across the street from Fresh Pond Reservation and a short distance to Alewife T Station on the Concord Avenue raised cycle track. The landscape capitalizes on its tight 25' building setback, utilizing seat walls with inset wood bench tops that serve multiple purposes. They help create a clear edge between public/private serving both residents and those at the MBTA 74 and 78 bus stop, while also defining a flush deck that becomes the project's 'front porch.' The back of the site features a custom landscaped play space for children.

For Enterprise Green Communities certification, the project utilizes native and low water requirement plants, porous paving and infiltration areas to retain stormwater on-site and strategically reduced the need for irrigated landscape.

FISHER HILL RESERVOIR PARK



Client

Town of Brookline
Parks & Open Space Division

Location

Brookline, Massachusetts

Status

Completed 2016

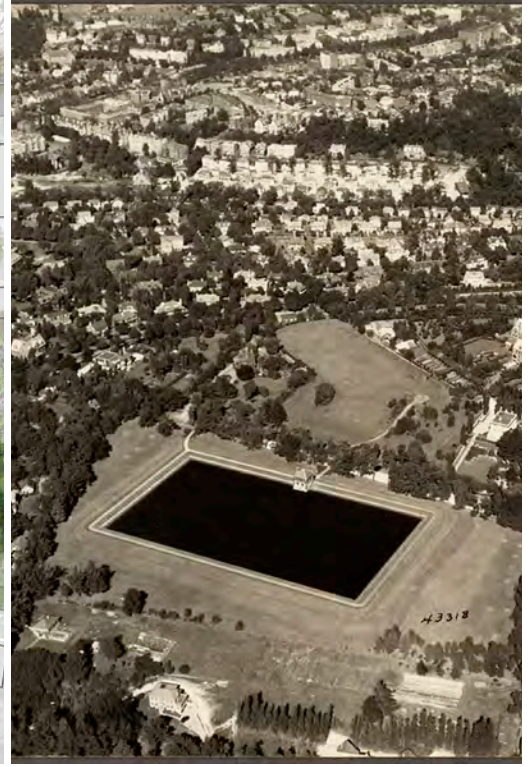
Awards

2018 BSLA Merit Award in Design
2017 BSA Honor Award Design Excellence
2017 American Architecture Prize
2017 Massachusetts Historical Commission
Preservation Award
2016 Architect Newspaper, Best of Design,
Adaptive Reuse
2016 Merit Award, Adaptive reuse AIA NE
2016 Award for Architectural Excellence APA
2016 Architect Newspaper, Design Award:
Adaptive Reuse

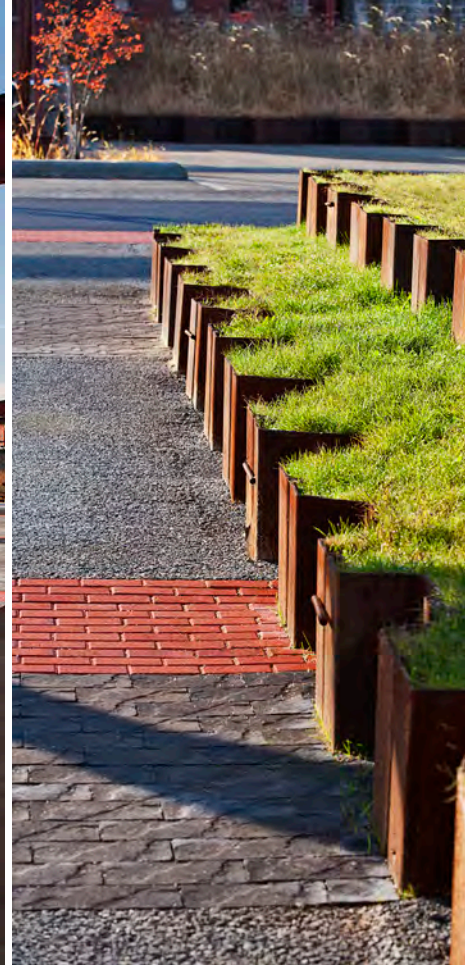
Built by the Massachusetts Water Resources Authority in 1893 the reservoir and its gatehouse (on the National Register of Historic Places) served as part of the water system of Brookline until 1954 when use of the facility was discontinued. In subsequent years a wetland formed in the basin of the former reservoir and the surrounding land grew into a woodland. The site was acquired by the town in 2011 for use as a park for active and passive recreation.

KMDG proposed a radical alternative to the town's conceptual master plan and promoted keeping the earth embankments as an important historic reference to the previous use and that created unique possibilities for the park as well. Through an extensive series of public meetings, the park design emerged as an open athletic field in the basin with spectator seating on the sloped landform. A series of terraces and ramps retain the historic relationship of the reservoir to Fisher Avenue and allow greater access to the site. The restored historic gatehouse is grounded by a granite promenade with an interactive playful water feature. Additional destinations throughout the park include an overlook platform, embankment slide, an artist-designed sculptural wooden climber, and a boardwalk through a wet meadow. On the outer edges of the reservoir, a diverse, layered planting creates a woodland environment for strolling and screens views into the park from the adjacent residential neighborhood.

FISHER HILL RESERVOIR PARK



THE STEEL YARD



Client

The Steel Yard

www.thesteelyard.org

Location

Providence, Rhode Island

Status

Complete

Awards

2013 Rudy Bruner Silver Medal for Urban Excellence

2012 Sen. Chaffee Award for Conservation

2011 Honor Award ASLA

2011 Honor Award BSLA

2011 Rhody Award, Preserve RI & RI Hist. Comm.

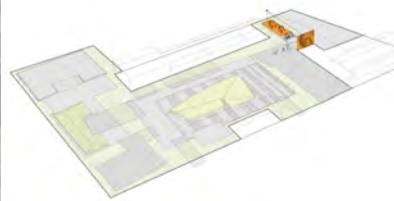
2011 Great Places Design Award, EDRA

2010 Providence Preservation Society Award

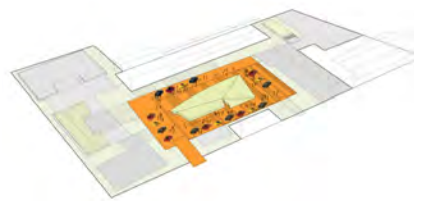
In 2001 a forward-looking group of individuals banded together to purchase Providence Steel, a disused steel fabrication facility near the center of Providence. Their goal was to develop a non-profit organization housing artist studios, facilitating instruction in metal, ceramic, and glass arts, and creating a campus for an arts community that offered different venues for showing and making art. With assistance in the form of EPA grants for brownfield remediation, construction was completed in 2010.

Competing interests of large paved surfaces for outdoor work space, events, and vehicular movement, balanced with the sustainable interests of reducing impervious pavement, are driving forces of the landscape design. The resulting design is centered on a paved plane, 'the carpet,' which is woven with heavy- and light-duty pavements, impermeable and pervious materials. The margins beyond the pavement act as 'storm-water moats' infiltrating stormwater runoff, and providing habitat for volunteer vegetation. Building the carpet over existing grade reduced excavate and allowed all contaminated soil to remain on-site in landforms. Various program activities occur around the flexible campus core throughout the year.

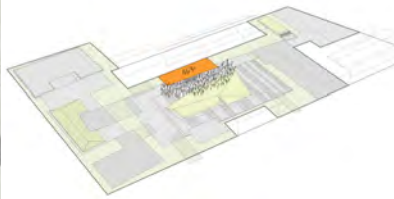
THE STEEL YARD



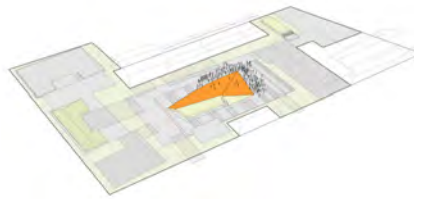
MOVIE NIGHTS



CRUISE NIGHT



IRON CHEF CONTEST



HALLOWEEN IRON POUR



Iron Chef viewing



Halloween Iron Pour



Cruise Night

THE CHARLES RIVER SPEEDWAY



Client
Architectural Heritage Foundation

Location
Boston, Massachusetts

Architect
Bruner Cott

Engineers
Nitsch

Landscape Architect
KMDG

Status
In Construction

The Charles River Speedway Complex is in the Brighton neighborhood of Boston, Massachusetts. Dating from the 1890's, the site was offered for development through the DCR's Historic Curatorship Program. The development team's proposal involves a full rehabilitation of the buildings and landscape. Critical to the use of the site is the central courtyard which will support the tenant businesses including one of the anchor tenants Notch Brewing, a local craft brewer. The courtyard helps expand function space while also being accessible to the public as a neighborhood open space.

In partnership with Bruner Cott, KMDG was brought on as one of the lead consultants from the start of the project to support programming and conceptual design of the Speedway. We are in the beginning phases of construction administration services for the exterior spaces as construction looks to be completed in Spring 2021.

EBLANA BREWERY CONDOMINIUMS



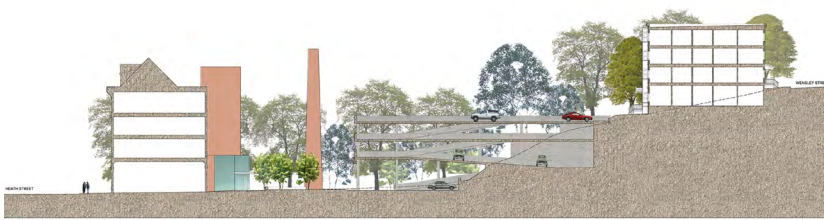
SECTION H - WENSLEY STREET



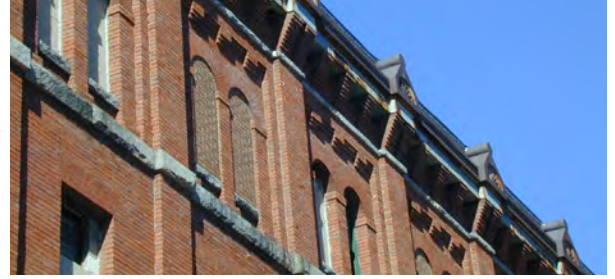
SECTION G - HEATH STREET



SECTION I



SECTION A



Client

The Mayo Group

Location

Boston, Massachusetts

Architect

Bergmeyer Associates, Inc.

Status

Construction Documents Complete

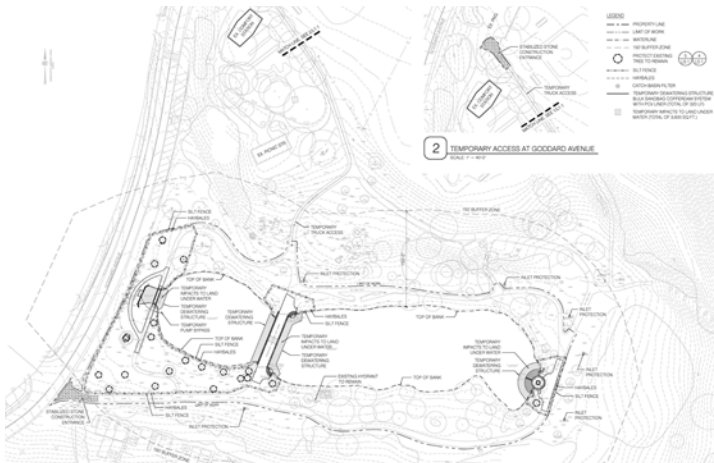
On Hold

The Eblana Brewery Building (1890) has seen a number of previous uses, most recently as home to an automotive parts manufacturer. After sitting vacant for nearly five years the Mayo Group purchased the property to create 88 condominiums in the two existing brewery buildings and in three, newly constructed, wood frame buildings on the rear of the site. The 2.2 acre parcel with access to two streets, slopes 60 feet across the site.

The goal of the design is to optimize landscape areas on the small site while also realizing a parking requirement of 100 spaces. To minimize the parking impact, it is housed in a four-level structure that connects the site's higher and lower elevations. By locating it in the center of the site, the structure is not seen from the condominiums and is less visible from Heath Street and the abutting houses. The landscape spaces establish pedestrian connections from the public streets to the individual buildings through front gardens and a courtyard that screens views between the buildings. Increasing the amount of greenspace along Heath Street dramatically improves the streetscape and connection to the neighborhood.

With a building area more than 100,000 square feet, this project is subject to Boston Redevelopment Authority's Article 80 Large Project Review Process and will include sustainable design features and a central "Beer Garden" exterior space.

LARZ ANDERSON PARK



Client

Town of Brookline, Parks Division,
Department of Public Works

Location

Brookline, Massachusetts

Civil & Traffic Engineers

Environmental Partners

Civil Engineers (Lagoon Structures)
Aqueous

Structural
Structures North

Status

Schematic Design for circulation
improvements and renovation of
historic architectural park structures

Occupying an entire drumlin in Brookline, the estate of Larz and Isabel Anderson featured an opulent mansion, elegant gardens (designed by Charles Platt), and sweeping pastoral views to rival any other residence of the period. The property was bequeathed to the Town of Brookline in 1948 and shortly after the mansion, which had fallen into disrepair, was demolished. A much loved skating rink was built within the walls that enclosed the formal garden, and the estate's greenhouses and outbuildings were converted to Town carpentry shops and maintenance yards. The Town stabilized key structures and horticultural features in the late 1980s, and in 2015 KMDG was selected to lead the Master Planning for the next era of park investments.

KMDG work-to-date includes developing a master plan and phased implementation to rejuvenate the historic fabric of the estate while still serving the contemporary park needs of the Town on one of their most important and largest landscapes. Completed first phases included identifying and improving key circulation, accessibility, drainage and lighting, as well as ecological restoration priorities in the park. Current phases underway include accessibility improvements to the main roadways and architectural improvements to replace the historic structures around the lagoon with new reconstructions that were extensively surveyed, scanned and researched. Subsequent phases will focus on possible relocation of the skating rink, reconstitution of the garden, and a better re-use of the outbuildings.

BREWSTER ACADEMY ROGERS CENTER



Client
Brewster Academy

Location
Wolfeboro, New Hampshire

Architect
DSK Architects

Status
In construction

KMDG is working with DSK Architects to develop a landscape masterplan for Brewster Academy, which includes advancing initial ideas of a new central quad, a renewed academic quad, and a renewed residential quad for students and faculty. The landscape master plan includes guidelines for landscape character, planting, paving, lighting, and furnishings. In addition to the masterplan, KMDG is working with DSK Architects on the first phase of construction: the renovation of Rogers Center, a 1954 gymnasium. The new Rogers Center will be a student center, complete with meeting rooms, recreation areas, a theater, a dance studio, art studios, a robotics lab, and social space for learning and gathering. KMDG worked within the renovation scope to develop clear connections from the adjacent buildings, offer hierarchy and clarity to the existing and proposed doors, and provide ADA accessible entry to the building. The renovation includes a new front porch and plaza that provide a formal entry to the building and intuitive connection to the academic quad and wider campus. The back terrace capitalizes on significant views to the athletic fields and lake and offers an outdoor social gathering space for students to study, meet, grab a quick bite, and enjoy student life.



Client
Berkeley Investments

Location
Boston, Massachusetts

Architect
CBT

Landscape Architect
KMDG

Status
In Design Development

The maker space and innovation district at 176 Lincoln is an institution-owned, developer-led rehabilitation project of a 1920s-era steel fabrication building, that in the 1990s was repurposed into a large floor plate, high floor-to-floor, raw lab space that never saw a tenant fit-out. The project is currently under review with the BPDA through Boston's Article 80 permitting process.

Our project re-envision the building's third life as a mixed-use 'maker space' with adjacent residences and offices to serve entrepreneurial, tech, start-ups. It introduces new 'shell and core' elements within the existing column and slab infrastructure, but the exterior, publicly-oriented spaces are the key components to this redevelopment. Some spaces are envisioned as extensions of the maker spaces in which prototypes and larger elements can be assembled, tested or weathered outside, while other spaces draw from this 'maker aesthetic' to become animated social spaces for gathering, events, retail functions such as cafes, or as semi-private landscapes for residential dwellings in the complex.



Client
Beacon Capital Partners

Location
Boston, MA

Architect
Handel Architects
STUDIO ENÉE

Landscape Architect
KMDG

Transportation Engineers
VHB

Civil Engineers
Nitsch

Status
In design development

Imagery
Shimahara Illustration

KMDG has teamed with Handel Architects on a new mixed use Life-Science center in Boston's Seaport located at the seam between the emerging residential and mixed-use South Boston Waterfront area and the industrial Raymond L. Flynn Marine Park (RLFMP). The site design of the 4-acre parcel looks to draw from the area's light-industrial and seaport history in establishing a new vision for landscape open space in the seaport. Site challenges include its location over the top of the Ted Williams Tunnel which precludes building construction over 2 floors, leading to the development of this portion of the site entirely as a landscape. Additionally the provision for 2050 resiliency that requires building ground floors be located four feet above grade poses challenges for the streetscape and the landscape around the building. As the gateway linking the Seaport and RLFMP, landscape design is at the forefront of obtaining Article 80 permitting approval from a multi-agency jurisdiction including Boston Planning & Design Authority, Massachusetts Port Authority, and Massachusetts Department of Transportation.



MARK KLOPFER, ASLA, AIA, LEED AP

Principal

PROFILE

Mark Klopfer is a LEED accredited, registered landscape architect and architect with over twenty-five years of practice experience. His experience is based in public building, housing, and campus site design, public park, and on-structure landscapes. Mr. Klopfer is a Professor of Architecture at Wentworth Institute of Technology, and has been a member of the landscape and architecture design faculties at Harvard Design School, Cornell University, and the Rhode Island School of Design. He was the 2000-2001 Prince Charitable Trusts Rome Prize winner at the American Academy in Rome.

His interests lie at the interface of architecture and landscape, at the human scale of rooms and gardens to the urban scale of neighborhoods and cities. Allowing people to interpret and understand a contemporary landscape with its cultural and historic legacy is a primary intention in Mark's work.

EDUCATION

Master of Landscape Architecture, 1994 - University of Virginia; Charlottesville, Virginia

Bachelor of Architecture, 1988 - Cornell University; Ithaca, New York

LICENSURE AND CERTIFICATION

Registered Landscape Architect - Massachusetts #1164, Connecticut #1075, Rhode Island, #437, New York #002141

Registered Architect - Massachusetts #31411, Virginia #0401 008798, NCARB #65854

Council of Landscape Arch. Registration Boards (CLARB) Certification #6361; LEED Accredited Professional

FELLOW

American Academy in Rome, FAAR 2001

RECENT CAREER SUMMARY

Klopfer Martin Design Group, Cambridge, MA

Co-founding Principal

2006 - Present

Wentworth Institute of Technology, Boston, MA

Professor of Architecture

2006 - Present

Jacques Whitford, Woburn, MA

Principal Landscape Architect, Practice Leader

2004 - 2006

Harvard University, Cambridge, MA

Studio Critic, Lecturer; Department of Landscape Architecture

1996 - 2005

Landworks Studio, Salem, MA, Principal

2001 - 2004

Hargreaves Associates, Cambridge, MA

1996 - 2000

RELEVANT EXPERIENCE – SELECTED WORKS

Housing & Mixed-Use

Finch Housing; Cambridge, MA

Ashlar Park Housing; Quincy, MA

Corcoran Park Housing; Cambridge, MA

Cohasset Development; Cohasset, MA

176 Lincoln; Boston, MA

2 Harbor; Boston, MA

Gove & Frankfort; Boston, MA



MARK KLOPFER, ASLA, AIA, LEED AP

Principal

Bromley Heath Housing site improvements; Boston, MA
Court Square Press; Boston, MA
Park 5 Mixed-Use Development; Beijing, China (w GBBN Architects)

Public Park + Urban Design

Fisher Hill Reservoir Park; Brookline, MA
Larz Anderson Park; Brookline, MA
Central Square; East Boston, MA
Kendall Square, Main Street; Cambridge, MA
Boston Downtown Crossing Business Improvement District, Design Guidelines; Boston, MA
Boston Crossroads Initiative, Causeway Street; Boston, MA
South Elm Street Redevelopment Plan; Greensboro, NC
Boston City Hall Plaza; Boston, MA; Hargreaves Associates
Vision Plan for Pittsburgh Waterfronts; Pittsburgh, PA; Hargreaves Associates
Condor Street Urban Wild; East Boston, MA; Hargreaves Associates

Institutional Landscapes + Master Planning

Brigham and Women's Hospital Landscape Masterplan; Boston, MA
Brigham and Women's Hospital, Hale Building for Transformative Medicine Landscapes, Boston, MA
The Steel Yard; Providence, RI
Roemer Plaza; Suffolk University, Boston, MA
Vanke Research Campus; Shenzhen, China
Beverly Waterfront Rezoning + Master Plan; Beverly, MA
American Repertory Theatre Loeb Drama Center; Cambridge, MA
Upper Neponset River Open Space Master Plan; Milton & Hyde Park, MA
University of Cincinnati Masterplan; Cincinnati, OH; Hargreaves Associates
Drexel University Masterplan; Philadelphia, PA; Hargreaves Associates

SELECT AWARDS & HONORS

- 2019 Merit Award, Boston Society of Landscape Architects, Central Square East Boston
- 2018 Merit Award, Boston Society of Landscape Architects, Fisher Hill Reservoir Park
Merit Award, Boston Society of Landscape Architects, Suffolk University, Roemer Plaza
Architecture Masterprize, Landscape Architecture - Public, Fisher Hill Reservoir Park
- 2017 Merit Award, Boston Society of Landscape Architects, Kennedy Plaza,
Honor Award, Boston Society of Architects, Fisher Hill Reservoir Park*
American Architecture Prize, Landscape Architecture - Installations & Structures, Fisher Hill Reservoir Park*
- 2016 Citation Award, Institutional Work, American Institute of Architects New England, Roemer Plaza, Suffolk University
Merit Award, American Institute of Architects New England, Historic Preservation + Adaptive Reuse, Fisher Hill Reservoir Park*
- 2013 Silver Medal, Award of Urban Design Excellence, Rudy Bruner Foundation, The Steel Yard
- 2012 Best Urban Regeneration Project in Asia, MIPIM Asia, Shanghai Bund (w/CKS, SMEDI)
The Senator John H Chafee Conservation Leadership Award, Environmental Council of Rhode Island, The Steel Yard
- 2011 Honor Award for Design, General Design, American Society of Landscape Architects, The Steel Yard
The Rhody Award, Landscape Preservation, RI Historical Preservation & Heritage Commission, The Steel Yard
Great Places Award for Design, Environmental Design Research Association, The Steel Yard
Honor Award, Boston Society of Landscape Architects, The Steel Yard
- 2010 Reuse and Neighborhood Preservation Award - Providence Preservation Society, The Steel Yard
- 2009 Merit Award, Boston Society of Landscape Architects, Signature Flight General Aviation Facility
- 2008 First Place in International Competition, Shanghai Bund Waterfront, Shanghai, China.
In collaboration with Chan Krieger Sieniewicz, Commission for Project for Expo 2010
- 2006 Merit Award, Accessible Design, Massachusetts Architectural Access Board, Bromley Park/Heath Street
Award for Excellence, American Society of Landscape Architects, Court Square Press, LANDWORKS Studio

*submitted by Touloukian Touloukian



kmdg



KAKI MARTIN, FASLA, PLA

Principal

PROFILE

Kaki Martin is a landscape architect with over twenty years of practice experience focused in park design and urban streetscapes, institutional and open space master planning, and experiential learning landscapes. She is keenly interested and knowledgeable in the design and construction of public urban landscapes. With extensive public design process experience, Kaki has led numerous multi-disciplinary projects in the public sector, all of which included a wide range of stakeholder groups. She is passionate about the process of finding solidarity with stakeholders and expressing a co-created vision using artful and contemporary solutions which deliver landscapes that engage and build community.

Kaki is the current president of the Boston Society of Landscape Architects (BSLA). She is a former adjunct professor at the Rhode Island School of Design and taught in a similar capacity at the Graduate School of Design at Harvard University. Additionally, she has been a member of thesis advisory teams at the Boston Architectural College and continues to be a visiting design juror at many institutions including the Harvard Graduate School of Design, Rhode Island School of Design, and Wentworth Institute of Technology. She is a long-standing member of the Cambridge Conservation Commission and a board member of the Community Design Resource Center of Boston.

Kaki is also a founding board member of Good Sports, a Boston based non-profit devoted to ensure that disadvantaged youth have the equipment they need to participate in organized athletic programs.

EDUCATION

Master of Landscape Architecture, 1995 - Harvard University; Cambridge, Massachusetts

Bachelor of Arts (Art History and Painting), Charles Hovey Pepper Prize, 1990 - Colby College; Waterville, Maine

LICENSURE AND CERTIFICATION

Registered Landscape Architect - MA #4272; CT #1150; ME #4925; NH #00140; RI #0700

Council of Landscape Arch. Registration Boards (CLARB) Certification #6361

RECENT CAREER SUMMARY

Klopfer Martin Design Group, Boston, MA

Co-Founding Principal

2007 - Present

Crosby | Schlessinger | Smallridge, LLC, Boston, MA

Associate

2003 - 2007

Wallace Floyd Design Group, Boston, MA

Associate

2000 - 2003

Hargreaves Associates, Cambridge, MA

1997 - 1999

Martha Schwartz, Inc., Cambridge, MA

1995 - 1997

RELEVANT EXPERIENCE – SELECTED WORKS

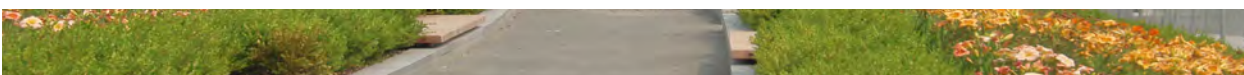
Housing

Finch Housing; Cambridge, MA

Ashlar Park Housing; Quincy, MA

Gove & Frankfort; Boston, MA

Corcoran Park Housing; Cambridge, MA



KAKI MARTIN, FASLA, PLA

Principal

Public Landscapes + Urban Design

Inman Square; Cambridge, MA
Fisher Hill Reservoir Park; Brookline, MA
Hoyt Sullivan Park; Somerville, MA
Lawrence Connector; Lawrence, MA
Providence Rapid Transit Improvements (R-Line); Providence, RI
Inman Square; Cambridge, MA
Kendall Square, Main Street; Cambridge, MA
Central Square, East Boston; Boston, MA
West Newton Square and Streetscape; Newton, MA
Walnut Street Newtonville Streetscape; Newton, MA
Everett Square and Streetscape; Everett, MA
Kennedy Plaza; Providence, RI
Boston Downtown Crossing Business Improvement District, Design Guidelines; Boston, MA
Boston Crossroads Initiative, Causeway Street; Boston, MA

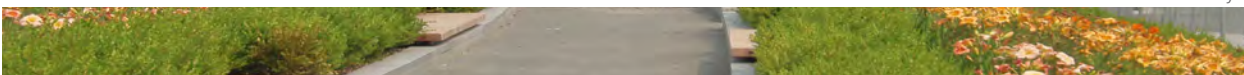
Institutional Landscapes + Master Planning

Charles River Speedway; Boston, MA
The Steel Yard; Providence, RI
The Eric Carle Museum of Picture Book Art; Amherst, MA
Roemer Plaza, Suffolk University; Boston, MA
Summer Star Wildlife Sanctuary; Boylston, MA
MIT NW23; Cambridge, MA
Boston Schoolyard Initiative, Outdoor Classrooms at 9 Boston Public Schools; Boston, MA
Brigham and Women's Hospital, Landscape Master Plan; Boston, MA
Vanke Research and Development Campus; Shenzhen, China

SELECT AWARDS & HONORS

- 2019 Merit Award, Boston Society of Landscape Architects, Central Square East Boston
- 2019 Merit Award, Boston Society of Landscape Architects, Hoyt Sullivan Park
- 2018 Merit Award, Boston Society of Landscape Architects, Fisher Hill Reservoir Park
Merit Award, Boston Society of Landscape Architects, Suffolk University, Roemer Plaza
Architecture Masterprize, Landscape Architecture - Public, Fisher Hill Reservoir Park
- 2017 Merit Award, Boston Society of Landscape Architects, Kennedy Plaza,
Honor Award, Boston Society of Architects, Fisher Hill Reservoir Park*
- 2016 Citation Award, Institutional Work, American Institute of Architects New England, Roemer Plaza, Suffolk University
Merit Award, American Institute of Architects New England, Historic Preservation + Adaptive Reuse, Fisher Hill Reservoir Park*
- 2014 Honor Award, Boston Society of Landscape Architects, Boston Schoolyard Initiative
Paul Davidoff Award, American Planning Association Rhode Island, Providence Rapid Transit Improvements (R-Line)
- 2013 Silver Medal, Award of Urban Design Excellence, Rudy Bruner Foundation, The Steel Yard
- 2012 Best Urban Regeneration Project in Asia, MIPIM Asia, Shanghai Bund (w/CKS, SMEDI)
The Senator John H Chafee Conservation Leadership Award, Environmental Council of Rhode Island, The Steel Yard
- 2011 Honor Award for Design, General Design, American Society of Landscape Architects, The Steel Yard
Great Places Award for Design, Environmental Design Research Association, The Steel Yard
Honor Award, Boston Society of Landscape Architects, The Steel Yard
Honor Award - Boston Society of Landscape Architects, North End Parks (Crosby | Schlessinger | Smallridge)
- 2010 Reuse and Neighborhood Preservation Award - Providence Preservation Society, The Steel Yard
- 2008 First Place in International Competition, Shanghai Bund Waterfront (in collaboration with Chan Krieger Sieniewicz)

*submitted by Touloukian Touloukian





KURT PETSCHKE, Assoc. AIA

Associate

PROFILE

Kurt is a Senior Landscape Designer and Associate with over 10 years of experience in the design of public and institutional landscapes. Trained as an architect, he has worked within architectural design studios, and in the landscape and building construction trades. At KMDG, Kurt leads the office's urban design, architectural, on-structure and infrastructural landscape design efforts, and is responsible for the office's 3-D modeling, rendering and graphic standards. He manages projects throughout all phases, from schematic design through construction observation, with a focus on ensuring that a rigorous design intention is realized through the built, constructed detail. Kurt is currently pursuing both his Architecture Registration Board license and his Landscape Architecture Registration Board license.

