

Wellesley Square Redevelopment



Response to the Town of Wellesley
Request for Proposals
Technical Proposal

Ground Lease of Tailby and Railroad Parking Lots
Development of Affordable and Market-Rate Housing

Submitted by
Trinity Financial, Inc.
75 Federal Street
Boston, MA 02110
617.720.8400

June 1, 2018

TRINITY
FINANCIAL



May 31, 2018

Board of Selectmen's Office
c/o Meghan Jop, Assistant Executive Director
528 Washington Street
Wellesley, MA 02482

Re: Trinity Financial's Proposal in Response to the Town of Wellesley's RFP for the Tailby and Railroad Parking Lots

Ms. Jop:

The Trinity Financial ("Trinity") team appreciates this opportunity to submit this proposal for the redevelopment of the Tailby and Railroad Parking Lots. Our proposal is to develop a vibrant mixed-use project that will help to activate this corner of Wellesley Square, including a mixed-income residential component as well as a publicly accessible arts space. Trinity's proposed development is two buildings that will flank the Wellesley Square commuter rail station: a 116,000 square-foot building on the Tailby Lot that will include 45 high-end condominium units and a 76,000 square-foot building on the Railroad Lot that will house 45 mixed-income rental units and a 10,000 square-foot arts space. In addition to replacing all 293 existing parking spaces on the Tailby and Railroad Parking Lots, our proposal also includes additional parking to support the condominium, rental housing and art space components.

Trinity's proposal for Wellesley Square provides several benefits to the Town of Wellesley and the community, which are responsive to the Town's objectives. The following is a description of six key benefits of this submission.

Mixed-Income Housing and SHI Inventory: The residential component of Trinity's proposal calls for a total of 90 units: 45 for-sale condominiums and 45 mixed-income rental units. Of the 45 rental units: 23 will be affordable at 80% of area median income and the remaining 22 will be market-rate units. All 45 rental units will count towards the Town of Wellesley's Subsidized Housing Inventory for 40B.

Replacement Parking: Trinity's proposal replaces all 293 existing surface parking spaces on the Railroad and Tailby Lots with a new structured parking facility located on the Tailby Lot. At the completion of construction, the Town of Wellesley will own and manage this new structured parking facility. All of the parking revenue generated by the 293-space structured parking facility will go to the Town of Wellesley. Our proposal also includes 22 additional "flex" spaces on the Tailby lot that

could be shared amongst patrons or workers at the arts space, tenants or guests of the housing component, or visitors to shops and restaurants in downtown Wellesley.

Community Arts: The arts are one of Wellesley’s most valuable cultural assets. Our proposal works to strengthen the community arts by including a publicly accessible arts space, including a 200-seat black box theater, rehearsal space, an art gallery space, and administrative/support space. The residential component of Trinity’s proposal also includes 10 artist live/work units. We have had a few initial discussions with the Wellesley Arts Alliance and its member organizations to design the arts space. Our program for the arts space reflects the feedback we received during these conversations. A letter of support from the Wellesley Arts Alliance is included in the appendix to Section 2, Development Concept, of this binder.

Improved Access: Pedestrian and ADA access across the commuter rail tracks is challenging. Trinity’s proposal responds to this need by incorporating an elevator and stair on both sides of the commuter rail lots that will service a new ADA accessible commuter rail train platform, the parking and residential levels of the Project, as well as Crest Road.

Massing, Density and Height: Both residential buildings are four stories or less from the existing street grade of Crest Road, Linden Street and Railroad Avenue. We believe this proposed massing, density and height respects the character of Linden Street, the College Heights neighborhood, and Wellesley Square.

Green and Sustainable Design: Sustainability, energy efficiency, and resiliency are driving forces behind our vision for the Wellesley Square development. Our team includes New Ecology Inc. (NEI) as our Sustainability Consultant, a leader in advising on cutting edge and state-of-the-art green technologies. NEI will work closely with the Lead Architect and with the Civil, Landscape, Interior Design and MEP consultants who each have a LEED accredited professional as a prime member of their design team.

The opportunity at Wellesley Square to make a significant, legacy contribution to the Town of Wellesley is substantial. Trinity has assembled a development team that has a long and distinguished track record of permitting, developing, financing, constructing, owning and operating complex, large-scale development projects across the Greater Boston area and throughout the Northeast. A list of the members of the Trinity team and some background information is provided below:

Lead Developer - Trinity Financial, Inc.

Trinity is a 250-person development and management company with offices in Boston and



Trinity Financial’s One Canal Project in downtown Boston

Manhattan and 30 years of development experience, encompassing over \$2.3 billion of commercial and residential development, including, for example, 551 units of luxury housing at our Avenir and One Canal developments in the Bulfinch Triangle in downtown Boston, 130 units of affordable artist housing in Lowell, Massachusetts, and 200 units of transit-oriented development adjacent to the Ashmont Red Line station that contains a mix of rental and condominium units.

Trinity has experience across four key areas, which are relevant to our proposal for Wellesley Square:

- Luxury and mixed-income housing
- Combined rental and for-sale housing developments
- Arts space
- Transit-oriented development



Trinity Financial's Appleton Mills Project in Lowell



Elkus Manfredi's Waterstone at Wellesley Project

Lead Architect – Elkus Manfredi

Elkus Manfredi is a Boston-based master planner and architect, with experience designing residential projects in Wellesley and the Greater Boston area, including the award-winning Waterstone at Wellesley project, a 134-unit senior living facility located along the Charles River. The firm's notable Boston projects include the 463,000 square-foot, mixed-use Ink Block project in Boston's South End, which includes 315 rental apartments, 153 condominium units, and 85,000 square feet of street-level retail space.

Landscape Architect – Carol R. Johnson Associates

Founded in Cambridge, Massachusetts in 1959 by Carol Johnson, a Wellesley College graduate, Carl Johnson R. Associates (CRJA) is landscape architecture firm that has developed a reputation for environmentally sensitive design. In Wellesley, CRJA provided landscape architectural services for the 273,000-square-foot Wellesley Gateway office complex at the intersection of Route 9 and 128.

Local/Permitting Counsel – Larry Shind, Kertzman & Weil

Kertzman & Weil, LLP is a Wellesley-based law firm that has been providing counsel for real estate transactions in Wellesley and its neighboring communities since 1979. Larry Shind, who joined Kertzman & Weil in 2002, will serve as Trinity Financial's local counsel with respect to land use, zoning and permitting. A Wellesley resident, Mr. Shind is active in town government, where he currently serves on the Permanent Building Committee and is an elected town meeting member. He was a member of the Wellesley Board of Selectmen from 1999-2005, serving as Chairman in 2000. He was also a member of the Wellesley Advisory Committee from 1995-1998, serving as Chairman in 1998.

During his tenure at Kertzman & Weil, Larry has represented numerous clients before local town boards and committees in the Wellesley area, including the land use and permitting work associated with the Wellesley Sports Center, a 102,000-square-foot multi-use sports complex containing ice hockey rinks, swimming pools, and indoor soccer field.

Other consultants:

- Transportation/Traffic Engineer – MDM Transportation Consultants
- Site/Civil Engineering – Bohler Engineering
- Outreach and Community Liaison – CoUrbanize
- Parking Consultant – Dane & Company
- Property Manager – Trinity Management, LLC
- Environmental Engineering – McPhail Associates

We would welcome the opportunity to work with the Town of Wellesley and residents of the community to refine and finalize the vision that Trinity has articulated in this proposal for an active mixed-use and mixed-income development project. By introducing a residential use and the arts on these two parking lots, it is Trinity's hope that this project will help to add new vitality to Wellesley Square.

Immediately following this cover letter is the Town's Comparative Evaluation Criteria with an additional column that includes how Trinity Financial believes our proposal responds to the objectives of this RFP. We hope that this matrix aids in the Town's review of our submission.

Please do not hesitate to contact me or Dan Drazen, Project Manager assigned to this Project, at 617-720-8400, with any questions or comments you may have.

Sincerely,



Patrick Lee

**Comparative Evaluation Criteria
for Trinity Financial Inc's Proposal**

Criteria	Rating Scale			Summary of Trinity Financial's Proposal
A1 - A4: Advantages to the Town				
A1	Affordable Housing Units that will add to the Town's Subsidized Housing Inventory	Very Advantageous	All proposed housing units are eligible for the Town's SHI	Of the 90 total units proposed, 50% (45 units) are eligible for the Town's SHI.
		Advantageous	25% or more of the proposed units are eligible for the Town's SHI	
		Non-Advantageous	20% of the proposed units are eligible for the Town's SHI	
		Unacceptable	No units qualify for the Town's SHI	
A2	Compensation for the land lease.	Very Advantageous	Benefits to Town are significantly above the market rate expectation.	Town will receive a new, 293-space parking garage, which is worth approximately \$15.69 million. The Town would receive tax revenues projected at over \$1.0M per annum, and additional compensation as set forth in the Price Proposal.
		Advantageous	Benefits to Town are above the market rate expectation.	
		Non-Advantageous	Benefits to the Town meet the market rate expectation.	
		Unacceptable	Benefits below market rate.	
A3	Existing Commercial and Commuter Parking spaces are maintained at the completion of the project.	Very Advantageous	An increase in parking for Commercial and Commuter Parking is created	All 293 existing parking spaces will be replaced.
		Advantageous	Existing parking spaces are maintained.	
		Non-Advantageous	Due to the size of construction there is a reduction of parking spaces for Commercial and Commuter Parking	
		Unacceptable	Reduction in parking spaces for Commercial and Commuter Parking in excess of 15%.	
A4	Construction Management Plan addresses impact on public parking	Very Advantageous	Proposed plan allows for up to 85% of existing parking spaces to remain open during construction through phasing and/or alternative site.	Trinity proposes to work with the Town to develop a construction phasing plan that will allow approximately 150 parking spaces (at least 51% of the spaces) to remain open during the construction by phasing the construction of the two lots and managing the construction of the Tailby Lot to allow parking during construction, consistent with a construction schedule agreed upon with the Town. Trinity will also pursue leasing private, off-site parking spaces in lots that are proximate to the site.
		Advantageous	Proposed plan allows for up to 75% of existing parking spaces to remain open during construction through phasing and/or alternative sites	
		Non-Advantageous	Proposed plan allows for up to 50% of existing parking spaces to remain open during construction	
		Unacceptable	Proposed Plan closes public parking areas during construction.	
A5	Amenities or open space are included in the proposed Facility or on adjoining land and can be accessible or rented to the public. Internal amenities may include as examples visual and performance art space, public meeting rooms, community space, and youth gathering space	Very Advantageous	One or more amenities and/or open space areas provided and accessible for use by the public.	Publicly accessible space includes 200-seat black box theatre, art gallery and rehearsal space. The Tailby Lot will include a landscaped patio space that is open to the public. A realigned Railroad Ave will reclaim a portion of what is now a paved street for community space at the corner of Railroad Ave and Crest Rd.
		Advantageous	One amenity and/or open space	
		Non-Advantageous	Amenities provided, but only accessible by residents	

Criteria	Rating Scale			Summary of Trinity Financial's Proposal
P1	Lighting - Outdoor Lighting	Very Advantageous	P1 - P7: Permitability Uses newest technologies to maximize use of dark sky lighting programs, with minimal impact on abutters. Minimize impact during all hours of darkness.	The Project design team will use the latest dark sky lighting practices to minimize impact on abutters.
		Advantageous	Reasonable use of dark sky lighting programs and acceptable impact on abutters. Minimize impact during all hours of darkness.	
		Non-Advantageous	Some use of dark sky lighting programs and some impact on abutters. Minimize impact after 10PM.	
		Unacceptable	Minimal use of dark sky lighting programs and maximum impact on abutters	
P2	Neighborhood impact - Potential noise Noise is more troublesome late at night through early in the morning. Noise includes things such as trash pickup, car doors closing, talking, mechanical systems.	Very Advantageous	Site noise that would impact the neighbors especially during the evening, night and morning hours (including the weekends) is fully mitigated.	Trinity will work with abutters to create a noise mitigation plan during the construction process. Noise from cars will be mitigated because all of the Project's parking is located within garages.
		Advantageous	Site noise that would impact the neighbors during the late night or early morning hours (including the weekends) is fully mitigated.	
		Non-Advantageous	Site noise to be no greater than current Route 9 site noise.	
		Unacceptable	Significant noise that would impact the neighbors.	
P3	Parking - Parking shall be based on best practices and/or proposed zoning to accommodate resident parking, in addition to Commercial and Commuter Parking	Very Advantageous	125% of required parking during peak hours located on property, including visitor and loading parking	The Trinity plan includes 157 parking spaces (90 for the condos, 45 for the apartments and 22 "flex" spaces), which amounts to over 116% of the required 135 parking spaces based on best practices and/or proposed zoning.
		Advantageous	100% of required parking during peak hours located on property, including visitor and loading parking.	
		Non-Advantageous	Most required parking during peak hours located on property, with minimal visitor and loading parking	
		Unacceptable	Unable to accommodate peak parking on site.	
P4	Traffic - Traffic considerations shall be based geometric improvements to adjacent intersections, on the site study, and on meeting requirements resulting from respondent's consideration of the Project of Significant Impact (PSI) Special Permit analyses.	Very Advantageous	Project proposes clear and sufficient mitigation for anticipated traffic impacts on Linden Street, Crest Rd, Washington Street, Central Street and adjoining neighborhood streets, and plans to manage process and fund 100% of the cost.	As described in Section 2, Development Concept, Trinity proposes to realign Railroad Avenue to avoid the sweeping, and dangerous, left turns that are currently being made from Crest Road onto Railroad Avenue. We are also proposing to make Railroad Avenue one way, which minimizes the pedestrian crossing width between Post Office Park and Central Park.
		Advantageous	Project proposes mitigation for anticipated traffic impacts on Linden Street, Crest Rd, Washington Street, Central Streets and adjoining neighborhood streets and plans to manage process and fund 100% of the cost.	
		Non-Advantageous	Project generally states it will mitigate anticipated traffic impacts on Linden Street, Crest Rd, Washington Street, and Central Street and fund 100% of the cost.	
		Unacceptable	Project does not include mitigation of expected traffic impact on Linden Street, Crest Rd, Washington Street, and Central Street and neighborhood streets and /or funds less than 100% of the cost.	