EDUCATION

Master of Architecture, 2009 - University of Virginia; Charlottesville, Virginia

Bachelor of Arts, Religion, 2003 - Reed College; Portland, Oregon

RECENT CAREER SUMMARY

Klopfer Martin Design Group, Boston, MA

Associate

2010 - Present

Mostue & Associates, Architects, Somerville, MA

Architectural Designer

2009 - 2010

Douglas Okun & Associates, Architects, Cambridge, MA

Architectural Designer

2007 - 2008

RELEVANT EXPERIENCE – SELECTED WORKS

Public Landscapes + Urban Design

Walnut Street Newtonville Streetscape; Newton, MA

West Newton Square and Streetscape; Newton, MA

Kendall Square Main Street; Cambridge, MA

Inman Square; Cambridge, MA

Everett Square and Streetscape; Everett, MA

Central Square, East Boston; Boston, MA

Fisher Hill Reservoir Park; Brookline, MA

Larz Anderson Park; Brookline, MA

Lawrence Alley; Lawrence, MA

Kennedy Plaza; Providence, RI

Providence Rapid Transit Improvements (R-Line); Providence, RI

Institutional Landscapes + Master Planning

Downtown Crossing, Business Improvement District; Boston, MA

Roemer Plaza, Suffolk University; Boston, MA

Massachusetts Institute of Technology, NW23 Courtyard; Cambridge, MA

The Steel Yard, Providence, RI

Brigham and Women's Hospital, Landscape Master Plan, Boston, MA

Brigham and Women's Hospital, 45 + 75 Francis Streets, Boston, MA

Brigham and Women's Hospital, Building for Transformative Medicine Landscapes, Boston, MA

Brigham and Women's Hospital, Garden Cafe Landscape, Boston, MA

Commercial + On-structure Landscapes



KURT PETSCHKE, Assoc. AIA

Associate

1 Beacon Street; Boston, MA
500 Boylston Street; Boston, MA
56 Leonard Street; New York, NY (w Herzog & de Meuron)
The Box Office; Providence, RI (w Distill Studio)

SELECT AWARDS & HONORS

- 2019 Merit Award, Boston Society of Landscape Architects, Central Square East Boston
- 2018 Merit Award, Boston Society of Landscape Architects, Fisher Hill Reservoir Park
Merit Award, Boston Society of Landscape Architects, Suffolk University, Roemer Plaza
Architecture Masterprize: Public, Fisher Hill Reservoir Park
Architecture Masterprize: Educational, Suffolk University, Roemer Plaza
- 2017 Merit Award, Boston Society of Landscape Architects, Kennedy Plaza,
Honor Award, Boston Society of Architects, Fisher Hill Reservoir Park*
American Architecture Prize, Landscape Architecture - Installations & Structures, Fisher Hill Reservoir Park*
- 2016 Citation Award, Institutional Work, American Institute of Architects New England, Roemer Plaza, Suffolk University
Merit Award, American Institute of Architects New England, Historic Preservation + Adaptive Reuse, Fisher Hill Reservoir Park*
- 2014 Honor Award, Boston Society of Landscape Architects, Boston Schoolyard Initiative
Paul Davidoff Award, American Planning Association Rhode Island, Providence Rapid Transit Improvements (R-Line)
- 2008 2007-2008 ACSA Collaborative Practice Award, with The Learning Barge Project Team, University of Virginia
- 2003 Commendation for Excellence for Academic Performance, Reed College

*submitted by Touloukian Touloukian

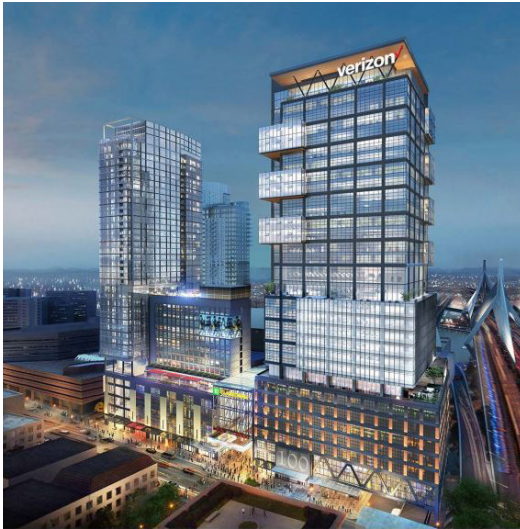


kmdg

ACENTECH

Company Profile

Whether you're looking to perfect the acoustics of a performance space, for cutting-edge technology design, or to quiet a noisy product, Acentech is your resource. We provide acoustics, audiovisual, telecommunications, security, and vibration consulting to clients across the US and beyond.



Acentech is a multi-disciplinary acoustics, audiovisual, telecommunications, security, and vibration consulting firm. We are one of the oldest and largest organizations of our type with roots stretching back more than 70 years. We are unequalled partners to architects, engineers, institutions, manufacturers, planners, and designers worldwide.

Acentech's acousticians, engineers, scientists, and technical consultants bring collective expertise and innovative thinking to the critical design relationship between architecture and technology, and the built environment. Our fully integrated consulting capabilities offer planning, design, and problem resolution in the areas of: architectural acoustics; noise and vibration control; environmental noise; audiovisual and multi-media systems; and telecommunications and security systems.



Our collaborative teams consult with clients to explore options to their space's performance demands and to help navigate them through the complexity that evolves with project scale, multiple interfaces, and new technologies. Our portfolio covers a wide variety of project types including performing arts, market sector facilities, and energy, industrial and transportation infrastructure.

SPECIALTY SERVICES

- > 3DListening (3DL)® Auralization
- > Noise & Vibration Remote Monitoring
- > Instrumentation Laboratory
- > Reverberation Chamber
- > WiFi Heatmap Antenna Planning

CONSULTING SERVICES

- > Architectural Acoustics
- > Environmental, Industrial and Transportation Acoustics
- > Audiovisual System Design and Broadcast Design
- > Telecommunications and Physical Security Systems Design
- > Mechanical Systems Noise and Vibration Control
- > Vibration Monitoring and Mitigation
- > Product Sound Quality Evaluation and Improvement

Boston Area Headquarters

33 Moulton Street
Cambridge, MA 02138
617 499 8000

ACENTECH.COM

Charlottesville, VA

Los Angeles, CA

New York, NY

Philadelphia, PA

Environmental Noise and Vibration Control Services

We specialize in evaluating, measuring, isolating and mitigating industrial noise and vibration. Working across a spectrum of facilities, Acentech consistently provides cost-effective solutions and streamlined execution. We work closely with our clients and members of the project team to help meet regulatory requirements, address stakeholder needs, and reduce the impact on affected communities. Our recent projects include:



- > Wind Turbine / Solar Farms
- > Energy Plants
- > Cogeneration/Chiller Plants
- > Communications Facilities
- > Quarries / Rock Crushing Facilities
- > OSHA Compliance
- > Water Treatment Facilities
- > Transformer Stations
- > Wastewater Treatment Facilities
- > Pump Stations
- > Ports / Marine Acoustics
- > Infrastructure Improvements

CONSULTING SOLUTIONS

Acentech is a multi-disciplinary consulting firm comprised of acoustical consultants, audiovisual consultants, noise and vibration consultants, IT consultants and more. We maintain and use a full inventory of noise and vibration instruments which are laboratory calibrated and traceable to the National Institute of Standards and Technology (NIST). We also maintain an inventory of the latest software to model, measure, evaluate and help mitigate noise.



- > Measurement, modeling, and analysis
- > Site evaluation
- > Baseline measurements
- > Licensing reports
- > Regulatory compliance
- > Design, specification, and evaluation of noise abatements
- > Public involvement
- > Litigation support / Expert testimony
- > Noise and vibration measurements, data analysis, and reporting
- > Noise modeling and vibration modeling
- > Evaluation of compliance with local, state, and federal regulations, ordinances and statutes
- > Project design considerations
- > Mitigation / BACT analysis
- > Development of noise and vibration control designs
- > Ground-borne vibration measurement and analysis
- > Vibration isolation of sensitive equipment
- > Environmental Impact Reports, Statements, and Assessments (EIR, EIS, and EA)
- > Residential Sound Insulation Programs (RSIP)
- > Public opinion analysis and public education
- > Underwater noise evaluations



Selected Experience

Residential + Mixed Use Projects



Aresenal Yards

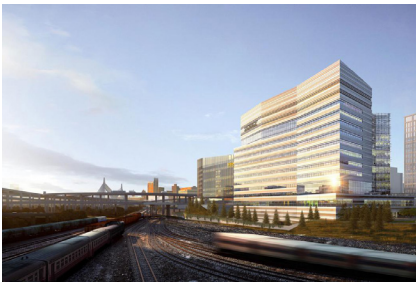
Watertown, MA

Est. Completion: 2021

Building Area: 1,000,000 sf (residential, hotel, multiplex cinema, retail, restaurants)

Acentech Services: Acoustics, HVAC Noise Control

Architect: Prellwitz Chilinski



Cambridge Crossing

Cambridge, MA

Est. Completion: 2021

Building Area: 693,000 sf (offices, retail, restaurants and residential)

Acentech Services: Acoustics, Noise & Vibration Control

Client: Perkins & Will



Echelon Seaport

Boston, MA

Est. Completion: 2021

Building Area: 950,000 sf (3 residential towers, restaurants, retail)

Acentech Services: Acoustics, HVAC Noise Control

Architect: CBT Architects (with Kohn Pedersen Fox)



Fenway Center Phase 1

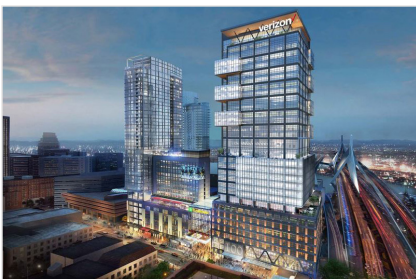
Boston, MA

Completed: 2020

Building Area: 339,000 sf (2 residential buildings, retail and parking)

Acentech Services: Acoustics, HVAC Noise Control

Architect: The Architectural Team



The Hub on Causeway

Boston, MA

Completed: 2020

Size: 440,000 sf (residential towers; restaurants, retail, cinema +

Big Night Live nightclub)

Acentech Services: Acoustics, Environmental Noise, HVAC Noise Control

Architect: Gensler

COHN REZNICK

Firm Resume



Submitted by:

CohnReznick LLP
One Boston Place, 5th Floor
Boston, MA 02108



CohnReznick is an independent
member of Nexia International

ACCOUNTING • TAX • ADVISORY

Firm Profile

CohnReznick is a national audit, tax, and business advisory firm with origins dating back to 1919.

Bringing the deep resources and technical acumen of a large national accounting firm without sacrificing the hands-on, entrepreneurial approach that today's dynamic business environment demands.

CohnReznick has developed specialized practices in key industries, including affordable housing and tax-incentivized real estate. CohnReznick is respected by developers, syndicators, investors, housing agencies, and not-for-profit organizations as a leading service provider to the affordable housing industry.

CohnReznick

- 11th largest audit, tax, and advisory firm in the United States
- 300+ partners/principals
- 2,700+ employees
- More than \$575 million in annual revenue
- Offices in 30 cities throughout:
 - California
 - Connecticut
 - Georgia
 - Illinois
 - Maryland
 - Massachusetts
 - New Jersey
 - New York
 - North Carolina
 - Pennsylvania
 - Texas
 - Washington, D.C.
 - Virginia
 - Cayman Islands
 - India
- International reach via Nexia member firms in more than 100 countries

We foster collaboration across every level and branch of our organization, so that the professionals who will serve you will have access to our firm's deep resources. Our service offerings include:

Accounting and Assurance Services	Tax Services	Advisory	Affiliated Companies and Subsidiaries
<ul style="list-style-type: none"> • Audits, Reviews, and Compilations • Employee Benefit Plans • IFRS • SOC 1, 2, 3 / SSAE 16 • Agreed upon procedures • Accounting outsourcing and consultations • Public company services • IT audit and controls review 	<ul style="list-style-type: none"> • Tax compliance and preparation • Strategic tax planning • Corporate tax outsourcing • Private clients • Federal tax • Trust and Estate • International tax • State and local tax • Transfer pricing • Cost segregation studies • New market tax credits • Tax specialty services • Tax credit advisory 	<ul style="list-style-type: none"> • Bankruptcy and restructuring • Computer Forensics and eDiscovery • Forensic and litigation • Governance, Risk and Compliance • Government • Management and Technology Consulting • Transactional • Valuation 	<ul style="list-style-type: none"> • CohnReznick Benefits Consultants • CohnReznick UIC Consultants LLC • Cohn Real Estate LLC • CohnReznick Professional Services PVT, Ltd. • CohnReznick Wealth Management LLC

Affordable Housing Industry Practice

As a first mover in the Affordable Housing industry, CohnReznick has been at the forefront of every major industry development and our passion remains affordable housing and community redevelopment. Inspired by Reznick Group's founder, David Reznick, CohnReznick has been an industry leader and trendsetter since the enactment of affordable housing legislation under the Johnson Administration in the early 1960s. With the addition of Section 42 to the U.S. Tax Code in 1986, the majority of new affordable housing developments, both new construction and rehabilitation, have used low income housing tax credits.

Today, we continue to help shape the policy of the industry, connect its people, and implement best practice solutions to help improve developer and investor outcomes. CohnReznick has one of the largest and most technically savvy affordable housing practices in our industry. More than 750 experienced professionals in 26 offices provide our clients with value-added services at each stage in the life cycle of a project—from pre-application to Year 15 to the post-tax credit period. Our clients benefit from dedicated practice groups in tax credit advisory, real estate development, renewable energy, valuations, and transactions for an integrated, one-stop resource. Our Office of Governmental Affairs provides a direct connection to the federal and state legislative initiatives impacting project development, grant applications, and transactional activity.

CohnReznick has experience with both—not-for-profit and for-profit affordable housing industry clients. Clients include but are not limited to, partnerships, developers, owners, syndicators, investors, mortgage companies, property managers, HUD, state agencies, and Public Housing Authorities (PHAs). These clients receive assistance from Federal or State programs including low income housing tax credits, HUD held or HUD insured mortgages, tax exempt bond funding, Federal and state rental subsidies, and USDA rural development loans. We serve over 5,000 clients in this area, with projects ranging in size from less than 20 units to those with more than 500 units. CohnReznick prepares applications on behalf of developers for project financing and tax credit allocations in accordance with each state's procedures and Qualified Allocation Plans. In addition, our firm has extensive experience advising not-for-profit affordable housing clients on exit strategies for low income housing tax credit projects that are at the end of the initial 15-year compliance period.

Low Income Housing Tax Credits (LIHTC) Experience

CohnReznick has earned its reputation as an industry leader in connection with federal tax credit and community development programs, most significantly, with the Low Income Housing Tax Credit program. Since the inception of the LIHTC program in 1986, we have been at the forefront in shaping the evolution of the program. The majority of new affordable housing developments, both new construction and rehabilitation, have used low income housing tax credits. CohnReznick:

- Represents clients in all areas of affordable housing including property managers, partnerships, developers, owners, syndicators, investors, mortgage companies, HUD, state agencies, PHAs and others
- Represents approximately 60 percent of the equity providers to affordable housing
- Submits over 1,100 REAC filings annually
- Provides more than 10,000 audits firm-wide
- Provides audit and tax services to over 5,000 real estate entities, including institutional and corporate investment companies
- Audit more than \$2 billion of federal funds

Familiarity with Applicable Affordable Housing Regulations

CohnReznick is exceedingly experienced in the various rules and regulations surrounding the development and operation of affordable, mixed income, and market rate housing. From the low-income housing tax credit to tax-exempt bond finance, HUD funding, Section 8, and public housing, we are very well-versed in the federal, state, and local legal and regulatory requirements and issues surrounding them. Indeed, in many cases, CohnReznick has been instrumental in the development of some of these regulations, whether in a state's qualified allocation plan for allocation of the housing credit, HUD requirements, or IRS rulings and pronouncements.

We have been involved in several developments which utilize multiple funding sources, with various permutations of the subsidies and financing involved, including:

- Low-Income Housing Tax Credits
- Tax-Exempt Bonds
- Rental Assistance Demonstration (RAD)
- HOME Investment Partnerships Program
- HOPE VI Public Housing Replacement
- Capital Fund Financing
- HUD Multifamily Programs (Sections 221, 223, 238, 202, and 811)
- Housing Choice Vouchers and HAP Contracts
- Annual Contribution Contracts
- New Markets Tax Credits and other CDFI Fund Programs

HUD Experience

The collective experience of the accounting and real estate professionals of CohnReznick makes the firm one of the nation's deepest pools of knowledge in affordable housing, particularly about HUD financed properties. CohnReznick is one of the largest providers of audited financial statements filed with HUD and other regulatory bodies in the country.

CohnReznick's HUD service team consists of individuals who have been servicing clients in this arena for multiple years. Clients in the HUD service group include, but are not limited to, multifamily housing, housing authorities, supervised mortgagees, housing projects, and projects that participate in the mark to market program, and those that receive low income tax credits.

Working with HUD and state agencies can be a complex and lengthy process, one that requires advice and assistance from people with very precise expertise. Our clients' needs include the services of a full-service accounting and business consulting firm that understands, and deals with daily, the specific areas that are most crucial to you:

- HUD regulatory requirements
- Construction and development
- Structure of ownership entities
- Cost certifications
- Tax accounting
- HUD electronic submission requirements

Our services offer a number of benefits:

- We currently service more than 1,200 HUD insured or Section 8 properties located throughout the United States and Puerto Rico, who utilize federal, state and local financing programs, including various HUD subsidies and financing programs.

- We have addressed virtually every major accounting and reporting issue affecting the affordable housing industry, and we work continuously with our clients to generate information on management and performance “Best Practices” within the affordable housing industry.
- We are actively involved in monitoring changes implemented under HUD’s various housing programs and assist our clients in implementing and capitalizing on recent changes to these programs.
- We are experienced in HUD’s electronic submission process and have a staff devoted to resolution of set-up and validation errors.

Public Housing Authority Experience

Across the United States, housing authority executives are engaging CohnReznick professionals for a multitude of value-added tasks including organizational structure assessments, process and technology reviews and management consulting. CohnReznick provides a superior level of service to public housing authorities and their affiliates including audit, accounting, and tax advisory; assistance in preparing competitive HOPE VI, LIHTC, and tax-exempt bond financing applications; analysis of Section 8 contract administration and asset management; as well as numerous operational review engagements. In addition, CohnReznick has experience in evaluating the effectiveness of existing internal controls implemented by management, identifying additional internal controls that should be implemented, and communicating deficiencies to management via a management letter or other memorandum.

CohnReznick has relationships with many affordable housing professionals and is able to utilize those resources to validate or challenge interpretations and assumptions. These relationships include HUD staff, IRS representatives, lawyers, syndicators, and others with extensive experience in the affordable housing area.

We have assisted many public housing authorities with structuring issues on new and rehabilitated LIHTC developments. Our audit team works closely along with our consulting division in resolving any issues that may arise in the cost certification process or during the annual audits throughout the life span of the project. We also work with many private developers in conjunction with public housing authorities on the redevelopment of public housing utilizing the Hope VI Program.

Commercial Real Estate Experience

In addition to our experience in the affordable housing industry, CohnReznick helps a wide variety of real estate clients grow and succeed by providing insight, ideas, and advice driven by our real estate industry expertise. We remain at the forefront of vital, topical issues that affect the real estate industry as a whole and our staff will be able to quickly address any issues and concerns as they arise. We have all the resources of a Big Four firm within the commercial real estate industry; but with the advantage of operating in a smaller, more highly focused environment. This allows us to provide the client service and close, personal communication that will continue to exceed your expectations.

CohnReznick’s Commercial Real Estate Industry Practice manages complex, high profile engagements for institutional commercial real estate buyers, sellers, owners, developers, and investors. We help our clients:

- Navigate the complex, constantly evolving regulatory and compliance environment
- Identify and capitalize on real estate opportunities in a highly volatile marketplace
- Maximize investor returns through sound transactional and tax advice
- Maximize revenues through improved, across-the-board operating efficiencies

- Advise funds from inception through fund-raising, operations, portfolio acquisitions and evaluation of internal controls

Our Commercial Real Estate Industry Practice serves hundreds of high profile companies across the country, providing us with the experience and the resources to help you tackle challenging issues such as taxes, strategic growth, financing alternatives, cash flow, and cost controls.

Historic Rehabilitation

The rehabilitation of historic buildings brings new life to old structures, repurposing them for today's business and housing needs. Since 1976, The Federal Historic Preservation Tax Incentives Program has provided incentives to do just that, and today a tax credit can be applied to the preservation of historic properties for offices, rental housing, and retail stores. Since the inception of the program, savvy investors, developers, and owners have turned to CohnReznick for our technical knowledge and guidance on projects that qualify for historic tax credits as well as our experience with thousands of rehabilitation projects across the country. We fully understand the competing interests of all parties in historic rehabilitation projects and the range of tax credit opportunities available from state to state. We help developers manage the compliance process and qualify for other tax credits that can be combined with the historic tax credit such as low-income housing tax credits and state tax credits.

Representative Affordable Housing Clients

CohnReznick has served organizations across the affordable housing spectrum. A sample list of relevant clients that have benefitted from our expertise includes:

A sample list of relevant clients that have benefitted from our expertise includes:

For-Profit Affordable Housing/Community Development Clients

- | | |
|--|-----------------------------------|
| • Affordable Housing Development Company | • Pennrose Properties |
| • AIMCO | • Picerne Development Corporation |
| • AMCAL Housing | • Reiner Communities |
| • Atlantic Development Group LLC | • RPM Development |
| • Beacon Communities | • Shelter Development Corp |
| • Columbia Residential Properties, Inc | • Trinity Financial, Inc |
| • Cornerstone Group | • USA Properties |
| • Global Premier Development, Inc. | • WinnCompanies |

Not-for-Profit Affordable Housing/Community Development Clients

- | | |
|--|--|
| • Abode Communities | • Mid-Bronx Desperadoes Community Development Corp |
| • Arlington Partnership for Affordable Housing | • Montgomery Housing Partnership |
| • BRIDGE Housing Corporation | |

- Caritas Communities, Inc.
- Catholic Charities of Brooklyn/Queens
- Community Preservation Corporation
- Corporation for Supportive Housing
- Enterprise Community Investment
- Enterprise Community Loan Fund
- Enterprise Community Partners
- Homes for America, Inc.
- Madison Park Development Corporation
- Manna, Inc.
- Mercy Housing, Inc.
- National Community Renaissance
- National Housing Trust
- NeighborWorks® Capital Corporation
- NHP Foundation
- Ohio Capital Corporation for Housing
- Pathway Homes, Inc.
- Preservation of Affordable Housing
- RuralEdge Community Development Corp
- So Others Might Eat
- Wesly Housing Development
- Westside Federation for Senior Supportive Housing

Other Not-for-Profit Clients

- American Institute of Certified Public Accountants
- American Society of Mechanical Engineers
- America's Health Insurance Plans
- Association of Foreign Investors in Real Estate
- Community Foodbank of NJ
- C-SPAN
- Easter Seals New Jersey
- Federation of Jewish Philanthropies of New York
- Financial Executives International
- Fund for the City of New York
- Greater Boston Food Bank
- Metropolitan Council on Jewish Poverty
- Metropolitan Museum of Art
- Mystic Seaport
- National Association of Real Estate Investment Trusts
- National Development Council
- Panasonic Foundation
- Sidwell Friends Schools
- Trust for the National Mall
- United Neighborhood House
- Washington National Cathedral
- YMCA of San Diego County and Los Angeles
- YWCA National Capital Area
- Zoological Society of San Diego

Syndicators for whom we audit their syndication entity

- Alliant Capital, Ltd.
- Boston Capital Partners
- Boston Financial Investment Management
- Enterprise Community Investment
- Ohio Capital Corporation for Housing
- R4 Capital LLC
- The Richman Group
- WNC & Associates, Inc.

Syndicators/Investors for whom we perform LIHTC fund audits

- Affordable Equity Partners
- Alden Torch
- Alliant Capital, Ltd
- Bank of America
- Boston Capital Partners
- Boston Financial Investment Management
- Cinnaire
- CREA, LLC
- Enterprise Community Investment
- First Sterling Financial Inc
- Hawaii Housing Finance
- Hudson Housing Capital LLC
- Ohio Capital Corporation for Housing
- PNC Bank
- Redstone Partners
- R4 Capital LLC
- Raymond James
- The Richman Group
- Texas Housing Finance Corp
- US Bank
- Wells Fargo
- WNC & Associates, Inc

Public Housing Authorities (PHAs)

- Dallas Housing Authority
- Denver Housing Authority
- Greenwich Housing Authority
- Houston Housing Authority
- Housing Authority of New Orleans
- Housing Authority of the County of Santa Clara
- San Diego Housing Authority
- Yolo County Housing







Client Resources

At CohnReznick, we believe that a more informed client is a more successful client. As such, we offer a variety of educational programs and information briefs to our clients. Our interactive seminars, most of which qualify for continuing professional education (CPE) credits, are valuable networking vehicles. We also issue alerts and updates to our clients to assist them with staying abreast of current business issues and industry-related trends.

These resources include:



Industry-specific news, articles and thought leadership on a range of affordable housing and not-for-profit related topics as well as complementary articles including: market-rate real estate, private equity, renewable energy, and government.

 Reports	<p>In-depth reports and analysis, at the national and local level, including the series on LIHTC property performance, Operating Expense study, and a special report on The Community Reinvestment Act.</p>
 Training	<p>Industry Practice professionals can provide on-site training in areas such as Low-Income Housing Tax Credit 101 or 201, Bonds, HUD, RAD, and Historic Rehabilitation Tax Credits.</p>
 Advocacy	<p>Bob Moss, National Director of Governmental Affairs, provides legislative updates to our clients and the industry at large. He works to create support in Congress for the LIHTC and awareness of its benefits.</p>
 Events	<p>Industry conferences, webinars, and executive roundtables provide peer-to-peer connections, guidance, trends and strategies on industry topics. Tuition and non-tuition programs are available.</p>
 Client Alerts	<p>Timely email updates with relevant and impacting changes in accounting and tax laws broken out with what you need to know and who to contact for more information.</p>
 Database Access	<p>Access to the ARM database (at a discounted rate through CohnReznick's relationship with CCH), which provides standards, regulations, and statements from the SEC, FASB, GASB, AICPA, and other accounting-related information.</p>

Active Involvement

Keeping abreast of current industry issues and challenges is critically important to be able to deliver relevant and actionable guidance to our clients. As such, our professionals remain actively involved with national and local real estate, affordable housing, non-profit, and governmental industry associations and are often sought after as speakers, moderators, and thought leaders.

National associations to which CohnReznick belongs include:

- Affordable Housing Tax Credit Coalition (AHTCC)
- Affordable Housing Association of Certified Public Accountants (AHA CPA)
- America Bar Association (ABA) Forum Committee on Affordable Housing and Community Development Law
- Council of Development Finance Agencies (CDFA)
- Council of Independent State Housing Associations (CISHA)
- Historic Tax Credit Coalition
- Housing Advisory Group (HAG)
- Housing Partnership Network (HPN)
- Institute for Responsible Housing Preservation (IRHP)
- National Affordable Housing Management Association (NAHMA)
- National Association of Housing and Redevelopment Officials (NAHRO)
- National Association of Local Housing Finance Agencies (NALHFA)
- National Association of State and Local Equity Funds (NASLEF)
- National Board Officers Association (NBOA)
- National Council of State Housing Agencies (NCSHA)
- National Housing and Rehabilitation Association (NH&RA)
- National Housing Conference (NHC)
- National Leased Housing Association (NLHA)
- National Low Income Housing Coalition (NLIHC)
- National Multifamily Housing Council
- National Association of Home Builders
- New Markets Tax Credit Coalition
- New York State Association for Affordable Housing
- New York Housing Conference
- Public Housing Authorities Directors Association (PHADA)
- Stewards of Affordable Housing for the Future
- Strength Matters/Neighborworks



Nicholas Ratti

Principal

One Boston Place, Suite 500
Boston, MA 02108
617-648-1405
nick.ratti@cohnreznick.com
www.cohnreznick.com

Nick Ratti is a Principal with CohnReznick's Project Finance Consulting Practice in Boston, Massachusetts. He has more than 15 years of experience in the tax credit industry. Nick is currently responsible for developing and evaluating tax credit syndication structures, providing tax compliance advice, evaluating tax credit recapture or tax-loss reallocation issues, strategizing post compliance period exits and providing syndication advisory services. Nick has extensive experience structuring a wide range of Historic, Low-Income Housing, and New Markets tax credit and Opportunity Zone transactions for his developer and investor clients.

Additionally, Nick is a frequent speaker at national conferences and seminars including but not limited to; CohnReznick New Markets Tax Credit Summit, National Housing and Rehabilitation Association, American Bar Association Forum on Affordable Housing and Community Development, IPED, and the New Jersey Governor's Conference.

Education

- Providence College: Cum Laude, Bachelor of Science, Accounting and Finance

Professional Affiliations

- Preservation Massachusetts, Executive Committee and Chair of LLC Committee
- National Housing & Rehabilitation Association

Sample of Low Income Housing/Historic Tax Credit Transaction Closings

Appleton Mills	Lowell, MA
New England Center for Homeless Veterans	Boston, MA
Ames Shovel Works	Easton, MA
Randolph Houses	New York, NY
Billings Forge Apartments	Hartford, CT
Westward Ho Apartments	Phoenix, AZ
Wayne Apartments	Boston, MA
Cotton Mill Apartments	Nashua, NH

FORT POINT ASSOCIATES



About Our Firm

Located in Government Center in downtown Boston, Fort Point Associates, Inc. (FPA) is a multi-disciplinary professional firm that provides urban planning, environmental consulting and permitting, and project management services to public and private sector clients. Over the past 35 years, FPA has established itself as a leader in managing urban and waterfront master plans, institutional expansions, private real estate developments, and complex public infrastructure improvements. FPA enjoys an enviable reputation with its clients for its professionalism and adeptness in dealing with the many federal, state, and local agencies relevant to planning and development.

FPA's team of highly experienced professionals counsels clients on approaches to planning and development projects, providing advice on effective strategies for facilitating approvals, and for managing the public review and community participation processes. With its breadth of professional expertise from fields including planning, architecture, historic preservation, landscape architecture, transportation, real estate development, and law, FPA offers insights and guidance that result in time and cost savings. Senior professionals dedicate their personal attention to every project to ensure effective relationships with interest groups including public agencies, private property owners, advocacy organizations, neighborhood associations, and others.

With its involvement in such high-profile undertakings as the \$14 billion Central Artery/Tunnel Project, the Boston Convention and Exhibition Center, and the \$2.5 billion Encore Boston Harbor Resort, FPA has longstanding relationships with key government personnel and closely monitors trends and changes to existing statutes and regulations. Its single office is located only minutes from state and city government offices in Boston, allowing it to keep abreast of the individual preferences and informal policies that operate alongside the laws and regulations that govern agencies' day-to-day activities. Although many of its projects are focused in the Boston area, FPA has successfully completed hundreds of projects throughout the Commonwealth of Massachusetts.

In 2018, FPA was acquired by Tetra Tech, an international leader in consulting, engineering, and technical services. With 20,000 employees located in 450 offices worldwide, Tetra Tech's technical expertise greatly complements FPA's own and bolsters its ability to offer comprehensive solutions to clients' needs. Although acquired in full, FPA continues to operate as Fort Point Associates, Inc., a Tetra Tech Company, a stand-alone entity within the Tetra Tech organization.



Chelsea Broadway Hotel

Chelsea, Massachusetts

Fort Point Associates, Inc. was retained by Broadway Hotel, LLC to manage the environmental permitting and review for the construction of a 124-room, full-service hotel on a 1.5 acre, undeveloped parcel on Mill Creek in Chelsea.

The approximately 64,000 square foot hotel, which is located a 10-minute drive from Logan International Airport, includes a restaurant, a pool and fitness center, a business center, and a pedestrian path along Mill Creek. FPA worked closely with the development team and responded to the concerns of the local neighborhood group to secure approvals for the five-story building. After key permits were secured, the client purchased the property, and construction began in the summer of 2017.

FPA secured approvals from the US Army Corps of Engineers, Massachusetts Executive Office of Energy and Environmental Affairs, Massachusetts Department of Environmental Protection, and the Chelsea Conservation Commission.

Client

Broadway Hotel, LLC

Client Contact

Christine Thomas

Services

Project Permitting

Status

Complete

Construction Cost

\$30 Million



Boston University Preservation Plan

Boston, Massachusetts

Fort Point Associates, Inc. played a strategic role in the development of an historic preservation plan for Boston University, the largest private owner of historic properties in the City of Boston. The University agreed to prepare a preservation plan for the entire Charles River Campus under a Memorandum of Agreement with the Massachusetts Historical Commission. Working with a preservation consultant, FPA oversaw the preparation of an inventory and assessment of some 317 potentially historic buildings containing millions of square feet of academic, residential and commercial space. The Preservation Plan assessed the University's real estate assets, provided a historical context for the development of this area of Boston and identified key preservation planning issues. The Preservation Plan provides a sound framework for campus planning and future building development programs.

Client

Boston University

Client Contact

Paul Rinaldi, Associate Vice President

Services

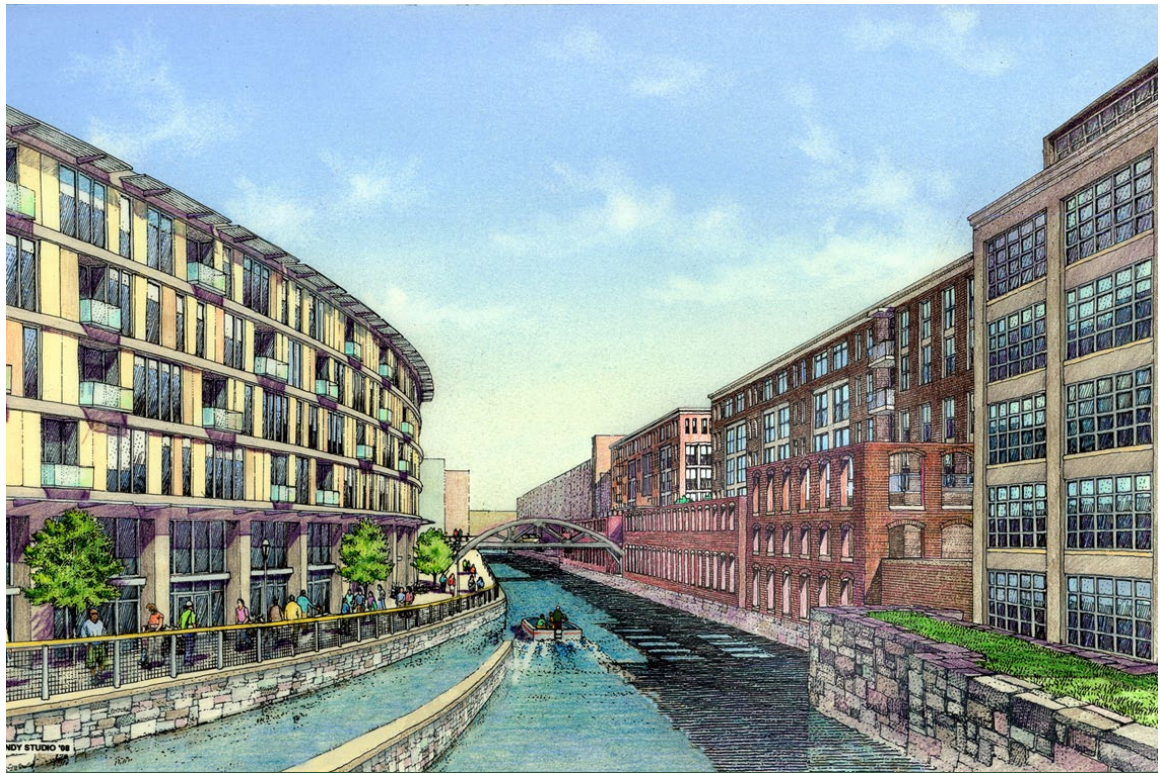
Planning

Status

Complete

Construction Cost

N/A



Hamilton Canal District Mixed Use Development

Lowell, Massachusetts

Fort Point Associates, Inc. was retained by Trinity Financial LLC to manage the environmental review and permitting process for the redevelopment of the 13-acre site in the heart of Downtown Lowell, MA. The project consists of nearly 2 million square feet of mixed use development to be developed over a 10 year period under a Form Based Code. While the project faced major permitting challenges, FPA worked closely with the client to acquire strong local support. The site was located in a National Register District and was trisected by canals with hydroelectric power rights. It required relief for use of state and federal parklands and needed highway access permits. The Project utilized the "Super MEPA" review process, as well as a Phase I waiver. The project will incorporate low impact development techniques and be LEED Certifiable. The project's first phase of construction was completed in 2013, and subsequent phases will be completed over the next several years.

Client

Trinity Financial

Client Contact

James Keefe, President

Services

Master Planning, Environmental Documentation, and Permitting

Status

Under construction

Construction Cost

\$250,000,000



Liberty Hotel

Boston, Massachusetts

Retained by Carpenter & Company, Inc., Fort Point Associates, Inc. was responsible for managing the environmental review and permitting of the Liberty Hotel. The project involved the rehabilitation of the vacant Charles Street Jail and the construction of an adjacent 15-story guestroom wing for a total of 239,000 square feet of hotel space. Improvements included removal of the perimeter security wall that surrounded the site to improve views of the historic jail from the Charles River and to facilitate public access to the site. In addition to guestrooms, the luxury hotel houses meeting rooms, restaurants, a bar, an exercise area and a small ballroom. The project involved close coordination with city and state agencies, particularly the Boston Landmarks Commission and the Massachusetts Historical Commission, Massachusetts General Hospital, project abutters, and a variety of other stakeholders.

Client

Carpenter & Company, Inc.

Client Contact

Peter Diana, Vice President and General Counsel

Services

Environmental Permitting and Strategy

Status

Complete

Construction Cost

\$150,000,000



Jamie M. Fay, AICP, CEP

President

Summary

Mr. Fay is the founder and president of Fort Point Associates, Inc., a multi-disciplinary planning and environmental consulting firm. Mr. Fay has been the principal-in-charge and lead consultant for the past 35 years for a variety of master planning, real estate development and public infrastructure projects. Notable public sector projects include the \$2.5 billion Encore Boston Harbor Resort, the \$850 million Boston Convention and Exhibition Center, and the \$14 billion Central Artery/Tunnel project. Private sector projects include over \$4 billion in real estate development for retail, commercial, industrial, residential and institutional uses. Mr. Fay is a member of the American Institute of Certified Planners and a Certified Environmental Planner, the former Chairman and member for 30 years of the Ipswich Finance Committee, Vice President and Trustee of The Boston Harbor Association in Boston for 25 years, Trustee of Boston Harbor Now, and a member of the Public Affairs committee of the National Association of Office and Industrial Properties.

Relevant Experience

Encore Boston Harbor Resort and Casino – Everett, MA

Mr. Fay was the principal environmental consultant for the competitively bid and awarded Region 1 Gaming License for the new \$2.5 billion Wynn Boston Harbor Resort and Casino in Everett, MA. Mr. Fay provided strategic advice on the environmental and land use approvals strategy for the project, including extensive and detailed review of the controversial project through the state MEPA process, development of a “living shoreline” as part of the project site, climate change and resiliency strategy for the facility, preparation and approval of the Everett Central Waterfront Municipal Harbor Plan, local, state and federal permits, all on an accelerated schedule. A total of five environmental legal appeals were filed on this controversial project and all were denied by the courts due to the diligent attention to detail and comprehensive documentation included in filings.

Environmental Assessments, Statewide

Over the past 27 years as president of Fort Point Associates, Mr. Fay has been the primary author of well over 200 Environmental Notification Forms (ENFs), Environmental Impact Reports (EIRs), Environmental Impact Statements (EISs), Project Impact Reports (PIRs) and Environmental Reevaluations (ERs) at the local, state and federal levels. Project types included transportation infrastructure (highway, rail, port), residential (single family, condominium, golf course community), office (high rise, low rise), commercial (box retailers, shopping center, specialty retail), institutional

(hospital, university) and industrial (manufacturing, distribution). In addition to the \$14 billion Central Artery/ Tunnel project, combined value of private projects reviewed under MEPA exceeds \$5 billion.

Boston Convention and Exhibition Center – Boston, MA

Mr. Fay was the local project manager for the interim and final planning/feasibility study for the new \$850 million Convention Center in South Boston. The study was prepared for a joint working group of the Senate, House of Representatives, City of Boston and Executive Office of Administration and Finance. The \$700,000 study was completed in five months and addressed all of the economic, community, programmatic, environmental and operational issues surrounding the facility. On the basis of the report, legislation was filed by the Governor and approved by the legislature. Mr. Fay subsequently prepared the Project Development Plan for approval by the Boston City Council, and the Expanded Environmental Notification Form, Final EIR for the Boston Redevelopment Authority and obtained all project permits and approvals.

Central Artery/Tunnel – Boston, MA

As a senior environmental strategist for joint venture providing environmental approvals for all activities proposed in conjunction with the Central Artery/Tunnel project for the Massachusetts Highway Department (MHD), Mr. Fay was responsible for providing the MHD with an environmental approvals acquisition strategy; providing Quality Assurance/Quality Control on permit submissions to agencies; recommending strategic approaches to the resolution of environmental controversies; and providing day-to-day liaison with environmental agencies. At \$14 billion, this project was the largest public works projects in the nation and required the acquisition of over seven hundred federal, state and local environmental approval actions covering work in some 150 separate construction contracts throughout Boston and Cambridge.

Education

B.A., 1976: Hampshire College, Amherst, Massachusetts

Professional Affiliations

- Member, American Institute of Certified Planners
- Trustee, Boston Harbor Now
- Former Trustee and Executive Committee Member, Boston Harbor Associates (25 years)
- Finance Committee Member, Town of Ipswich (30 years)
- Public Affairs Committee Member, NAIOP Massachusetts Chapter
- MassDEP Regulatory Reform Task Force

Publications and Presentations

“Waterfront Resiliency: Architecture and Site Strategies,” AIA National Convention, June 2019

“Coastal Development Best Practices” Urban Land Institute Coastal Forum, October 2018

“Rising Sea Levels; Design Strategies for Waterfront Projects,” ABX, November, 2016

“Industrial Development and Clean-up of Mystic River,” Mystic River Watershed Association/Tufts Institute on the Environment, October 28, 2014

“Climate Resilient Housing Types,” Architecture Boston Expo, October, 2014



Katherine C. Moore
Environmental Planner

Summary

Ms. Moore joined Fort Point Associates, Inc. in 2019, bringing experience in urban and waterfront planning, environmental policy, and sustainability planning. She is LEED AP ND accredited and has over 16 years of professional experience in environmental, energy, and resiliency-related projects.

Prior to joining FPA, Ms. Moore worked at an urban design and planning studio in Boston where she was involved with a wide range of projects, including: municipal harbor planning, municipal master plans, urban renewal master planning, regulatory analysis for potential development, and sustainability and Municipal Vulnerability Preparedness Program planning. She also has prior experience with economic analysis, technical and communications support, and public meeting support for a variety of federal agencies through her position as a researcher and economist.

Ms. Moore is a member of the Massachusetts Chapter of the American Planning Association. She earned a Master's degree in Urban and Environmental Policy and Planning from Tufts University and a Bachelor's degree in Political Science from the University of Michigan.

Relevant Experience – Fort Point Associates, Inc.

125-133 Sumner Street – Boston, MA

The project at 125-133 Sumner Street calls for the demolition of the existing Boston Housing Authority public housing development and the construction of a mixed-use, mixed-income, transit-oriented development. Ms. Moore provided assistance with the Boston Conservation Commission permitting and Chapter 91 Waterways License commitments.

Bayside DoubleTree Hotel Expansion – Dorchester, MA

Ms. Moore is assisting in the project management for the Corcoran Jennison hotel expansion project in Dorchester's Columbia Point. The project endeavors to enliven a transit-orientated area adjacent to UMass-Boston, which has been long characterized by acres of surface parking, with 97 new hotel rooms, active ground floor uses including a publicly-accessible restaurant and bar, function rooms, and new landscaped open space. Ms. Moore is managing regulatory and zoning approvals, including the Boston Conservation Commission permitting process and FAA approval for crane use in proximity to a major airport.

Boston University Institutional Master Plan (IMP) – Boston, MA

Ms. Moore is preparing an update for the Fenway Campus (Wheelock College IMP Update) and Charles River Campus IMPs for Boston University. The nation's fourth largest private nonprofit university, Boston University has 12 million sf of buildings and serves 38,000 students, faculty, and staff. In this role, she is coordinating with the University's leadership to present its programmatic and enrollment growth and outline its sustainability activities and targets.

Relevant Experience – Harriman, Inc.

Municipal Vulnerability Preparedness (MVP) Program Planning – Boxford and Harvard, MA

Ms. Moore was the Project Manager responsible for leading the towns of Boxford and Harvard through the MVP program process. Following the state-approved Community Resilience Building framework, she led the kick-off meeting with Town staff and Core Group, developed GIS-based mapping for critical facilities and environmental features, compiled and presented climate projections and potential town-specific hazards at workshops, moderated small and large stakeholder group discussions, and drafted final reports with the workshop findings for state approval.

Beverly Harbor/Waterfront Plan – Beverly, MA

Ms. Moore served as Assistant Project Manager for the development of a waterfront plan in Beverly. The project followed the regulatory requirements for a municipal harbor plan, including consultations with state agencies, but state approval was ultimately not pursued. Ms. Moore reviewed previous planning documents; compiled historic, environmental, and existing land use condition data; reviewed regulatory conditions; coordinated efforts with economic sub-consultant FXM Associates; moderated small group discussions within public meetings and open houses; compiled and analyzed feedback; developed graphics of existing conditions and findings; and drafted a report and recommendations.

CSX Master Plan and Urban Renewal Plan – Brockton, MA

Ms. Moore served as Assistant Project Manager for a project exploring potential land uses for a large area of underutilized land near downtown Brockton. Initial work was conducted to develop a Master Plan of potential uses and existing conditions, with efforts in the latter stages of project preparing the data and information required for an urban renewal plan. Ms. Moore coordinated with sub-consultants and the public while evaluating City data and regulations to draft a report and recommendations.

Commercial Street Corridor Framework Plan – Malden, MA

Ms. Moore was Assistant Project Manager for a project developing a strategic development plan for the Commercial Street corridor that built upon a Urban Land Institute Technical Advisory Panel Report's recommendations regarding development and land use within the corridor. Ms. Moore coordinated with sub-consultants and the public while evaluating City data and regulations to draft a report and recommendations.

Relevant Experience – Eastern Research Group

Deepwater Horizon – New Orleans, LA

As a sub-consultant to Industrial Economics, Inc., Ms. Moore served as assistant project manager in coordinating the compilation of the Draft and Final Programmatic Damage Assessment and Restoration Plan and Final Programmatic Environmental Impact Statement (PDARP/PEIS) for the Deepwater Horizon Oil spill incident. She provided formatting, word processing, and technical editing assistance for the 1,300-page document; facilitated collaboration and multiple rounds of

revision and review among dozens of authors and reviewers from multiple federal and state agencies and other contractors; and worked directly with graphic artists for visual element creation.

Education

M.A., Urban & Environmental Policy and Planning, Tufts University, Medford, MA

B.A., Political Science, University of Michigan, Ann Arbor, MI

Professional Affiliations

- Member, American Planning Association
- LEED AP ND, United States Green Building Council
- Municipal Vulnerability Preparedness (MVP) Technical Service Provider (TSP), Commonwealth of Massachusetts

FOUGERE PLANNING & DEVELOPMENT

Fougere Planning & Development, Inc.

Mark J. Fougere, AICP

Mr. Fougere is the President of Fougere Planning & Development, Inc. and is an AICP land use planner with over 30 years of both public and private sector experience. He has an extensive background in project management dealing with a broad array of planning related issues including spearheading rezoning efforts, managing development teams, site and land use planning, fiscal impact analysis, public presentations, expert witness testimony, land use law analysis and consensus building challenges. Mr. Fougere has also served on a municipal planning board and as a selectmen. He has operated as a project manager overseeing development projects that required careful design to minimize neighboring impacts. He has managed numerous rewrites and amendments to zoning ordinances and site plan/subdivision regulations.

Relevant Experience:

Private Sector:

FISCAL IMPACT ANALYSIS: Numerous assignments have been completed evaluating fiscal impact for various development proposals including 40B developments, mixed use project, office space and assisted living facilities. Reports have been completed for in a number of communities in the metro Boston region including: Arlington, Beverly, Braintree, Cambridge, Concord, Hanover, Lexington, Lynnfield, Medfield, Newton, Newburyport, Natick, North Andover, Weston and Wellesley.

SITE SEARCHES & ANALYSIS: Evaluate markets to locate properties meeting client's development criteria. These efforts include site feasibility analysis, local market conditions, community zoning analysis, utility availability, area traffic patterns & trends, community profiles & current views towards development. In addition, workforce housing economic viability analysis has been completed for proposed housing developments.

PROJECT MANAGEMENT & COORDINATION: Assemble qualified development teams consisting of professionals familiar with the surrounding environment and local personalities. Oversee the development approval process including obtaining all local, state and federal permits and approvals, always ensuring client's interests and concerns are consistently addressed.

Municipal:

Town of New Boston – Planning Consultant: Current

Mr. Fougere is currently providing weekly planning services to the Town of New Boston, attending all Planning Board meetings and staffing the Planning Office twice a month. Responsibilities include reviewing all current and proposed development projects, writing staff reports, updating the Town's master plan, drafting amendments to ordinances and regulations, and assisting in relevant legal proceedings.

Town of Hollis – Planning Consultant: Current

Mr. Fougere is currently providing weekly planning services to the Town of Hollis Planning Board, attending all Planning Board meetings and staffing the Planning Office one day a week. Responsibilities include reviewing all current and proposed development projects, writing staff reports, drafting amendments to ordinances and regulations, and assisting in relevant legal proceedings. Successfully drafted and proposed a workforce housing ordinance for the community, which was subsequently adopted at Town Meeting in March/09.

Town of Henniker – Planning Consultant: Current

Mr. Fougere is currently providing weekly planning services to the Town of Henniker Planning Board and Zoning Board, attending all Board meetings and staffing the Planning Office one and half times a week. Responsibilities include reviewing all current and proposed development projects, writing staff reports, energy grant writing, drafting amendments to ordinances and regulations, and assisting in relevant legal proceedings.

Town of Amherst - Regulatory Review and Ordinance Update

Working in conjunction with KNA, Inc. we analyzed existing land use ordinances and regulations for consistency with the 2010 Master Plan goals and priority actions and the NH Livability Principles and analyzed six water resource related ordinances to simplify, combine and update with best management practices to protect Amherst and the regions high quality drinking water and watershed. In addition, utilizing the results of the Regulatory Review of the Project Team updated, with Best Management Practices (BMP's), the Watershed Protection District and the Wetlands Protection District in order to protect the high quality drinking water and watershed of the Town of Amherst and the region.

Town of Greenland – Planning Consultant: Current

Mr. Fougere is currently providing weekly planning services to the Town of Greenland Planning Board; attending all Board meetings and staffing the Planning Office twice a month. Responsibilities include reviewing all current and proposed development projects, writing staff reports, drafting amendments to ordinances and regulations, and assisting in relevant legal proceedings.

Town of Gilmanton – Planning Consultant: Current

Mr. Fougere is currently providing planning services to the Town of Gilmanton Planning Board attending Board meetings as needed by the community. Responsibilities include reviewing all current and proposed development projects, drafting amendments to ordinances and regulations, and assisting in relevant legal proceedings.

Town of Plaistow – Temporary Planning Consultant

Mr. Fougere provided interim planning services to the Town of Plaistow Planning Board. Responsibilities included reviewing all current and proposed development projects, assisting in updating the Town's Master Plan, drafting amendments to ordinances and regulations, and assisting in relevant legal proceedings.

Town of Amherst – Regulation Review and Wetland Ordinance Update

In partnership with Keach-Nordstrom Associates, Inc., and Gove Environmental a full analysis of the community's Wetland's Ordinance was completed. In addition, the Aquifer Ordinance was updated along with re-codifying the Zoning Ordinance.

Town of Merrimack – Merrimack Outlet Mall Inspections

Fougere Planning provided the Town with site plan inspection services over the past year and a half insuring the proposed 400,000 square foot retail center conformed to all project approvals and conditions. Over 40 pages of conditions and specifications were attached to the approval, including concerns for blasting (over one million yards of material) and water quality. Significant efforts were made to coordinate issues and concerns with appropriate town departments, other consultants and the project developer. Major inspection services were finalized with the mall opening in June, minor follow up issues will continue in the near future.

Town of Bedford – Parking Analysis

Fougere Planning, along with Stephen Pernaw & Company completed an analysis of the Town of Bedford's parking standards to review their applicability to allowed uses and review the need to update them to reflect current trends, including mixed uses. The Planning Board adopted the recommended changes.

New Hampshire Housing Finance Authority

Working with a team of consultants, including Keach-Nordstrom Associates, Inc., a Community Guidance document was published to assist communities in addressing the many requirements of the workforce housing statute. Key components of the document will include: an outline of important definitions that are relevant to workforce housing, self-audit guidance as it relates to a communities existing housing stock and strategies to review ordinances and regulations to pinpoint how they can impact the cost of housing, and discuss the

many costs associated with the development of a housing project, from concept to sale.

Town of Merrimack – Zoning and Building Code Analysis

In partnership with Keach-Nordstrom Associates, Inc., Fougere Planning and Development completed a full analysis of the community's Code in order to re-codify and bring order to a document that has undergone numerous amendments over the last 25 years.

Town of Pelham – Park and Recreation Impact Fee

In order to further accommodate and cope with demands associated with its continued growth and ensure that adequate public facilities are in place to serve the community, the Pelham Planning Board elected to undertake the required analysis to expand its impact fee system to also include provisions for the assessment and collection of capital facility impact fees for Park and Recreational needs. An impact program consistent with RSA 674:21, Innovative Land Use Controls and the Town of Pelham's existing Impact Fee Ordinance, was drafted and adopted by the Town.

Town of Danville – Mixed Use Zoning District

The Town of Danville has wrestled with the concept of creating a mixed used district along the community's Main Street. Whether to have such a district; where the district should be situated; and how a mixed used district could be configured have been questions that have been discussed for some time. Fougere Planning and Development, Inc., in partnership with Keach-Nordstrom Associates, Inc, developed of a Mixed Use Zoning Study and Ordinance program for Danville's 111A/Main Street neighborhood. The project team's goal was to craft a set of sound regulations that will address the needs of the community and support the key strategies articulated through findings discovered during a participatory public involvement process. A mixed use zoning district ordinance has been developed and was approved by the voters in March, 2008.

Town of Greenland – Zoning Analysis

Fougere Planning and Development, Inc., in partnership with Keach-Nordstrom Associates, Inc., reviewed and analyzed the Town of Greenland's outdated Zoning Ordinance. The goal of this project was to report on key deficiencies and recommend specific zoning changes that were necessary to adhere to current land use law and sound planning principles. The Project Team was able to provide the Planning Board with a series of practical and strategic zoning changes that, if adopted, would significantly improve the readability and soundness of the town's existing zoning ordinance.

City of Concord – Aquifer Zoning Regulation

With Emery & Garrett Groundwater, Inc. acting as the lead consultant, teamed with Fougere Planning & Development, Inc. and Keach-Nordstrom Associates, Inc. to develop an aquifer protection ordinances that addressed both rural and

urban areas of the City. In regards to regulating urban areas of the City, requirements and standards for management practices such as leak detection and spill containment were explored. The Project Team also reviewed the legal means to apply these requirements retroactively to those pre-existing land uses that represent hazards to groundwater resources. The draft regulations recognized current Federal and State laws and regulations relating to water supply and pollution control as well as land use.

Town of Peterborough – Zoning Diagnostic Analysis

As a prologue to considering further amendments to the Peterborough's dated Zoning Ordinance, Fougere Planning and Development, Inc., in partnership with Keach-Nordstrom Associates, Inc., initiated a "diagnostic analysis" with the goal of not only objectively determining the document's strengths and weaknesses, but also reviewing the Ordinance's connectivity with the adopted 2003 Master Plan. As a part of this effort, the Project Team participated in numerous public meetings and discussions, which included a public hearing attended by representatives of many of Peterborough's boards and commissions. The completed report will provide the Planning Board with a guiding tool that will enable them to focus on key zoning initiatives that are needed in the community.

City of Nashua – Nashua Landing Project Review – Staff Assistance

Because of temporary staffing constraints, Fougere Planning assisted the City in reviewing the site plan for one of the largest retail redevelopment projects ever proposed (800,000 square feet) along the City's key commercial corridor. Critical issues that are being overseen include: traffic, architectural design, landscaping, access, and drainage, and environmental constraints. This complex project was approved by the Planning Board.

Upper Valley Lake Sunapee Regional Planning Commission – Staff Assistance

During the search for a new Executive Director, Fougere Planning & Development provided oversight assistance to UVLSRPC Staff. Responsibilities included staffing the Office one day a week, reviewing reports and studies, addressing staff questions related to on going projects and land use planning issues.

City of Nashua – Land Use Code Update

Working with the Greater Nashua Chamber of Commerce and most recently with the City's Community Development Department, Mr. Fougere was heavily involved in shaping the final draft of this new code, the first comprehensive change in some thirty years. Mr. Fougere, in coordination with the Nashua Regional Planning Commission, lead the effort in reviewing the six months of public testimony on the proposed new code and fasten clear and concise language to address these comments. This final draft was approved by the Board of Alderman.

Town of Atkinson, NH – Rezoning Analysis

Working with the Atkinson Planning Board, Mr. Fougere was requested to analyze the potential impacts associated with a planned rezoning proposal that involved allowing multi family age restricted housing to be built in exchange for increased open space. Key issues that were analyzed included: Consistency with the community master plan, the fiscal impact of the proposed project and its impacts on municipal services, experiences of other New Hampshire to similar projects, recommended phasing options, and Regional Impact issues. The finding of the report provided the basis for the Planning Board to support the rezoning initiative and the zoning proposal was passed by Town Meeting.

Town of Hooksett, NH – Performance Zoning Initiative

Building upon the success of the Performance Zoning corridor in Bedford, this innovative zoning technique is being crafted for the Town of Hooksett's Route 3 corridor. Keach Nordstrom Associates, along with Mr. Fougere, crafted an ordinance that addresses not only land use and dimensional requirements, but also focuses on landscape and streetscape improvements, access control, utility extensions, and promotion of numerous corridor wide betterments. Written with a series of incentive based controls, it was the intent of this new regulation to encouraged quality reuse and reinvestment in the Route 3 corridor, improving the visual and functionality on this key commercial area.

Somersworth, NH-Contract Planner

Mr. Fougere completed an assignment consisting of assisting the community with site plan and subdivision development review, along with ZBA support. This effort has involved weekly meetings and visits to the town. Other responsibilities included: writing Planning Board Staff Notes to the Planning Board (which summarizes key developments issues involving proposals on the Planning Board agenda), attend all Planning Board and ZBA meetings and present Staff Notes to both the Planning Board and Zoning Board, and communicate with applicant's on development issues and concerns.

Laconia, NH-Contract Planner

Over a two period Mr. Fougere assisted the Planning Director with site plan and subdivision development reviews. This effort has involved weekly meetings and visits to the City, including managing the biweekly Technical Review Committee Meetings. The meetings are held with the applicants & representatives to review their proposed plan and discuss issues and concerns with City Staff. Other responsibilities have included: writing Planning Board Staff Notes to the Planning Board (which summarizes key developments issues involving proposals on the Planning Board agenda), attend all Planning Board meetings and present Staff Notes to the Planning Board, communicate with applicants on development issues and concerns. In addition, ordinance rewrites and amendments were initiated. Reviewed a significant development project proposed in the City involving a new marina, over 300 homes, a golf course and associated commercial activity.

Hampton, NH-Contract Planner

Mr. Fougere has twice assisted the community with site plan and subdivision development reviews for a total period of nine months. This effort involved weekly meetings and visits to the town. Other responsibilities included: writing Planning Board Staff Notes to the Planning Board (which summarizes key developments issues involving proposals on the Planning Board agenda), attend all Planning Board meetings and present Staff Notes to the Planning Board, communicate with applicants on development issues and concerns.

Hooksett, NH-Master Plan Update

In conjunction with Keach-Nordstrom & Dufresne-Henry, Fougere Planning & Development completed a master plan update for the community of Hooksett. The team worked closely with the Master Plan Committee, which had completed a significant amount of research and documentation of the various master plan chapters. The team reviewed the data to strengthen and enhance the chapter's content. Key findings and goals were developed to help guide the Town of Hooksett as they face the many challenges associated with a growing community. The final draft has been completed and adopted by the Planning Board.

Sandown, NH-Master Plan Update

In conjunction with Keach-Nordstrom, an update to the community's master plan has been completed. This initiative concentrated on the transportation, conservation & historic resources, community facilities & recreational portions of the master plan. Like many southern New Hampshire communities, significant growth of residential development has occurred, straining local services. The master plan will be an invaluable tool to the community to help address the many issues facing the community today.

Bedford, NH- Site Plan and Subdivision Regulations

In partnership with Keach-Nordstrom, Fougere Planning & Development rewrote the Town of Bedford's dated subdivision and site plan regulations. Given the tremendous development pressures that have occurred within the community over the last ten years, this comprehensive update to the regulations was imperative to deal with the many challenges facing the community today. The combined experience of these two firms provided Bedford with the tools needed to comprehensively complete this project. Landscape improvements, access management and off site improvements are just a few of the numerous issues that are addressed in the comprehensive update.

Town of Bedford – TCSP (Transportation and Community and System Preservation Pilot Program

As the prime project manager, Mr. Fougere oversaw the FHWA TCSP grant award reporting requirements associated with the progress of Bedford's Route 101 Traffic Corridor Study. Reporting requirements included noting innovative plan aspects being used, evaluation of the studies accomplishments, public participation, project status and products, and lessons learned from the project. At project completion, an evaluation report was completed outlining the projects major achievements.

Hayner-Swanson, Inc. – Senior Planner

Involved with development project management from concept to approval, permit coordination, drafted preliminary layouts for residential and commercial projects, fiscal reports and analysis.

Private Development Companies: The Flatley Co. & S.K. Properties - Project Manager NH & MA

- Managed and oversaw development process for countless projects. Assembled and managed professional development teams consisting of company officials, lawyers, engineers, and other consultants.
- Coordinated and made numerous public presentations, clearly conveying the positive attributes of proposed projects.
- Acted as a key liaison with abutters to address potential conflicts. Developed and nurtured quality relationships with municipal officials.
- Developed buildout scenarios involving commercial, industrial & residential projects that outlined potential future impacts of development.
- Through careful negotiations and perseverance, spearheaded a very difficult rezoning effort that permitted assisted living uses within a community.
- Organized neighborhood meetings that were successful in gaining the support of abutters, a key facet of a successful project.