Criteria	Rating Scale			Summary of Trinity Financial's Proposal
P5 Pedestrian Safety and Circulation (including bicycles). Consideration of requirements resulting from the Project of Significant Impact (PSI) Special Permit analyses.	Very Advantageous	Project promotes bicycle and pedestrian access to and on the site. Project effectively designs pedestrian sidewalks on main roadways and internal to the site, in particular through the parking lot and around the building perimeter. Project has a bike rack. Project effectively connects or leads to alternative paths such as the aqueduct trail or Fuller Brook Park		Trinity's proposal includes ADA accessible commuter rail platforms on both the inbound and outbound tracks. The Project design also calls for new elevators that will service the commuter rail platforms up to Crest Road to solve what is now vertical access deficiencies. Trinity's proposal includes ample bike parking.
	Advantageous	Project promotes bicycle and pedestrian access to and on the site. Project effectively designs pedestrian sidewalks along main roadways and internal to the site, in particular through the parking lot and around the building perimeter. Project has a bike rack.		
	Non-Advantageous	Project provides some bicycle and pedestrian access to and on the site.		
	Unacceptable	Project does not support bicycle and pedestrian access to and around the site.		
P6 Design elements and integration of facility with surrounding abutters and neighborhood.	Very Advantageous	Facility respects abutters' views, leverages existing natural topography and trees, provides walkways around and through site and will work with the abutters on effective mitigation. Facility has high curb appeal from Linden St., Crest Road, and Washington Street.		At no more than four stories above street elevations, the massing, design and height of Trinity's proposal respects the fabric of Wellesley Square and the surrounding College Heights neighborhood. Trinity has taken advantage of the sunken nature of the Tailby site to create parking that will sit below the street grade of Linden St and Crest Rd.
	Advantageous	Facility respects abutters' views and will work with abutters on mitigation. Facility uses some of the existing natural topography and trees to mitigate impact, provides walkways around and through site Facility has high curb appeal from Linden Street and Washington Street		
	Non-Advantageous	Is a stand-alone facility with little curb appeal, and with minimal mitigation of impact on neighbors.		
	Unacceptable	Doesn't meet PSI requirement		
P7 Zoning needs are clear	Very Advantageous	No zoning variance, bylaw or map changes required. Variance, bylaw, or map change expectations clear in requested exhibit		Section 4, Implementation Plan and Project Timetable, includes a memo and matrix of the permits and approvals necessary to permit the Project, which was prepared by our Wellesley-based local counsel, Larry Shind.
	Advantageous	Variance, bylaw, or map change expectations clear in requested exhibit		
	Non-Advantageous	Variance, bylaw, or map change expectations clear in separate paragraph in response		
	Unacceptable	Variance, bylaw, or map change expectations not clearly stated in either an exhibit or a separate paragraph		

Criteria	Rating Scale			Summary of Trinity Financial's Proposal
Q1 - Q3: Developer Qualifications				
Q1	Experience of Developer	Very Advantageous	Developer has designed and built a significant number of multi-family housing facilities, in close proximity to the MBTA rail line, that were successful and that were similar to the Town's goals and expectations.	In its 30-year history, Trinity Financial has developed \$2.2 billion of development, including 9,000 units of housing. We have experience with artist housing, transit-oriented development (including developments on land leased from the MBTA at its Ashmont Station (our Carruth development), and on air rights above its Orange and Green line North Station (our Avenir development), combined rental/for-sale developments and luxury and mixed-income housing.
Advantageous		Developer designed and built some multi-family housing facilities that were successful and that were similar to the Town's goals and expectations.		
Non-Advantageous		Developer has designed and built some larger commercial facilities that were successful that had different goals from the Town's.		
Unacceptable		Developer has a minimal number of projects developing similar types of housing facilities.		
Q2	Experience of Property Manager	Very Advantageous	Property Manager has a significant number of years operating similar types of facilities that match the Town's goals for this site	Trinity Management's staff of 225 employees provides management for 7,000 residential units, about 20% of which are market-rate and homeownership units, including all of Trinity Financial's properties with an arts space.
Advantageous		Property Manager has a reasonable number of years operating similar types of facilities that match those project's goals and quality expectations		
Non-Advantageous		Property Manager has some years operating similar types of facilities that have survived multiple business cycles.		
Unacceptable		Property Manager has a minimal number of years operating similar types of facilities.		
Q3	Town Management of Development - The town does not intend to be involved with the development of the project or with managing the relationship between multiple developers of different use facilities. Preference will be given to a single organization that develops the entire site as well as a single organization that manages sub-developer(s).	Very Advantageous	No Town management of project, and one point of contact for developer.	Proposed organizational structure will require no Town management of the Project and will provide the Town with one point of contact at Trinity.
Advantageous		No Town management of project, and one point of contact with developer, but sub-developer(s) engaged for portion(s) of the project		
Non-Advantageous		Two or more points of contact for the Town with distinct areas of responsibility for elements of the project for each.		
Unacceptable		Town oversight and management required.		

Criteria	Rating Scale			Summary of Trinity Financial's Proposal
F1 - F3: Project Financials				
F1	Financials – Project equity; construction loan	Very Advantageous	Sources of project equity identified and conservative equity investment plan.	Trinity's financing plan for Wellesley Square is predicated on the same type of conservative assumptions that have enabled our firm to leverage more than \$1.4 billion in equity.
		Advantageous	Sources of project equity identified and sufficient equity investment plan.	
		Non-Advantageous	Sources of project equity unknown but demonstrated ability to raise equity on other projects	
		Unacceptable	Sources of project equity unknown and little or no prior record of raising comparable amount of equity on other projects	
F2	Financials – Financial feasibility, including construction and operation.	Very Advantageous	Pro Forma for the project give confidence the project can be capitalized within the time required to obtain permits, operate highly profitably and be able to maintain a high quality development.	Based upon our extensive track record of securing financing, Trinity is confident that we could secure financing, obtain any necessary permits, close and begin construction by the end of 2019. Trinity operates our properties efficiently to ensure profitability while also investing in ongoing upkeep and maintenance.
		Advantageous	Pro Forma for the project make the project appear able to be capitalized within the time required to obtain permits, operate sufficiently profitably while maintaining the development.	
		Non-Advantageous	Pro Forma require favorable assumptions for the project to be capitalized within the time required to obtain permits, be successful and to allow for high quality maintenance.	
		Unacceptable	Pro Forma seem insufficient for the project to be capitalized within the time required to obtain permits and support the project and its expected maintenance over the life of the project.	
F3	Budget and Pro Forma assumptions	Very Advantageous	Reasonable revenue, expense, and project cost assumptions clearly listed with explained adjustments in future operating pro forma projections	The 20-year operating pro forma included in Section 6, Project Financing and Analysis, is based upon Trinity's analysis of comparable rental properties in the area and our experience operating similar projects in the Greater Boston area. The annual adjustments made to the revenue and expenses are based upon widely accepted industry underwriting standards.
		Advantageous	Reasonable revenue, expense, and project cost assumptions clearly listed with explained fixed growth rate in future operating pro form assumptions	
		Non-Advantageous	Some Revenue Assumptions, project cost assumptions, and expenses listed and used in future pro forma with explained fixed growth rate	
		Unacceptable	Minimal revenue assumptions provided leaving questions about cost to customers and therefore reasonableness of occupancy rates / and revenue projections	

Criteria	Rating Scale			Summary of Trinity Financial's Proposal
D1 - D2: Development Design				
D1	Sustainability and energy efficiency (Town related)	Very Advantageous	Project uses the current best practices for energy and water efficiency, recycled materials, is committed to alternative sources of energy and other aspects of sustainability, and incorporates LEED considerations.	Working with our sustainability consultants at New Ecology, Trinity's Project reflects many cutting edge and state-of-the-art green technologies for energy and water efficiency and sustainability, including LEED considerations. Our design incorporates on-site stormwater retention, "smart" irrigation, high performing windows, LED lighting and low-flow plumbing fixtures.
		Advantageous	Project uses many of the current best practices for energy and water efficiency and recycled materials, is committed to alternative sources of energy and other aspects of sustainability, and reflects some LEED considerations.	
		Non-Advantageous	Project uses some of the current best practices for energy and water efficiency and recycled materials, is committed to alternative sources of energy and other aspects of sustainability, and reflects a limited consideration of LEED.	
		Unacceptable	Project does not use the current best practices for energy and water efficiency and recycled materials, reflects little consideration of alternative sources of energy and other aspects of sustainability and/or LEED.	
D2	Synergy of facilities on the site and their uses.	Very Advantageous	Proposed uses fit together and make highly efficient use of the site as well as shared uses of common facilities.	The arts space we have introduced forms what we see as a vibrant cultural facility for the Town. From a site design perspective, the site plan that Trinity has proposed takes advantage of the site's natural topography by incorporating parking that sits below street level. Finally, our design embraces Post Office Park, Central Park and the Station Oak.
		Advantageous	Proposed uses fit reasonably together and make less efficient use of the site as well as shared uses of common facilities.	
		Non-Advantageous	Proposed uses fit together less efficiently or are independent and there is minimum or no shared space.	
		Unacceptable	Separate independent proposals are submitted without regard for construction management, parking configuration, access or shared spaces.	

Section 1 – Development Team

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

Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110
617-720-8400

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 four-person master development team for the Wellesley Square Project. Everyone specifically picked to fashion the perfect vision for revitalizing the Tailby and Railroad Parking Lot sites.

Patrick Lee, one of the principals 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. **Dan Drazen** will serve as the Project 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; he 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 Project Manager. **Tim Smith**, 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.

Principal: Patrick Lee 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's degree from the University of Pennsylvania.

Project Manager: Since joining Trinity in 2010, Dan Drazen has led interdisciplinary project teams to design, finance, permit and construct multifamily development projects in Massachusetts and Rhode Island. In 2017, Dan spearheaded Trinity's closing on the historic Van Brodie Mill building in Lawrence, Massachusetts, which will adaptively reuse an abandoned property that was originally built in 1919 into 102 units of mixed-income housing. Dan also recruited and certified more than 200 artists from across New England to lease live/work spaces specifically designed for artists at Trinity's Appleton Mills project in Lowell, Massachusetts.

In Rhode Island, Dan managed the project team that recently closed on 60 King, the \$22.5-million conversion of a vacant historic mill building in the Olneyville neighborhood of Providence into 60 units of affordable and market-rate housing. Trinity assembled a mosaic of tax credit equity sources, including 9% and 4% LIHTCs, and federal and state historic tax credits, to finance this project. Dan holds a BA in political science from Lewis & Clark College and an MBA from Boston University.

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 with Dan Drazen previously on the financial closing of the Van Brodie Mill. 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 Bachelors of Marketing from Boston College

Design and Construction: Tim Smith is a Vice President for Design and Construction and brings 25 years of experience in affordable housing planning, design, and development to the organization. Among his projects is Washington Village, a public-private partnership with the Norwalk Housing Authority to redevelop 273 new apartments in Norwalk, CT. Mr. Smith has extensive experience in large site planning having managed over twelve HUD HOPE VI Revitalizations in eight states ranging in hard costs from \$30-120M. His work has involved broad experience in public bidding, code review, zoning analysis, permitting, single- and multi-family design and construction. Additionally, Mr. Smith is the Design and Construction Manager for Park Square West Phase IV, a market rate, high-rise apartment in downtown Stamford, CT. He also brings intensive experience working with residents and community groups to achieve common objectives. Mr. Smith is a registered architect and holds a BA in Social Sciences from the University of California-Berkeley, and a MA in Architecture from the Massachusetts Institute of Technology.

2. If the developer is not an individual doing business under his/her name, a description of the firm and status of the organization (e.g., whether a for-profit, not-for-profit or charitable institution, a general or limited partnership, a corporation, LLC, LLP, business association, or joint venture) and the jurisdictions in which it is registered to do business.

The Tailby and Railroad Lot Redevelopment will be undertaken by two, to-be formed legal entities. Trinity Wellesley Square Homeownership Limited Partnership and Trinity Wellesley Square Limited Partnership. Both limited partnerships will be Massachusetts limited partnerships. Each of the limited partnerships will have a to-be-formed Massachusetts limited liability company as its general partner. All of the entities will be Trinity Financial, Inc. affiliates.

Given that the legal entities described above have not been established, Trinity Financial, Inc. is the applicant for this proposal and all of the Required Forms in Section 5 have all been completed in the name of Trinity Financial, Inc.

3. The nature of the entity to enter into a lease.

Trinity is currently contemplating that there will be separate ground leases for the Railroad Lot and the Tailby Lot. Trinity Wellesley Square Limited Partnership will be the tenant under a ground lease for the Railroad Lot. Trinity Wellesley Square Homeownership Limited Partnership will be the tenant under a separate ground lease for the Tailby Lot.

A separate ground lease for each lot will help facilitate the anticipated different financing structures for each component: a condominium homeownership and a multifamily rental housing development.

4. A description of the general skills and nature of the operation of the developer and the development team.

Established in 1987, Trinity Financial, Inc. is a real estate development firm based in Boston and is 50% minority owned. Trinity currently employs 35 professionals with expertise in project management, design and construction, and asset management. Trinity has organized more than 70 limited partnerships, through which it has completed or is currently developing nearly \$2.2 billion in a wide range of real estate projects, including over 8,800 units of housing and almost 600,000 square feet of commercial space. Trinity has established a reputation for delivering complex, multi-source projects within budget and on schedule. Trinity is adept at managing development projects involving substantial community participation. Trinity is committed to developing real estate that aids in creating viable urban neighborhoods including commercial districts and mixed-income residential communities.

Included as an appendix at the end of this section is a complete list of the projects that Trinity has completed over our 30-year history.

5. Identification of all principals, partners, co-venturers or sub-developers participating in the development, and the nature and share of the participants' ownership in and compensation from the project.

As noted above, the Trinity Wellesley Square Homeownership GP LLC and the Trinity Wellesley Square GP LLC will be affiliates of Trinity Financial, Inc. Principals James G. Keefe and Patrick A.T. Lee are the sole shareholders and directors of Trinity Financial, Inc. Trusts controlled by Mr. Keefe and Mr. Lee will be the sole members of the general partners of the limited partnerships that will enter into ground leases with the Town of Wellesley for both parking lots.

6. If the respondent proposes to lease one of the two Properties, a statement indicating whether or not the respondent is willing to partner with any other respondent(s) offering to lease and develop the remaining portion of the Properties. Developers should also provide a statement indicating whether or not the developer has participated in a similar partnership with another developer in the past.

As stated above, Trinity proposes to enter into two separate ground leases with the Town for each parcel. Trinity's proposal does not contemplate partnering with another developer on this opportunity but has partnered with others in certain of its development projects.

7. The developer will be expected to either oversee directly, or subcontract the management and operations of the Facility for the tenure of the lease.

Trinity will oversee all aspects of development and construction of all aspects of the Project, including the Town parking garage component. Upon completion of construction of the Project, our affiliated management company, Trinity Management, LLC will provide property management services for the residential components of the Project and the parking associated to those uses, and is willing to manage the Town's parking garage component, should the Town want Trinity Management to do that. Trinity Management has a portfolio of 7,000 residential units and 550,000 square feet of commercial space managed in Massachusetts, Rhode Island, Connecticut, and New York.

8. Identification of the development team, such as architects, engineers, landscape designers, development consultants, and facility operators, including subcontractors. Background information, including firm resumes and resumes for principals and employees expected to be assigned to the project, should be provided.

The Trinity Team is comprised of firms and individuals with extensive residential and commercial development experience, including housing development and green and sustainable building design. All have collaborated on multiple projects. Members of the Team are as follows:

Elkus Manfredi Architects will serve as the lead architectural firm and provide planning, design, and architectural services. Trinity Financial will contract directly with and oversee Elkus Manfredi. John Martin, AIA, LEED AP will serve as Principal-in-Charge for the Wellesley Square development effort. Rayford Law AIA LEED AP will serve as Project Architect and Kevin Park will serve as Project Manager. Elkus will collaborate with several sub-consultants, including the following:

- **Carol Johnson** (Landscape Architect)
- **MDM Transportation Consultant** (Traffic Consultant)
- **Bohler Engineering** (Civil Engineer)
- **Peter Dane Co** (Parking Consultant)

Local/Permitting Counsel: Kertzman and Weil will be the local counsel with the Town of Wellesley to provide services related to permitting, zoning, and local approvals. Trinity Financial will contact directly with Kertzman and Weil, a Wellesley-based attorney, and be responsible for all oversight of the team member. Laurence Shind will serve as local/permitting counsel for the Wellesley Square development.