Nashua, NH - Deputy Planning Director

- Coordinated development review process with all city departments. Acted as key liaison between development community, city agencies, boards, and commissions. Staff to the Nashua Conservation Commission.
- Organized and made countless public presentations to boards and commissions. Complex matters were presented with clarity and thoroughness, ensuring all stakeholders were informed of the issues at hand.

- Involved with making and developing key policy recommendations within the City, including amendments to numerous ordinances and regulations.
- Participated in the development of the City's Master Plan Update.
- Organized and coordinated a charrette involving a large 300 acre plus vacant area of the City. Bringing together neighborhood groups, developers, city officials and land use professionals, a coherent strategy for a key area of the City was developed. This successful event led to the co-authoring of new zoning district in Nashua, using innovative zoning techniques to develop a vibrant neighborhood of single family, elderly housing, commercial and office development. This project is currently under construction.
- Responsible for fiscal impact review/analysis, transportation analysis, and impact fee administration. These key tasks were essential in dealing with the numerous development initiatives that were occurring within the city. The Planning Board and other key officials relied upon this analysis to adequately review the impacts of proposed development.

Milford, NH - Director of Planning & Community Development

- Successfully proposed and implemented numerous policy initiatives. This resulted in the development of a number of amendments to the zoning ordinance, site plan and subdivision regulations.
- Initiated downtown revitalization program and grant award, improving both its appearance and safety. Oversaw and coordinated the design facilitation process (charrette) involving numerous groups within the community. Resulting physical improvements and organizational development has led to numerous awards, including the National Main Street Program. The success of this initiative can be seen in the numerous successful businesses that reside in the downtown and the continued success of yearly festivals and celebrations.
- Responsible for impact fee administration, fiscal impact analysis, infrastructure planning, transportation analysis and capital improvement planning. These key functions were important to insure public officials were aware of the ramifications of growth and its impacts on the community. Acted as the planning board liaison with the Conservation Commission, assisting the group with numerous assignments.
- Completed town wide build out analysis. This endeavor allowed for the careful review of future developmental impacts and resulted in the initiatives to deal with the expected impacts that would result from this development.
- Completion of comprehensive Master Plan update for the community. Through a year and half public process involving hearings, surveys, analysis and discussion, a ten year plan for the future of the community was developed. Developed during a time of a severe recession, the challenges of economic development and future growth pressures were analyzed.

EDUCATION

University of Massachusetts, B.S. Environmental Design
University of Massachusetts, Master's, Regional Planning

AFFILIATIONS

- Member, Greater Nashua Workforce Housing Coalition
- American Institute of Certified Planners (AICP)
- New Hampshire Planners Association Member
- American Planning Association Member
- Northern New England Chapter American Planning Association Member
- Former President & Vice-President of the NH Planners Association
- Former Secretary of the Northern New England Chapter – American Planning Association
- Former Milford Planning Board Member
- Milford Rotary Member
- Former Member, Milford Board of Selectmen

MCPHAIL ASSOCIATES



Statement of Qualifications

Firm Profile

Since 1976 McPhail Associates has been providing geotechnical engineering services to architects, owners, contractors, institutions and developers. Over the years our services have expanded to include geoenvironmental, geothermal energy and below-grade waterproofing consultation. In addition, we offer a wide variety of contractor support services including design of temporary and permanent excavation support systems, pile and specialty foundations, and construction dewatering systems. We remain true to the vision of our founder, Robert E. McPhail, and continue to be creative, practical, respected problem solvers, always keeping our clients' best interest and vision in mind.

The ownership of McPhail consists of three principals who collectively have more than 80 years of consulting experience. Our professional staff consists of approximately fifty-five (55) individuals with backgrounds in Civil Engineering, Geotechnical Engineering, Environmental Engineering and Geology. The senior engineering staff has advanced degrees in the geotechnical or geoenvironmental engineering discipline. Our key engineers have had extensive experience in subsurface explorations, geotechnical analysis and design, geoenvironmental site evaluation and remediation, design assistance to structural engineers and architects, and construction monitoring for more than 6,000 building, environmental, waterfront, and heavy construction projects.

We understand the role of the geotechnical engineer in performing the subsurface design of construction projects in terms of both the geotechnical and geoenvironmental considerations. We are oriented towards providing timely design assistance to the design team which assists in the proper implementation of the geotechnical design recommendations and geoenvironmental requirements into the Contract Documents.

Relevant Experience

McPhail Associates has provided geotechnical and/or geoenvironmental engineering consulting services for numerous historical projects as well as other Town of Medfield projects including the following:

- Renovations to Trinity Church of Boston; Boston, MA
- Charles Street Jail (The Liberty Hotel); Boston, MA
- Widener Library; Cambridge, MA
- Harvard Business School – Baker Library Addition; Cambridge, MA
- Edward Devotion School; Brookline, MA
- Charlestown Navy Yard –Buildings 4, 32, 109; Charlestown, MA
- Chain Forge Building; Charlestown, MA
- Worcester Court House; Worcester, MA
- Appleton Mills; 219 Jackson Street; Lowell, MA
- The Parc at Medfield; Medfield, MA
- Renovations and Additions to Medfield High School; Medfield, MA



Geotechnical Services

Since 1976 McPhail Associates has been providing geotechnical engineering services to architects, owners, contractors, institutions and developers. In addition, we offer a wide variety of contractor support services including design of temporary and permanent excavation support systems, pile and specialty foundations, and construction dewatering systems. We remain true to the vision of our founder, Robert E. McPhail, and continue to be creative, practical, respected problem solvers, always keeping our clients' best interest and vision in mind. Our geotechnical consulting services include:

- Subsurface Exploration Programs
- Foundation Recommendations
- Geotechnical Analysis and Design
- Construction Quality Assurance/Quality Control (QA/QC) Observation
- Soil Laboratory Testing
- Soil Permeability Testing

Geoenvironmental/Licensed Site Professional (LSP) Services

In accordance with the enactment of the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (MCP), our scope of services includes consulting geoenvironmental engineering services to address the impact that the complex legislation has placed upon the development of properties that have been impacted by the presence of oil and/or hazardous materials. Our geoenvironmental consulting practice includes a wide range of services focused on regulatory compliance and the implementation thereof as efficiently and cost-effectively as possible. McPhail currently has five Massachusetts LSPs on staff to provide the necessary oversight of our wide range of projects.

Having worked over the years with a large number of design teams representing a broad spectrum of engineering disciplines and with the Massachusetts Department of Environmental Protection (DEP) who administers the MCP, we developed an in-depth understanding of the role of the geotechnical engineer and the geoenvironmental professional in performing the subsurface design of construction projects in terms of both geotechnical and geoenvironmental considerations.

Our geoenvironmental/LSP consulting services includes the following:

- Property Due Diligence; Environmental Site Assessments
- Geoenvironmental Analysis (Soil, Groundwater, Soil Gas, and Indoor Air)
- State and Federal Regulatory Compliance
- Remediation Quality Assurance (QA)/Quality Control (QC) Observation
- Dewatering Permit Applications and Regulatory Compliance
- Aboveground Storage Tank (AST)/Underground Storage Tank (UST) Environmental Assessment and Closure
- Soil Disposal Facility Profile Preparation



Project Team Structure

Our success is due to our extremely knowledgeable staff and experienced leadership who work with unparalleled collaboration to deliver comprehensive solutions to our client's development plans.

The following are the key personnel that will be assigned to this project:

- Principal-in-Charge: Ambrose J. Donovan, P.E., L.S.P.
- Geotechnical Engineer: Olivia D. Black, P.E.
- Environmental Scientist: Kathryn Hanrahan

Resumes are attached herein.

Diversity, Equity & Inclusion

Our people come from a wide variety of backgrounds whether it be race, color, age, sex, national origin, or basis of disability. The diverse background of our people makes McPhail stronger and this diversity benefits both McPhail and our clients by fostering a close-knit community that encourages new thoughts and perspectives on old problems, leading to new and innovative solutions.



AMBROSE J. DONOVAN, **P.E., L.S.P**

PRINCIPAL

Education

Trinity College; Dublin, Ireland
Bachelor of Arts in Mathematics
Bachelor of Engineering in
Civil Engineering

Northeastern University
Master of Science in Geotechnical
Engineering

Professional Registration

Registered Professional Engineer:
Massachusetts

Licensed Site Professional:
Massachusetts

Professional Affiliations

American Society of Civil Engineers
Boston Society of Civil Engineers
Licensed Site Professional
Association
NAIOP Massachusetts



Mr. Donovan has acquired over 30 years of extensive geotechnical and geoenvironmental engineering experience covering a wide range of projects in Massachusetts.

Mr. Donovan's experience also includes performing geotechnical analysis and design, preparing construction documents, construction monitoring and project coordination with other design professionals. His geoenvironmental experience includes performing site assessments for the presence of oil and hazardous materials, characterization of soil and rock for off-site disposal, preparation of site remediation plans, monitoring of site remediation operations, and preparation of reports documenting the completion of remedial actions in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000).

Representative Experience:

Florida Ruffin Ridley School; Brookline, MA
Clark Avenue School; Chelsea, MA
Newton North High School; Newton, MA
The Fan Pier; South Boston, MA
Van Ness and 1325 Boylston Street; Boston, MA
SixTen Main Street; Cambridge, MA
Waterfront Residences and Marriott Hotel; South Boston, MA
The Intercontinental - 500 Atlantic Avenue; Boston, MA
Westin Boston Waterfront Hotel; South Boston, MA
Trilogy Mixed Use Development; Fenway, MA
Liberty Hotel (formerly Charles Street Jail); Boston, MA
M.G.H. Inpatient Facility; Boston, MA
University Park at M.I.T.; Cambridge, MA
Novartis Institute for Biomedical Research; Cambridge, MA
Boston Police Headquarters; Boston, MA



OLIVIA D. BLACK, P.E.

PROJECT MANAGER

Education

Northeastern University;
Boston, Massachusetts
Bachelor of Science
in Civil and Environmental
Engineering

University of Texas at Austin;
Austin, Texas
Master of Science in
Geotechnical Engineering

Professional Registration

Registered Professional Engineer;
Massachusetts

Professional Affiliations

American Society of Civil Engineers
Boston Society of Civil Engineers

Since 2015, Olivia D. Black has been directly responsible for a variety of geotechnical and/or geoenvironmental projects with McPhail Associates.

Olivia's geotechnical responsibilities have included coordination of subsurface exploration programs, geotechnical analysis, design, and instrumentation, design assistance in preparing construction documents, and project coordination with other disciplines. Her foundation construction experience includes both design and/or field monitoring of shallow and deep foundations including spread footing systems, ground improvement systems, drilled and driven piles, slurry walls, underpinning, and temporary earth support design for building projects.

Ms. Black's geoenvironmental experience includes performing site assessments for the presence of oil and hazardous materials, preparation of soil disposition plans, and monitoring of site remediation operations in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000).

Representative Experience:

Kenmore Square Development; Boston, MA
Arsenal Yards; Watertown, MA
WIT, New Multipurpose Building; Boston, MA
Kendall Square Initiative; Cambridge, MA
100 Shawmut; Boston, MA
The Residences at Forest Hills; Boston, MA
Riverside Boat Club; Cambridge, MA
Boston Public Library Johnson Wing Improvements; Boston, MA
Plymouth Town Hall; Plymouth, MA
12 Emily Street; Cambridge, MA
Bayside Doubletree Hotel Expansion; Boston, MA
20 Inner Belt Road; Somerville, MA
370 Harvard Street; Brookline, MA
North Shore Medical Center; Salem, MA
79-83 Gardner Street; Brighton, MA
Dewitt Community Center; Boston, MA
One Oceanfront at Salisbury Beach; Salisbury, MA
North Square at the Mill District; Amherst, MA



GEOTECHNICAL AND
GEOENVIRONMENTAL ENGINEERS
2269 Massachusetts Avenue
Cambridge, Massachusetts 02140
(617) 868-1420



KATHRYN E. HANRAHAN

ENVIRONMENTAL SCIENTIST

Education

University of Connecticut;
Storrs, Connecticut
Bachelor of Science
in Environmental Science

Trinity College of Dublin;
Dublin, Ireland
Master of Environmental Science

Certifications and Training

OSHA 40-Hour Hazardous Waste
Operations and Emergency
Response (HAZWOPER)

National Radon Proficiency
Program (NRPP) Residential
Measurement Provider #111407

Professional Affiliations

Licensed Site Professional
Association



Since 2015, Ms. Hanrahan has acquired extensive experience in monitoring soil borings and test pit explorations and classifying soil and rock samples. Ms. Hanrahan also has extensive experience performing geoenvironmental sampling of air, soil gas, soil, and groundwater.

Ms. Hanrahan has served as a geoenvironmental engineer at McPhail Associates since 2017 and her responsibilities have included planning and monitoring of subsurface explorations, completion of American Society of Testing and Materials (ASTM) Phase I and Phase II Environmental Site Assessments for the presence of oil and hazardous material in accordance with the Massachusetts Oil and Hazardous Materials Release Prevention and Response Act (MGL Chapter 21E) and the Massachusetts Contingency Plan (310 CMR 40.0000), performance of geoenvironmental analysis based on data obtained through exploration programs, and preparation of dewatering permit applications.

Representative Experience:

Former Van Brodie Building; Lawrence, MA
Beryl Garden Apartments; Boston, MA
Bayside Doubletree Hotel Expansion; Boston, MA
Cate Street Development; Portsmouth, NH
530 Wellington Avenue; Cranston, RI
100 Shawmut Avenue; Boston, MA
Kenmore Square North Development; Boston, MA
450 Massachusetts Avenue; Boston, MA
Old Colony Housing Development; South Boston, MA
Michael E. Haynes Arms; Boston, MA

NEW ECOLOGY

NEW ECOLOGY

WHO WE ARE

Founded in 1999, New Ecology, Inc. (NEI) is an innovative, nationally-recognized Green Building and Sustainable Design non-profit consulting firm. We work with our clients to develop and implement practical, cost-effective ways to reduce energy and water use, improve indoor air quality and occupant health, and make buildings more durable, resilient, and less costly to maintain.



"New Ecology has an amazing team of experts who optimize our systems by contributing to the efficient design of buildings, assisting with heating system upgrades, and applying for large energy rebate programs. We have worked with other energy consultants that are basically in the business to produce reports- New Ecology does much more than that- they are true partners in our efforts and go the extra mile to get it done right."

*~Frank Alvarez, Sr. Vice President,
Beacon Communities*

NEI has greened over 158,000 units of housing and helped owners articulate and achieve their sustainability goals in settings including schools, day care centers, health care facilities, office buildings and community centers. The common thread among these projects is that they are better buildings—for owners, for residents, for the environment—because of NEI's involvement.

WHAT WE DO

NEI's services include:

- Integrated Green Design
 - Charrette Facilitation
 - Peer Review
 - Contractor Training and Field Inspections
 - Life Cycle Cost Analysis
- Audits and Analysis
- Green Building Certification
 - HERS Rating
 - Energy Star
 - LEED
 - Enterprise Green Communities
 - Passive House
 - NGBS Green Verifier
- Renewable Energy
- Energy Modeling
- Remote Monitoring and Optimization
- Rebates and Incentives
- Operations and Maintenance Planning and Training
- Owners Representative Services



Ames Shovel Works

Historic adaptive rehabilitation project on the 113-unit, 9 building Ames Shovel Shop industrial site. Rehabilitation greening goals included the installation of high-efficiency HVAC systems and comprehensive building envelope efficiency.

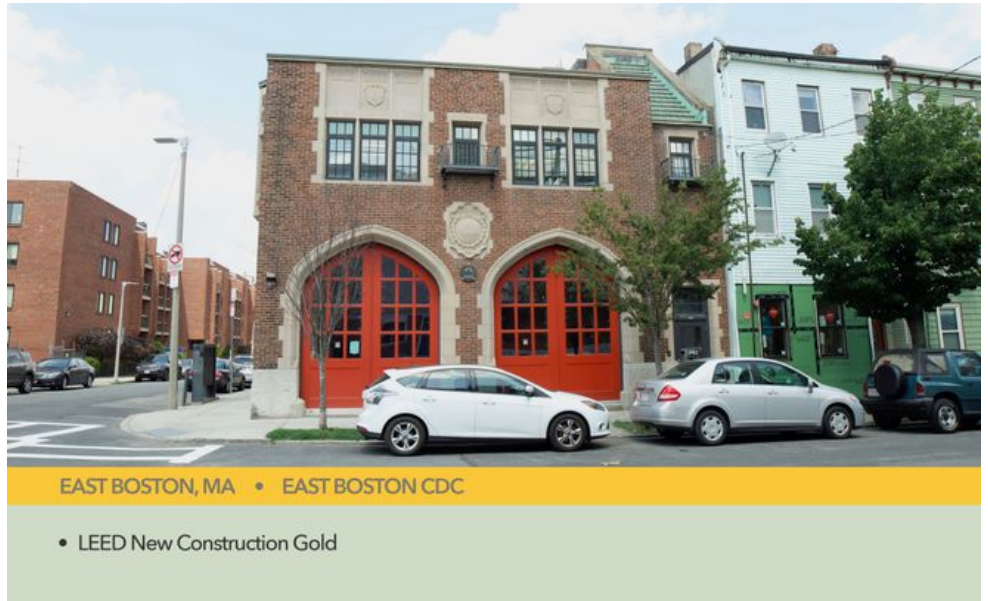
- LEED for Homes: Silver/Gold Certifications
- HERS Energy Performance Score: 60



Zumix

The redevelopment of an abandoned firehouse into a cutting-edge music education, performance, and cultural facility to serve low-income youth in East Boston. Green features include:

- VAR HVAC system and HRV for efficient, simultaneous heating, cooling, and ventilation
- Spray foam insulation
- Renewable flooring materials
- White roof and paving stones



HOW WE GET RESULTS

NEI works as an integrated part of the project team, providing the technical expertise and capacity to ensure that the project achieves its sustainability and energy-efficiency goals in the most cost-effective and complementary way possible. We are constantly refining our knowledge and approach based on what we learn and the results we measure and achieve. We are not merely advisors; we do the actual work of ensuring that the team's green and sustainability goals are clear and well communicated, adequately documented, and built as designed. We are expert in achieving the highest certification levels attainable for a project and in qualifying for the maximum incentives and rebates. Whether the design team has chosen to build a conventional high performance building or to break new ground as an early adopter, the NEI team has a track record of delivering cost-effective results.



New Ecology, Inc.
www.newecology.
org

Firm Profile

BOSTON

15 Court Square, Suite 420
Boston, MA 02108
617-557-1700

BALTIMORE

1014 W. 36th Street
Baltimore, MA 21211

WILMINGTON

100 West 10th Street
Suite 1015
Wilmington, DE 19801
302-300-4321

New Ecology is a mission-driven nonprofit, seeking to address global environmental and equity issues by making the built environment more efficient, healthier, durable, and resilient. We are nationally recognized for our work on affordable and multifamily housing, community and government buildings, educational facilities, renewable energy and local infrastructure and for the positive effect we have on the people who live and work in these places.

Our reputation is based on our focus on practical and cost-effective strategies. We work with developers and design teams to achieve significant positive environmental and economic impact by emphasizing measures to reduce energy and water use, improve indoor air quality and occupant health, and make buildings more durable and less costly to maintain. We also work with building owners to analyze their building performance, track their energy use, and recommend improvements. We have pioneered the effort to use cost/benefit analysis to inform greening decisions and measure their impact. We have worked with financing agencies to help them understand how to incorporate sustainability criteria into their lending decisions. We have helped to train the next generation of practitioners and disseminated much of what we have learned by conducting trainings, speaking at conferences, and publishing our findings.

Our scope of work for projects includes leading integrated design teams, facilitating design charrettes, providing technical assistance on sustainable design, writing specifications that ensure that projects are built as intended, providing field inspection of green features, conducting renewable energy assessments, interfacing with local utilities, developing energy management strategies for existing buildings, facilitating certifications, fundraising, and ground-breaking work in measuring the costs and benefits of green building. NEI staff have experience with energy modeling, life cycle cost assessments, and climate resilience auditing.

New Ecology is a leader in the cost-effective implementation of Passive House design and construction in Massachusetts. Our staff includes multiple Certified Passive House Consultants (CPHCs) as well as certified Passive House Builders and Raters/Verifiers. We recently completed the first certified multifamily affordable passive house project in MA, and we are currently working on twenty-five multi-family residential Passive House certification projects at various phases of design and construction. We are often consulted for our expertise on implementation of this deep energy reduction.



NEI Provides consulting services to approximately 125 projects a year, which enables us to continually learn and apply what we learn from one project to the next. We have provided green technical assistance to over 140,000 units of multifamily housing, historic buildings, community facilities, arts buildings, day care centers, health care facilities and office buildings. We have LEED certified 50 buildings and assisted with the successful execution of one of the City of Boston E+ housing projects, taking affordable housing beyond “net zero” into energy production.

New Ecology is an approved vendor to the MA Statewide Contract PRF62 Energy Consulting Services in all seven categories of work, including:

- Energy Research and Analysis Services
- Clean Energy Systems and Technology Analysis and Research
- Energy Programs Stakeholder Engagement Services
- Energy Project Advisory & Consulting Services
- Existing Building Commissioning
- Facility Maintenance and Operations
- Advisory Services
- High Performance Buildings Advisory Services

In addition to our fee-for-service sustainable design consulting on multifamily new construction and rehabilitation refinancing, and energy efficiency technical assistance, we have raised millions of dollars in funding for energy efficiency and green building projects from a variety of sources that include foundations, MA Clean Energy Center, MA DOER and other government agencies, and utility companies.

M/WBE Qualifications

New Ecology is a 501(c)(3) non-profit organization, which does not recognize a business owner or owning entity. Our board of directors is composed of a majority of female members.

LAUREN A. BAUMANN, LEED AP, CPHC

New Ecology, Inc.

15 Court Square, Suite 420, Boston, MA 02108

baumann@newecology.org 617-557-1700 x7023



SUMMARY

Ms. Baumann joined New Ecology, Inc. in 2005. She has fifteen years' experience providing technical assistance for clients developing and rehabilitating green affordable housing, educational and cultural facilities, community centers, day-care and health care facilities. At NEI she serves as Vice President. During her time at NEI she has provided technical assistance to "green" thousands of units of affordable housing in the Boston Metro area and beyond, including Energy Star, Enterprise Green Communities, LEED, and Passive House certifications. Working with NEI's clients she has raised millions of dollars in grant and rebate funds to support energy efficiency, renewable energy and other green features. She is a Senior Fellow in the New England Region Environmental Leadership Program. Ms. Baumann holds a degree in Biology from Cornell and a Masters in Urban and Environmental Policy and Planning from Tufts.

EXPERIENCE

New Ecology, Inc.

Boston, MA

June 2005-Present

Vice President, Senior Associate, Associate

Vice President of an innovative environmental organization that serves as a catalyst for community-based sustainable development projects.

- Trains and supervises a team of project managers to provide technical assistance on the design, construction, retrofit, and operation of high performance affordable housing and community buildings
- Advances a climate change resilience practice with state and local government agencies and owners of multifamily housing portfolios in Massachusetts and New York
- Assists with budgeting, strategic planning, staff and board management, and growth and expansion across the organization
- Specializes in the implementation of the green integrated design process; specifically, charrette facilitation, project team coordination, contractor/sub-contractor training, and resident education
- Facilitates coordination with governmental agencies, utilities and utility program administrators, and other related organizations and has raised millions of dollars in grant and rebate funds to support efficiency, greening, and renewable energy features on projects
- Coordinates project certifications through EPA Energy Star Homes, various USGBC LEED rating systems, and Enterprise Green Communities
- Presents on the practical implementation of green affordable housing at various conferences and forums

Estee Lauder

Melville, NY

June 2003-August 2004

Junior Chemist

- Formulated skin care products to meet marketing, regulatory, and patent guidelines
- Performed formula modification, batch production, and stability and safety testing
- Initiated water filter recycling at division-wide level and paper recycling within lab

LAUREN A. BAUMANN, LEED AP, CPHC

California Public Interest Research Group

Fall 2002

Berkeley, CA

UC Berkeley Campus Organizer

- Coordinated campaigns for non-profit student organization that addressed environmental, democratic, and social justice issues
- Recruited student volunteers and interns, executed grassroots fundraising and taught intern class

EDUCATION AND TRAINING

Tufts University, Medford, MA

2006

Master of Arts in Urban and Environmental Policy and Planning

Cornell University, Ithaca, NY

2002

Bachelor of Science in Biology, Ecology concentration

CERTIFICATIONS

US Green Building Council – LEED Accredited Professional: Building Design and Construction and Homes

Passive House Institute U.S. (PHIUS) – Passive House Certified Consultant (NaCPHC)

AWARDS AND AFFILIATIONS

Wild Gift – Recipient, Alumni Board Member, Alumni Council Member

Environmental Leadership Program - New England Regional Network – Fellow

**MACIEJ KONIECZNY, CPHC, LEED AP BD+C, C.E.M.,
CBCP**

New Ecology, Inc.

15 Court Square, Suite 420, Boston, MA 02108

konieczny@newecology.org 617-557-1700 x 7024



SUMMARY

Mr. Konieczny joined New Ecology, Inc. in 2013. At NEI he manages the energy efficiency and sustainability components of NEI's retrofit, rehabilitation, and new construction projects, including LEED, Enterprise Green Communities and Energy Star certification processes as well as securing utility rebates. He has extensive experience with private and public sectors, having worked with multiple engineering and architectural firms, contractors, city, state and federal agencies. Previously, he worked for the Energy Efficiency and Sustainable Buildings Group for the Commonwealth of Massachusetts where he managed energy efficiency and renewable energy projects. Mr. Konieczny managed the sustainability office for the city of Newton, MA where he managed the planning, development and implementation of capital and energy efficiency projects, as well as energy management and procurement. He holds a Bachelors in Science in chemistry from Colorado College and a Masters in Landscape Architecture from UMass Amherst.

EXPERIENCE

New Ecology, Inc.

June 2013–Present

Boston, MA

Senior Project Manager, Project Manager

Sustainability consultant and technical assistance provider for high performance, green affordable housing

- Technical assistance and certification for LEED New Construction, Homes and Mid-Rise and Energy Star Homes and utility rebates
- Analysis and technical assistance for renewable and alternative energy
- Analysis and technical assistance for sustainable, energy efficient, high performance new construction and renovation/retrofit projects

City of Newton

2011–June 2013

Newton, MA

Sustainability Project Manager – Public Buildings Department

- Responsible for managing projects focused on energy efficiency
- Technical review of designs and specifications to assure compliance with high performance building guidelines
- Performing energy audits and implementing appropriate ECMs
- Building benchmarking, BMS operation, commodity purchase, energy modeling

Commonwealth of Massachusetts

2009–2011

Boston, MA

Project Manager/Planner – Division of Capital Asset Management, Energy Efficiency and Sustainable Buildings Group

- Responsible for managing capital improvement projects focused on the reduction of energy consumption and greenhouse gas emissions at multiple state facilities
- Completed energy and water conservation construction projects across the Commonwealth through all phases of energy performance contracts
- Project phases included planning, study, procurement, investment grade audit, construction, commissioning, and measurement and verification

MACIEJ KONIECZNY, CPHC, LEED AP BD+C, C.E.M., CBCP

City of Boston

2008–2009

Boston, MA

Project Manager – Capital Improvements Division

- Responsible for the oversight of the design and construction of capital improvements across the City of Boston
- Accountable for representing the City of Boston during capital improvement projects by managing designers and contractors, and by interfacing with non-profit “friends” groups and the public

Foliaire, Inc.

2006–2008

Boston, MA

Project Manager/Designer

- Experienced in all aspects of small business management, including staff and subcontractor recruitment, development and supervision; project estimation, budgeting, and cost analysis; client relations and community networking; quality control, organizational and efficiency assessment, training, and evaluation of staff.

EDUCATION AND TRAINING

Colorado College, Colorado Springs, CO
Bachelor of Science, Chemistry, Physics

1998

University of Massachusetts, Amherst, MA
Master of Landscape Architecture

2005

CERTIFICATIONS

Association of Energy Engineers (AEE) – Certified Building Commissioning Professional (CBCP)

Association of Energy Engineers (AEE) – Certified Energy Manager (C.E.M.)

Passive House Institute US – PHIUS Certified Builder

Passive House Institute US – Certified Passive House Consultant

US Green Building Council – LEED Accredited Professional Building Design and Construction (BD+C) and Homes rating systems

U.S. Department of Labor OSHA – Ten-Hour Certification

State of Massachusetts – Certified Public Purchasing Program

State of Massachusetts – Pesticide Applicator License: Commercial – L

TECHNICAL PROFICIENCIES

Microsoft Office Suite, Adobe Suite, QuickBooks, Delta Controls (BMS), AutoCAD, eQuest, Dialux, Rhino, Microsoft Projects, Primavera, ArcGIS

ROBERT BAKER

New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
robert.baker@newecology.org 617-557-1700 x7097



SUMMARY

Mr. Baker joined New Ecology, Inc (NEI) in February 2021. As a Project Manager, he works to achieve sustainable and resilient design objective in collaboration with project team members while ensuring project goals are met. Mr. Baker strives to achieve the highest level of green building certification on behalf of the project owner within a variety of certification systems, including but not limited to: LEED, Enterprise Green Communities, Energy Star, and PHIUS Passive House.

Before joining NEI, Mr. Baker was Lead Field Advisor at NMR Group, Inc., an energy program evaluation and market research company. At NMR, he facilitated implementation of data collection and research activities to inform state and utility program administrators as to the effectiveness of their energy programs and assess new avenues for energy conservation in the residential and commercial markets. Mr. Baker has extensive building science experience having audited over 2,000 single family residences and more than 100 commercial buildings. He holds a Bachelor of Science in Energy, Business, and Finance from The Pennsylvania State University and past certifications as a HERS, HES, and BPI Building Analyst.

EXPERIENCE

New Ecology, Inc.
Boston, MA

February, 2021-Present

Project Manager

- Review technical documents to ensure that sustainable design intent is incorporated and feasible
- Facilitate design charrettes to identify and target cost effective greening strategies and approaches for clients
- Attend project meetings and contributing toward discussions on relevant sustainability issues
- Conduct post-occupancy evaluations of projects to ensure they are performing as intended
- Coordinate and document green building rating system compliance
- Securing funding for clients, including: writing grant proposals, working with utilities, and facilitating rebate incentives

NMR Group, Inc.
Somerville, MA

April, 2014 – June, 2019

Lead Field Advisor

- Facilitation of data collection tasks for residential, commercial and institutional energy program studies
- Design and implementation of energy evaluation and research activities
- Training and supervision of energy auditors
- Engineering desk reviews and takeoffs
- QA/QC of energy data and building energy models
- Analysis and reporting on evaluation findings
- Contractor and stakeholder interviews
- Secondary research activities, including technical white paper reviews

ROBERT BAKER

Next Step Living
Boston, MA

February, 2011 – September, 2013

Senior Energy Auditor

- Over 1500 residential energy audits completed
- Training and mentoring new and junior auditors on best practices
- Piloted new auditing processes and techniques
- Conducted homeowner and landlord workshops on Mass Save program and EE in the home
- Combustion appliance testing and safety inspections
- Implemented a thermostat recycling program that saved over 20 lbs. of mercury from going to a landfill

EDUCATION AND TRAINING

The Pennsylvania State University
B.S. Energy, Business and Finance, Minor in Economics

2008

CERTIFICATIONS

- HERS Rater
- BPI Building Analyst
- HES Rater

**PUBLIC ARCHAEOLOGY
LABORATORY (PAL)**



Historic Rehabilitation Tax Credits PAL Qualifications

The Public Archaeology Laboratory, Inc. (PAL) is a cultural resources management firm based in Pawtucket, Rhode Island. PAL assists clients in successfully navigating complex historic preservation review and planning processes by providing expert consultation services and historic resources documentation.