Property Management: Trinity Management, LLC will be responsible for property management services. Trinity Financial will contract directly with Trinity Management and be responsible for all oversight of the management company. Kate Franco, CEO of Trinity Management, will serve as Principal-in-Charge for the Wellesley Square Project.

Community Liaison: CoUrbanize will be responsible for outreach and communication with residents of Wellesley if Trinity is designated as developer. CoUrbanize will provide a web-based platform that is interactive and will provide information regarding the project as it moves forward. Trinity will direct and oversee the CoUrbanize team.

Sustainability Consultant: New Ecology, Inc. will serve as the Project's Sustainability Consultant. In this role, New Ecology will oversee the team's effort to obtain LEED-ND status and to ensure compliance with Enterprise's Green Communities standards. Trinity will contract directly with New Ecology for their services. Lauren Baumann, Vice President, will represent New Ecology for the Wellesley Square Project.

Environmental: McPhail Associates, LLC will be responsible for all environmental engineering services including geo-technical and geo-environmental services. Trinity Financial will contract directly with McPhail Engineering and be responsible for all oversight of the team members. Ambrose Donovan, LSP, will serve as Principal-in-Charge and William Burns will serve as Project Manager for the development.

9. A summary of first, the developer's, and secondly, the development team's experience, collectively and individually, and with similar projects. Particular attention should be given to demonstrate experience with projects of a similar scale and complexity. Developers should demonstrate the ability to perform in accordance with their proposal, including the ability to pursue and carry out permitting, financing, marketing, design and construction, and to complete the project in a competent and timely manner.

The transformation of both Tailby Lot and Railroad Lot in Wellesley Square will be performed by a development team that can respond not only to the complexity of both sites, but also how they relate to the surrounding communities. Coordinating relocation of commuter and Town parking during construction and developing projects that fit into the existing neighborhood fabric requires a development team with experience in managing projects with intricate, engineering and construction and management components. Additionally, the development team must be prepared to respond to the various, and potentially opposing, needs of community groups, public officials and government entities. Trinity recognizes the importance of balancing the sites parking availability, accessibility to the commercial district and commuter rail station, and the aesthetic characteristic of the design to the needs of the surrounding community. Our proposed development addresses each of these points by marrying thoughtfully designed community, improved parking accommodations, and tasteful architecture.

Members of the Trinity team have worked on complex, large-scale projects like the Wellesley Square Parking Lots. Elkus Manfredi designed Waterstone at Wellesley which incorporates residential, medical and commercial uses onto one site. Carol Johnson has created landscapes in Wellesley, most notably at Babson and Wellesley Colleges. Kertzman and Weil have provided legal and permitting services in Wellesley since 1979. McPhail Engineering has provided environmental engineering services for Trinity's projects since 1992. Trinity Management provides management services at almost all of Trinity's housing sites in Connecticut, Rhode Island, and Massachusetts.

10. A summary of the past housing development and/or management and operation experience. Respondents should include a narrative that describes similar projects and explains why and how that experience is relevant to the proposed development project.

The Tailby and Railroad Parking Lots offer a unique and challenging opportunity to create a place at the intersection of three different areas. The commercial district of Wellesley Square, the residential community of College Heights, and the public transportation and parking use of Wellesley Square Commuter Rail Station offers a chance to make these disparate areas come together cohesively and the effort to create not just a project, but a precedent. Trinity’s proposal for both parking lots in Wellesley Square incorporates four elements that the firm has experience with in previously completed projects:

- Luxury and mixed-income housing
- Combined rental and for-sale housing developments
- Arts space
- Transit-oriented development

The following is a description of the eight projects from Trinity’s portfolio that feature these four elements:

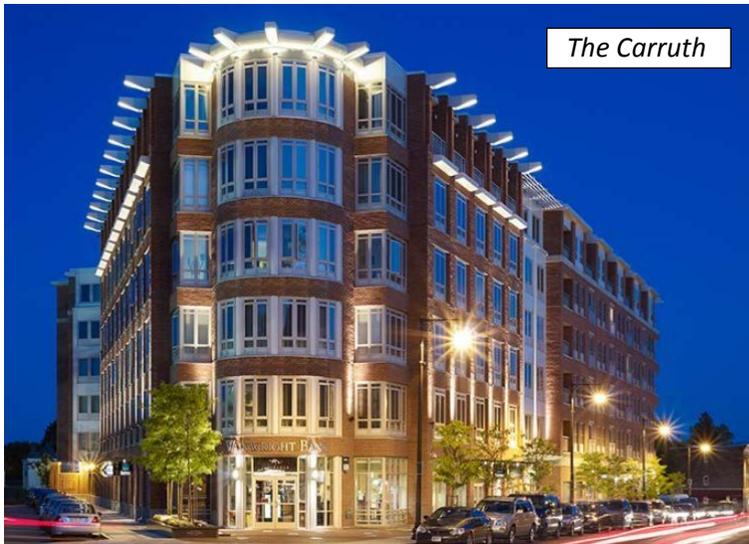
	<u>Luxury</u>	<u>Affordable</u>	<u>Market Rate Rental-Units</u>	<u>For-Sale Units</u>	<u>TOD</u>	<u>Artist-Oriented</u>
One Canal (310 units)	x		x		x	
Avenir (241 units)	x		x		x	
Carruth (116 units)		x	x	x	x	
Treadmark (83 units)		x	x	x	x	
Enso Flats in Brockton (113 units)		x	x		x	
Boston East (200 units)	x	x	x		x	x
Appleton Mills (130 units)		x	x			x
66 Summer (194 units)	x		x		x	



One Canal is a 310-unit, rental development situated in the Bulfinch Triangle neighborhood of Boston, located at the tip of the Rose Kennedy Greenway. The project includes luxury apartment units with amenities such as a fitness center, pool, and lounges that provide a comfortable living experience. One Canal is a great example of transit oriented development due to its proximity to the MBTA Haymarket

Station and MBTA North Station transit nodes. It is located on land created by the submersion of the Central Artery and incorporates a 99-year ground lease with MassDOT. This project has also been instrumental in revitalizing the street-level activity of the neighborhood and the infusion of new residents has added a new supply of patrons to support existing businesses and establishments in the community.

Avenir is another Trinity project in the Bulfinch Triangle, located one block away from One Canal. Like One Canal, this development is 241 units of luxury housing units with matching amenity spaces. It also sits on land created by the Big Dig and sits atop MBTA North Station serving the Orange Line and Green Line. This project required working collaboratively with the MBTA and MassDOT to create a development that not only creates high quality housing and access to public transportation but also connections along the street grid of the neighborhood that allow residents and patrons to navigate safely while creating a sense of place.



The Carruth is a mixed-income, mixed-housing development situated directly across the street from the MBTA Ashmont Station. The project contains 74 affordable rental apartments and 42 market rate condominiums all located in one building. This was an opportunity to provide quality housing for low-income families and increase the number of home ownership possibilities within the neighborhood, promoting housing and economic diversity. The construction of this project occurred simultaneously as the building of

Ashmont Station and involved cooperation with the MBTA. The building sits atop a 99-year ground lease. Additionally, the ground level uses of the project have aided in the vibrancy of the active Peabody Square. Commercial uses such as cafes, restaurants, and banks sit along Dorchester Avenue to create places to engage in and to encourage street activity from the surrounding community. This project, along with the new Red Line T Station have to worked to improve a public node that can accommodate many different needs.



Treadmark

Treadmark, or Ashmont Phase II, is under construction and is adjacent to Carruth. Similarly, to its predecessor, it is located next to a major transit node and contains 51 affordable apartment units and 32 for-sale condominiums, promoting a housing and income diversity all within one building. Also located along Dorchester Avenue, this project, which is expected to be completed in November of 2018, will house a grocery store that will give residents of

Treadmark, Carruth, and the Ashmont neighborhood overall another option for local retail and business. This combination of street-level retail, along with a major public transportation node further encourages walking. Both Treadmark and the Carruth are located along Dorchester Avenue, a major thorough fare in the neighborhood that also serves as a commercial district that encourage residents to walk and bike to uses they enjoy.

Phase I of Trinity's Brockton development, named **Enso Flats**, includes 113 rental apartments, which are located three blocks away from the Brockton MBTA Commuter Rail Station serving the Middleborough Line. Forty two of the 113 units are designated as artist-oriented units that cater to the arts community that exists in the city. Additionally, the Gallery at



Enso Flats

Enso Flats hosts arts events curated by the artists in residence. This phase is in the heart of Downtown Brockton with the goal of creating affordable housing options for residents looking for greater access to public transport and proximity to the commercial and civic uses along Main Street.



Boston East

Boston East, a 200-unit, market rate project recently opened its doors along the Inner Harbor in East Boston. Formerly a vacant, waterfront site that was inaccessible to the community, Boston East transformed an underutilized parcel into new private residences and public amenities available to the East Boston neighborhood. The luxury apartments have access to lounges, a gym, and underground. Yet the public uses include a landscaped yard that looks out on the Harbor, a paved harbor walk to allow pedestrians to move along the shore, a public art gallery that will

host public events and art shows and finally six apartment units designated for artists to live, work, and sell their creations from their front door. Boston East also sits one block away from Central Square which offers commercial and retail uses, and four blocks away from the MBTA Maverick Station which serves the Blue Line to Downtown and Logan Airport. Trinity wanted Boston East to not only be a great place to live, but to be an addition to the neighborhood that encouraged interaction and participation with the greater community.

Appleton Mills was Phase One of the Hamilton Canal District, which created 130 units of affordable artist units in the Appleton Mills complex in Lowell. The project re-used deteriorated vacant mill, which assisted Lowell in its efforts to revitalize its downtown. Yet the central theme of the development is the appeal to artists. Lowell contains a thriving artist community that the city wanted to incorporate into its downtown development strategy. The complex offers units that are loft style and range in bedroom types, including live/work/sell units with ground-floor access to the outside. Additionally, the development contains an atrium designed as a gallery/exhibit space that promotes community events such as open studios, film screenings and readings, creating a connection with the surrounding neighborhood that invites foot traffic and public interaction. The arts are used as unifying use to create a more vibrant neighborhood from just a single project.



66 Summer is a 209-unit luxury, mixed-use high rise that is centrally located in Downtown Stamford Connecticut, opening in 2015. The project includes a mix of bedroom accommodations studios to three-bedroom units, high end amenities such as fitness center and community room, and street level retail to engage foot traffic. 66 Summer's location in an active commercial district enhances the vibrancy of the area by introducing new residents into a neighborhood with thriving businesses such as restaurants, movie theatres and department stores. Additionally, the project is

a 10-minute walk from the Stamford Transportation Center, where commuters can reach Manhattan by train in 45 minutes.

It is also noteworthy that the parking for this development (66 Summer) is in a garage that includes 803 parking spaces that are for 66 Summer (209 spaces) and another of Trinity's developments (the 209-unit Vela development – 112 spaces) and 482 parking spaces that are owned and operated by the City of Stamford, 389 of which are for public use and 93 are under a long-term lease to Vela. Of these spaces, 321 were built by Trinity as an addition to an existing City garage, that was kept open and in operation during construction of the addition. Trinity and the City of Stamford entered into an agreement for the mutual use of this garage that could be a template for the mutual use of the garage we propose to develop in Wellesley.

Trinity has the experience to not only deliver high quality, mixed-use developments on challenging sites but to perform development in the way so the project fits cohesively into the existing community and serves as a catalyst. We are confident that Trinity can realize the proposed plan.

11. Identification of current and prospective projects that could impact this project.

We do not see any current or prospective projects impacting our ability to complete this project. With a staff of 250 employees, including 35 development staff, and financial relationships spanning a 30-year history and over \$2.3 billion worth of development work, we are confident in our ability to complete this development as promised. Trinity is currently constructing seven projects. The firm has on-staff construction managers that monitor the progress of each project and are assigned to one major development at a time. Concurrently, the development staff is processing six prospective projects that are in various stages of the development process such as financing, permitting, design, or closing. These transactions are occurring in Massachusetts, Rhode Island, Connecticut, and New York.

If designated as developer, Trinity anticipates that when the Wellesley Square Project would prepare to enter financial closing, all the projects currently in construction will have been completed and all prospective developments will have commenced construction. Consequently, the Wellesley Square Project will fit seamlessly into the firm's pipeline of projects. The expectation will be to close, construct, and complete the Project in an efficient and thoughtful manner.

12. Description of the organizational structure of the development team and a plan for the maintenance of effective communications between the Town and the development team during all phases of the project.

To ensure that we have and maintain effective communications between our clients, in this case this would be the Town of Wellesley and our development team, Trinity development projects are managed with a team that in this case will include the following individuals: Patrick Lee, as principal-in-charge of Trinity, will make all executive decisions for Trinity for the project. Kenan Bigby, managing Director of our Development Department is an alternate to the principal-in-charge, with authority to speak for the PIC and to direct the development team. Dan Drazen, the primary development manager contact responsible for the Project's day-to-day activities will be assisted by Aaron Horne, assistant project manager; and together they will work, Tim Smith who will oversee the design and construction activities for the Project. All subcontractors that are part of the development team will either directly or indirectly report to Trinity. An attached organizational chart further delineates the hierarchy of the development team.

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

Trinity Financial, Inc. confirms that it has no local, state, or federal taxes are due and outstanding.

14. A disclosure of whether or not the developer and/or any of the developer's principals, partners, co-ventures and/or subcontractors participating in the proposal or the project has been dismissed or disqualified from a bid or contract within the past five years, and if yes, the reason(s) why.

Neither Trinity Financial, nor any affiliate or principal of Trinity, have been dismissed or disqualified from a bid or contract ever.

15. A disclosure of any conditions (bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect the developer's ability to perform contractually. If a joint venture, a disclosure is required for each partner in the joint venture.

Neither Trinity Financial, nor any affiliate of Trinity, have any conditions that may affect the developer's ability to perform contractually.

16. Information regarding any legal or administrative actions past, pending or threatened that could relate to the conduct of the developer's (or its principals' or any affiliates') business and/or any of those entities' compliance with laws and other governmental requirements.

Neither Trinity Financial, nor any affiliate of Trinity or principals, has any information regarding any legal or administrative actions that could relate to the conduct of the developer's business or compliance with laws and other governmental requirements.

17. Descriptions of any procedures that relate to developer's ability to control costs and keep a project within budget.

Trinity has several procedures in place during the pre-construction and construction phases of projects to keep costs controlled and remain within the development budget. Firstly, Trinity underwrites project pro forma with conservative metrics regarding operating costs, reserves, and debt service coverage ratios. Secondly, careful market analysis is done to confirm that rental rates in a particular area are accurate, creating a realistic model of the income stream derived from revenues and expenses. Additionally, when structuring the sources and uses of a project, Trinity carries contingencies of 5% for hard costs for new construction projects and 5% for soft costs to cover unforeseen expenses. Finally, Trinity engages in a competitive bidding process for generating general contractor bids to ensure that we receive market pricing for construction and that costs are reflective of the project's scope of work.

During the construction phase of projects, measures are put in place to continue to monitor cost and budget considerations. Trinity employs on-staff construction managers who are regularly on site. They hold weekly job meetings with the general contractor and other consultants to track progress. Weekly reports are issued that document the completion rate, contingency remaining, and tasks

ahead to provide awareness of what the project will encounter going forward. Development project managers are also on-site several times a month looking over the project, attending jobs meetings, and analyzing the weekly construction reports as well.

18. References: The names, addresses, telephone and fax numbers and email addresses of at least three business references whom we may contact regarding the developer's business experience. For each, identify the property or properties about which the individual is informed. References may include building owners, architects, engineers, subcontractors, and other building or development professionals with whom you have worked.

Please see the table included in the appendix at the end of this section.

19. Resumes or brochures.

Please see the resumes and brochures included in the appendix at the end of this section.

20. Description of Project capital structure (total project budget and amounts of equity and construction financing)

Please see the sources and uses included in Section 6, fto Financing and Financial Analysis.



Section 1 Appendix:

- List of Trinity Projects
- Qualifications of Development Team
- Table of Business References
- Organizational Chart of Development Team

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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	2018 (P)
							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 (P)
							2020 (P)
Orient Heights Phase 2 East Boston, MA	\$50.5m (P)	\$15.5m (P)	Public Housing, Mixed Income	92	Tax Exempt Bonds, LIHTC, City of Boston, BHA, DND, DHCD	Owner Developer	2018 (P)
							2020 (P)
Washington Village CNI Phase 2 Norwalk, CT	\$50m (P)	25m (P)	Mixed Income Rental Housing	85	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECED, CHFA, CTDOH	Owner Developer	2018 (P)
							2019 (P)
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 (P)
Washington Village CNI Phase 1 Norwalk, CT	\$44m	20.6m	Mixed Income Rental Housing	80	LIHTC, Tax Exempt Bonds, HUD CNI Funds, DECED, CHFA, CTDOH	Owner Developer	2016
							2018 (P)
Enterprise Center Phase 2 Brockton, MA	\$60m (P)	TBD (P)	Mixed Income Rental Housing	111	LIHTC, Tax Exempt Bonds	Owner Developer	2017 (P)
				414+ Parking Garage			2019 (P)
425 Grand Concourse Bronx, NY	\$114m (P)	\$37.6m (P)	Mixed Income Rental Housing, Commercial	241	Tax Exempt Bonds, HDC, HPD, LIHTC	Owner Developer	2017 (P)
				60,000 SF			2019 (P)
Albany Tower Boston, MA	\$223m (P)	\$147m (P)	Market Rate Rental Housing, Commercial, Office	211	Private Debt & Equity, EB5	Owner Developer	2018 (P)
				300,000 SF			2020 (P)

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units		Financing	Role of Trinity	Year Closed	
				SF	Commercial			Year Completed	Year Completed
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 (P)
Van Brodie Mill 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 (P)	2019 (P)
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 (P)
Treadmark Dorchester, MA	\$45m (P)	\$22.4m (P)	Mixed Income Rental, Home- ownership, Com- mercial	83		LIHTC, State LIHTC, Private Debt & Equity, Tax Exempt Bonds, DHCD, DND	Owner Developer	2016	2017 (P)
				5,000 SF					
Boston East East Boston, MA	\$71.4m	\$23.1m (P)	Market Rate Rental, Marine Related Commercial	200		Private Debt & Equity	Owner Developer	2015	2017 (P)
				50,000 SF					
VELA on the Park Stamford, CT	\$79m	\$21m	Mixed Use Market Rate Rental, Commercial	209		Private Debt and Equity	Owner Developer	2016	2018 (P)
				3,699 SF					
3160 Park Avenue Bronx, NY	\$66m	\$31m	Mixed Income Rental, Commercial	152		LIHTC, Tax Exempt Bonds, HDC, HPD, NMTC	Owner Developer	2015	2016 (P)
				21,000 SF					
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

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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
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

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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
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

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units		Financing	Role of Trinity	Year Closed	
				SF Commercial				Year Completed	
Foundry Square Newburyport, MA	\$7.2m	N/A	Mixed Income, Home Ownership	20		HSF, AHT, HOME, North Shore - HOME, City of Newburyport	Developer	2005	
									2006
The Riverway Dorchester, MA	\$7.92m	N/A	Commercial	61,000 SF		Private Financing	Owner Developer	2005	
									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
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 Exempt Bonds	Owner Developer	2002	
									2007
The Foley Mattapan, MA	\$20m		Affordable, Assisted & Independent Living, Supportive Housing	116		LIHTC, HTC, HOME, CDBG, FHLB	Owner Developer	2001	
									2003

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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, 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
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

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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
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

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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
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

Project Name Location	Total Project Costs	Equity Raised	Project Type	Housing Units	Financing	Role of Trinity	Year Closed
				SF Commercial			Year Completed
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	\$3b	\$1.4b		8,994 units			
				818,848 SF			

FIRM PROFILE



DAVID MANFREDI
Founding Principal



ELIZABETH LOWREY
Principal



JOHN MARTIN
Principal

Elkus Manfredi Architects is a full-service design firm providing architecture, master planning, urban design, interior architecture, and workplace consulting. The firm was founded in Boston in 1988 by Howard F. Elkus FAIA, RIBA, LEED AP and David P. Manfredi FAIA, LEED AP.

Elkus Manfredi has been selected by leaders in a wide range of industries to make their goals physically tangible. A cross-pollination of ideas, inspired by a rich diversity of clients and project types, informs and energizes all of our work. The result is a considerable portfolio of completed master planning and design work that has set the standard for mixed-use development and residential communities across the country. Elkus Manfredi's projects create vibrant, pedestrian-friendly places in which to live, work, shop, and entertain. In each case, the influence of these dynamic spaces extends beyond the projects to knit together the fabric of their surroundings, revitalize adjacent communities, and inspire future development.

We attribute our success to four important priorities. First, the firm's designers share the passionate conviction that sustainable urban design principles must inform every aspect of a project, and our mixed-use work stands apart from others because of this strong emphasis on placemaking that begins and ends with contextually sensitive urban planning. Second, we have worked with a wide range of clients and stakeholders, and understand what makes a project successful for all parties. Third, we listen carefully to our clients' goals and are able to translate these ideas into financially successful realities. Fourth, we are highly experienced in navigating the complex permitting and other regulatory processes necessary to the success of any project.

SIMILAR EXPERIENCE

Elkus Manfredi places people at the center of every design decision we make – this is particularly true of our developer-led residential work. From single buildings to entire city blocks to master plans on a neighborhood and district scale, Elkus Manfredi has built a national practice focused on creating durable, livable neighborhoods and inspiring spaces for people to live, work, and play. We have been responsible for the design of a diverse, award-winning portfolio of residential projects including apartments, condominiums, senior living, and student residences. For each project, we seek first to understand the site, its context, and our client's goals.

Elkus Manfredi has directly relevant experience with multi-family housing that integrates mixed-income residences. While much of our work is driven by the market demands that influence our clients, we are strong advocates for diversity in our projects – whether it be diversity of use, diversity of housing types, or diversity of residents – because we strongly believe that the vitality it adds is crucial to the long-term success of a neighborhood. Elkus Manfredi's mid- and low-rise residential design projects include the West End Residences, an award-winning, five-building residential development in Boston's West End; the Flats on D in the renowned South Boston neighborhood; and Ink Block, a new residential development in Boston's South End. In Medford's Station Landing neighborhood, Elkus Manfredi designed four different residential buildings: the 127-unit Skyline residential building, two market rate apartment buildings, and 75SL, an innovative, highly sustainable apartment building certified LEED Gold. Elkus Manfredi is also responsible for two notable projects in Wellesley – the broadly acclaimed Wellesley Gateway office building that serves as a headquarters for Harvard Pilgrim Health Care and Waterstone at Wellesley, a progressive mixed use project that combines independent and assisted living residences for seniors with an ambulatory surgery center and a CVS Pharmacy.

JOHN MARTIN AIA, LEED AP

Principal-in-Charge



EDUCATION

MASTER OF ARCHITECTURE
HARVARD UNIVERSITY GRADUATE
SCHOOL OF DESIGN, 1989

BACHELOR OF ENVIRONMENTAL
DESIGN IN ARCHITECTURE
BACHELOR OF SCIENCE IN CIVIL
ENGINEERING
NORTH CAROLINA STATE UNIVERSITY,
1985

AFFILIATIONS

AMERICAN INSTITUTE OF ARCHITECTS

BOSTON SOCIETY OF ARCHITECTS

LEED ACCREDITED PROFESSIONAL

NAIOP

NEWTONVILLE HISTORIC DISTRICT
COMMISSION

SOCIETY OF COLLEGE AND UNIVERSITY
PLANNING

URBAN LAND INSTITUTE

PUBLICATIONS

“STUDENTS IN MY BACKYARD:
HOUSING AT THE CAMPUS EDGE AND
OTHER EMERGING TRENDS IN
RESIDENTIAL DEVELOPMENT”
PLANNING FOR HIGHER EDUCATION
(SCUP JOURNAL), JANUARY 2009

RELEVANT EXPERIENCE

WATERSTONE AT WELLESLEY | WELLESLEY,
MASSACHUSETTS

*Gold Award – Excellence in Senior Design, National Association
of Home Builders, 2013*

*Excellence Award – Best New Development: Senior Housing,
Multi-Housing News, 2012*

WELLESLEY GATEWAY | WELLESLEY,
MASSACHUSETTS

WATERSTONE AT THE CIRCLE | BROOKLINE,
MASSACHUSETTS

INK BLOCK | BOSTON, MASSACHUSETTS

SEPIA

SIENA

AC HOTEL BY MARRIOTT

INK 7

STATION LANDING | MEDFORD, MASSACHUSETTS

Disability Awareness Award, City of Medford, 2008

*Smart Growth Award, Office for Commonwealth Development,
2006*

ARBORPOINT AT STATION LANDING

SKYLINE AT STATION LANDING

75 STATION LANDING

BOSTON SPORTS CLUB

RESIDENCES AT 199 MAIN STREET | CAMBRIDGE,
MASSACHUSETTS

AVALON AT CHESTNUT HILL | CHESTNUT HILL,
MASSACHUSETTS

AVALON EXETER | BOSTON, MASSACHUSETTS

FENWAY TRIANGLE TRILOGY | BOSTON,
MASSACHUSETTS

SOUTH CREEK ROW | CHAPEL HILL, NORTH
CAROLINA

THE RESIDENCES AT 7 CAMBRIDGE CENTER |
CAMBRIDGE, MASSACHUSETTS

HARBOR POINT | BALTIMORE, MARYLAND

HARBOR POINT MASTER PLAN

THAMES WHARF OFFICE BUILDING

BLOCK STREET APARTMENTS

WILLS PIER CONDOMINIUMS

EXELON AT HARBOR POINT

1330 BOYLSTON STREET | BOSTON, MASSACHUSETTS

MEADOW WALK AT LYNNFIELD | LYNNFIELD, MASSACHUSETTS

HARVARD UNIVERSITY GRADUATE COMMONS | CAMBRIDGE, MASSACHUSETTS

Honor Award for Excellence in Planning for a District or Campus Component, SCUP/AIA-CAE, 2008

RAYFORD LAW AIA, LEED AP

Project Architect



EDUCATION

MASTER OF ARCHITECTURE WITH
DISTINCTION
HARVARD UNIVERSITY GRADUATE
SCHOOL OF DESIGN, 1983

BACHELOR OF ENVIRONMENTAL
DESIGN IN ARCHITECTURE, SUMMA
CUM LAUDE
NORTH CAROLINA STATE UNIVERSITY
COLLEGE OF DESIGN, 1978

AFFILIATIONS

AMERICAN INSTITUTE OF ARCHITECTS

BOSTON SOCIETY OF ARCHITECTS

SOCIETY FOR COLLEGE & UNIVERSITY
PLANNING

LEED ACCREDITED PROFESSIONAL

AMERICAN LIBRARY ASSOCIATION

LABS FOR THE 21ST CENTURY (LABS21)