PAL's team of architectural historians, industrial historians, preservation planners, and archaeologists provides clients with the insight and guidance needed to secure project approvals and clearances from local, state and federal agencies, State Historic Preservation Offices, the National Park Service, and local historic district commissions. PAL's staff has extensive experience in assisting clients with historic preservation planning and compliance, and architectural design review. We are expert in interpreting Section 106 of the National Historic Preservation Act, Chapter 254 of the Massachusetts General Laws, and related local, state, and federal regulations and guidelines affecting historic resources. PAL has assisted numerous project proponents and their design teams in meeting the Secretary of the Interior's *Standards for Rehabilitation*. We maintain strong professional relationships with the National Park Service and the State Historic Preservation Offices.

PAL's staff advises owners and developers of older and historic buildings through the development process, helping them secure state and federal historic tax credits. Services include preparation of Parts 1, 2 and 3 applications, National Register nominations, and construction oversight. PAL facilitates consultation with the client and review agencies through project planning/design, preliminary approval, and construction to project completion.

Our primary historic tax credit service area extends throughout the Northeast, but we often conduct projects in other regions of the United States, including the Mid-Atlantic. PAL's collective experience has resulted in the preparation of state and federal historic tax credit applications for over 150 projects representing a total investment of over \$2 billion and the allocation of over \$250 million in state and federal credits.

Recent and ongoing historic tax credit projects in Massachusetts include the Worcester County Courthouse in Worcester, Boott Mill in Lowell, Ashworth Brothers Mill in Fall River, William Barton Rogers School in Boston, and the Chelsea Homes I portfolio in Chelsea. Outside of Massachusetts, PAL's projects include the Barnum Hotel in New Britain, CT, Fire Signal Equipment Building in Albany, NY, Sibley, Lindsay & Curr Building in Rochester, NY, Carl Mackley Apartments in Philadelphia, PA, the Hope Webbing Company in Pawtucket, RI, Allen Printworks in Providence, RI, and the China Mill in Allenstown, NH.

ROBINSON + COLE



Prepared for

Trinity Financial

An Introduction to our Real Estate + Development Practice

June 2021

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Introduction to the Firm

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

CLIENTS FIRST

By cultivating a thorough understanding of your industry, the nature and structure of your business, your risk tolerance level, and your budget, our more than 200 lawyers tailor legal strategies that align with the overall business needs of your company. Since our founding in 1845, commitment to our clients and their success has distinguished the firm. We judge ourselves this way: If our clients succeed and achieve their objectives as they planned and at the cost they expected, we have succeeded.

GLOBAL REACH

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

FOCUSED SERVICE

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

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

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

ENGAGED PEOPLE

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

FLEXIBLE FIRM

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

Our Services

Our team is committed to delivering excellent, high-level service to our clients by promptly responding to their needs. We offer a variety of critical path services, including the following examples:

- + development permitting for complicated projects in and around urban areas that involve multiple levels of government review
- + high-stakes litigation arising out of government decision-making controlling real estate development
- + integrating land use strategies with real estate financing, ownership, and development structures
- + due diligence review and analysis of individual sites and portfolios of properties for real estate leasing, acquisition and/or financing
- + government economic incentives for development, tax-advantaged transactions and public/private partnerships
- + structuring and negotiation of leases and financing arrangements

Our experience cuts across virtually all areas, including the following:

- | | |
|--|--|
| + affordable housing | + takings, property rights, and condemnations |
| + brownfields redevelopment | + tax increment financing |
| + coastal development and permitting | + traffic planning and regulation |
| + common interest ownership communities | + transit-oriented development |
| + development agreements | + subdivision regulation |
| + environmental impact review | + utilities and infrastructure |
| + floodplain regulation | + wetlands and waterways permitting |
| + form-based codes | + zoning regulation |
| + historic preservation and adaptive reuse | + sustainability and green building |
| + mixed-use projects | + sale-leaseback transactions |
| + parking agreements | + telecommunications matters |
| + property tax appeals | + negotiation of risk allocation and transfer mechanisms |
| + religious rights and land use | + environmental cleanups |
| + regulation and ordinance drafting | |

Our Team

Our practice is a cross-disciplinary group of real estate, development, leasing, construction, land use and environmental, energy and telecommunications lawyers, professional planners, and environmental analysts that focuses its combined resources on the interrelated fields of planning, land use and environmental law, and real estate development, leasing and finance. Our practice is based upon an extensive knowledge of land use and real estate law and procedure, as well as practical experience gained from decades of working with clients on challenging and complex matters across the country.

INDUSTRY LEADERSHIP

Members of our practice have become leaders in the profession and enjoy national reputations for being on the cutting edge of law and practice in land use and real estate. We frequently appear before reviewing bodies at the federal, state, and local levels, enabling us to gain the most up-to-date knowledge about procedures, personalities, and trends in the law. We also regularly speak and write on real estate, land use and environmental topics and legal trends.

Our lawyers are active in numerous regional and national industry and professional organizations and trade groups. We also regularly speak and write on real estate topics. We hold leadership positions in many of these organizations, including committee chairs and board memberships:

- + the American Bar Association's Section of State and Local Government Law, Section of Environment, Energy and Resources and Section of Real Property, Trust and Estate Law
- + the American Planning Association
- + the Congress for the New Urbanism
- + the International Council of Shopping Centers
- + the International Municipal Lawyers Association
- + the National Association for Industrial and Office Parks
- + the Urban Land Institute
- + the Wildlife Conservation Society
- + the World Jurist Association
- + American College of Real Estate Lawyers
- + American College of Mortgage Attorneys
- + CoreNet
- + International Council of Shopping Centers (NAIOP)
- + Counselors of Real Estate
- + Real Estate Finance Association

What Our Clients Say...

- + "They give great M&A advice. They are all about solving problems."
- + "They really give a great service and have a stellar support team. They are absolutely fantastic."
- + "They are very responsive, they have a great work product and are trusted partners at reasonable prices."
- + "Their performance is spectacular. It's a big firm with big firm capabilities, but they manage like a smaller shop with a more personal touch."
- + "Improvements? Not at all, I think it is five stars across the board."
- + "We chose them for a combination of their good size, their impressive experience in the M&A area, and the hometown feel of the firm. They're a big firm with big resources but they don't feel that way. I'd recommend them to anyone and I'd use them again in a heartbeat."
- + "They are an excellent team who are not only extremely knowledgeable in their specialties, but also take a deep personal interest in the well-being of their clients."

Reported by clients in Chambers USA – America's Leading Lawyers for Business

Real Estate + Development

Robinson+Cole's real estate practice encompasses a spectrum of real estate transactional and related matters. We represent a range of clients, including multinational corporations; institutional, public, and private lenders; retailers; state agencies; bonding authorities; schools; commercial and multifamily developers; health care institutions; hotel chains; and manufacturers.

We have a robust general real estate practice that includes these areas:

- + project development, re-development and entitlements
- + financing
- + conveyancing
- + commercial leasing
- + land use and Fair Housing Act litigation

Our Real Estate + Development Group lawyers have a keen understanding of complex transactions, ventures, and matters that include the following:

- + tax-advantaged transactions
- + public/private ventures
- + waterfront development
- + municipal tax lien sales
- + affordable housing
- + sale-leaseback transactions

- + common interest communities
- + telecommunications matters

Nationally, our team of real estate lawyers commonly handles the following types of transactions and matters:

ACQUISITION AND SALES ON BEHALF OF PURCHASERS AND SELLERS OF ALL ASSET CLASSES

- + vacant land
- + improved commercial and industrial properties
- + health care facilities
- + multifamily housing complexes

LEASING AND SUBLEASING ON BEHALF OF LANDLORDS AND TENANTS OF ALL ASSET CLASSES

- + office and retail space
- + warehouse and distribution facilities
- + restaurants
- + industrial and manufacturing facilities
- + brokerage matters on behalf of landlords, tenants, and brokers, including commission and agency agreements and commission claims
- + cable television and telecommunications licensing on behalf of landlords and tenants in commercial, industrial, and residential buildings

DEVELOPMENT OF COMMERCIAL AND INDUSTRIAL PROPERTIES AND MULTIFAMILY HOUSING COMPLEXES

- + drafting and negotiating construction contracts on behalf of property owners, landlords, and tenants
- + handling zoning and land use matters, from the acquisition and planning phases through the operation of commercial, retail, industrial, master-planned residential, and mixed-use facilities

REAL ESTATE FINANCE ON BEHALF OF LENDERS AND BORROWERS

- + acquisition, development, and construction loans
- + permanent commercial mortgage loans
- + mezzanine and conduit loans
- + creditors' rights, workouts, restructuring of loans, and mortgage banking issues

Development Permitting

Robinson+Cole's Land Use Group offers innovative, yet pragmatic, project legal services. Our lawyers and professional analysts are leaders in their field, recognized nationally, regionally, and locally for providing cutting-edge advice and counsel to developers and property owners.

Our experience cuts across all aspects of project legal services and all facets of government regulation of land use, including the following:

- + drafting zoning ordinances and other regulations tailored to specific client and project needs
- + securing development approvals, including site plans and special permits
- + advising on variances and special exceptions
- + advising on wetlands and waterways permitting
- + advising on subdivisions
- + advising on traffic approvals
- + managing controversy in high-profile projects
- + drafting and negotiating municipal development agreements for infrastructure and financing
- + coordinating professional teams, including architects, engineers, and scientists
- + devising proactive strategies for minimizing litigation exposure
- + providing related real estate services such as documenting easements and operating agreements for access, utilities, and roadways

Land Use

Our Land Use practice is a cross-disciplinary group of lawyers, professional planners, and environmental analysts that focuses its combined resources on the interrelated fields of planning, land use law, and real estate development. We provide legal services to a wide variety of clients, including property owners, real estate developers and investors, commercial and industrial users, and government entities. Our practice is based upon an extensive knowledge of land use law and procedure, as well as practical experience gained from decades of working with clients on challenging and complex matters across the country. Members of our land use practice have become leaders in the profession and enjoy national reputations for being on the cutting edge of land use law and practice. We frequently appear before reviewing bodies at the federal, state, and local levels, enabling us to gain the most up-to-date knowledge about procedures, personalities, and trends in the law.

Our team is committed to delivering excellent, high-level service to our clients by promptly responding to their needs. We offer a variety of critical path services, including the following examples:

- + development permitting for complicated projects that involve multiple levels of government review
- + high-stakes litigation arising out of government decision-making controlling real estate development
- + integrating land use strategies with real estate financing, ownership, and development structures
- + due diligence review and analysis of individual sites and portfolios of properties for real estate acquisition and financing

- + Our experience cuts across virtually all areas of land use practice, including the following:
- + affordable housing
- + brownfields redevelopment
- + coastal development and permitting
- + common interest ownership communities
- + development agreements
- + endangered species habitat
- + environmental impact review
- + floodplain regulation
- + form-based codes
- + government economic incentives for development
- + historic preservation and adaptive reuse
- + mixed-use projects
- + parking agreements
- + property tax appeals
- + public-private partnerships
- + religious rights and land use
- + regulation and ordinance drafting
- + takings, property rights, and condemnations
- + tax increment financing
- + traffic planning and regulation
- + transit-oriented development
- + subdivision regulation
- + utilities and infrastructure
- + wetlands and waterways permitting
- + zoning regulation

Land Use Litigation

Courts adjudicate the rights of individuals, businesses, associations, and community organizations as they relate to wide-ranging circumstances involving the development and use of land. These cases generally arise out of local, state, or federal government action in the form of regulatory decisions, enforcement proceedings, development activity on the government's own property, and the taking of private property.

Our Land Use Litigation Group is noted for its full-service practice, reflecting our familiarity and comfort with all manner of land use laws, regulations, and procedures and our comprehensive understanding of applicable federal and state constitutional principles. We are proficient in all aspects of litigation implicating land use and development and property rights, both in the states where we are based and nationally. We represent clients in litigation arising out of state and local administrative decision-making and in challenges to regulatory enactments. We also handle regulatory taking, eminent domain, and condemnation cases and represent clients in litigation under specialized federal statutes, such as the Religious Land Use and Institutionalized Persons Act and the Fair Housing Act.

Real Estate Acquisitions, Dispositions, and Development

Robinson+Cole handles transactions involving the acquisition or disposition of multiple parcels of property across all asset types—retail, office, hotel, industrial, medical, institutional, mixed use, research and development, biotech, and multifamily. In addition, our lawyers also regularly advise national, regional, and local developers in constructing and rehabilitating mixed-use, transit-oriented, and commercial and industrial properties, and multifamily housing complexes.

Acquisitions and Dispositions

We routinely work with our land use, construction, environmental, corporate, and tax colleagues to structure each transaction to meet our clients' needs, determining the most appropriate experience and staffing needed to best structure, execute, and then close the deal. Our lawyers and professional staff are equipped to handle all of the following:

- + the review of title documents, surveys, and title insurance commitments
- + the negotiation and drafting of real estate documents
- + the formation of business entities to address liability and tax issues
- + the investigation, analysis, and risk allocation of environmental matters
- + the due diligence and analysis required to obtain any federal, state, and local permits or approvals

Development

Our development lawyers provide a wide range of services to our developer clients that includes these services:

- + deal structuring
- + joint venture negotiation
- + acquisition documentation
- + financing
- + permitting and approval strategy and implementation
- + due diligence in all phases (physical, environmental, title, and existing permitting)
- + drafting and negotiating design and construction contracts

In all cases, we work with our colleagues across our offices in land use, construction, environmental, corporate, and tax to provide our developer clients with the highest level and most efficient legal advice and service.

Selected Representative Experience

DEVELOPMENT



Represented the town of West Hartford in connection with the joint development of Blue Back Square, a 500,000 sq ft mixed-use facility, including 230,000 sq ft of retail mall space.

REAL ESTATE



Represented Carrier Corporation, a global leader in high-technology heating, air-conditioning and refrigeration solutions, in connection with a sale-leaseback, build-to-suit development of a 514,000 sq ft distribution facility in San Antonio, Texas.

REAL ESTATE



Represented Diageo North America, Inc. (NYSE:DEO), a multinational alcoholic beverages company, in connection with its headquarters lease, as well as with multiple acquisition, sale, brokerage, construction, and licensing matters throughout the US.

REAL ESTATE



Represented FactSet Research Systems Inc., a leading provider of integrated global financial information and analytical applications for the investment community, in connection with its multi-building headquarters lease and subsequent expansions, and tax incentives.

REAL ESTATE



Represented Related Affordable in connection with the \$11 million purchase of a portfolio of affordable housing buildings across Connecticut.

REAL ESTATE



Represented Datto, Inc., a leading provider of backup, disaster recovery, and intelligent business continuity solutions, in connection with its 100,000 sq ft headquarters lease, expansion, and state incentives benefits.

REAL ESTATE



Represent PepsiCo, Inc. in its commercial real estate leasing, acquisition, sale, brokerage and construction matters throughout the U.S.

FINANCING AND REAL ESTATE DEVELOPMENT



Represented Unilever in the construction, financing and development of regional distribution facilities in Jacksonville and Dallas for its soap and laundry brands.

FINANCING AND REAL ESTATE DEVELOPMENT



Represented Unilever in the construction, financing and development of regional distribution facilities in Jacksonville and Dallas for its soap and laundry brands.

**REAL ESTATE LEASING
AND DEVELOPMENT**

DIAGEO

Represent Diageo North America, Inc. in connection with its commercial real estate leasing, acquisition, sale, brokerage and construction matters throughout the United States, including office, retail, warehouse, land, and industrial properties.

DEVELOPMENT



Represented OUE Ltd. (SGX: L33), an international real estate owner, developer, and operator, in the development of "OUE Skyspace LA," an open-air observation deck atop California's tallest building, Los Angeles' U.S. bank tower.

DEVELOPMENT



Represented The Stop & Shop Supermarket Company, LLC, the largest retail grocer in New England, in connection with the permitting and development of more than 50 supermarket locations.

- + Represented major East Coast developer on local permitting matters, including Article 80 Large Project Review and obtaining zoning relief from the Boston Board of Appeal, for mixed-use project in the Allston neighborhood of Boston. This project includes 170 units of rental housing, artist space, ground floor restaurant space, and an automated parking garage for the project's uses. It is currently under construction.
- + Representing major East Coast developer on local permitting matters, including Article 80 Large Project Review and obtaining zoning relief from the Boston Board of Appeal, for proposed multifamily residential project in the Dorchester neighborhood of Boston. This project includes 206 units of rental housing.
- + Ongoing representation of Boston Redevelopment Authority and Economic Development and Industrial Corporation of Boston (both d/b/a Boston Planning & Development Agency) in all aspects of ongoing development ground lease transactions, including:

Southwest Corridor/South End/Roxbury – New 40,000 SF Tropical Foods at Parcel 10 North, including shared parking and access (Melnea Cass Boulevard at Washington); New Melnea Hotel and Residences 108-room hotel and 50 residential rental units (7 affordable), and 4300 SF of ground floor retail, with accessory off-street parking (Melnea Cass Boulevard at Albany Street); and sale of existing mixed-use development in Crosstown to the Boston Medical Center under lease-based purchase option.

Raymond L. Flynn Marine Park in South Boston – Innovation Square at 6 Tide Street 122,000 SF lab/research facility, half of which has been subleased to Mass. Innovation Labs; the relocation of Cannistraro Industries, a major specialty sheet metal producer, from suburban Boston to 25 Fid Kennedy Way to occupy a previously abandoned industrial structure; and an approximately 294,000 SF speculative office building to be located at the intersection of Drydock Avenue and Summer Street.

Charlestown Navy Yard – Parcel 39A, a new, ground-up building containing 54 residential units; and the Ropewalk, a major historic rehabilitation project with 97 residential rental units and publicly-accessible "flirtation walk" and exhibit space related to the historic rope-making activities at the site.

- + Represented the master developer in a major mixed-use project adjacent to the University of Connecticut. Our services included virtually all aspects of the project including the preparation of a state-level municipal development plan, the negotiation of development agreements with the municipal development agency and the town, and the creation a new special design district to streamline zoning permits, worked with the client's team in developing comprehensive design guidelines, drafted and negotiated numerous phased purchase and sale agreements with state agencies and private landowners, composed land use and environmental permit applications with local, state and federal agencies (local inland wetland permits, special use permits, subdivision approvals, state traffic agency approvals and storm water permits), drafted land easement conveyances for roadway improvements, prepared commercial leases with retail and restaurant tenants, created a condominium structure, and provided government relations services that resulted in state and federal infrastructure funding.
- + Represented borrower/developer/guarantor team on the development, permitting, and then construction to permanent senior financing and soft subordinate financing for a 27-unit all affordable transit-oriented development in the Hyde Park neighborhood of Boston. The project, adjacent to the Fairmount station on the MBTA's Fairmount/Readville Commuter Rail line, is the first new transit-oriented development in this part of Boston in several decades and the first ground-up construction project for long-term firm client Southwest Boston CDC.
- + Represented a private developer in a large mixed-use, transit-oriented development on land adjacent to the MBTA's Wonderland Station. The 1.3 million-square-foot project involved the construction of over 900 residential units; a 125-room hotel; 187,000 square feet of retail, office, and cultural use space; and structured parking for over 2,000 vehicles. Our services included drafting the developer's response to the City's RFP, performing all due diligence for the nine-acre site, preparing and negotiating the master development agreement, and preparing a long-term ground lease with the MATA. We also prepared and negotiated the construction management contract for the MBTA parking garage, prepared several memoranda of understanding with state agencies and utility companies, and assisted with the project's federal, state, and local permitting requirements. We likewise participated in securing federal stimulus funds to construct the MBTA garage.
- + Representing international solar power investment company on multiple solar energy generation facility sites in Massachusetts. Areas within scope of assistance included review of local, state, and federal permitting, site acquisition, and PILOT agreements for facilities.
- + Represented a major real estate investment trust in land use permitting analysis in connection with the acquisition of an under-construction, 330-unit multifamily development in a southern suburb of Boston.
- + Two-phase redevelopment of Clippership Wharf in East Boston, MA. Phase 1 involved the acquisition of parcel from the Boston Redevelopment Authority and new construction of a mixed-income condominium project using workforce housing proceeds from Massachusetts Housing Finance Agency. Phase 2 involved a ground lease of property from the Boston Redevelopment Authority and new construction of a mixed use affordable housing project involving federal and state Low Income Housing Tax Credits and loan proceeds from Massachusetts Housing Finance Agency, as well as subordinate debt from multiple local and state sources.
- + Acquisition and financing of historic school building in Southbridge, MA utilizing financing from numerous state and local sources including DHCD HOME funds, Affordable Housing Trust Funds, Facilities Consolidation Funds and Housing Stabilization Funds as well as state and federal Low Income and Historic Tax Credits.
- + Multi-phase redevelopment of one million square foot historic department store in Rochester, NY into mixed- use condominium involving retail, restaurant, innovation labs, market rate housing, workforce housing and affordable housing. Redevelopment involved a seven (7) phase historic project. Two phases included the use of new market tax credits combined with an historic lease pass-through; two phases involved the development of affordable housing utilizing Low Income Housing and Historic Tax Credits; and one phase involved the use of tax exempt bond financing, work force housing proceeds and Historic Tax Credits. Two additional phases involved the use of opportunity zone fund investments.

- + \$48MM HUD financing of an occupied multi-family housing project in Jackson, MS that included a joint venture with the local housing authority ground lease from the housing authority, RAD conversion and syndication of Low Income Housing Tax Credits.
- + Acquisition and financing of historic mill building using condominium structure to bifurcate a single project into a 4% project and 9% project, using construction financing from Rhode Island Housing Finance Agency and Citizens Bank. Because of issues related to the transferability of the state Historic Tax Credits, a new ownership structure was created that allowed the tax credit investor to be admitted as a sole member of each of the condominium owners, which allowed each owner to be treated as a disregarded entity for the purposes of the tax credits.



PARTNER

dmrobinson@rc.com

One Boston Place

Boston, Massachusetts, 02108

617-557-5928

ADMISSIONS

Commonwealth of Massachusetts

U.S. District Court, District of

Massachusetts

EDUCATION

Boston College Law School

J.D.

Boston University

B.A.

cum laude

Relationship Partners

DEIRDRE M. ROBINSON

Deirdre M. Robinson represents developers in the Northeast and across the country in all aspects of affordable housing development with an emphasis on syndication of tax credits including low income housing, historic and new markets. She represents for-profit and nonprofit organizations owners and developers in complex, mixed-use and multi-family housing projects, utilizing creative financing structures that combine private and subsidy loan programs and various tax-credit programs. Deirdre is a member of the firm's Real Estate + Development Group.

Affordable Housing Real Estate Development

Deirdre specializes in complicated transactions that frequently involve historic preservation. She works with her clients to develop creative solutions to complicated structuring and financing problems faced by owners and developers that involve a wide array of private, state and federal funding sources, tax-exempt bond financing and equity investment from the syndication of federal and state Low Income Housing Tax Credits, federal and state Historic Tax Credits, New Markets Tax Credits, Solar Energy Tax Credits and Brownfields Credits. Deirdre is committed to working with her clients to address the need for safe, quality affordable housing and community development.

Professional Associations

- + Massachusetts Bar Association
- + Boston Bar Association
- + CREW Network
- + National Housing & Rehabilitation Association
- + Citizens' Housing and Planning Association (CHAPA)

Awards

- + *Massachusetts Lawyers Weekly* 2015 Top Women of Law Honoree
- + The Legal 500 US (2019), Real Estate



PARTNER

mlawlor@rc.com
One Boston Place
Boston, Massachusetts, 02108
617-557-5948

ADMISSIONS

Commonwealth of Massachusetts

EDUCATION

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

MATTHEW J. LAWLOR

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

Real Estate Disposition for Public Agencies

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

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

Affordable Housing Finance

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

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

Development, Permitting, and Land Use

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

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

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

Pro Bono

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

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

Professional Associations

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

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

Community Involvement

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

Awards

- + Board Distinguished Service Award, Southwest Boston Community Development Corporation
- + Selected by his peers for inclusion in *The Best Lawyers in America*® in the area of Real Estate Law since 2019 and in the area of Land Use and Zoning Law for 2021.
- + Selected to the Massachusetts *Super Lawyers* list from 2018 to 2020.
- + Selected as a Rising Star to the Massachusetts *Super Lawyers* list in 2008 and from 2010 to 2011.
- + Robinson+Cole Pro Bono Service Award Recipient, 2016
- + WalkBoston Golden Shoe Award, 2018

VHB



June 2021 | Qualifications
Trinity Financial

Medfield State Hospital

Civil, Traffic, and Survey Services



Medfield State Hospital

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Medfield State Hospital

1

Firm Corporate Profile



Founded in
1979



1,600 passionate professionals

including engineers, scientists, planners, and designers

30 locations
throughout the east coast



55th on ENR

Top 500 Design Firms List

Markets

Real Estate

Institutions

State and Local Governments

Transportation Agencies

Federal Government

Energy

VHB's passionate professionals include land planners, urban designers, engineers, scientists, and designers who partner with public and private clients in the real estate, transportation, institutional, and energy industries, and federal, state, and local government markets.

Together, we work to improve mobility, enhance communities and economic vitality, and balance development and infrastructure needs with environmental stewardship. VHB's innovative thinking leads to creative, practical solutions for our clients. We bring collective knowledge, technical excellence, and a wide network of trusted relationships across our footprint to deliver value. Our team has an open-minded approach to projects, and we are committed to listening and truly understanding our clients' needs—we see the whole picture, not just one piece. We integrate the right people and resources from our four core service areas to help clients initiate and complete intricate, challenging, and significant projects.

Offering Clients Fully Integrated Services

Our planners, civil and transportation engineers, designers and scientists provide conceptual and technical services to facilitate large-scale real estate developments. VHB's integrated services approach gives us the ability to create bold and visionary outcomes that incorporate technical skill and sustainable strategies to plan, design, and permit sensitive and complex projects. We understand the intricacies of working in a densely populated urban environment, navigating often-competing regulatory requirements, and designing solutions that work. Whether a project involves new construction or development of an underutilized, blighted site, VHB's passionate professionals turn visions into reality.

Services

Master Planning
 Civil Engineering
 Land Use Planning,
 Engineering & Analysis
 Traffic Engineering
 Transportation
 Planning & Engineering
 Permitting
 Landscape Architecture
 Resiliency Planning
 Stormwater
 Utilities Design
 Bikeway & Pedestrian
 Planning & Design
 Community Planning
 Due Diligence
 Emergency
 Preparedness
 Entitlements
 Hazard Mitigation
 Land Survey
 Parking Studies, Design
 & Engineering
 Research & Analysis

VHB works with cities, developers, owners, and institutions who want to move complex projects forward. We are at our best when a project requires us to bring together skills in civil engineering, transportation planning and design, urban land planning, survey, environmental sciences, entitlement permitting and environmental review. On each project, we combine careful research, assessment, and analysis of existing natural and infrastructure conditions with community and stakeholder outreach to develop innovative plans that create opportunities for economic growth, improved lifestyle, and environmental stewardship. Whether it be residential, academic, recreation, commercial, retail, or a combination of all of these types of project, VHB is at the forefront of collaborating with our clients as they build for the future. Our public- and private-sector balance brings unique perspectives that result in plans that get implemented to deliver economic development, new jobs, and great places to live, work and play.



Strong Relationships

with local communities, stakeholders,
and state and local agencies



Proven Track Record

of cost-savings and expedited schedules

Land Development

Related Services | Civil Engineering | Community Planning | Due Diligence Research & Analysis | Land Survey | Land Use Planning, Engineering & Analysis | Stormwater Design & Engineering | Utilities Design | Master Planning

VHB provides comprehensive site planning and engineering design services to assist clients with a diverse mix of projects, from minor site improvements to major capital programs. Our clients look to us to provide specialized design expertise and cost-effective solutions on a broad range of campus facility types—including residential, academic, recreation, commercial, retail, or mixed-use. We have more than 85 LEED®-accredited professionals representing the major physical design disciplines, and we have extensive experience in the areas of low impact design and stormwater management.

Planning & Design

Related Services | Community Planning | Comprehensive Plans | Entitlement Services | Landscape Architecture | Public Outreach | Zoning Analysis

Our planning services facilitate the development of large-scale real estate developments, recognizing that they play an integral part in the local community. As part of VHB's integrated services practice, we offer feasibility and site analyses, land use planning, urban/regional planning, zoning, community visioning, comprehensive municipal plans, downtown revitalization strategies, waterfront planning, natural resources planning, preparation of environmental impact reports and impact statements, landscape architecture, and graphic/web site design to communicate planning goals. In fact, nearly all of our planners have completed the National Charrette Institute Charrette System® training program. VHB offers the planning capabilities necessary to realize sensitive and responsive development that engenders long-term community support for a project.

Transportation Planning & Engineering

Related Services | Roadway & Highway Engineering | Bridge Design & Engineering | Bicycle/
Pedestrian Planning & Engineering | Traffic Engineering | Alternative Delivery | Transit & Rail

VHB's transportation planners seek to integrate all modes of transportation, requiring a balanced program of policy, operational and capital investments. Our transportation practice serves our clients by improving the pedestrian and vehicular systems environment, addressing access needs for a wide range of user groups, and developing transportation growth management and strategies. Projects include: corridor studies, transportation impact assessments; vehicular/pedestrian conflict studies; downtown/village parking, circulation, and access studies; multimodal access identifying multi-modal transportation issues associated with various types of transportation projects such as alternative modes analyses; and highway route location studies.