SOCIETY OF ARCHITECTURAL
HISTORIANS

RELEVANT EXPERIENCE

BENEDICT COURT RESIDENCES | GREENWICH,
CONNECTICUT

EMMANUEL COLLEGE – NEW JULIE HALL RESIDENCE
HALL | BOSTON, MASSACHUSETTS

LANDMARK CENTER REPOSITIONING – 401 PARK
DRIVE | BOSTON, MASSACHUSETTS

THE OHIO STATE UNIVERSITY – NORTH
RESIDENTIAL DISTRICT MASTER PLAN | COLUMBUS,
OHIO

RUTGERS UNIVERSITY HONORS COLLEGE | NEW
BRUNSWICK, NEW JERSEY

UNIVERSITY OF SOUTHERN CALIFORNIA –
UNIVERSITY VILLAGE | LOS ANGELES, CALIFORNIA

UNC HOSPITALS MASTER PLAN | CHAPEL HILL, NORTH
CAROLINA

PREVIOUS EXPERIENCE | EYP

BEREA COLLEGE – HUTCHINS LIBRARY – MASTER
PLAN AND FEASIBILITY STUDY | BEREA, KENTUCKY

HARVARD KENNEDY SCHOOL OF GOVERNMENT
FACILITY PLANNING STUDY | CAMBRIDGE,
MASSACHUSETTS

HARVARD UNIVERSITY UNDERGRADUATE HOUSING |
CAMBRIDGE, MASSACHUSETTS

MASSACHUSETTS COLLEGE OF LIBERAL ARTS
CENTER FOR SCIENCE AND INNOVATION | NORTH
ADAMS, MASSACHUSETTS

NATIONAL DEFENSE UNIVERSITY – LIBRARY
PROGRAMMING AND FEASIBILITY STUDY |
WASHINGTON, DC

PRINCETON THEOLOGICAL SEMINARY LIBRARY |
PRINCETON, NEW JERSEY

TRINITY WASHINGTON UNIVERSITY MASTER PLAN |
WASHINGTON, DC

UNIVERSITY AT ALBANY – UNIVERSITY LIBRARY |
ALBANY, NEW YORK

UNITED NATIONS HEADQUARTERS | NEW YORK,
NEW YORK

KEVIN PARK AIA, CDT, LEED AP BD+C

Project Manager



EDUCATION

BACHELOR OF ARCHITECTURE
RHODE ISLAND SCHOOL OF DESIGN,
2011

AFFILIATIONS

AMERICAN INSTITUTE OF ARCHITECTS

CONSTRUCTION SPECIFICATIONS
INSTITUTE

LEED ACCREDITED PROFESSIONAL

RELEVANT EXPERIENCE

RESIDENCES AT 199 MAIN STREET | CAMBRIDGE,
MASSACHUSETTS

STOCKTON UNIVERSITY – RESIDENCE HALL AT
ATLANTIC CITY GATEWAY | ATLANTIC CITY, NEW
JERSEY

NEW ENGLAND INSTITUTE OF TECHNOLOGY –
RESIDENCE HALL | EAST GREENWICH, RHODE
ISLAND

SOUTH CREEK ROW | CHAPEL HILL, NORTH
CAROLINA

UNIVERSITY OF CHICAGO – WOODLAWN
RESIDENTIAL + DINING COMMONS | CHICAGO,
ILLINOIS

DUKE UNIVERSITY CENTRAL CAMPUS MIXED USE
DEVELOPMENT | DURHAM, NORTH CAROLINA

JANAYA HART AIA

Job Captain



RELEVANT EXPERIENCE

WATERSTONE AT THE CIRCLE | BROOKLINE,
MASSACHUSETTS

STOCKTON UNIVERSITY – RESIDENCE HALL AT
ATLANTIC CITY GATEWAY | ATLANTIC CITY, NEW
JERSEY

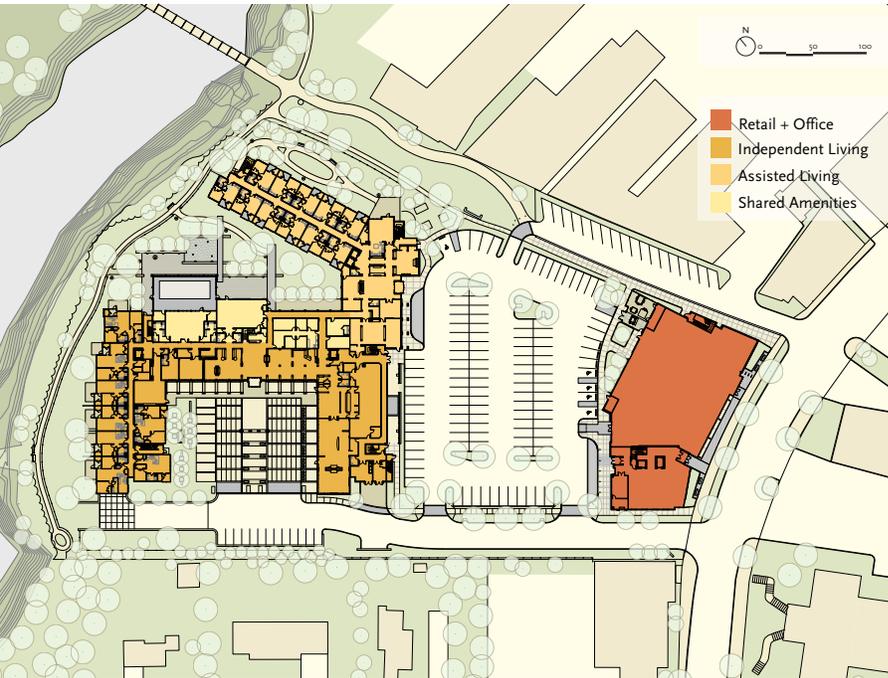
INK BLOCK | BOSTON, MASSACHUSETTS
SIENA
SEPIA
INK 7

EDUCATION

BACHELOR OF ARCHITECTURE
CORNELL UNIVERSITY COLLEGE OF
ARCHITECTURE ART & PLANNING, 2014

AFFILIATIONS

AMERICAN INSTITUTE OF ARCHITECTS



WATERSTONE AT WELLESLEY

Wellesley, Massachusetts

Client: National Development

Located on the Charles River, Waterstone at Wellesley comprises three buildings totaling 158,223 square feet. Elkus Manfredi Architects drew on the site's natural attributes and historic mill architecture to raise the senior living building type to a new level of non-institutional appeal and independent architectural character.

Behind a street-edge "gatehouse" containing a pharmacy and medical offices, two residential buildings overlook the river. The independent-living building includes 82 residences, library, resident bar/lounge, living room, formal and private dining rooms, café, and activity rooms. The assisted-living building includes 52 residences, library, living room, dining rooms, and country kitchen. An event room, gym, and indoor pool are shared. Between the buildings, a riverbank courtyard features terraces, lawn, and outdoor seating. Best sustainable practices for stormwater management, irrigation, and heat island reduction protect the river.

The design creates a strong New England sense of place. Exteriors draw massing and character from surrounding renovated mill buildings; common areas are homelike, with refined finishes that speak of Yankee craftsmanship. Details appeal to the senses: woodwork, tiles, and fabrics invite touch; cooking areas near common spaces circulate appealing aromas; and textured surfaces reduce noise clutter. Residences feature individual porches and abundant daylight through large windows that open to fresh breezes.



AWARDS

DESIGN AND ARCHITECTURE AWARD — ASSISTED LIVING/MEMORY CARE
SENIOR HOUSING NEWS, 2013

GOLD AWARD — EXCELLENCE IN SENIOR DESIGN
NATIONAL ASSOCIATION OF HOME BUILDERS, 2013

EXCELLENCE AWARD — BEST NEW DEVELOPMENT: SENIOR HOUSING
MULTI-HOUSING NEWS, 2012









WATERSTONE AT THE CIRCLE

Brookline, Massachusetts

Client: National Development

Located at the site of the former Circle Cinema at the intersection of Beacon Street and Chestnut Hill Avenue, The Circle comprises two new buildings: a 92-unit apartment complex for active senior adults and a 162-key AC Marriott Hotel. Elkus Manfredi sited the buildings along the street edge with ground floor retail to enliven the streetscape opposite the MBTA Green Line Cleveland Circle stop and to promote connections with the commercial heart of Cleveland Circle. The iconic Circle Cinema sign remains as a reminder of the circle's history and as a beacon of its renewal.

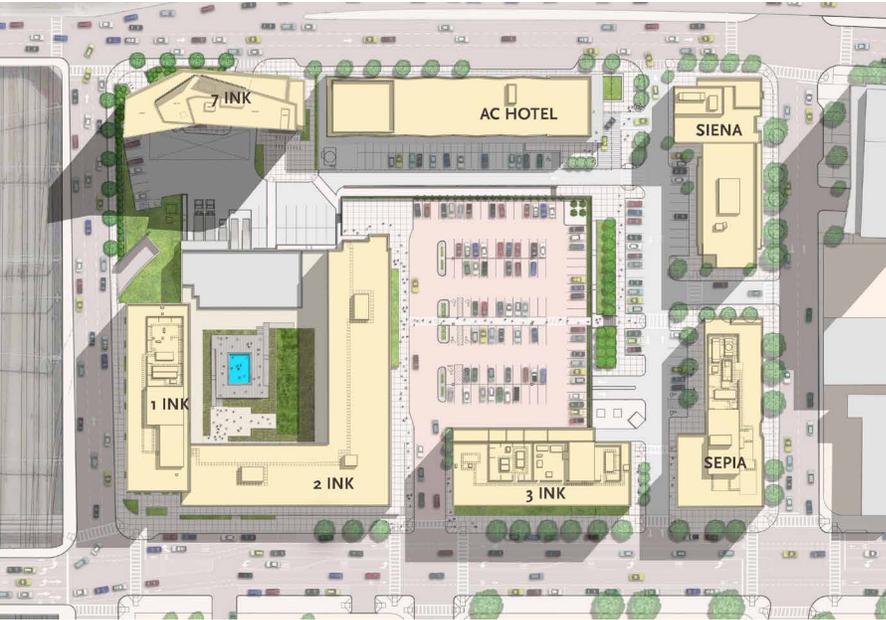


The buildings negotiate the competing characteristics of the adjacent neighborhoods, balancing an urban scale with residential characteristics, such as carefully detailed buff-colored brick and warm metal shingles. Amenities at the six-story residences include large windows with great views across Cassidy Park and the reservoir beyond, balconies for most units, and shared rooms for entertaining, including a theater, pool, fitness room, library, workshop, salon/spa, dining room, and bar. The five-story hotel also has a pool and fitness room. Access is consolidated in a central automobile court to minimize pedestrian conflicts and congestion on the busy street. The two buildings share 188 parking spaces, with 92 of those in an underground garage. With its sensitivity to the historic surroundings and emphasis on community connections, the project sets a high standard for future projects in Cleveland Circle.

CIRCLE

ELKUS MANFREDI ARCHITECTS





INK BLOCK

Boston, Massachusetts

Client: National Development

Elkus Manfredi Architects is the master planner, architect, and interior designer of the mixed-use residential/retail hub, Ink Block, a 6.22-acre South Boston block that was formerly the home of the *Boston Herald* newspaper. The design challenge was to re-envision and revitalize this urban industrial block into a dynamic, desirable upscale residential environment consistent with nearby South End neighborhoods, while honoring the history and relevance of the site's roots.



At 463,000 square feet, Ink Block is composed of three new apartment buildings, 1 Ink, 2 Ink, 3 Ink, with 315 residential units; two condominium buildings: the 112,000-square-foot, 77-unit Sepia and 122,400-square-foot, 76-unit Siena; a 200-key AC Marriott Hotel; 6,800 square feet of second-level outdoor space with a lawn, pool, and deck area; and 85,000 square feet of streetfront retail, including a 50,000-square-foot Whole Foods, other shops, and several restaurants.

Ranging in size from five to eight stories, each building evokes a distinct design character, allowing Ink Block to appeal to multiple tenant profiles. Providing a total of 468 new units of housing, Ink Block has reinvigorated its surroundings with 24/7 activity that links the previously disconnected South End and South Boston neighborhoods.

LEED | SUSTAINABLE DESIGN

CERTIFIED LEED-NC GOLD

AWARDS

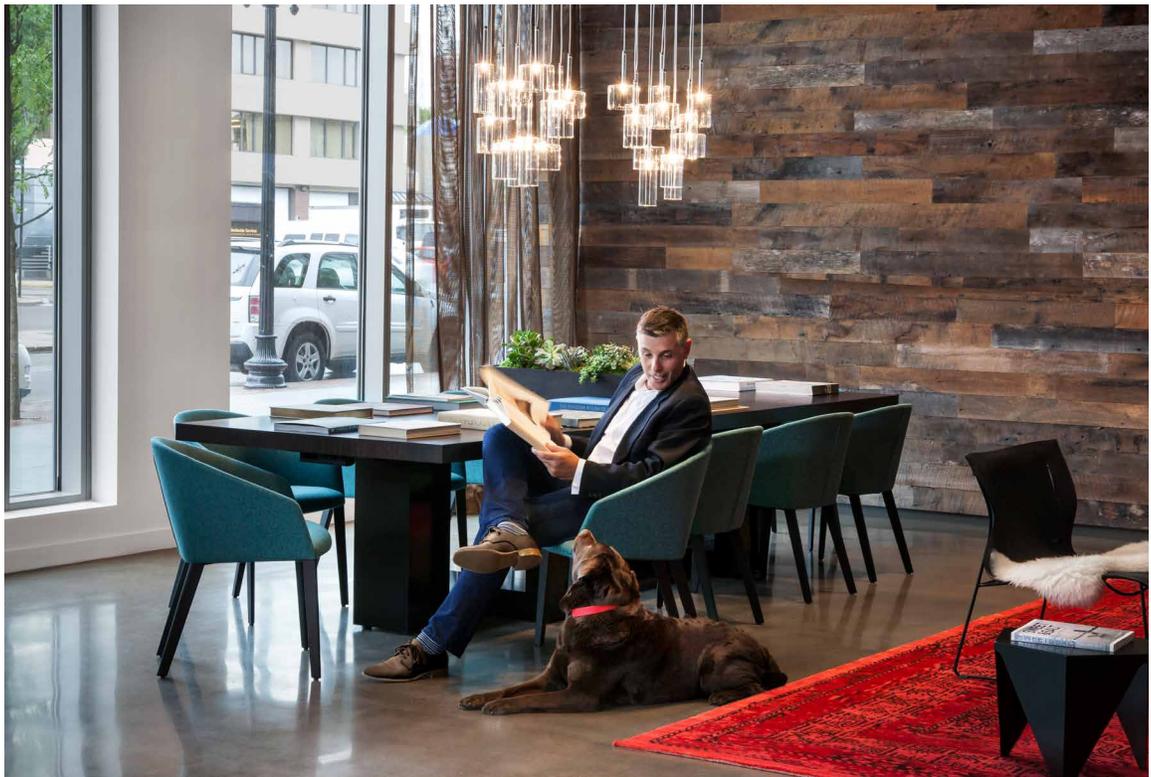
WINNER, INTERIOR DESIGN/RESIDENTIAL, THE AMERICAN ARCHITECTURE PRIZE, 2017

FINALIST, RESIDENTIAL DEVELOPMENT, INTERIORS CATEGORY, WORLD INTERIORS NEWS, 2016

ID BEST OF YEAR HONOREE, INTERIOR DESIGN MAGAZINE, 2015









STATION LANDING

Medford, Massachusetts

Client: National Development

Built on a 16-acre brownfield site at Wellington Circle in Medford, Station Landing is a transit-oriented waterfront development. Elkus Manfredi Architects created a master plan to include 650 residential units, 100,000 square feet of retail space, a 190-room hotel, 165,000 square feet of Class A office space, and a 1,350-car parking structure adjacent to a riverfront park and marina on the banks of the Mystic River.

In addition to developing the master plan, Elkus Manfredi was the architect for:

Arborpoint – 292 apartment homes in two buildings. Both six-story buildings have active retail bases and a single level of below-grade parking. Retail shops include five restaurants, a Walgreens pharmacy, and service retailers such as a bank, salon, and a technology store.

Skyline at Station Landing – a 12-story, 127-unit condominium building overlooking the Mystic River.

75 Station Landing – a LEED-NC Gold mixed-use residential building, with 169 apartments situated atop of an 8,000-square-foot restaurant.

Boston Sports Club – a new three-story, 50,000-square-foot stand-alone fitness club featuring aquatic facilities and a basketball court.

LEED | SUSTAINABLE DESIGN

75SL CERTIFIED LEED-NC GOLD

AWARDS

STATION LANDING AWARDED DISABILITY AWARENESS AWARD
CITY OF MEDFORD – COMMISSION FOR PERSONS WITH
DISABILITIES, 2008

STATION LANDING AWARDED SMART GROWTH AWARD
OFFICE FOR COMMONWEALTH DEVELOPMENT, 2006

75SL AWARDED BEST GREEN DESIGN
BOSTON SF REAL ESTATE AWARDS, 2011



**HARVARD UNIVERSITY
RIVERSIDE INITIATIVE**

Cambridge, Massachusetts
Client: Harvard Real Estate Services

Elkus Manfredi Architects provided master planning and design for Harvard University to increase graduate housing and restore the dense residential neighborhood edge of the University's campus, where demolition of older residences replaced by surface parking lots had made the streetscape discontinuous. Infill required varied urban design solutions to allow density while preserving the neighborhood's character.



While the project's central element was a new, six-story residence hall with 141 apartments and 189 below-grade parking spaces on Cowperthwaite Street, Elkus Manfredi also designed 11 new wood frame houses on three irregular sites.

Each of these wood frame houses was designed to be compatible with the neighborhood scale and land use patterns. They combine elements common to older local houses, including bay windows, front porches, flat roofs, and double-hung windows, with variations of massing, materials, fenestration, and historic color schemes that blend with existing stock. As described by the community, the handsome rows of wood frames "fill in the missing teeth" of the neighborhood, restoring the urban fabric and redefining the public realm.

LEED | SUSTAINABLE DESIGN

CERTIFIED LEED-NC GOLD

AWARDS

BUILDING PROJECT OF THE YEAR, CONSTRUCTION MANAGEMENT ASSOCIATION OF AMERICA, 2009

HONOR AWARD — EXCELLENCE IN PLANNING FOR A DISTRICT OR CAMPUS COMPONENT, SOCIETY FOR COLLEGE AND UNIVERSITY PLANNING/AIA-CAE, 2008





ST. PAUL CROSSING

Brookline, Massachusetts

Client: The Raymond Property Company

Elkus Manfredi provided architectural design services to develop a 49-unit residential project on a 60,000-square-foot property in Brookline. Buildings range from four to six stories and include 12 townhouses and 37 one- and two-bedroom units with adjacent parking.



The new buildings complement and enhance the surrounding properties, transforming what was an under-utilized property into an attractive and desirable place to live. The design continues the scale of residential development along Aspinwall Avenue and presents a gracious facade along St. Paul Street. The exterior of the buildings feature traditional materials such as masonry and clapboard, with architectural elements inspired by surrounding Brookline properties.





FIRM OVERVIEW

DESIGNING A BETTER EXPERIENCE

We help you make profitable real estate decisions and deliver exceptional results.

Built from nearly 40 years of private market expertise, we embrace proven methods to identify and overcome the development obstacles standing between you and your success. Our leaders are engaged and our employees are empowered to ask the questions that create value before plans are cemented.

We also work hard at being easy to work with, knowing you've hired us to navigate a complex, technical process so that you can focus on the big picture. We take pride in our work, our reputation and our partnerships with leading organizations in every real estate sector.

WHY BOHLER?



EARLY STAGE
VALUE CREATION



AGGRESSIVE
PERMITTING STRATEGIES



QUALITY PRODUCT
AND EXPERIENCE



TRUSTED
PARTNERSHIPS



LOCAL LEADERSHIP,
NATIONAL NETWORK



PROACTIVE
COMMUNICATION



INDUSTRY EXPERTS
AND TEAMS



FINANCIAL
STABILITY

CORE SERVICES

- Due Diligence
- Land Surveying
- Land Planning
- Landscape Architecture
- Civil Engineering
- Sustainable Design
- Entitlement Services
- Program Management

DEVELOPMENT MARKETS

- Residential
- Mixed-use
- Retail
- Municipal
- Healthcare
- Higher Education
- Hospitality
- Industrial
- Office



BOHLER
ENGINEERING

www.bohlerengineering.com



BOHLERTM
ENGINEERING

45 Franklin Street, 5th Floor
Boston, MA 02110
P: 617-849-8040
www.BohlerEngineering.com

RELEVANT PROJECT EXPERIENCE

Bohler has provided superior site civil and consulting engineering services to residential and mixed-use developers for over 30 years. We have designed a variety of communities including multi-building apartment complexes with 40B affordable housing components, urban multifamily high-rises with ground-floor retail, and all-inclusive town centers with significant retail. Our professionals design with the tenants and shoppers in mind, creating inviting common spaces, while promoting safe, walkable and convenient sites.

Bohler's team understands the intricacies of designing mixed-use communities similar to the proposed Wellesley redevelopment. Our recent experience includes **40 Rugg Road** in Allston, a two-acre redevelopment including 261 apartments, 46 condominium units and 2,700 SF of ground-floor retail, and **Washington Place** in Newton, a three-acre, vertically integrated project that includes 170 multifamily units and 40,000 SF of retail. Bohler's team coordinated extensively with MBTA on the **North Quincy Station Redevelopment** project, a 1.2 million SF parking lot redevelopment into 610 multifamily units, 50,000 SF of retail space and 1,567 parking spaces, some of which are dedicated to the North Quincy Station daily commuters. Finally, our engineers are familiar with the requirements for including affordable housing components to a community, including 102 units at the **Van Brodie Mill** project in Lawrence and 74 units within **Forest Ridge** in Winchester, the first 40B housing in the town.

TOWN OF WELLESLEY EXPERIENCE

Bohler has been active in the Town of Wellesley for nearly 20 years. From retail programs including financial institution reimagining and fueling station projects, to site improvements for the Kidville location on Central Street, Bohler's team is familiar with the local land development requirements. Bohler Branch Manager Steve Martorano has designed and permitted various residential projects in the town throughout his career.



msmith@bohlereng.com

EDUCATION

B.S. Civil Engineering,
Northeastern University
(High Honors)

PROFESSIONAL LICENSES

Connecticut Professional Engineer
PEN.0024567
Massachusetts Professional Engineer
45496-C
Maine Professional Engineer
11023
New Hampshire Professional Engineer
12931
New Jersey Professional Engineer
24GE05110200
New York Professional Engineer
094789-1
North Carolina Professional Engineer
041111
Rhode Island Professional Engineer
8145

PROFESSIONAL AFFILIATIONS

American Society of
Civil Engineering

Chi Epsilon, Civil Engineering Honor
Society

International Council of
Shopping Centers

National Association of
Industrial and Office Properties

MATTHEW D. SMITH, PE PRINCIPAL

Matt serves as Principal for Bohler Engineering and is predominantly focused on Bohler's New England region. For over 20 years, he has played an integral role in the company's growth and reputation through his efforts in project management, staff mentoring, business development, quality control and client management.

Matt's daily responsibilities include management of ongoing client contact throughout the land development process, management of design teams and deliverables, and detailed design and permitting of projects. Matt has extensive experience with land development throughout New England and New York. He has navigated hundreds of projects through the regulatory process including all phases of municipal land use entitlements. Through his broad technical knowledge of land development engineering and permitting, he is able to manage projects of any size and scope from inception through due diligence, design and construction.

RELEVANT PROJECT EXPERIENCE

40 Rugg Road, Allston, MA: Matt served as Principal-in-Charge for a 295,000 SF mixed-use development on two acres. The project includes 261 apartments, 46 condominium units, and 2,700 SF of ground-floor retail and restaurant space. Bohler is providing site civil and consulting engineering, permitting and landscape architecture services.

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

Forest Ridge, Winchester, MA: Matt is currently serving as Principal-in-Charge for the development of a five-story, 296-unit apartment complex. The community includes 74 40B affordable housing units, the first to be approved in Winchester.

St. Gabriel's Monastery Redevelopment, Brighton, MA: Matt is serving as Principal-in-Charge for this adaptive reuse of a monastery and church facility on 12 acres. The project includes 652 apartments and 520 parking spaces, and is located within a half mile from an MTBA station and multiple bus connections.



jswerling@bohlereng.com

EDUCATION

B.S. Civil Engineering,
Northeastern University

PROFESSIONAL LICENSES

Massachusetts Professional Engineer #41697-C
Rhode Island Professional Engineer #PEN.0011425
Connecticut Professional Engineer #PEN.0030785
New Hampshire Professional Engineer #14695
Maine Professional Engineer #13816
DEP Approved Soil Evaluator
OSHA Forty-Hour Hazardous Waste Operation and Emergency Response Certified

PROFESSIONAL AFFILIATIONS

American Society of Civil Engineers, Associate Member
Boston Society of Civil Engineers, Member
National Fire Protection Agency, Member
Chi Epsilon, Civil Engineering Honor Society
Tau Beta Pi, Civil Engineering Honor Society

JOSHUA G. SWERLING, PE PRINCIPAL

Josh has recently been named Principal of Bohler Engineering's New England region after coming aboard nearly 16 years ago. Josh leads a team of engineers who design a variety of projects including municipal, commercial, retail, industrial and residential developments. In this role, Josh has successfully extended client relationships across Bohler's footprint, facilitating introductions to other offices and advising regional teams on best practices in executing development programs for these clients in their territories.

With over twenty years in the industry, Josh has significant experience in site planning, subdivision, and stormwater management design on projects throughout New England. In addition to his technical responsibilities, Josh manages engineering support staff and project contracts. His technical savvy, positive attitude, and dedication make him a valuable asset to the Bohler team and to his clients.

RELEVANT PROJECT EXPERIENCE

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

Washington Place, Newton, MA: Serving as Project Manager, Josh is providing site civil engineering and permitting services for this three-acre mixed-use development. The project includes 170 multifamily units and 40,000 SF of ground-floor retail.

Worcester County Courthouse Redevelopment, Worcester, MA: Josh is providing site civil and consulting engineering services for this four-acre restoration and redevelopment. The project will include 114 mixed-income apartments, nearly half of which will be 40B affordable housing units.

The Harlo, Boston, MA: Josh provided site civil and consulting engineering services for this 17-story, 212-unit apartment building with 7,000 SF of ground-floor retail. The project received LEED Gold certification.



smartorano@bohlereng.com

EDUCATION

B.S. Civil Engineering,
University of New Hampshire

PROFESSIONAL LICENSES

Massachusetts Professional Engineer
#45942

LEED BD+C

PROFESSIONAL AFFILIATIONS

American Society of
Civil Engineering

National Association of
Industrial and Office Properties

Urban Land Institute

STEPHEN MARTORANO, PE BRANCH MANAGER

Steve serves as Branch Manager for Bohler Engineering, specifically responsible for the day-to-day operations of the Boston office. Steve brings over 19 years of experience in site civil engineering, surveying, and construction to his current projects and clients. In addition to design duties, his efforts include financial management, business and staff development.

Steve is a “go-to” consultant for City of Boston permitting, having guided dozens of projects through the regulatory processes including Boston Redevelopment Authority Article 80 Review, Boston Water and Sewer Commission, Public Improvement Commission, Boston Transportation Department, Inspectional Services Department, and the Boston Parks & Recreation Department.

RELEVANT PROJECT EXPERIENCE

40 Rugg Road, Allston, MA: Steve served as project manager for a 295,000 SF mixed-use development on two acres. The project includes 261 apartments, 46 condominium units, and 2,700 SF of ground-floor retail and restaurant space. Bohler is providing site civil and consulting engineering, permitting and landscape architecture services.

St. Gabriel’s Monastery Redevelopment, Brighton, MA: Steve is providing site civil engineering services for this adaptive reuse of a monastery and church facility on 12 acres. The project includes 652 apartments and 520 parking spaces, and is located within a half mile from an MTBA station and multiple bus connections.

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

Van Brodie Mill, Lawrence, MA: Steve is providing site civil and consulting engineering to Trinity Financial for this adaptive reuse project. The redevelopment will include 102 mixed-income apartments.



zrichards@bohlereng.com

EDUCATION

B.S. Civil & Environmental Engineering, Bucknell University

PROFESSIONAL LICENSES

Massachusetts Professional Engineer #51848

PROFESSIONAL AFFILIATIONS

Urban Land Institute

ZACHARY RICHARDS, PE ASSISTANT PROJECT MANAGER

Zach serves Assistant Project Manager in Bohler's Boston office. He has over seven years of experience in site civil engineering, surveying and construction efforts on projects throughout Massachusetts. Zach has provided engineering design and support that includes site planning and permitting, stormwater management and utility design, earthwork analysis and grading, and construction administration on numerous projects including multifamily, mixed use, commercial and retail developments.

Zach has played a pivotal role in client coordination efforts and working with development teams at all levels, guiding projects from due diligence and concept phases to ultimate design and construction completion.

RELEVANT PROJECT EXPERIENCE:

St. Gabriel's Monastery Redevelopment, Brighton, MA: Zach is providing site civil engineering services for this adaptive reuse of a monastery and church facility on 12 acres. The project includes 652 apartments and 520 parking spaces, and is located within a half mile from an MTBA station and multiple bus connections.

Avalon at Hilltop, Saugus, MA: As lead engineer, Zach provided site civil and consulting engineering design services for this 607,000 SF mixed-use development. The project includes 280 apartments, 24,000 SF of retail space, and a club house. 28 of the units are slated for 40B affordable housing.

40 Rugg Road, Allston, MA: Zach provided site civil engineering design services for a 295,000 SF mixed-use development on two acres. The project includes 261 apartments, 46 condominium units, and 2,700 SF of ground-floor retail and restaurant space.

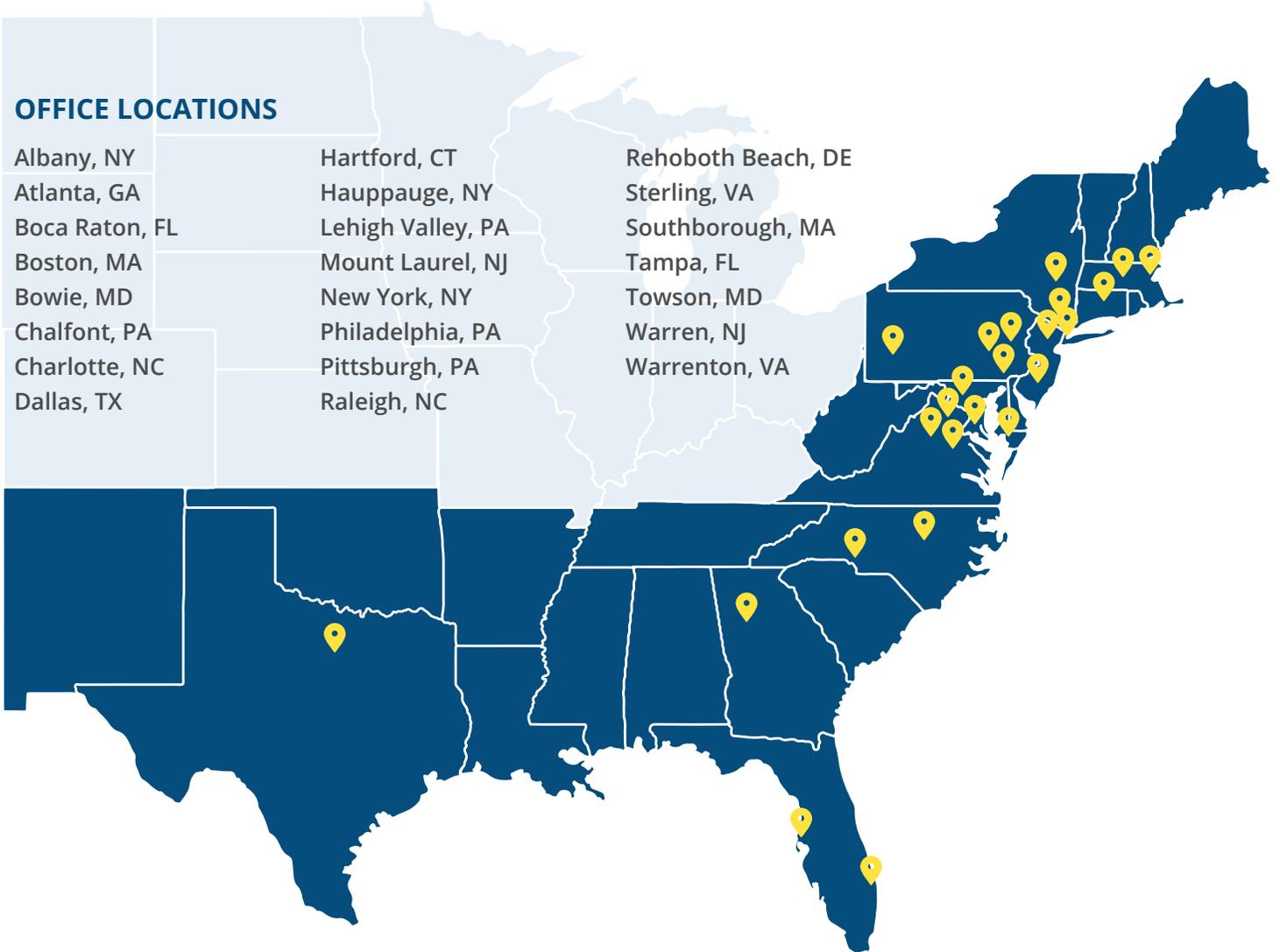
First Street, Cambridge, MA: Zach provided engineering design services for this 435,000 SF mixed-use redevelopment. The project includes office, retail and residential spaces with surface and below grade parking. Bohler provided site civil and consulting engineering, permitting, and landscape architecture.