Environmental

Related Services | Environmental Assessment & Compliance | Natural Resource Assessment & Analysis | NEPA Documentation & Analysis | Water Resources Analysis | Wetlands Delineation, Mitigation & Permitting | Climate Adaptation Planning

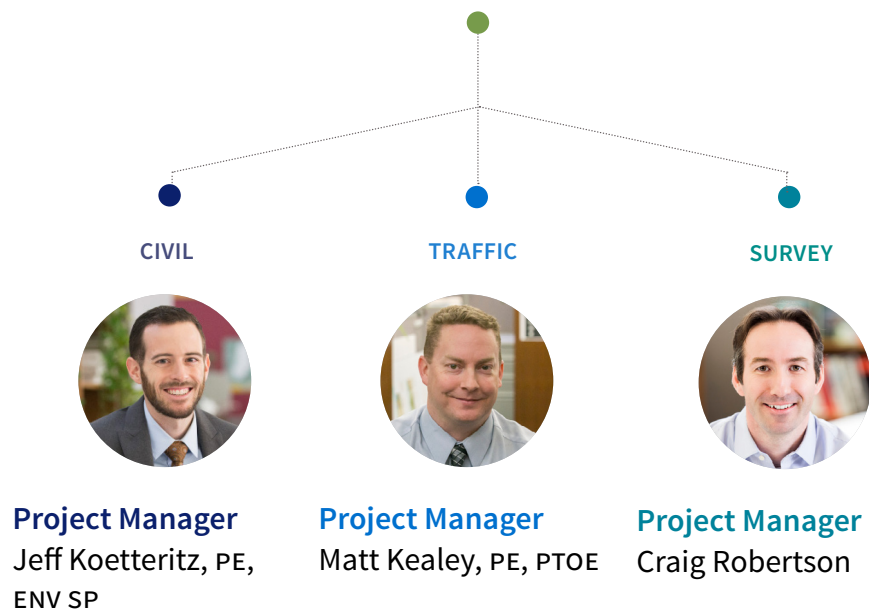
As environmental concerns and regulations have evolved, we have developed the skills base to advise our institutional clients on the full range of environmental issues that may influence the overall direction and implementation of a capital project. VHB offers a depth and breadth of experience in environmental permitting, entitlement strategy, water resource management, hazardous materials management programs, environmental risk management, air quality and noise assessment, wetlands mitigation, cultural resource identification and assessment, socioeconomic evaluations, and brownfields site evaluations and redevelopment plans. Our track record of success is the result of effective communication and relationships with regulatory agencies, as well as the ability to convey key regulatory and technical information.

Your VHB Team

Below is an organizational chart that describes the individual teams that we are proposing Civil Engineering, Traffic Engineering, and Survey services for Medfield State Hospital. Since all of our service teams are in-house, we will be able to be in constant communication with each other and huddle up to solve your issues on the fly—saving you time and money.

The following proposal sections include full resumes for each of the service leads outlined in the org chart below.

Medfield State Hospital (Trinity Financial)



2

Civil Engineering

VHB offers our clients full-service civil engineering capabilities that result in projects that are managed efficiently and effectively. Our engineering professionals provide services that include site design, land planning, due diligence analysis, feasibility studies, master planning, utility infrastructure design, traffic design and engineering, traffic and environmental impact analysis, landscape architecture, community involvement, and permitting and regulatory approvals. VHB's team has a proven track record in securing necessary project clearances from regulatory agencies to help our client's projects to move forward without costly and time-consuming delays. VHB's capabilities and depth of experience guide the smallest to the most complex project through the often challenging regulatory arena.

Jeff Koetteritz, PE, ENV SP

Project Manager



Jeff is a Project Manager with VHB's Land Development Department where he is responsible for civil engineering design and permitting for a wide range of land development projects. His work includes projects involving permitting, site design, stormwater management system design, utility infrastructure design, and construction support.

13 years of professional experience

Education

BS, Civil & Environmental
Engineering, Northeastern
University, 2008

Registrations/Certifications

Professional Engineer MA, 2013
Envision™ Sustainability
Professional, 2013

Affiliations/Memberships

American Society of Civil
Engineers, 2013

Merrimack College, Campus Renewal, Andover and North Andover, MA

Since 2011, Merrimack College has been implementing its “Agenda for Distinction”, an aggressive strategic plan to grow the college and its reputation in a highly competitive market. Jeff has been the Project Manager and Senior Project Engineer for a number of capital projects that support the agenda, including the Merrimack Athletic Complex, South Residential Village, North Campus Development, Crowe Hall Academic Building, Arcidi Welcome Center and Warrior Stadium. These projects have incorporated a wide variety of design components such as site/civil design, permitting, utility infrastructure planning, stormwater analysis and design, athletic facilities design, transportation design and construction phase services. Jeff has led design and permitting efforts with consultant teams and provided construction administration and observation support services. Throughout the implementation of the campus renewal, Jeff has worked closely with the DPW, Engineering Division, Board of Health, Planning Department, Fire, Police, Planning Boards and Conservation Commissions of Andover and North Andover in the design and construction of the improvements.

Harvard University, Allston Campus Enabling Infrastructure, Boston, MA

Jeff has been a Project Manager and Senior Project Engineer for Harvard University's Allston Enabling Roadways project, an early milestone of the University's Institutional Master Plan (IMP) to promote growth on its Allston campus. The IMP, over an area of approximately 30-acres, encompasses a plan to develop infrastructure and support more than a million square feet of new academic, research, and administrative facilities; renovating, both programmatically and physically, buildings that support Executive Education and other uses; and creating new gathering and social spaces for the University and the community. The Project consists of heavy civil utility infrastructure, coordination of thermal utility corridors, existing streetscape improvements, new roadway construction, creation of a mobility hub (a multi-modal transportation hub for students and commuters) and associated site, parking and landscape areas. The Project is centered around the new Science and Engineering Complex, which will be home to nearly two-thirds of the Harvard John A. Paulson School of Engineering and Applied Sciences (SEAS), and will see more than 900 undergraduate students on any given day. Jeff has been working with VHB's Transportation Department to lead a team of design consultants for the Enabling Design, with a focus on permitting, site/civil design, stormwater management design, utility infrastructure and transportation enabling efforts, as well as construction logistics and preliminary cost estimate support.

Jeff Koetteritz, PE, ENV SP**Princeton University, Arts & Transit Neighborhood Enabling Project, Princeton, NJ**

Jeff served as the lead Project Engineer for the 22-acre project to transform the southwestern edge of Princeton University in support of a strategic initiative to fully integrate the arts within the institution's undergraduate curriculum. The project included several elements—roadway improvement, roundabout design, transit plaza, rail relocation, service tunnel, utility improvements, stormwater, and open space—that, taken together, enabled the development of as many as four major buildings over an extended period of time. Jeff's responsibilities included site/civil design, stormwater design and hydrologic/hydraulic modeling, utility infrastructure design, coordination with design consultants, and construction phase support.

North Hill Renovation and Expansion Program: True North, Needham, MA

Jeff was a Project Engineer for civil engineering design and site permitting efforts for the repositioning within the marketplace of North Hill, a 60-acre life care facility that has provided high quality, innovative, personalized services and amenities to people 65 or older since 1984. The project is a multi-phased major renovation and expansion program, dubbed True North, that adds new living spaces, replaces the existing hospital-style skilled nursing facility (SNF) with a new small-homes-style SNF, and creates an inviting village green as a gateway to the campus. Jeff's responsibilities include site/civil design, permitting, stormwater management system design, coordination with design consultants, preparation of construction documents, and construction support services.

University of Massachusetts Medical School, Albert Sherman Center & Albert Sherman Center Parking Garage, Worcester, MA

Jeff was the Project Engineer on a 480,000 SF medical building and associated 1,400-car parking structure located on UMass Worcester Campus along with low impact development (LID) stormwater management surface features and a stormwater re-use system. His responsibilities include site/civil design, permitting, stormwater management system design, coordination with design consultants, preparation of construction documents, and construction support services. Given tight constraints on an active medical campus, the design required phased development to maintain utility service while establishing new corridors to free up the project site for construction of the Sherman Center. The off-site parking structure required wetland fill and replication to establish buildable area sufficient to fit the required program. This project was delivered in an "IPD-light" manner, with consultants and the construction team regularly sharing BIM models to facilitate a design and construction on a challenging site constrained by existing buildings, ledge and existing campus utility infrastructure.

MIT – Lincoln Laboratory, West Laboratory, Lexington, MA

Jeff was a Project Engineer on an architectural team for the design and preparation of construction documents for a new laboratory on the Katahdin Hill area of the Massachusetts Institute of Technology (MIT) Lincoln Laboratory Campus. Project responsibilities include conceptual utility infrastructure planning, stormwater management system design, coordination with design consultants, and preparation of planning phase and basis of design material.

3

Traffic Engineering

VHB designs intersection improvements for new land developments, as well as municipalities and state agencies. Services include the design of new signal systems, redesign of existing signal systems, system coordination, geometric and channelization improvements, pavement markings, and signs. VHB has both developed and reviewed a vast number of traffic and parking studies and reports for private- and public-sector clients. In representing private developers, we pay particular attention to zoning requirements and neighborhood impacts.

In addition to providing complete design services for all areas of traffic signal operations, VHB also understands the need to move traffic through active construction zones. Our award-winning work for the traffic management component of the Central Artery project demonstrates our ability to design traffic management for projects of varying complexity. As New England's preeminent transportation and traffic consulting firm, VHB has worked on a wide range of traffic control and signal upgrade projects under diverse conditions, from inspecting, evaluating, and improving systems that no longer can boast about their once modern status to designing and installing today's state-of-the-art systems.

Matthew J. Kealey, PE, PTOE

Project Manager



Matt is a Project Manager with VHB's Transportation Planning and Engineering Group. His engineering responsibilities include managing the preparation traffic impact and access studies and access/circulation/parking analysis for institutional, retail, office, and residential developments.

24 years of professional experience

Education

BS, Civil Engineering, Worcester
Polytechnic Institute, 1997

Registrations/Certifications

Professional Engineer (Civil)
MA, 2003

Professional Traffic Operations
Engineer

Affiliations/Memberships

Institute of Transportation
Engineers

Suffolk Downs Redevelopment, East Boston and Revere, MA

Matt is the Project Manager in charge of the transportation planning and engineering services to support the redevelopment of Suffolk Downs, a 161-acre former horse racing facility. This 16,200,000 sf redevelopment project, led by HYM Investment Group, provides the unique opportunity for a new transit-oriented mixed-use neighborhood with the ability to evolve with the ever-changing needs of the community and market conditions. The project will include recreation areas, a retail district, housing, integration of the existing adjacent MBTA Blue Line stations and alternative travel modes, including new bicycle paths and pedestrian facilities.

1265 Main Street, Waltham, MA

1265 Main Street is a mixed-use development consisting of 850,000 sf of office space, 200,000 sf of retail space, 150,000 sf of health and wellness uses, and 300 hotel rooms to be located on the former Polaroid site in Waltham, Massachusetts. Matt was the Project Manager for the traffic impact access study for this project, which involved complex trip generation, trip distribution, capacity analyses, and numerous conceptual improvement plans developed in close coordination with the Massachusetts Department of Transportation (MassDOT) and the City of Waltham.

Market Street at Lynnfield, Lynnfield, MA

Market Street at Lynnfield is a mixed-use development consisting of 395,000 square feet of retail space, 80,000 square feet of office space, and 228 residential units to be located on the former Colonial Golf Club site in Lynnfield. Matt was the Project Manager for the traffic impact and access study, including an extensive mitigation program that involved signalization of multiple interchange ramps from Route 128.

Harwich Commons Expansion, Harwich, MA

Matt worked on the evaluation of the traffic impacts associated with the expansion of a Stop & Shop Supermarket and construction of additional retail space located along Route 137 and Route 39 in Harwich. Project mitigation included modifications to traffic signal timing and phasing, construction of a new traffic signal and construction of a roundabout. The traffic study also included an evaluation of existing and future traffic operations as well as a parking and circulation assessment.

Matthew J. Kealey, PE, PTOE**The Station at Riverside, Transit-Oriented Mixed-Use Development, Newton, MA**

The Station at Riverside is a transit-oriented mixed-use development consisting of 225,000 square feet of office space, 290 residential units, 20,000 square feet of retail space, and an intermodal commuter facility located at Riverside Station in Newton. Matt was the Project Manager for the traffic impact access study for this project, which involved complex trip generation, trip distribution, capacity analyses, and numerous conceptual improvement plans developed in close coordination with the Massachusetts Department of Transportation (MassDOT) and the City of Newton. The project also included preparation of traffic simulations using VISSIM software.

Meadowbrook School, Weston, MA

VHB has had a long relationship with the Meadowbrook School and has performed a number of transportation-related studies. Matt was involved with the construction of two new athletic fields on the school's campus. This project involved assessment of new traffic associated with the new fields, on-site circulation patterns for visiting buses and spectators, parking locations, adequacy of parking supply, and pedestrian connections, circulation, and safety. Other assignments have included an evaluation of the pick-up/drop-off operations at the school during future construction on the site. Matt worked with the school to recommend different circulation options to accommodate pick-up/drop-off operations under various conditions on site.

The Park at Great Woods, Norton, MA

The Park at Great Woods development involved the construction of a Tournament Players Club (TPC) Championship Golf Course and 1 million square feet of office space along Route 140 in Norton, Massachusetts. The project involved evaluation of the traffic impacts on local roads as well as the I-495 Ramps at Route 140 and Route 123. Extensive mitigation requirements of this project included widening of Route 140, traffic signal installation at the proposed site driveway, Route 140 at the I-495 Ramps, and Route 123 at the I-495 Ramps. In addition, Matt prepared the Event Traffic Management Plan (TMP) for the annual Deutsche Bank Championship played at the TPC course. Attendance at this popular event reaches 25,000 spectators per day during the tournament, and the event requires an updated plan each year. Preparation of the TMP includes planned use of satellite parking areas, coordination of shuttle buses, pedestrian accommodations, and an extensive network of static signs and variable message signs.

1021 Kingston's Place Mixed-use Development, Kingston, MA

For Thorndike Development, Matt provided transportation services for a new transit-oriented development consisting of 50,000 square feet of retail space, 250,000 square feet of Class A office space, and 730 residential units to be located adjacent to the commuter rail stop in Kingston. He prepared the traffic impact and access study for this project, which included detailed assessment of existing operations of the commuter rail station and trip generation credits associated with mixed uses being built in close proximity to a transit station. This project also involved justification of constructing a new on-ramp to Route 3 southbound and analysis of multiple alternatives.

4

Survey

Survey services are an essential part of VHB's integrated multidisciplinary capabilities, and we have performed thousands of surveys throughout New England for public and private clients. Projects have ranged from small acreage residential sites to large-scale developments. Our talented survey team performs roadway survey for all types of streets and highways, covering surveys for boundary line determination, topographic surveys, and aerial mapping projects for hundreds of clients and agencies. Survey input is fully computerized and integrated with VHB's CAD-based engineering products. High-level electronic surveying instruments, including the latest GPS technology, is standard equipment for our field crews.

Supported by planners, engineers, and environmental specialists from our offices across the Commonwealth, VHB's team of 100+ surveyors across our footprint provide high-quality survey services with a technology-driven approach—providing contextual information as they describe the exact nature of the real estate they are evaluating. Our survey teams work closely with our Applied Technology team and use the latest and greatest technologies—from ArcGIS to Unmanned Aircraft Systems—to collect and share survey data accurately, efficiently, and cost-effectively. Through proven standards, the VHB survey team consistently demonstrates its ability to successfully complete large scale surveying efforts for public and private sector clients on some of the most complex and urgent development projects in the nation.

Craig D. Robertson

Project Manager



Education

BS, Building Surveying, Napier University (Scotland), 1997

Affiliations/Memberships

Massachusetts Association of Land Surveyors and Civil Engineers, Eastern Massachusetts, 1997

Craig is a Senior Project Surveyor and Project Manager with VHB's Survey Group in the Watertown, Massachusetts, office. He has considerable experience in all types of land surveying, with responsibilities that include developing proposals, crew coordination, checking field notes and procedures, final plan checks, and budget analysis for a wide range of public- and private-sector clients. He has performed diverse survey tasks for numerous projects in the greater Boston area for both public and private clients, many for institutional sites.

24 years of professional experience

Beth Israel Deaconess Medical Center (BIDMC – West Campus), New Inpatient Building, Boston, MA

For the BIDMC, Craig provided survey services for this a new 400-square-foot clinical inpatient building. VHB's services included supporting BIDMC in its effort to permit, design, and construct a new 400K SF clinical building on the West Campus in the Longwood Medical Area. VHB provided transportation, civil, Article 80, and MEPA permitting services.

Massachusetts Division of Capital Asset Management and Maintenance, Shattuck Hospital Transportation Analysis, Boston, MA

Craig was Survey Project Manager for this Transportation Access Study to support the Shattuck Campus Planning initiative. The study establishes important mobility goals and objectives that will support and enhance the Master Plan Vision and support integrating the re-use of the campus with the surrounding park and connecting it to the neighborhoods. Craig's work included providing a property line and existing conditions survey and utilizing drone imagery of the site and surrounding roadways.

Massachusetts General Hospital, Traffic/Parking Planning Services, Boston, MA

Craig facilitated existing conditions survey for MGH's Phase II building, as well as provided surveys of existing roadways for improvements to site access and circulation.

Joslin Diabetes Center Redevelopment, Boston, MA

Craig served as Survey Project Manager to support the replacement of a building, apartment complex, and surface parking lot in Boston's Longwood Medical Area with the newly constructed Joslin Diabetes Center, the world's largest diabetes research institution. His work consisted of property line and existing conditions survey, ALTA/NSPS land title survey, as-built surveys, preparation of subdivision and easement plans, and deformation monitoring and construction layout.

Partners Healthcare System, Inc., Various Hospitals, Boston, MA

Craig facilitated surveys for several hospital projects in and around Boston, as well as provided surveys of offsite improvements to site access and circulation. These projects consisted of property line and existing conditions survey, ALTA/ACSM land title survey, as-built surveys, preparation of various property line, discontinuance & easement plans, and construction layout.

Craig D. Robertson

St. Elizabeth's Hospital, Institutional Master Plan, Boston, MA

When St. Elizabeth's Hospital intended to build an emergency department expansion that would require the preparation of an Institutional Master Plan for the Boston Redevelopment Authority, Craig provided survey services that included an existing conditions survey of the proposed location of the new building and roadway and construction layout.

UMASS Medical School, Worcester, MA

Craig is the Survey Project Manager for several development projects for the UMass Medical School campus. Survey work involved property line determination, topography/aerial and utility surveys, ALTA/NSPS Land Title Surveys, as well as developing subdivision, license, lease, and easement plans. Craig was also involved in the preliminary construction layout of the proposed buildings and completion of as-built plans.

MIT, Facilities Microgrid Master Plan Project, Cambridge, MA

Working as part of the Facilities Engineering Associates team, Craig is VHB's Task Manager for Survey for the MIT Facilities Microgrid Master Plan project. VHB is providing professional land survey, permitting support, civil engineering services, and construction phase service to support the construction of the project, which involves three phases of electrical duct bank construction on the MIT campus, which is anticipated to be completed in the Fall of 2023.

MassDOT, On-Call Survey Services, Massachusetts

Under VHB's current survey contract with the Massachusetts Department of Transportation (MassDOT), Craig has provided a variety of surveying services including property line surveys, existing conditions surveys, land title surveys, and easement plans. Responsibilities include crew coordination, checking field notes and procedures, calculations and drafting, final plan checks, and budget analysis.

Additional Site & Roadway Surveys, Massachusetts

Craig has managed surveying efforts to develop an existing conditions base plan for both site and roadway design in various communities in Massachusetts, specifically in the City of Boston. This work has included the determination property lines/right-of way lines, topography, and utilities lines, for some of the following projects Route I-93 Parking, Boston, MA Government Center Garage, Boston, MA Landmark Center, Boston, MA Massachusetts Institute of Technology Campus, Cambridge, MA Prudential Center, Boston, MA Simmons College, Boston, MA First Church of Christian Scientists, Boston, MA 2, 4, 7 & 17 Cambridge Center, Cambridge, MA Beacon Street, Brookline, MA Route I-495, Amesbury, MA Route I-195, Fairhaven, MA Blackstone Canal District, Worcester, MA Cape Cod Rail Trail, Barnstable/Yarmouth, MA Route 85, Marlborough, MA Route 2, Cambridge, MA French River Riverwalk, Webster, MA Washington Street (Route 1A), Norwood, MA.

5

Project Experience & References

VHB's passion for designing and completing projects for local communities reflects in our client relationships. The following select projects and associated references demonstrate VHB's experience in providing civil, traffic and survey services for other similar projects.



Assembly Row

Somerville, Massachusetts

Clients

Federal Realty Investment Trust

VHB Schedule

Started: March 2003

Completed: Ongoing

Reference

Don Briggs
Executive Vice President -
Development
Federal Realty Investment
Trust
617.684.1515
dbriggs@federalrealty.com

Relevant Services Provided

Master Planning
Civil Engineering
Traffic Engineering
Permitting

Assembly Row is a vibrant mixed-use development featuring approximately 5 million square feet of residential, office, and retail space resulting from a total investment of \$1.5 billion. Since 2006, Federal Realty has worked to transform this underutilized industrial parcel into a thriving destination. Sited along the Mystic River, this Smart Growth project will enhance access to the waterfront, provide new transit facilities, and implement pedestrian-oriented features that will encourage visitors and residents to live, work, and play at Assembly Row. VHB's extensive knowledge of the site and breadth of in-house planning, permitting, and engineering expertise enhanced our ability to move the project forward and we have remained Federal Realty's trusted consultant for over eight years. Working alongside Federal Realty and multiple stakeholders, VHB developed a comprehensive master plan—including onsite roadways and new utility infrastructure—sustaining a decade-long development project while allowing for flexibility in the development program and potential changes along the way. VHB's efforts were also supportive of the community's and our client's commitment to using public-private partnership funding mechanisms. Our past working relationship with teaming partners and regulators promoted a high level of confidence in the design and permitting of Assembly Row which helped to keep the project schedule on track. VHB continues to manage the design and permitting for this project's success and to support Federal Realty's goals for this transit-oriented development—fostering collaboration, community and connectivity.



Image © Elkus Manfredi

Union Point

Weymouth, Massachusetts

Client

LStar Ventures

VHB Schedule

Started: Sept. 1998

Completed: Ongoing

Reference

Kyle Corkum, Managing
Partner - LStar Ventures
919.256.1981
kyle@lvnt.com

Relevant Services Provided

Master Planning
Civil Engineering
Traffic Engineering
Permitting
Transportation

Union Point is helping to shape the definition of Smart City—transit oriented, technologically advanced, and environmentally conscious. A culturally rich urban environment only 20 minutes from Boston, Union Point is a \$1.5B mixed-use development envisioned as a beautiful and sustainable city. LStar Ventures is making this vision a reality. When the South Weymouth Naval Air Base closed in 1997, it opened 1,400 acres of economic development potential. The area's accessibility to Route 3 and the MBTA's Commuter Rail made it an ideal location for commercial and residential development. The base's sprawling plain also presented a rare opportunity to create a brand-new community within one of the South Shore's densest areas. Union Point is a smart growth community that exudes the live, work, play mentality with 8M SF of commercial space, 4,000 private residences, and 50 miles of hiking/biking trails amidst 1,000 acres of open space. Construction to date includes 500 residential homes, 200 condominiums and 108 townhomes.

For nearly two decades, VHB has helped to keep this project moving forward. Our teams were heavily involved for much of the base's redevelopment history, including the early environmental permitting and extensive monitoring of protected wildlife species that populate the base's open spaces. LStar Ventures' vision revolved around essential infrastructure improvements crucial to making the community more accessible and economically viable. LStar Ventures engaged VHB to design a solution—the Bill Delahunt Parkway. The team secured \$6.5M in MassDOT funding to complete this key access road that connected Route 3, Route 18, and the MBTA South Weymouth Commuter Rail Station.



Image © VHB - Christoph Gervais

The Merc at Moody & Main

Waltham, Massachusetts

Client

Northland Investment
Corporation

VHB Schedule

Started: Sept. 2012
Completed: Ongoing

Reference

Kent Gonzales
Vice President, Development
617.630.7209
kgonzales@northland.com

Relevant Services Provided

Civil Engineering
Permitting

The Merc at Moody & Main is a transit-oriented apartment community transforming Waltham center. Centrally located near public transportation and restaurants, this community is well positioned to serve Waltham's growing demand for housing. VHB's history with Northland, familiarity with the site, and strong relationships with the City of Waltham enabled us to alleviate site challenges, such as site logistics due to existing tenants and a uniquely designed underground parking garage with surface parking. Our extensive knowledge of the City's environmental regulations, review process, and drainage for development within the Charles River Basin enabled us to drive the development forward and meet the construction schedule.



Legacy Farms 733-Acre Mixed-Use Development Hopkinton, Massachusetts

Client

Baystone Development

VHB Schedule

Started: Dec. 2006

Completed: Ongoing

Reference

Steven Zieff

Project Manager

781.894.1000

Relevant Services Provided

Master Planning

Civil Engineering

Traffic Engineering

Permitting

Legacy Farms is a mixed-use master planned community located in the picturesque Town of Hopkinton. The 733-acre development is a national model of Smart Growth, boasting more than 500 acres of preserved and restored open space. When this highly-anticipated project comes on line, it will deliver a balanced mix of single family homes, townhouses, condominiums, and rental apartments to meet residential market demand. Since 2007, Baystone Development, in partnership with Pulte Homes and Wood Partners, has worked with the Town and local stakeholders to develop a plan the community can embrace. As the largest remaining undeveloped parcel within the Route 495 loop, Baystone Development relied on VHB's land planning expertise to develop a sustainable master planned community that captured the site's existing amenities and minimized impacts to natural resources. The project features Low Impact Development techniques, a self-contained infrastructure system for water supply and wastewater management, restoration of several historic properties, and a new bypass road to mitigate traffic conditions. VHB's integrated planning, engineering, transportation, and environmental services helped to keep the project moving forward by fostering workable solutions to balance environmental, transportation, infrastructure, and community concerns. Legacy Farms was awarded the 2009 Outstanding Award for a Planning Project by the Massachusetts Chapter of the American Planning Association and despite a delay due to unfavorable economic conditions, Legacy Farms is now under construction.



Patriot Place Mixed-Use Development

Foxborough, Massachusetts

Client

The Kraft Group/New
England Patriots

VHB Schedule

Started: Sept. 2007
Completed: Ongoing

Reference

Dan Krantz
The Kraft Group
Developer
508.384.4330
dkrantz@thekraftgroup.com

Relevant Services Provided

Civil Engineering
Permitting

In September 2005, VHB was awarded a contract with The New England Patriots to provide engineering and permitting services for Patriot Place, a 1.4 million-square foot mixed-use development constructed on existing parking areas and links to Gillette Stadium. Patriot Place includes a wide variety of retailers and entertainment venues, including the region's first Bass Pro Shop. It also includes some of the area's premier restaurants, a regional medical office center and the new Patriots Hall of Fame and Pro Shop. These project elements will enhance the overall visitor experience on game day, as well as bring life and activity to the site throughout the year.

Phase I of VHB's work began with design and permitting of a 6,800-space game day parking lot located across Route 1 from the Stadium. Construction, which included over 300,000 yards of earthwork, began in mid-April (only eight months after contract award), and the parking lot was ready for use for the first Patriots home game on August 19 - a three-month construction turnaround and a mere eleven months from contract award.

Concurrent with Phase I, VHB was preparing the design for Patriot Place. Massachusetts Environmental Policy Act (MEPA) filing for the design was submitted in June and shortly after, VHB was notified that the permitting was approved with no further action required. The MEPA document included an air quality analysis for ozone precursor emissions and greenhouse gas analysis for mobile and building GHG emissions. The GHG analysis responded to Massachusetts GHG policy, which required the evaluation of sustainable mitigation measures.



Ink Block

Boston, Massachusetts

Client

National Development

VHB Schedule

Started: Aug. 2009

Completed: Ongoing

Reference

Sherry A. Clancy

Project Manager

617.559.5080

sclancy@natdev.com

Relevant Services Provided

Civil Engineering

Traffic Engineering

Permitting

For this high-profile project, National Development relied on VHB to lead the Boston's Article 80 Development Review and the Massachusetts Environmental Policy Act review processes and the public review processes. VHB also led the site/civil and utility infrastructure design, which included an extensive stormwater recharge facility to satisfy the City's Groundwater Conservation Overlay District requirements. Our design efforts helped to shape the master development plan, which was especially challenging due to the decision to re-use the previous industrial building's foundations as a cost saving measure. National Development and VHB are also involved with the redesign of a major segment of Harrison Avenue—a roadway improvement that was identified by the Boston Redevelopment Authority as part of an area-wide planning study. VHB continues to manage the design and permitting for the Ink Block's success while supporting National Development's goals for this modern mixed-use community.



The District: Transformation of a Suburban Office Park

Burlington, Massachusetts

Client

National Development

VHB Schedule

Started: July 2011

Completed: Ongoing

Reference

Katie Britt Snyder

National Development

Project Manager

617.559.5119

KSnyder@NatDev.com

Relevant Services Provided

Civil Engineering

VHB has been an integral member of two development teams, the original owner, Equity Office Properties, and more recently, National Development, working on the redevelopment of New England Executive Park, now branded as “The District.”

VHB has provided a wide variety of services to support the transformation of this traditional suburban office park into a vibrant mixed use development consisting of a new limited service hotel with an integrated first floor restaurant, additional retail, restaurant, and entertainment venues as well as refurbished and expanded office spaces.

The project also includes major upgrades to the streetscape and creative integration of existing environmental resources that form the framework for the development. Our extensive local knowledge of the stakeholder interests including the transportation network, sensitive environmental resources, and site environs have enabled expedited review and approval of early stage development and contributed to the development of the new vision for the asset.



The Continuum

Allston, Massachusetts

Client

Samuels & Associates in cooperation with Harvard University

VHB Schedule

Started: Nov. 2012
Completed: June 2017

Reference

Leslie Cohen
Senior Vice President of Development
617.247.3434

Relevant Services Provided

Civil Engineering
Traffic Engineering

The Continuum is a new apartment community on the border of Harvard University's southern campus and North Allston. Due to a need for additional housing, Harvard engaged real estate partner Samuels & Associates under a long-term ground lease to develop this site. Designed to meet the community demand for high quality housing, Continuum offers rental units as well as a fitness center, game room, roof garden and public terraces. VHB was recruited by long term client Samuels & Associates to provide civil engineering and transportation services. Key to the project's success was the design of a new public roadway network to support the ongoing redevelopment of the area. Continuum's public open space features wide sidewalks, street furniture, and ground floor shops to align with the community's goals—creating a lively and fun destination for residents and visitors.



www.vhb.com

Industrial Hygiene & Building Sciences

Indoor Air Quality Assessments
Mold Assessments
Industrial Hygiene
Lead & Asbestos

Environmental Services

Due Diligence
Environmental Site Assessments
Portfolio Risk Management
Remedial Design & Construction
Underground Storage Tank Related Services
Site Development Services

Engineering Services

Civil
Structural
Mechanical
Construction
Facilities

Construction Services

Owner's Project Management
Schedule & Budget Management
Cost Estimating
Value Engineering
Constructability Reviews
Contractor Prequalification
Contract Procurement
LEED Professionals / Green Building
Project Document Controls
Construction Management
Surety Consulting
Claim Consulting
Expert Witness
Tenant Improvement
Insurance Services

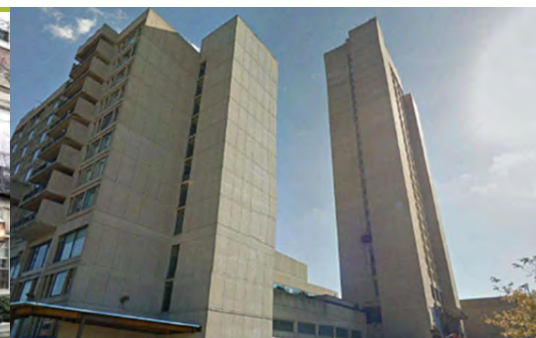
The Vertex Companies, Inc. (VERTEX) is a fast-growth, international firm that is employee-owned and consistently ranked as one of the best places to work. As an industry-rated top Engineering, Construction, Environmental, and Forensic Consulting company, VERTEX is value-focused and operates with a constant sense of urgency. We have provided complex engineering and construction services on over \$1 billion in construction projects. We have also completed over \$150 million in general construction and construction management projects for a wide array of private and public customers nationally and internationally.