OFFICE LOCATIONS

Albany, NY
Atlanta, GA
Boca Raton, FL
Boston, MA
Bowie, MD
Chalfont, PA
Charlotte, NC
Dallas, TX

Hartford, CT
Hauppauge, NY
Lehigh Valley, PA
Mount Laurel, NJ
New York, NY
Philadelphia, PA
Pittsburgh, PA
Raleigh, NC

Rehoboth Beach, DE
Sterling, VA
Southborough, MA
Tampa, FL
Towson, MD
Warren, NJ
Warrenton, VA



35+
YEARS



650+
PEOPLE



30K+
PROJECTS

Firm Profile

SERVICES

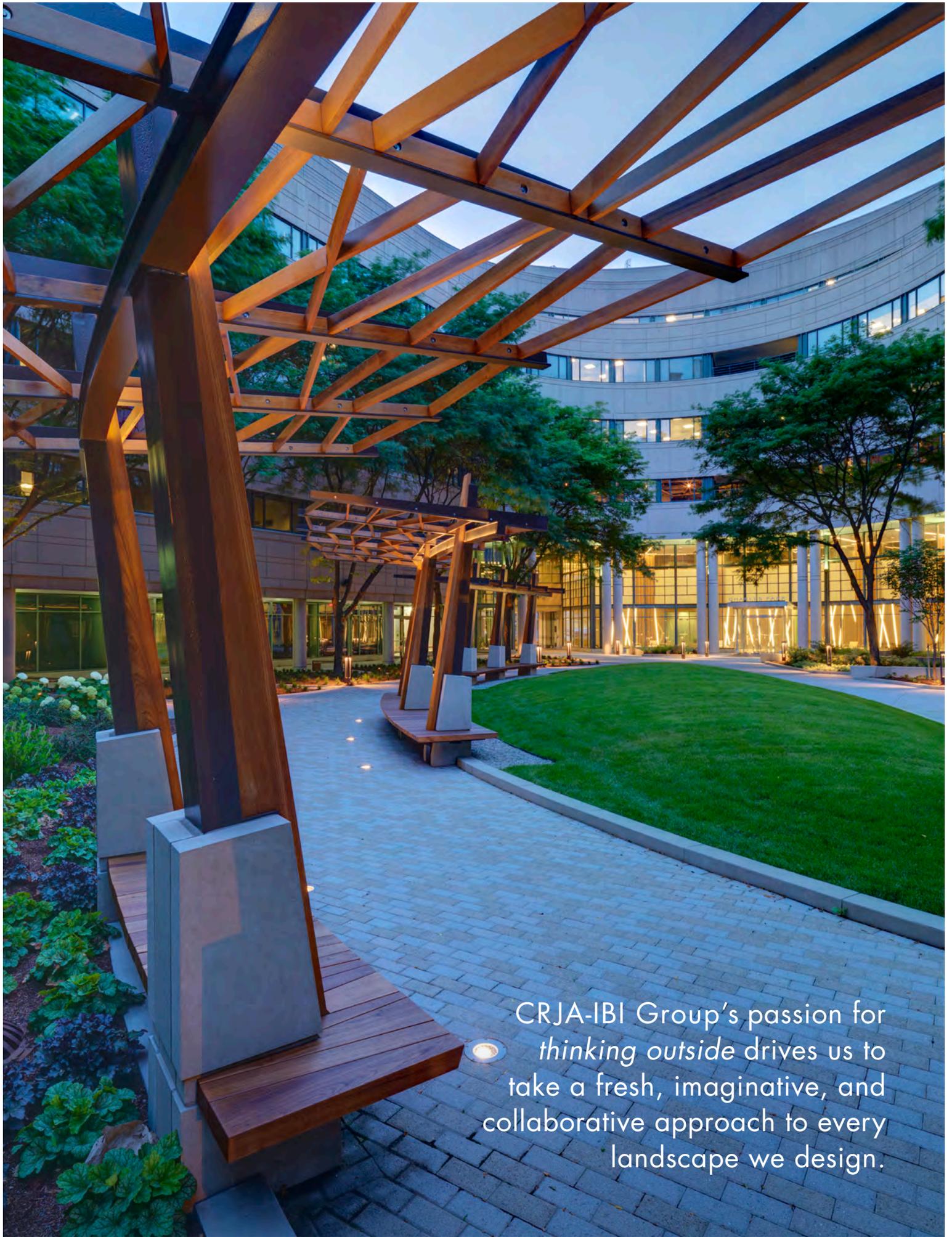
- Site analysis and master site planning
- Site selection and feasibility studies
- Landscapes on Structure
- Open Space and recreation planning
- Park and playground design
- Streetscape design and urban revitalization
- Transit and transportation site design
- Pedestrian and bicycle path planning and design
- Trail planning and design
- Healthcare and senior living
- Housing and residential site design
- Historic landscape rehabilitation and restoration
- Museum and visitor center design
- Waterfront design and reclamation
- Corporate facilities design
- Campus landscape planning and design
- Cemetery planning and design
- Ecological inventories, assessments and management

CRJA-IBI Group is an award-winning landscape architectural design and environmental planning firm with offices in Boston and Knoxville. Founded as Carol R. Johnson Inc. in 1959, our practice has expanded over the years into a 45-person studio serving national and international clients.

CRJA-IBI Group has developed a reputation for excellence in the design of both natural and urban environments. This multifaceted reputation and our ability to collaborate effectively in team situations have led to long-standing relationships with many of the country's leading architects and engineers. Our contribution brings measurable value to the projects we undertake. Our design approach integrates natural systems with built features, achieving high quality, cost-effective solutions through the use of innovative and environmentally sensitive design.

We are adept at working with complex sites for which standard landscape design technologies may not be desirable. To every project we bring design leadership, energy, experience, fresh imagination, and a collaborative spirit.

In 2011, CRJA joined the IBI Group of firms with 69 offices worldwide. With more than 2,400 employees, IBI Group brings together multi-disciplinary teams to help our clients define the cities of tomorrow.



CRJA-IBI Group's passion for *thinking outside* drives us to take a fresh, imaginative, and collaborative approach to every landscape we design.

Christopher M. Jones, ASLA

Principal in Charge



EDUCATION

Purdue University, West Lafayette, IN, Bachelor of Science in Landscape Architecture, 1989

RELATED PROFESSIONAL EXPERIENCE

Teaching Assistant, Purdue University, West Lafayette, IN

Second Year Design Studio, 1987

Second Year Construction, 1988

PROFESSIONAL REGISTRATION

Registered Landscape Architect in
Massachusetts #1091
North Carolina #1771
Tennessee #1133
Virginia #0406001854
CLARB #2939

PROFESSIONAL AFFILIATIONS

Boston Society of Landscape Architects,
Past President

Society for Campus and University
Planning

Since joining CRJA-IBI Group in 1991, Mr. Jones has directed a wide range of college and university campus landscape master planning and site design projects, both in the U.S. and abroad. He regularly includes innovative sustainable design strategies in his projects.

MIXED-USE COMMERCIAL, RESIDENTIAL AND CORPORATE PROJECTS

BOSTON LANDING // BRIGHTON, MA. *Principal-in-Charge.*

Mr. Jones is currently collaborating with the project architects on conceptual site planning and design for a mixed use development project adjacent to the existing New Balance Headquarters. The development program includes a new corporate headquarters for New Balance, a new sports complex which would include the Boston Bruins training facility, court sports, track and field sports and swimming, a 200 key hotel, three new office buildings and supporting street level retail. Mr. Jones is overseeing the conceptual design of the public streetscape, public and semi-private rooftop gardens and courtyards. A new MBTA commuter rail station stop adjacent to these facilities is also being planned. The first phase of this project was recently completed and opened to much acclaim.

ASSEMBLY ROW RESIDENCES // SOMERVILLE, MA. *Project Manager.*

Mr. Jones collaborated with the project architects to design the site for the new mixed-use Assembly Row Residences, one of the largest residential real estate projects now under construction in the Boston area. The residences are a key part of a new mixed-use development located east of Interstate 93N and adjacent to the Mystic River in Somerville.

WEST END LONGFELLOW APARTMENT COMPLEX // BOSTON, MA. *Principal in Charge.*

Mr. Jones has worked with the project architects and the project owners on upgrades to the site surrounding the West End Longfellow Apartment Complex in Boston's historic West End neighborhood. Recently installed improvements include upgrades to Staniford Street along the project site, which is bordered by multiple retail storefronts. The project also encompassed a redesign and dramatic upgrade to the auto court and drop-off area serving the two apartment towers. A new gatehouse and a re-facing of the first level podium were also part of the upgrade program, as were the redesign and upgrade of the outdoor pool deck. A shaded cabana area, new pool house and an original sculptural addition to an existing vent shaft greatly enhance the pool complex.

COPLEY PLACE RETAIL EXPANSION AND RESIDENTIAL ADDITION // BOSTON, MA.

Principal in Charge. The site of this proposed retail expansion and residential addition occupies the southwest corner of Stuart and Dartmouth Streets at the border of Boston's South End and Back Bay neighborhoods. The site currently functions as a large brick paved entry plaza for Neiman Marcus and Copley Place. Mr. Jones is collaborating with Elkus Manfredi Architects and the developer on the redesign of the Southwest Corridor park deck and the design of streetscape improvements along Dartmouth and Stuart Streets. The new design will transform the brick-paved plaza entrance to Neiman Marcus into a multi-story atrium with a glass façade welcoming pedestrians into an indoor garden with programmed activities and channeling visitors and shoppers to the retail stores.

ONE FIRST STREET CONDOMINIUMS // EAST CAMBRIDGE, MA. *Principal-in-Charge.*

Consulting to the project architects, CRJA-IBI Group designed the site for the One First Street condominium complex in East Cambridge, MA. Located on the site bounded by Cambridge

Street, First Street, Otis Street, and Second Street, the new development has been created from the redevelopment of the former Haviland Candy factory, combined with new construction. The 199 units in the complex are arranged around an internal landscaped courtyard. Retail and office space enliven the street level along Cambridge Street. An enclosed garage beneath the buildings and the interior courtyard provides on-site parking for residents.

150 SEAPORT // BOSTON, MA. *Principal-in-Charge.*

CRJA-IBI Group is currently working on the site design for a new residential tower in the rapidly developing Seaport District. This project includes site design for a new residential tower atop street level retail and amenities. There will also be 3 levels of below-grade parking. The public realm improvements will create an expansion of the Boston Harborwalk and re-alignment of Seaport Boulevard. Services include assistance with permitting related to Chapter 91 and Boston's Article 80 review process.

THE DISTRICT // BURLINGTON, MA. *Principal-in-Charge.*

This premier corporate office park in a well established campus setting adjacent to I-95 in Burlington, MA. Following the acquisition of this corporate office park by new developers, CRJA-IBI Group was retained by the project architects to assist with repositioning the park into a mixed-use destination, through a planned program of building and site upgrades. Site amendments focus on the design of outdoor open space, plazas, streetscapes and a fountain. Relocating public art in the landscape is also a part of the site upgrade program.

480 ARSENAL // WATERTOWN, MA. *Principal-in-Charge.*

Working with the project architects, CRJA-IBI Group provided conceptual site design services for this new business office in Watertown, MA. Formerly a warehouse, this adaptive reuse project includes creating connections to the neighborhood and the nearby Watertown Greenway as well as the bicycle and pedestrian paths along the Charles River. An abundance of outdoor amenities include new open green space for recreation, outdoor gatherings, and collaboration; attractive entry plazas with improved circulation; and courtyards all of which work to create a vibrant environment and help attract tenants.

1265 MAIN STREET // WALTHAM, MA. *Principal-in-Charge.*

Mr. Jones is currently managing site planning and design for the 1265 Main Street mixed use development project in Waltham, MA. Sited on a former Polaroid Corporation corporate site adjacent to I-95, the site is being redeveloped to accommodate a marketplace, office buildings, and a town center shopping village. He is directing the design of pedestrian site circulation, entry areas, open spaces, outdoor gathering areas, and roadway and parking area plantings within the limit of work. Also included is the design of site furnishing and improvements such as steps, walls, ramps, bollards, bike racks, trash receptacles and seating.

ONE ROGERS STREET // CAMBRIDGE, MA. *Principal in Charge.*

One Rogers Street is an existing 252,000 s.f. first class office building that adjoins One Charles Park in East Cambridge. The building features a shared landscaped courtyard, and panoramic views of the Charles River. Mr. Jones worked with the project developer and building architects to design the entry plaza courtyard and adjacent streetscape for the new One Rogers Street office building in East Cambridge. CRJA-IBI Group was responsible for the design of both hardscape and softscape elements, including new sidewalks, streetscape, entry courtyard gathering spaces, and custom design of site walls and trellises.

Johnathan Law

Senior Associate



Since joining the firm in 2001, Johnathan Law has played a key role on a range of streetscape and open space improvement projects, merging his design and technical expertise.

RELEVANT PROJECT EXPERIENCE

SCHRAFFT'S CITY CENTER // CHARLESTOWN, MA. *Project Manager.*

Mr. Law oversaw the CRJA-IBI Group team providing full landscape architecture services for the rehabilitation and upgrade of an existing waterfront dock and open space at Schrafft's City Center, a mixed-use development on the Mystic River. It was once the manufacturing site of the famous Schrafft's Candy Factory and is considered a Boston landmark. Redevelopment of the site included the Main Street Entry Plaza, the 529 drop-off and open space, and the Pedestrian Promenade connection to the Boat Pier and Waterfront. All areas were transformed into clean, clear, unique transition spaces for use by the tenants and guests. Site improvements included small gathering spaces, accessible pedestrian connections, landscaping, site furnishings, and accent lighting.

CONCORD MAIN STREET IMPROVEMENTS // CONCORD, NH. *Project Manager.*

Mr. Law led the design effort for this new downtown streetscape in collaboration with the project engineers. Through an extensive public process which included several presentations to the city council, stakeholders, and residents, Mr. Law was able to achieve consensus on the preferred design approach for Main Street. One of the goals of the revitalization project was to have it serve as a catalyst for the regeneration of Concord's retail core. By creating an attractive, comfortable, safe, vibrant and sustainable setting, as well as a destination for residents and visitors alike, the improvements have aided in preserving and enhancing the economic vitality of downtown Concord. This was accomplished by reducing the vehicular travel lanes from four to two, considerably widening the sidewalks, and creating communal spaces that can facilitate public art, small pocket parks and social gatherings. Universal access has been provided to all buildings along the street. Main Street is viewed as a "Complete Street," not simply as a transportation corridor. It can now accommodate pedestrians, drivers, and transit users in equal measure. It has already been embraced by the Concord community, recently receiving a "Best of NH" recognition.