VERTEX was founded in 1995 as a full-service construction and environmental services firm and services the entire United States through over 20 offices strategically located in: Massachusetts, Connecticut, New York, New Jersey, Pennsylvania, Maryland, North Carolina, Florida, Illinois, Kansas, Missouri, Michigan, Colorado, California, Oregon, Texas and Washington, and Canada as well as Mexico.

VERTEX's culture is based on caring for our clients and employee-owners—this is the foundation of everything we do. We deliver value-added AEC services with a constant sense of urgency on complex projects throughout the globe, which leads to long-term working relationships with our client base. This strategy supports our growth-focus, which benefits our clients because we offer integrated solutions in multiple markets and it benefits our employee-owners because it generates entrepreneurial career advancement opportunities. VERTEX sustains the highest level of quality and service through our sustained growth program by embracing a lifetime of learning philosophy, which ensures that we stay ahead of the curve in industry trends, and this rewards our employee-owners by providing a clear path for professional development.

Throughout our 26-year history, VERTEX has strived to be industry leaders. For over a decade, ENR has consistently ranked VERTEX on their list of Top Construction Management/Program Management Firms, Top Environmental Firms, and Top Engineering Firms. Also, for the seventh year in a row, Zweig has ranked VERTEX as one of the Best Firms to Work for in the industry.

VERTEX is a financially viable corporation and annually undergoes the preparation of Financial Statements prepared by our accountants of Ernst & Young. As our clients will attest, VERTEX has an excellent track record for solving complex challenges and for supreme dispute resolution experience. In December of 2013, VERTEX became 100% employee-owned through an Employee Stock Option Plan ("ESOP"). Employee ownership not only bolsters the entrepreneurial spirit for which this organization was founded, it also acknowledges the hard work and contributions that the VERTEX team has made, and further deepens our employees' responsibility in making VERTEX exceptional in the work we do.



Industrial Hygiene & Building Sciences **Services**

VERTEX provides significant benefits and competitive advantages for your business with respect to identifying and/or managing potential hazards associated with asbestos, indoor air quality, lead, mold, and health and safety. Whether your mission is to renovate or demolish existing structures, ensure a healthy and safe work environment, or address concerns of potential exposure to toxic elements, VERTEX can help you identify, implement, and achieve your goals in a timely and cost-effective manner.

Liability Protection for Property Managers

VERTEX works to assist Property Managers with:

- Testing and inspection services
- Remedial protocol preparation
- Specification preparation
- Asbestos, lead and microbial operation and maintenance plans
- Project oversight during abatement and work activities

Water Intrusion/Mold Growth

- Cause and origin assessments
- Bioaerosol sampling
- Clearance sampling
- Remedial protocol preparation
- Remedial monitoring
- Post-remediation verification sampling

Silica Exposure Control

- Interior renovations
- Concrete work and masonry
- Core drilling/grinding
- Exposure control plans
- Exposure monitoring

Water Intrusion/Mold O&M Plan and Mold Awareness Training

- Multi-family residential complexes
- Office buildings
- Commercial properties
- Large property portfolio plan preparations
- Focuses on prevention, awareness and the procedures to minimize the extent of damages and liability

Indoor Air Quality (IAQ) Assessments

- IAQ parameters (temperature, relative humidity, CO2 and CO)
- Building inspections (interior and exterior)
- Commercial and residential HVAC inspections

Industrial Hygiene

- Forensic, environmental and occupational exposure investigations
- Regulatory compliance reviews (OSHA, EPA, ISO, Joint Commission)
- Quantitative and qualitative exposure assessments
- Hazard analysis
- Root cause analysis
- Best practice due diligence

Lead & Asbestos Investigations and O&M Preparations

- Pre-renovation sampling surveys
- Turn-key asbestos management in buildings
- Initial assessments and representative sample collections
- Operation and maintenance plan preparation
- Project design and abatement protocol action
- Abatement monitoring



**SERVICE AREA
ENVIRONMENTAL**



SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**

Hospital/Medical



PROJECT 15929

Medfield State Hospital Demolition

Medfield, MA, USA

VERTEX was retained by an engineering company as part of the State of Massachusetts State Project Drug Control Program 0505 to complete a comprehensive asbestos-containing materials and regulated materials surveys.

In preparation for demolition activities, VERTEX deployed a state of Massachusetts licensed inspector to the site to collect samples of suspect asbestos-containing materials and to catalog identified regulated materials located both inside and outside of the buildings. Specific areas sampled included the salvage yard buildings and debris piles on the sledding hill area. Results and findings were detailed in a survey report with an attached response action determination schedule to control the release of potentially dangerous materials.

Upon the Department of Capital Asset Management and Maintenance's (DCAMM) review and approval, VERTEX was contracted to prepare abatement specifications for all asbestos-containing materials identified prior to the commencement of demolition activities, and abatement specifications were prepared and formatted to meet DCAMM requirements.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**Residential - Multi-
Family

PROJECT 29178

Low-Rise Apartment Building

Boston, MA, USA

VERTEX was retained by the Client to conduct comprehensive pre-renovation Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys in preparation for the Client's redevelopment activities of the 12-story residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the 12-story residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of 12-story residential building renovation activities, VERTEX's professionals individually inspected each unit and issued Letter of Compliance and provided a Project History Report detailing the asbestos abatement activities performed.

This building renovation was the second phase of a renovation that also included a 29-story residential building across the street.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**

Residential



PROJECT 24126

Multi-Residential High-Rise Complex Renovation

Boston, MA, USA

VERTEX was retained by the Client to conduct comprehensive pre-renovation Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys in preparation for the Client's redevelopment activities of the 29-story residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the 29-story residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of 29-story residential building renovation activities, VERTEX's technical professionals individually inspected each unit, issued Letter of Compliance, and provided a Project History Report detailing the asbestos abatement activities performed.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**Residential - Multi-
Family

PROJECT 34138

Orient Heights

Boston, MA, USA

VERTEX was retained by the Client to conduct comprehensive pre-demolition Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys of a multi-tenant residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of demolition activities, VERTEX's technical professionals provided a Project History Report detailing the asbestos abatement activities performed.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**

School/University



PROJECT 58708

Harvard Club

Boston, MA, USA

VERTEX was retained by the Client to conduct pre-renovation asbestos, lead-based paint, and regulated/universal waste surveys of the former Squash Building located in Boston, Massachusetts. The surveys were conducted in accordance with the State of Massachusetts asbestos regulations and the United States Environmental protection Agency (USEPA) National Emissions Standards for Hazardous Air Pollutants (NESHAPs) to identify asbestos-containing materials (ACMs), lead-based paint and regulated materials to be abated/removed prior to the scheduled renovation. VERTEX completed this project on time and within budget.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**

Industrial/Manufacturing



PROJECT 47008

Environmental Assessment of Former Mill for Residential Renovation

Lawrence, MA, USA

VERTEX was retained by the Client to conduct comprehensive pre-renovation asbestos and regulated/universal waste surveys of the former mill located in Lawrence, Massachusetts. The mill was being renovated into a residential apartment. The surveys were conducted in accordance with the State of Massachusetts asbestos regulations and the United States Environmental protection Agency (USEPA) National Emissions Standards for Hazardous Air Pollutants (NESHAPs) to identify asbestos containing materials (ACMs) and regulated materials to be abated/removed prior to the scheduled renovation of the vacant mill. VERTEX completed this project on time and within budget. Additionally, upon completion of the renovation activities, VERTEX provided the client with documentation of all sampling and abatement activities in a comprehensive project history report.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**

Residential



PROJECT 18872

Condominium Units Microbial Growth Impacts

Dorchester, MA, USA

VERTEX assisted the client in assessing the extent of hidden microbial growth impacts on plywood roof sheathing behind cathedral ceilings in several condominium units. Once the extent of microbial impacts were determined, VERTEX assisted the client with identifying proper mold remedial protocols in accordance with industry-standard guidelines.

Upon completion of the mold remediation activities in each of the affected units by the contractor, VERTEX conducted Post Remediation Verification visual inspections and air sampling. Verification of remedial activities was based on the areas being free of visual mold growth, dust, and debris as well as indoor airborne mold spore counts equal to/or less than the comparison outdoor sample results.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**Residential - Multi-
Family

PROJECT 14121

Apartment Buildings Demolition

Roslindale, MA, USA

VERTEX conducted asbestos abatement and asbestos background monitoring work activities at the apartment buildings. Various asbestos-containing materials were abated from the apartment buildings in preparation for demolition.

VERTEX provided asbestos design and air monitoring services. Asbestos Abatement monitoring services were conducted in accordance with NESHAPS (40 CFR 61); the Massachusetts Department of Labor and Workforce Development "The Removal, Containment or Encapsulation of Asbestos," (453 CMR 6.00); the Massachusetts Department of Environmental Protection "Air Pollution Control Regulations," (310 CMR 7.00); the Occupational Safety and Health Administration (OSHA) General Industry and Construction Standards (29 CFR 1910.1001 and 1926.1101), as well as local department of health and fire requirements.

The scope of on-site project monitoring activities included: (1) containment inspection prior to removal, (2) air monitoring for the removal phase outside the work area, (3) post removal visual inspection to ensure proper clean-up, and (4) post removal clearance air monitoring to establish level of cleanliness achieved.

An asbestos survey was conducted and involved inspecting the Apartments Phase II. The inspection included the interior and exterior of the buildings. With all of the data compiled, a detailed survey was generated, which included (1) the inspection for asbestos-containing materials (ACM) and the quantity and conditions of the ACM, (2) the development of the appropriate response actions to control the release of asbestos fibers, (3) a description of the appropriate response actions and recommended abatement actions, and (4) an estimate of the resources needed to remove the ACM.

SOLUTION

Environmental

EXPERTISEIndustrial Hygiene &
Building Sciences**TYPE OF SITE**

Redevelopment



PROJECT 39698

Pre-Renovation Asbestos and Waste Survey of Former Knife Manufacturing Plant

Providence, RI, US

VERTEX was retained by the Client to conduct comprehensive pre-renovation asbestos and regulated/universal waste surveys of the former knife manufacturing plant located in Providence, Rhode Island. The surveys were conducted in accordance with the State of Rhode Island asbestos regulations and the United States Environmental protection Agency (USEPA) National Emissions Standards for Hazardous Air Pollutants (NESHAPs) to identify asbestos containing materials (ACMs) and regulated materials to be abated/removed prior to the scheduled renovation of the vacant industrial/manufacturing plant. VERTEX completed this project on time and within budget. Additionally, upon completion of the renovation activities, VERTEX provided the client with documentation of all sampling and abatement activities in a comprehensive project history report.

Highlights

Compliance Management for
Global Firms

Project Management Experience
Nationwide

Expertise

Asbestos

Indoor Air Quality

Lead

Lead Paint

O&M Program

Owner's Representation

Environmental Permitting

Remediation & Construction
Management

Vincent Agostino | Assistant Vice President

EMAIL vagostino@vertexeng.com | **PHONE** 781.952.6000

BIOGRAPHY

Mr. Agostino has over 20 years of experience in the industrial hygiene industry. Specific expertise includes asbestos inspections, design specifications, and project monitoring; industrial hygiene and indoor air quality; regulated material surveys; HVAC assessment; and emergency response actions. Throughout his tenure, he has successfully been involved with over 100 hazardous materials/industrial hygiene projects ranging from limited surveys to comprehensive pre-renovation assessments of occupied hospitals and/or schools.

As Assistant Vice President at VERTEX, Mr. Agostino is responsible for the oversight and management of field technicians performing asbestos, lead, indoor air quality assessments, and industrial hygiene projects conducted by VERTEX. Mr. Agostino strives to assure that all phases of hazardous materials abatement projects are conducted in a manner that is in compliance with the complex industry regulations that safeguard the public from exposure to hazardous materials. As a State of Massachusetts Licensed Asbestos Project Designer, Mr. Agostino is responsible for the development of detailed asbestos abatement specifications with the correlation between abatement schedules and construction schedules to prevent contamination of project work sites and exposure to the multitude of tradesman present on any given renovation and/or demolition project.

Management tasks include site investigations/surveys; cause and origin determinations; microbial growth remediation protocol preparation; delineation of contaminated media; development of remediation strategies; asbestos project design, and oversight and management of contractors. Mr. Agostino also provides comprehensive investigative reports, remedial protocols, operational plans, and underwriting assessments.

EDUCATION/TRAINING

A.S., Science in Business, Massasoit Community College

LICENSES/CERTIFICATIONS

Asbestos Project Designer, State of MA
Asbestos Project Monitor, State of MA
Asbestos Inspector, State of MA
40-Hour Hazardous Waste Operator Training
AHERA Project Designer
AHERA Building Inspector

SPECIAL TRAINING

American Industrial Hygiene Association, Proficiency Analytical Training Program
Institute for Environmental Education Asbestos Project Monitor Training
Institute for Environmental Education Asbestos Project Designer Training
Institute for Environmental Education Asbestos Inspector Training
NIOSH 582 Equivalent Asbestos in Air Analysis by Phase Contrast Microscopy

RELEVANT EXPERIENCE

Pre-Demo Survey | Orient Heights, East Boston

Mr. Agostino directed and oversaw the comprehensive pre-demolition Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys of a multi-tenant residential building as well as other non-residential spaces within the complex located in East Boston.

Utilizing the data compiled during the surveys of the residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of demolition activities, Mr. Agostino provided a Project History Report detailing the asbestos abatement activities performed.

Air Quality | 860 Harrison Ave Low Rise

Mr. Agostino served as the Senior Project Manager during a comprehensive pre-renovation Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys in preparation for the Client's redevelopment activities of the 12-story residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the 12-story residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of 12-story residential building renovation activities, Mr. Agostino oversaw inspections of each unit, issued Letter of Compliance, and provided a Project History Report detailing the asbestos abatement activities performed.

This building renovation was the second phase of a renovation that also included a 29-story residential building across the street.

Pre-Renovation Survey | Former Van Brodie Mill, Lawrence, MA

Mr. Agostino directed comprehensive pre-renovation asbestos, lead and regulated/universal waste surveys of the former mill located in Lawrence, Massachusetts. The mill was being renovated into a residential apartment. The surveys were conducted in accordance with the State of Massachusetts asbestos regulations and the United States Environmental protection Agency (USEPA) National Emissions Standards for Hazardous Air Pollutants (NESHAPs) to identify asbestos containing materials (ACMs) and regulated materials to be abated/removed prior to the scheduled renovation of the vacant mill. VERTEX completed this project on time and within budget. Additionally, upon completion of the renovation activities, Mr. Agostino provided the client with documentation of all sampling and abatement activities in a comprehensive project history report.

Pre-Renovation Survey | Former Knife Factory, Providence, RI

Mr. Agostino directed the comprehensive pre-renovation asbestos and regulated/universal waste surveys of the former knife manufacturing plant located in Providence, Rhode Island. The surveys were conducted in accordance with the State of Rhode Island asbestos regulations and the United States Environmental protection Agency (USEPA) National Emissions Standards for Hazardous Air Pollutants (NESHAPs) to identify asbestos containing materials (ACMs) and regulated materials to be abated/removed prior to the scheduled renovation of the vacant industrial/manufacturing plant. VERTEX completed this project on time and within budget. Additionally, upon completion of

the renovation activities, VERTEX provided the client with documentation of all sampling and abatement activities in a comprehensive project history report.

Pre-Renovation Surveys | Residential Complex Renovation, Boston, MA

Mr. Agostino served as the Senior Project Manager during comprehensive pre-renovation Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys in preparation for the Client's redevelopment activities of the 29-story residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the 29-story residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of 29-story residential building renovation activities, VERTEX's technical professionals individually inspected each unit, issued Letter of Compliance, and provided a Project History Report detailing the asbestos abatement activities performed.

Asbestos, Lead and Regulated Materials Survey | UMass, Healey Library

Mr. Agostino performed a comprehensive asbestos, lead-based paint, and regulated materials survey of the occupied Healey Library. Detailed and color-coded floor plans were integrated into the report for immediate identification of "hot" areas to be avoided as well as the implementation of a site-specific Operations and Maintenance Program for on-site personnel to refer to if any of the identified material was to be affected.

Hazardous Materials | Franklin Hill Apartment Complex, Roxbury, MA.

Mr. Agostino served as the lead Hazardous Materials Consultant on this \$100M+ project. The project included apartment complex demolition followed by the conversion from a low-income housing complex to a modern middle-income living facility. The scope of Mr. Agostino's responsibilities included an initial survey of each building, including the power plant; underground pipe trenches, lead-based paint, PCB containing materials and regulated materials. He collected hundreds of samples of suspect materials in both occupied and vacant spaces then delivered the samples to a variety of laboratories for analysis. Upon analyzing the results, Mr. Agostino assisted in the generation of detailed hazardous materials abatement specifications for the confirmed materials, which included detailed bidding documents and CADD drawings. Special considerations were implemented for sensitive areas. Throughout the abatement phase, Mr. Agostino served as the on-site industrial hygienist performing full-time abatement oversight and collection and analysis of air samples.

Pre-Demo Survey | Moody Street Commercial Building, Waltham, MA

Mr. Agostino managed and oversaw comprehensive pre-demolition Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys of a multi-tenant commercial building as well as other common spaces within the building.

Utilizing the data compiled during the surveys of the commercial building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of demolition activities, VERTEX's technical professionals provided a Project History Report detailing the abatement activities performed.

Expertise

Asbestos
Indoor Air Quality
Industrial Hygiene
Investigations & Remediation
Lead
Lead Paint
Mold
O&M Program
PCA
Peer Review
Phase I ESAs
Phase II LSI
Environmental Health & Safety
Environmental Permitting
Groundwater & Soil
Characterization
Hazardous Materials/Waste
PCB
Remediation & Construction
Management
UST Removal
Vapor Intrusion Investigations &
Remediation

Jeremy Kent | Project Manager

EMAIL jkent@vertexeng.com | PHONE 781.952.6000

BIOGRAPHY

As a Project Manager, Mr. Kent is involved in indoor air quality assessments at commercial, residential, and industrial properties for both public and private sector clients. Mr. Kent performs Limited Subsurface Assessments, Asbestos Containing Materials Surveys, Asbestos Abatement Project Monitoring as part of the due diligence process to support potential property transfers. He conducts state and municipal research, fieldwork to support further site actions and report preparation.

Mr. Kent also provides proposals and assistance to senior-level managers dealing with complicated projects. Mr. Kent conducts many tasks related to the reduction and interpretation of field and laboratory data, pre-demolition/renovation reports, and project history reports. Project experience includes full pre-demolition survey activities, historic research and environmental quality surveys in accordance with Massachusetts General Laws, Chapter 21E, the Massachusetts Contingency Plan 310 CMR 40.0000, and the American Society for Testing Materials (ASTM) E 1527/28-06 site assessment protocols.

EDUCATION/TRAINING

B.S., Marine Safety and Environmental Protection, Massachusetts Maritime Academy

LICENSES/CERTIFICATIONS

40-Hour Asbestos Inspector License, State of MA
40-Hour Asbestos Project Monitor License, State of MA
40-Hour OSHA Health and Safety Certification
10-Hour OSHA Construction Safety and Health Certification
8-Hour OSHA Health and Safety Certification
OSHA Annual 8 Hour Refresher Course
Oil pollution Act 1990, Qualified Individual (QI)
Respiratory Protection Certification
Property Condition Assessment Certification
8-Hour Asbestos Inspector Refresher, State of MA
Crane and Derrick Awareness Training

RELEVANT EXPERIENCE

Pre-Demo Survey | Orient Heights, East Boston

Mr. Kent served as the project manager during comprehensive pre-demolition Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys of a multi-tenant residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of demolition activities, Mr. Kent prepared a Project History Report detailing the asbestos abatement activities performed.

Pre-Renovation Survey | Former Van Brodie Mill, Lawrence, MA

Mr. Kent served as the Project Manager during the comprehensive pre-demolition Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys of a multi-tenant residential building as well as other non-residential spaces within the complex.

Utilizing the data compiled during the surveys of the residential building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of demolition activities, Mr. Kent prepared a Project History Report detailing the asbestos abatement activities performed.

Pre-Renovation Survey | Former Knife Factory, Providence, RI

Mr. Kent served as the project manager during the comprehensive pre-renovation asbestos and regulated/universal waste surveys of the former knife manufacturing plant located in Providence, Rhode Island. The surveys were conducted in accordance with the State of Rhode Island asbestos regulations and the United States Environmental protection Agency (USEPA) National Emissions Standards for Hazardous Air Pollutants (NESHAPs) to identify asbestos-containing materials (ACMs) and regulated materials to be abated/removed prior to the scheduled renovation of the vacant industrial/manufacturing plant. VERTEX completed this project on time and within budget. Additionally, upon completion of the renovation activities, Mr. Kent assisted in the preparation of a comprehensive project history report.

Pre-Demo Survey | Moody Street Commercial Building, Waltham, MA

Mr. Kent served as the project manager during comprehensive pre-demolition Asbestos, Lead, Regulated/Universal Waste, and PCBs in caulking surveys of a multi-tenant commercial building as well as other common spaces within the building.

Utilizing the data compiled during the surveys of the commercial building, VERTEX prepared abatement bid packages and individual abatement specifications for asbestos, lead, and universal wastes to be followed by the abatement contractor. VERTEX's licensed asbestos professionals then performed monitoring during abatement of asbestos-containing materials, Occupational Health and Safety Administration (OSHA) Lead in Construction compliance, and proper removal, handling, and transportation of universal wastes.

Upon completion of demolition activities, Mr. Kent provided a Project History Report detailing the abatement activities performed.

Expertise

Asbestos
Indoor Air Quality
Industrial Hygiene
Investigations & Remediation
Lead
Mold
O&M Program
LEED Assessment & Certification
Environmental
Green Building
Compliance Audits
Database Review
Environmental Portfolio Reviews
Peer Review
Phase I ESAs
Phase II LSI
Transaction Screen
Claim Investigation
Biology
Environmental Health & Safety
Environmental Permitting
Groundwater & Soil Characterization
Hazardous Materials/Waste
PCB
Remedial Design & Feasibility Studies
Remediation & Construction Management
Site Characterization
UST Removal
Vapor Intrusion Investigations & Remediation
Water & Wastewater Sustainability Consulting
Radon Sampling
Radon Services
Domestic (Potable) Water System Sampling
Lead in Water
COVID-19

Jason Mohre | Senior Project Manager

EMAIL jmohre@vertexeng.com | **PHONE** 781.952.6000

BIOGRAPHY

Mr. Mohre has over 20 years of experience in the environmental industry. Field expertise includes AHERA consulting, Asbestos Inspections, Indoor Air Quality Assessments, Hazardous Material building surveys and Water Intrusion/Mold Cause and Origin Investigations as well as on-site project management related to remedial action oversight, Phase I Environmental Site Assessments (ESAs), Commercial Property Transaction Screens, and Phase II Subsurface Investigations.

Mr. Mohre is currently responsible for managing industrial hygiene projects involving asbestos abatement, mold remediation, and indoor air quality. Management tasks include asbestos inspections; indoor air quality assessments; site investigations; cause and origin determinations; delineation of contaminated media; development of remediation strategies; oversight and management of contractors; and field technicians. He also provides comprehensive investigative reports, remedial protocols, and operational plans, and training.

Mr. Mohre also works closely with the other divisions of VERTEX which include environmental site investigations for insurance claims, property development/redevelopment, and/ or property transactions.

EDUCATION/TRAINING

B.A., Earth & Geographical Studies, University of Massachusetts
A.S., Environmental Technology, Cape Cod Community College (CCCC)
Coastal Zone Management Certificate, CCCC
Water Supply Certificate, CCCC/Massachusetts Maritime Academy (MMA)
Wastewater Technology Certificate, CCCC/MMA
Geographical Information Systems Certificate, CCCC/MMA
Hydrogeology Certificate, UMASS Boston

LICENSES/CERTIFICATIONS

Asbestos Management Planner, State of MA
Asbestos Inspector, State of MA
Asbestos Project Monitor, State of MA
OSHA 10
OSHA 40 Hour HAZWOPER Training
8 Hour OSHA HAZWOPER Refresher Certification, Annual
Transportation Workers Identification Credential (TWIC)
United States Coast Guard Masters License

SPECIAL TRAINING

CIEC Training, Indoor Sciences
Institute for Environmental Education, Asbestos Project Monitor Training
Institute for Environmental Education Asbestos Inspector Training
Institute for Environmental Education Asbestos Management Planner Training
NIOSH 582 Equivalent: Air Sampling & Analysis for Asbestos Training
American Industrial Hygiene Association, PAT Program Participant

PUBLICATIONS/PRESENTATIONS

2-Hour Awareness Training for the MBTA, Various MA School Districts and MA Municipalities

RELEVANT EXPERIENCE

Asbestos Surveys

Mr. Mohre has completed over a hundred asbestos surveys throughout New England, Ohio, Illinois, Georgia, Wisconsin, and Washington of structures ranging from residential, commercial, retail, and industrial buildings.

Asbestos Abatement Project Monitoring

Mr. Mohre has performed asbestos abatement monitoring on numerous projects in Massachusetts and New Hampshire, as well as managed projects throughout the United States and has prepared final project history reports for clients.

AHERA Inspections And Management Planning

Mr. Mohre has performed numerous Asbestos Hazard Emergency Response Act (AHERA) inspections and reinspections as well as prepared or updated management plans for Local Education Agency's (LEAs) in Massachusetts and New Hampshire.

IAQ and Water Intrusion/Mold Investigations

Mr. Mohre has completed numerous indoor air quality surveys as well as water intrusion and mold cause and origin investigations throughout New England of structures ranging from residential, commercial, retail, and industrial buildings.

Industrial Hygiene

Mr. Mohre has managed several industrial hygiene projects in New England as well as Florida, Ohio, New York, Texas, California, Illinois, and New Jersey.

PHASE I ESAs and Phase II Subsurface Investigations

Mr. Mohre has completed numerous Phase I ESAs of sites including gasoline stations, dry cleaners, industrial, commercial, and multi-family residential properties throughout the United States. Mr. Mohre has conducted over one hundred Phase II Limited Subsurface Investigation projects ranging in size from single sites to multi-state portfolios.

Remedial Projects

Mr. Mohre has conducted project management and oversight of numerous remedial projects in New England as well as New York, Florida, Kentucky, West Virginia, North Carolina, Texas, Washington and California.

Hazardous Materials Surveys

Mr. Mohre has completed numerous hazardous materials surveys throughout New England of structures ranging from residential, commercial, retail, and industrial buildings.

VERTEX

TRINITY MANAGEMENT

TRINITY MANAGEMENT

Trinity Management, LLC was established February 24, 2012 by the principles of Trinity Financial, Inc., to provide exceptional property management services for real estate investment partnerships, condominiums, cooperatives and resident associations, community development corporations, and non-profit and for-profit developers. Since inception, Trinity Management, LLC (TMLLC) has consistently demonstrated a breadth of expertise in managing properties during all phases of the development process - from providing valuable input in the conceptual stage to marketing in the lease-up period to successful management of stabilized properties.

Trinity Management provides management services for a wide

array of ownership entities in Massachusetts, Rhode Island, Connecticut and New York. We presently have more than 7,000 residential units, of which approximately 21 percent are market-rate and home-ownership, along with more than 500,000 square feet of commercial and retail space.

The residential portfolio consists of a mix of affordable, mixed-income and market-rate units, and various homeownership programs. Our affordable and mixed-income communities use a variety of subsidy programs, including state and federal low-income housing tax credits, public housing operating and capital funds, Section 8 subsidies, and HOME and CDBG resources, among others.



The lobby at Boston East, one of the many amenity areas that residents enjoy.

Professional Affiliations

- Citizens' Housing and Planning Association
- Community Associations Institute
- Institute of Real Estate Management
- National Affordable Housing Management Association
- National Apartment Association
- National Association of Housing Cooperatives
- New England Affordable Housing Management Association
- Rental Housing Association, Greater Boston Real Estate Board

Services

- Apartments
- Condominiums
- Resident Associations
- Cooperatives
- Affordable Housing
- Market-Rate Housing
- Commercial Properties
- Low-Income Housing Tax Credits (LIHTC)
- Public Housing
- Transit-Oriented Housing

Lead-Safe Certified Firm, U.S. Environmental Protection Agency

- Better Buildings Challenge Partner, U.S. Department of Energy

Our Mission

The mission of Trinity Management, LLC is to meet the programmatic and financial goals of our owners by providing exceptional customer-focused property management services. We specialize in managing properties in urban communities. Our aim is to aid in revitalizing these communities, enhancing the lives of our residents and neighbors, strengthening local commerce and fostering opportunities for positive growth.



The exterior at Appleton Mills in Lowell, MA.

A Company For All Reasons

Trinity Management, LLC offers a full range of real estate services, including effective marketing, careful applicant screening and eligibility determinations, rent collections, resident/management relations, maintenance and repairs, and accounting and compliance services. The procedures and systems of accounting and compliance for our entire portfolio, regardless of individual property size, are identical: we apply the highest level of scrutiny and integrity to all. Our maintenance program is proactive and stresses preventative maintenance. The properties we manage are assets to the communities in which they are located, and they encourage other property owners to take pride and interest in the well-being of the neighborhood.

Winning Recognition

In the first year of operation, Trinity Management LLC was designated a Specialist in Housing Credit Management Company (SHCM) - a difficult benchmark for a property management company to reach, and one that indicates a high level of expertise.

Three national organizations sponsor this certification: the National Affordable Housing Management Association, the National Apartment Association Education Institute, and the Leading Age (formerly The American Association of Housing and Services for the Aging).

The award recognizes excellence among management companies involved with the Low-Income Housing Tax Credit (LIHTC) program. At least 30 percent of the management portfolio must be LIHTC; each of these properties must have at least one SHCM professional with daily supervision of the LIHTC population; at least 50 percent of the staff must be SHCM certified; at least one executive of the management company must be SHCM certified; and all must abide by the SHCM Code of Ethics.

The code includes: exercising the highest level of integrity; reasonable compliance with all federal, state and local laws; providing equal employment and housing opportunities; professionally managing the properties by avoiding disclosure of confidential information, maintaining accurate records, maintaining fiduciary obligations to clients and protecting all clients' assets; and using professional means if seeking to influence legislation, regulations or public opinion.

Our Employees Make All the Difference



Members of Trinity Management's Accounting Department staff.

Photos by Josh Behan

Trinity Management's corporate philosophy includes a dedication to a personal, hands-on approach regarding all the details of management, which we believe fosters good relationships with tenants and owners and, ultimately, success for the property.

At TMLLC, every member of our staff of 265 is thoroughly engaged and committed to realizing their full potential by effectively using their talents, creativity and professionalism on each client project. Our effectiveness is based firmly on the success of each property we manage, using our greatest asset - our employees.

The diversity of our personnel matches the diversity of our portfolio. As residential real estate managers, we manage new construction, established properties, conventional housing, condominiums, historic properties, low-income housing tax credit developments, public housing units and government-assisted housing for multifamily and elderly residents.

What differentiates us from other real estate management companies is our unique ability to effectively combine our skill in providing detailed management and financial services with our demonstrated commitment to fulfilling the needs of residents and contributing to the success of the communities in which we operate.



Awards and Accomplishments

Vanguard Award, Glenark Mills/Oaks, in the major rehabilitation category, from the National Affordable Housing Management Association (NAHMA).

Vanguard Award, Bristol Commons/Lenox Green, in the New Construction, More than 100 Units category by NAHMA.

Community of Quality designations, Washington Beech (Boston, MA), Appleton Mills (Lowell, MA), The Blakeley (Lawrence, MA), and Newport Heights (Newport, RI) by NAHMA.

Washington Beech was named a Community of Quality by NAHMA and an Exemplary Family Development by New England Affordable housing Management Association (NEAHMA).

Vanguard Award for a major rehab, Glenark Mills/ Glenark Oakswon by NAHMA.

Community of Quality designations, Forest Hills (Boston, MA), Countryside Village (Oxford, MA), The Rowe (New Haven, CT) and Franklin Hills (Boston, MA) by NAHMA.

Exemplary Family Development Award, Washington Beech, by NEAHMA.

Top 100 Affordable Property Management Company.

MassHousing, Company Awards, Multi-Million Dollar MBE and Million Dollar WBE (contracts with minority and women-owned businesses).

July 29, 2021

Abby Goldenfarb
Trinity Acquisitions LLC
75 Federal Street, 4th Floor
Boston, MA 02110

Subject: Environmental Sound Study
Medfield State Hospital Residential Development; Medfield, MA
Acentech Project No. 634738

Dear Abby:

The Medfield State Hospital Residential Development (the Project) in Medfield, Massachusetts involves a proposal to redevelop the existing site at 100 Service Drive, Medfield, MA 02052 into residences. As part of the RFP process for this project, this narrative report represents an analysis of environmental sound on the Project site. In particular, this report focuses on an analysis of sound emitted from the firearm shooting range owned by the Town of Medfield, located approximately 1,500 feet to the southwest of the Project site.

Acentech conducted a survey of existing sound on the project site, involving both attended measurements while the firing range was in operation, as well as an unattended one-week continuous sound level measurement. Using our evaluation of the range of firing range sound emissions, we developed an outdoor acoustic propagation model to predict how sound propagates onto and around the project site, and to evaluate the effectiveness of mitigation measures such as sound barrier walls.

In summary, our evaluation of the Project site found that although the firing range operates intermittently, it emits relatively high-amplitude and impulsive sound during operation that is clearly audible at the Project site and is likely to be intrusive to resident passive recreation. Our primary recommendation is to attenuate sound emitted by the firing range either by locating the range underground or in a fully enclosed structure, both of which have been effective mitigation measures for firing ranges in the past. We do not expect that sound barrier walls will be a recommended design alternative for this Project, due to the height and weight that would be required to significantly attenuate firing sounds.

The following pages of this report document the technical background of our measurements and modeling, a summary of analyzed design alternatives, and a summary with further discussion of recommended acoustic mitigation measures for this project.

ACOUSTIC MEASUREMENTS

Acentech conducted a survey of existing sound on the project site, which was conducted at locations intended to be representative of the nearest residential buildings to the Town firing range, near the southwest corner of Residential Building 2. Measurements were conducted continuously from July 14, 2021 at approximately 12:00pm to July 21, 2021 at approximately 12:00pm. Additional shorter-term attended acoustic measurements were conducted on the afternoons of July 14, 2021 and July 21, 2021 at a nearby location. Measurement locations are specified in Table 1, and are shown on an aerial photograph in Figure 1 on the following page of this report.

Table 1. Sound measurement locations

Measurement location	Coordinates	Description of location
A ^a	42.2096°, -71.3366°	West of Building 2 in enclosed chain link fence area, tripod-mounted at height approximately 5 feet above grade elevation.
B ^b	42.2096°, -71.3365°	Southwest of Building 2 at corner of outdoor stairs, tripod-mounted at height approximately 5 feet above grade elevation.

^a Measurements were conducted at Location A as a seven-day continuous survey from 2021-07-14 to 2021-07-21.

^b Measurements were conducted at location B as short-term attended surveys on 2021-07-14 from approximately 11:30am to 1:30pm and on 2021-07-21 from approximately 12:15pm to 1:00pm.

Acoustic measurements for this project were conducted at location A with a Rion NL-52 sound level meter, and at location B with a Brüel and Kjær Type 2250 sound level meter, both of which conform to IEC 61672:2013 for Class 1 precision sound level meters. All equipment was field-calibrated before and after measurement periods using a Brüel and Kjær Type 4231 acoustic calibrator. Measurements were conducted at least five feet away from local acoustically-reflective surfaces.

The intent of these measurements was to characterize and quantify sound emissions from the firearm shooting range located approximately 1,500 feet to the southwest of the residences, as is illustrated in Figure 1 on the following page. Sound emissions from the firing range are presented in this report (unless otherwise noted) in units of A-weighted decibels (dB re: 20µPa) using the $L_{max, Fast}$ time weighting, which is the maximum sound level measured with a rise and decay time of 125 milliseconds.

During the attended measurement period on July 21, 2021 from approximately 12:00pm to 1:00pm, the firing range was active and clearly audible at both measurement locations. During this attended measurement, there were 620 seconds observed where firearm activity was audible. Some or many of these seconds may contain multiple audible “shots” from the firing range, as multiple users may have been operating simultaneously. During these observed firing seconds, 1-second $L_{max, Fast}$ sound levels were evaluated to range from 46 dBA to 76 dBA. This relatively wide range of sound level is fairly common for impulsive sounds, especially from firearms, which are highly dependent on type of firearm, ammunition used, and direction of firing.

From this sample of 620 seconds where firing range activity was audible, we evaluated the distribution of sound in terms of summary statistics based on the 1-second $L_{max, Fast}$ sound level, as is presented in Table 2 on page 4 of this report. For each sound level, we have presented an associated expected frequency of occurrence, based on a representative hour where the firing range is active. For example, the mean (average) sound level emitted from the firing range was evaluated to be 61 dBA, which is predicted to occur for approximately 390 seconds in a given hour during which the firing range is active, non-consecutively.

(this section continued on following pages)

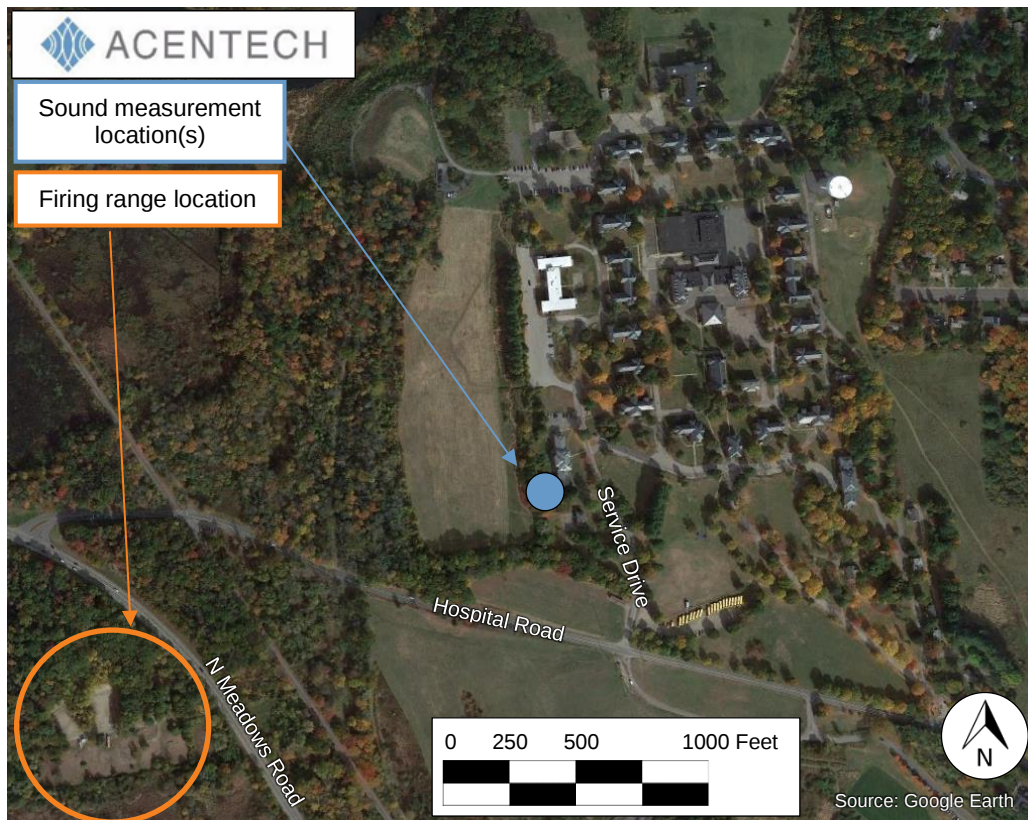


Figure 1. Sound measurement and firing range locations

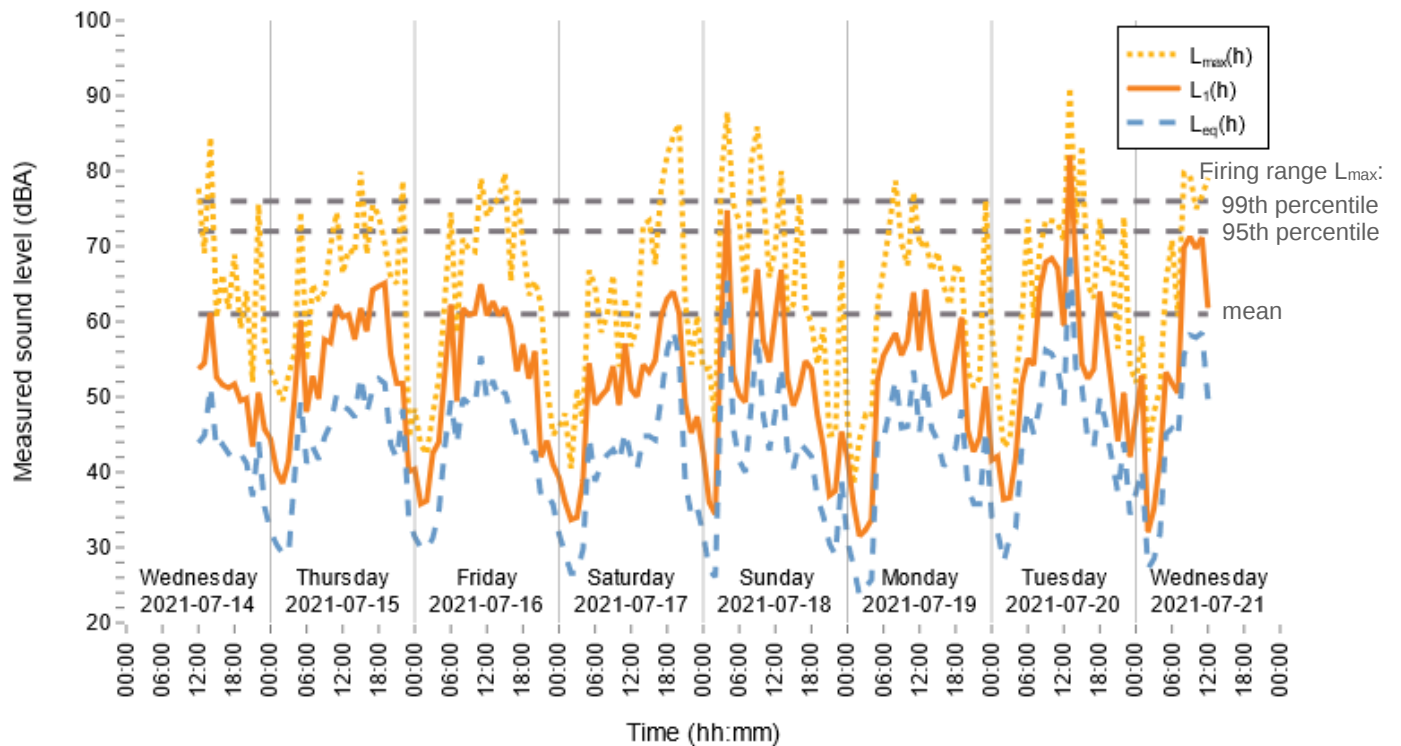


Figure 2. Summary of measured one-week sound level survey

(Figure 2 discussed on following page of this report)

Table 2. Summary maximum sound levels emitted from firing range

Summary statistic	Representative sound level (dBA)	Predicted typical frequency (seconds per active hour) ^a
99th percentile	76	8
95 th percentile	71	40
Mean	61	390
Minimum	46	775

^a The predicted typical frequency is the number of seconds for which a sound level equal to or greater than the representative sound level is expected to be measured in a representative hour during which the firing range is active. For example, a value of 390 seconds with a representative sound level of 61 dBA is an evaluation that an L_{max} sound level of at least 61 dBA is expected for 390 seconds (non-consecutively) out of an active hour.

Firing range sound level statistics were compared to the sample of one-week sound levels measured at Location A, during which period the firing range was intermittently active during weekdays. In addition to hourly L_{max, Fast} sound levels, the L₁ sound level (sound level exceeded only 1% of the time, which excludes transient outliers) and the L_{eq} sound level (equivalent time-weighted average sound level) are presented for reference. One-hour sound levels over the one-week period are presented in Figure 2 on the previous page of this report.

Comparing the estimated mean, 95th percentile, and 99th percentile of firing range sound to the measured sound levels over the course of a week, they are confirmed to be representative of the acoustic environment while the firing range is active. There were observed periods where the transient maximum sound level was evaluated to exceed the evaluated 99th percentile of firing range sound, as is expected due to other intermittent sources (traffic, aircraft, or local activity), unobserved firing range sound, or meteorological conditions (especially during nighttime hours, where the firing range is known not to operate). However, these periods are expected to be relatively infrequent and short-duration such that our previously presented analysis of firing range sound is sufficient for this summary.

ENVIRONMENTAL ACOUSTIC MODELING AND SOUND BARRIER WALL EVALUATION

Calibrated from firing range measurements, an outdoor acoustic model of firing range sound emissions was created using the CadnaA (Computer Aided Noise Abatement) acoustic propagation tool designed by DataKustik. This model utilizes International Organization for Standardization (ISO) 9613-2:1996, *Acoustics – Attenuation Of Sound During Propagation Outdoors – Part 2: General Method of Calculation* for calculation. The model includes sound reflections and shielding from project and surrounding building orientations and elevations, as well as the terrain elevations of the project site.

The goal of this model was to both predict how firing range sound propagates on the Project site for areas which were not directly measured, as well as to model the effect of sound mitigation measures applied at the firing range.

The acoustic model of existing conditions on the project site illustrated that firing range sound levels in the approximate magnitudes discussed in the previous section of this report are expected to be received on the western and southern façades of the majority of Project buildings. The eastern side of buildings, as well as buildings to the northeast of the Project site, receive the benefit of shielding from other structures on the site, and therefore may require a lesser degree of attenuation for those façades.

Sound level contours (or “lines of equal sound level”) predicted for the 95th percentile of firing range L_{\max} sound level are shown in Figure 3. Contours are drawn at a height of 5 feet above grade elevation, and are drawn by interpolation between grid points spaced 10 meters by 10 meters horizontally.

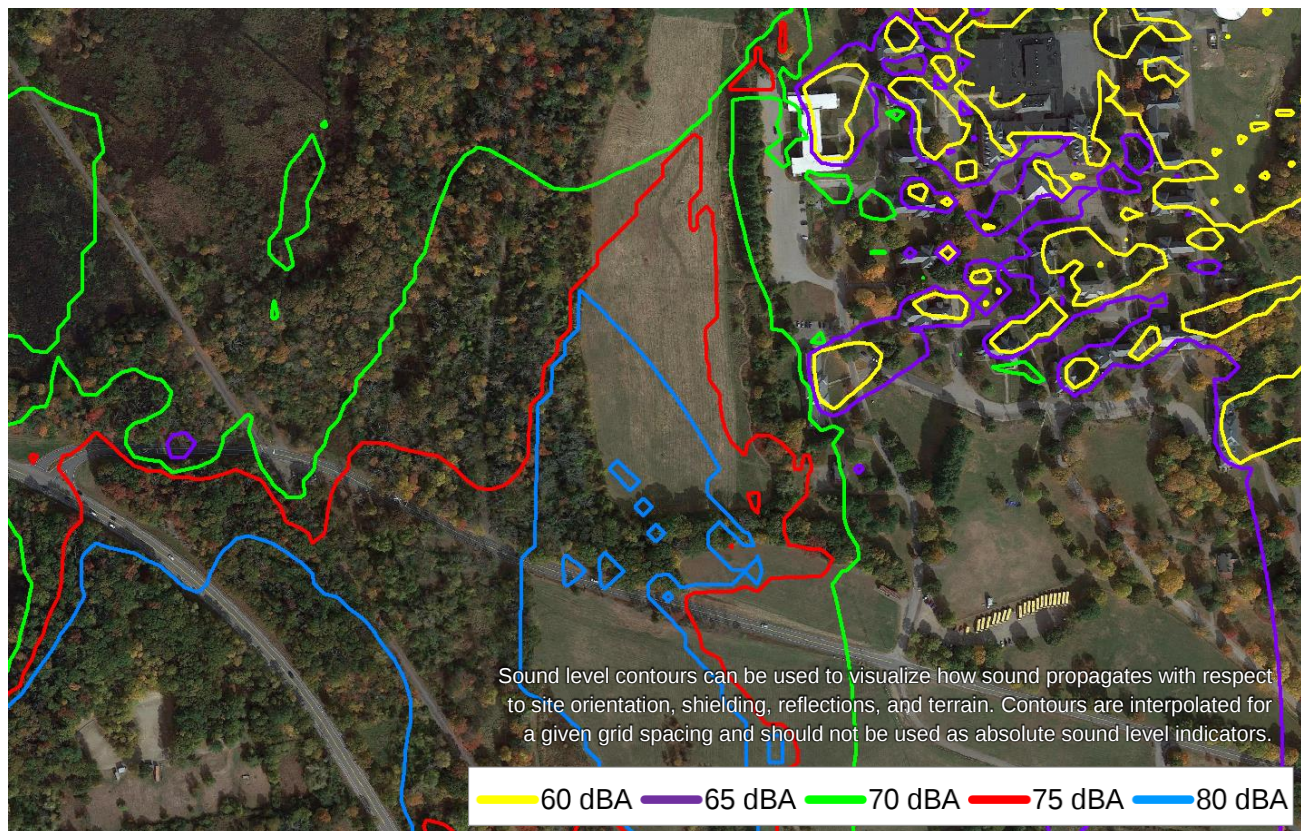


Figure 3. Sound propagation model contours, existing conditions

We used this acoustic model to evaluate the effectiveness of a sound barrier wall installed along the firing range. Although there is no strict regulation for how much sound must be attenuated by such a wall, due to the amplitude of sound at the Project, we recommend that a wall installation attenuate sound from the firing range by at least 10 dB on an overall A-weighted basis. Although this will likely result in a significant reduction of perceived loudness of impulsive sound, firing range sounds will likely be clearly audible and potentially intrusive under this condition.

We evaluated that in order to achieve a 10 dB sound level reduction, a solid sound barrier wall with an elevation of 30 feet above grade elevation would be required. The barrier wall will have to extend well past the direct line-of-sight between sound source and receptor, and extend completely downrange. Although such a wall is expected to reduce on-site sound levels by 10 dB, this is a significant construction whose feasibility will have to be assessed by a structural engineer with respect to wind load and other parameters. Further recommendations on the construction of sound barrier walls are discussed in the final section of this report, under the subheading *Alternative 3: sound barrier walls*.

The conceptual location and predicted effect of this noise barrier wall is shown in Figure 4. Although sound levels will be significantly attenuated with this design, sound levels of greater than 60 dBA are predicted at the Project for the 95th percentile of firing range activity, which will be audible and potentially intrusive to residents. Therefore, we have predicted the indoor sound level with respect to a standard STC-31 glazing assembly for these residences in combination with the barrier wall, the results of which are shown in Figure 5 on the following page of this report.

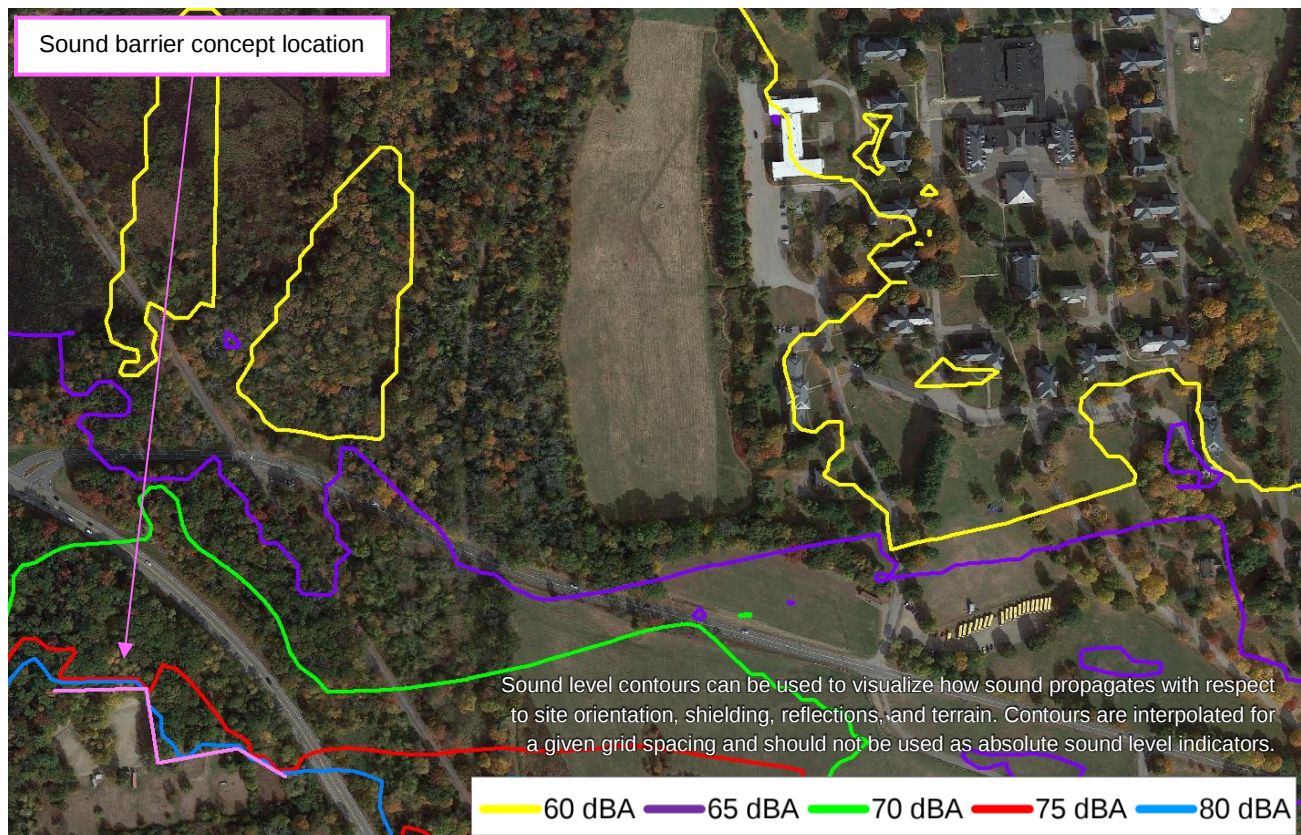


Figure 4. Sound propagation model contours, with 30 foot elevation barrier (as shown)

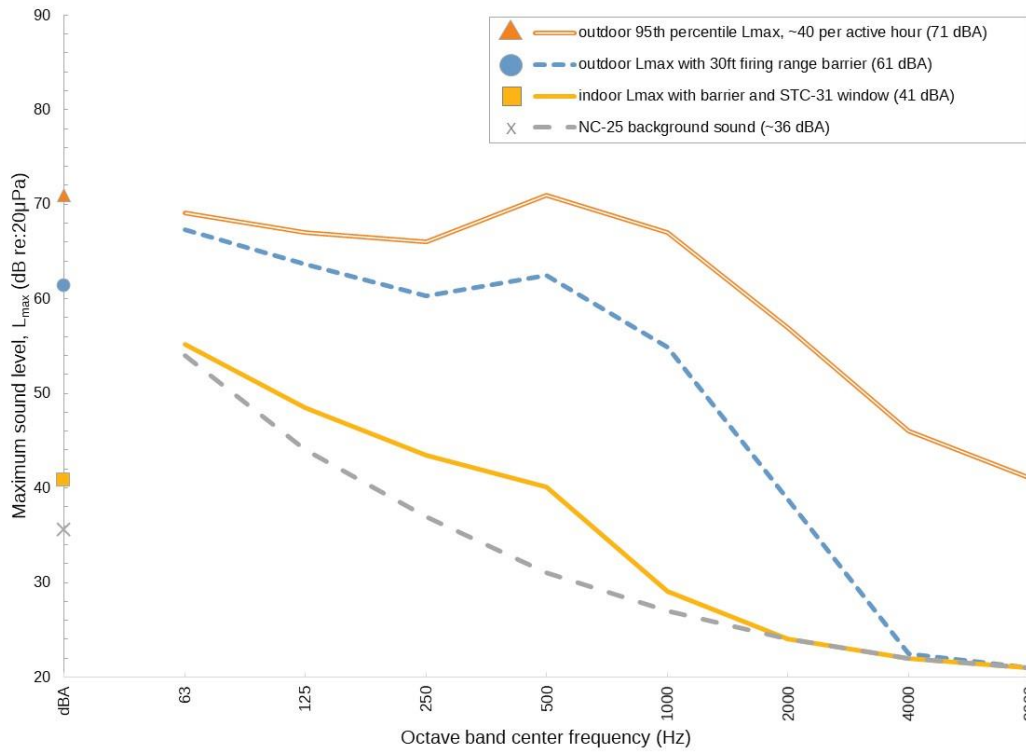


Figure 5. Sound barrier wall attenuation predictions

Even with the significant construction of a 30-foot high sound barrier wall and a typical residential window, intermittent impulsive sound levels are predicted to be clearly audible inside residences during firing range activity. Therefore, we do not recommend the installation of a sound barrier wall as a feasible alternative for this project.

SUMMARY AND DISCUSSION OF RECOMMENDATIONS

Our measurements and modeling of firing range sound on the project site indicate that acoustic mitigation is likely to be necessary for the successful development of the site into residential use. The firing range to the southwest of the Project, although only intermittently active, emits clearly audible impulsive sounds which are repeated hundreds of times over the course of an hour during periods of activity.

This section of our report presents a summary of recommendations for successful development of the project. For many impulsive and high-amplitude sound sources such as the firing range, acoustic mitigation is most likely to be successful when applied at the sound source, rather than closer to the sound receptor. Therefore, our recommendations apply on the firing range property itself.

Alternative 1: underground firing range

The most effective method for attenuating firing range sound will be to move the range underground. This results in very few paths for sound to be emitted to the environment, and offers significant attenuation to firing sounds. The feasibility of this alternative should be evaluated by Project structural and other engineers, and will require participation from the Town and firing range.

Underground firing ranges will likely require the design of mechanical ventilation systems, which themselves can emit sound when operating. In this case, given the proximity to other receptors, we do not expect that sound emissions from project mechanical systems will exceed environmental sound regulations or result in sound-related complaints.

Alternative 2: indoor firing range

If the firing range cannot be located underground, we recommend that it be placed entirely indoors in a solid-walled structure, constructed of CMU or a structure of similar weight. The interior walls and ceiling of the building should be solid, be treated with acoustically-absorptive material, and all ventilation or openings should be oriented to the west of the building wherever feasible. The feasibility of this alternative should be evaluated by Project structural and other engineers, and will require participation from the Town and firing range.

Similar to Alternative 1, such a building construction may require mechanical ventilation systems, depending on design. In some cases, design of a structure with one side open (such as having the west wall open) have been successfully designed, but can provide lesser sound attenuation with respect to sound emitted to the environment. Such a structure will require significant acoustic absorption on the ceiling of the structure, and have a ceiling that extends significantly past the final range to the west of the facility.

The attenuation provided by such a structure can be widely varied based on construction material, quality of construction, ventilation paths, orientation, and other factors. This structure should be designed with the express goal of attenuating sound propagating toward the Project, and the predicted sound emission should be evaluated prior to final design and construction. The goal of such a structure should be to attenuate firing range sound by at least 20 dB on an overall A-weighted basis, which will significantly reduce the perceived loudness of impulsive firing range sounds. Assuming this 20 dB reduction, firing range sound will likely still be intermittently audible while outdoors at the Project, but will be less intrusive to passive recreation.

Alternative 3 (not recommended): sound barrier walls

As discussed in the previous section of this report, sound barrier walls constructed near the firing range would likely need to be relatively high in elevation and be constructed with significant structural weight to significantly attenuate sound. Even with 30-foot high walls, impulsive sound from the firing range is likely to be audible and potentially intrusive inside residences with windows closed.

In the case that the previous two alternatives are not feasible, a sound barrier wall may be able to be designed that is more effective by being “cantilevered” or slanted towards the firing range such that it “shadows” the range. The effectiveness of such an arrangement is largely dependent on the placement of the wall, the height of the start of the cantilever, and the amount it is over to extend over the firing range, to be determined by structural designers or engineers.

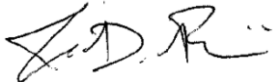
Sound barrier walls should be solid walls that weigh at least 3 pounds per square foot of surface area, and should be completely sealed at all gaps between panels with non-hardening sealant. The barrier should extend such that it is flush with the ground and sealed, or as close to the ground as is feasible, as gaps at the bottom are likely to diminish the performance of the wall. The wall should have acoustically-absorptive material facing the firing range having rated Noise Reduction Coefficient (NRC) of at least 0.7. Such barriers can be constructed out of a variety of materials in the field, or commercially-available products are available from suppliers such as IAC Acoustics¹.

Acentech is available for further consultation on the design of the Project and direction of alternatives as the Project progresses in design. We would welcome the opportunity to propose to work with either the Project design team or a separate firing range design team to develop mitigation alternatives for this project, if requested.

* * * * *

Please contact us (617-499-8075 or jbriskie@acentech.com) to discuss any questions or comments you may have about this letter or our study.

Sincerely,



Jack Briskie, P.E.
Senior Consultant

¹ IAC Acoustics sound barrier walls ([link](#))