KEENE REVITALIZATION STUDY // KEENE, NH. *Project Manager.*

CRJA-IBI Group and the project team worked closely with the City of Keene and the community to develop a vision that addresses function, aesthetics and infrastructure needs for the downtown area. The resulting planning study provides a vision for the future of downtown Keene, the economic engine of the community. Public process was a large component of this visioning exercise which included a 3-day charrette with residents and stakeholders in an 'open house' style format. The goal of these charrettes was to facilitate feedback on what features and amenities people wanted to see in their new downtown. Public feedback was generated through the creation of a website, where the public could submit thoughts and ideas in a survey-style format.

CENTRAL AND KENDALL SQUARE // CAMBRIDGE, MA. *Project Manager.*

Working with the urban designers, Mr. Law assisted in conducting a comprehensive urban design/planning study for the Central and Kendall Square area of Cambridge. The effort seeks to determine steps-through urban design, zoning, retail analysis,

EDUCATION

Leeds Metropolitan University,
Graduate Diploma in Landscape
Architecture (Distinction), 2000

Leeds Metropolitan University, Bachelor
of Arts in Landscape Architecture (First
Class Honors), 1998

SELECTED AWARDS

2017 ITE Complete Streets Council
Best Project Award for Concord Main
Street Improvements, Concord, NH with
McFarland Johnson

New Hampshire Planners Association
2017 Project of the Year for Concord
Main Street Improvements, Concord,
NH with McFarland Johnson

New Hampshire Preservation Alliance
2017 Preservation Achievement Award
or Concord Main Street Improvements,
Concord, NH with McFarland Johnson

American Public Works Association's
2017 Public Works Project of the Year
for Small Cities/Rural Communities,
Transportation Category for Concord
Main Street Improvements, Concord,
NH with McFarland Johnson

ACEC-NH 2017 Gold Engineering
Excellence Award for Concord Main
Street Improvements, Concord, NH with
McFarland Johnson

Massachusetts Chapter of the American Council of Engineering Companies 2017 Bronze Award for Engineering Excellence for University of Massachusetts Boston University Hall

2014 MIPIM Architectural Review Future Project Awards, Big Urban Projects for PaoJiang Lake, China with Paul Lukez Architecture

World Architecture News (WAN) 2013 Urban Design Award for Paojiang Lake Master Plan, Shoaxing, China with Paul Lukez Architecture

Boston Society of Architects, 2012 Accessibility Award for Fall River Justice Center, Fall River, MA, with Finegold Alexander + Associates, Inc.

Boston Society of Architects/AIA, 2011 Accessible Design Award (Citation for Public Architecture) for Fall River Justice Center, Fall River, MA.

Boston Society of Landscape Architects, 2009 Honor Award for Fresh Pond Reservation Northeast Sector, Cambridge, MA.

PROFESSIONAL AFFILIATIONS

Wellesley Design Review Board, Chairman, April 2014-March 2018

Wellesley Design Review Board, Member, February 2010-2014

transportation planning, and design review—to reinforce the strong individual character of each Square, while making better connections between them. Central Square is a vibrant retail district at the northwest end of the Massachusetts Institute of Technology campus. Kendall Square, home to the M.I.T. campus and a cluster of biotech and high-tech businesses, has an emerging residential population but lacks a well defined “center.” The varied stakeholder groups are participating in a public process that addresses the diverse concerns and opportunities of this area in Cambridge.

MELROSE HIGHLANDS STREETSCAPES IMPROVEMENTS // MELROSE, MA. *Project Manager.* Mr. Law recently collaborated with the project engineers on the design of roadway improvements along the Melrose Highlands corridor. The project scope entailed roadway resurfacing, sidewalk reconstruction, enhanced pedestrian accommodations, streetscaping, and reconfiguration of the municipal and MBTA parking lots within the area. Small urban gathering spaces within the streetscape were also created. The project seeks to enhance the visual appearance of the corridor and parking areas and provide increased usability through improved pedestrian facilities and traffic calming features.

ATTLEBORO STREETSCAPES // ATTLEBORO, MA. *Project Manager.* For the City of Attleboro, Mr. Law managed the design and implementation of streetscape improvements which have helped to refresh and expand the visibility and attractiveness of its downtown so residents and visitors would be encouraged to shop, live in, and visit Attleboro. Building on the synergy of other ongoing downtown projects, the streetscapes project connects commercial districts, the new Riverwalk, City Hall and police station, the Amtrak station, and a new intermodal facility and its associated mixed-use development. Improvements include new sidewalks, cross-walks, neckdowns, lighting, site furnishings, street tree planting, and signage consolidation. An extensive public process helped to ensure that the plan is familiar to, and supported by Attleboro merchants and residents.

JILL BROWN-RHONE PARK IN LAFAYETTE SQUARE // CAMBRIDGE, MA. *Project Manager.* Mr. Law was Project Manager for the design of the new Lafayette Square pedestrian plaza and park in Cambridge, MA. Lafayette Square is on the historic route between Boston and Harvard Square and is rich in history. The City of Cambridge commissioned a park to be built in Lafayette Square with dual goals of creating open space in this dense urban setting and improving the safety of the intersection. Working with the City of Cambridge, the project’s traffic engineers and the surrounding community, Mr. Law helped to achieve traffic calming objectives and to reassert the Square’s historic pedestrian character through the design of new bus stops, seating, lighting, planting, gathering spaces and opportunities for historical reference. He also provided construction administration for the project, reviewing submittals, chairing site meetings, and providing services to both the Client and the contractor.

CAMBRIDGE STREET IMPROVEMENTS // CAMBRIDGE, MA. *Project Manager.* Mr. Law was a key member of the design team which designed streetscape improvements along Cambridge Street. The project encompassed design for the 1.5-mile section of Cambridge Street that connects Inman Square with the Lechmere MBTA Station. Mr. Law assisted the project team with inventory and analysis, conceptual and development design, materials proposals, cost estimating, phased bid documents, and construction phase services. The implemented streetscape improvements are oriented around transportation elements and open spaces. They include improved signalization, traffic calming, updated crosswalks and ramps, new signage and lighting, street trees, site furnishings, the creation of a public reading garden, and expanded open space for a neighborhood plaza.



Mezzo Lofts and Streetscape, Charlestown MA; One First Street Condominiums, Somerville MA; West End Longfellow Residences, Boston MA

Site Master Planning and Design for Residential Properties

SERVICES

- Site analysis and master site planning
- Site selection and feasibility studies
- Barrier-free site access
- Visual quality and open space assessment
- Vehicular circulation and parking
- Site furnishings and lighting
- Historic site and structure renovation
- Planting inventory, assessment, and design
- Irrigation design

Through more than 50 years of experience, we have developed unparalleled expertise in creating memorable landscapes.

CRJA has worked with individual homeowners and developers of residential properties to design sites that function well, provide identity, and satisfy often difficult environmental concerns. Our projects have included site design for private residences, new luxury and market-rate condominiums, rehabilitation of residential communities, and conversions of other-use buildings into residential properties.

We have specific experience in designing residential sites to accommodate security and safety issues as they relate to access and vehicular and pedestrian circulation. Our designs also provide opportunities for family leisure activities, incorporating both active and passive recreational amenities for single and multi-family developments, including swimming pools, tennis courts, private beaches, golf courses, club houses and outdoor dining facilities, marinas and boat launches, jogging and walking paths. On all of our residential projects, our sustainable design approach minimizes ecological impacts and maintenance.

Multi-Family Residential Site Planning and Design

IN PROGRESS

530 Main Street, Melrose, MA

Emerald Gateway
Abu Dhabi, UAE

Five Points Community
Knoxville, TN

Longfellow Place
Boston, MA

Lynn Gear Works
Lynn, MA

Tianjin TEDA MSD
Tianjin, China

Vine Avenue Row Houses
Knoxville, TN

2010-2014
Assembly Row Parcel 1 & 4
Somerville, MA

Chongqing Vanke Town
Chongqing, China

Eastport Senior Living Apartments
Knoxville, TN

Emei Waterside Fragrant Garden
Residential Community, EMei, China

Marasy
Abu Dhabi, UAE

Palace of Pleasure Residential Development
Chongqing, China

West End Longfellow Apartment Complex
Boston, MA

2005-2009
180 Newbury Street
Danvers, MA

195 First Street
Cambridge, MA

330 Beacon Street
Boston, MA

Al-Rajhi Housing Development
Hail Kingdom, Saudi Arabia

Beau Monde Neighborhood at
Northshore Town Center, Knoxville, TN

Blanchard Farms Condominium East
Westford, MA

Bluffs at Cross Pointe
Sevierville, TN

Brooksby Village
Peabody, MA

Burj Residences
Dubai, UAE

Cotuit Subdivision Development
Cotuit, MA

D-4 Housing Development
Boston, MA

English Mountain Master Plan
Sevierville, TN

East Bay Condominiums
Weymouthport, MA

Garden Street Condominiums
Cambridge, MA

Hai Fu Garden
Shanghai, China

Harbor View Condominiums
Charlestown, MA

Hickory Pointe
Tazewell, TN

Hodge Steam Boiler Condominiums
East Boston, MA

Kindom B-10
Taipei, Taiwan

Linden Ponds
Hingham, MA

Marabet
6th of October City, Egypt

Marina Bay Residential Development
Quincy, MA

Mezzo Lofts
Charlestown, MA

One First Street Condominiums
Cambridge, MA

Reserve at Tuckaleechee Cove
Townsend, TN

Severance Corners Village
Colchester, VT

Steele Creek Park
Bristol, VA

Tian Ji Xian Fu
Changsha, China

Union Avenue Lofts
Knoxville, TN

The Village at Northshore Town Center
Knoxville, TN

Villas at Linksview Terrace
Knoxville, TN

The Waterfront at Pitts Bay Road, Phase II
Hamilton, Bermuda

West End Residences
Boston, MA

2000-2004
Baker Hill
Hingham, MA

Bird Pond
Walpole, MA

Brandon Woods Residential Subdivision
Hingham, MA

JPI Ashland
Ashland, MA

JPI Bellingham
Bellingham, MA

JPI D Street
South Boston, MA

JPI Dedham
Dedham, MA

JPI Milford
Milford, CT

JPI Providence
Providence, RI

JPI Salem
Salem, MA

JPI Wheeler Hill
Marlborough, MA

JPI Woburn
Woburn, MA

Kindom II
Taipei, Taiwan

Kindom XII Sites
Taipei, Taiwan

Longyear Estate at Fisher Hill
Brookline, MA

Royale Garden Condominiums
Taipei, Taiwan

1995-1999

Amory House Condominiums
Brookline, MA

Linnean Street / Avon Hill
Cambridge, MA

The Waterfront at Pitts Bay Road
Pembroke Parish, Bermuda

West End Place
Boston, MA

1990-1994

Harbor Point Housing Revitalization
Dorchester, MA

Heritage Common Housing
Lawrence, MA

Wildflower Lane
Weston, MA

1985-1989

Arbor Glen Housing
Providence, RI

Arluwade Residential Subdivision
Hampton, NH

Baker Chocolate Mills Residences
Dorchester Lower Mills, MA

Beacon Heights
Newton Centre, MA

Dalton Ridge
Whitefield, NH

Gulf Meadows Housing
Dartmouth, MA

Pier 7 Condominiums at Shipyard Quarters
Charlestown, MA

Hawkes Brook Estates
Methuen and Haverhill, MA

Kells Farm Residential Analysis
Greenfield, MA

Two Clarendon Street Condominiums
Boston, MA

Ryders Hill
Chatham, MA

Windchime Point
Mashpee, MA

Projects in Wellesley, MA

CORPORATE AND INDUSTRIAL

981 Worcester Street

Wellesley Gateway

Wellesley Office Park

HIGHER EDUCATION SITE PLANNING AND DESIGN

Babson College Admissions Building

Babson College Bryant Hall

Babson College Campus Center

Babson College Central Campus Landscape Master Plan

Babson College Coleman Hall

Babson College Coleman Hill Road Improvements

Babson College DC Garden

Babson College Forest Hall

Babson College Graduate Center

Babson College Knight Annex

Babson College Library

Babson College Master Plan

Babson College Physical Facilities Master Plan and Implementation

Babson College Senior Wall 1998

Babson College Senior Wall 1999

Babson College Senior Wall 2000

Babson College Trim and Hollister Halls

Babson College Trim Hall Renovations

Babson College Upper Fields Site Design

Babson College Wellesley Ave Stormwater Upgrade

Babson College Main Entry

Babson Publishers House

Wellesley College Bates Freeman Dormitory

Wellesley College Admissions Walkway

Wellesley College Distribution Center Parking Lot

Wellesley College Greenhouses

Wellesley College Jewett Art Center

Wellesley College Landscape Improvements

Wellesley College Nehoiden (Vice President's) House

Wellesley College Oakwoods, Admissions Office Landscape

Wellesley College Parking Master Plan

Wellesley College Science Center and Greenhouses

Wellesley College Stone Center

Wellesley College, Lighting and Safety, Improvements

PRIMARY AND SECONDARY SCHOOL

Bates School

Dana Hall School Landscape Master Plan

Sprague School

Warren School

Wellesley Middle School

Wellesley Public Schools

STREETSCAPES

Holman Block

MUNICIPAL/GOVERNMENT

MWRA Framingham Extension Relief Sewer

TRANSPORTATION

Needham Wellesley I-95 Transportation Improvements

Dane & Company, Inc. provides strategic advice and services to owners of parking properties. We assist in valuing properties and in creating value for them by identifying and obtaining ideas and resources in the marketplace. We have a very complete and up-to-date understanding of the techniques and companies which provide those resources and of the principles that work. Typical services that we provide to clients include:

- RFP solicitations and analysis
- Adjunct asset management
- Purchase and sale underwriting
- Operational audits
- Strategic initiative analysis
- Equipment and resource procurement
- Design, Functionality

All of our approaches are market-based: they either emerge from best practices developed in the industry over many years or from specific polling of current industry participants.

Peter Dane, our President, is a Harvard-trained anthropologist who worked entrepreneurially in the parking industry for 35 years as an owner, developer and operator of facilities. His last position in the industry was as Executive Vice President, Director and minority-shareholder of Allright Corporation, an owner and operator of nearly 3,000 facilities in North America. His background in anthropology biases analysis towards solutions that are fit for both the circumstances and the specific culture of our clients.

Dane & Company's client list includes: Boston Properties, Folio Residences (Boston), Residences at the Intercontinental (Boston), Equity Office Properties, Northwood Investors, Hilton Hotels, Corcoran Jennison Properties, 33 Arch Street Tower (Boston), Trinity Financial, CBRE/NE, MassDevelopment, Edison Properties, Prudential Real Estate Advisors, Harvard Real Estate Services, AEW Capital Management, Betawest Ltd., Intercontinental REIC, Cathartes, Flatley Companies, BUMC, Biomed Realty, Clarion Partners, Christian Science Church, Coughlin Real Estate Company and Liberty Mutual. We have consulted, in one capacity or another, at most major buildings in Boston and at many others nationwide. We do not provide services to nor do we have any business relationships with any service providers in the parking industry.

Curriculum vitae—Peter Dane

Peter Dane is a graduate of Lynnfield Public High School, where he received the Outstanding Student Award, and of Harvard University, from which he received an honors degree in Anthropology.

In 1972, after having parked cars to help pay for a college education, he joined Allright Auto Parks as a parking lot attendant. He quickly became a Zone Manager and, in 1973, became President and City Manager of the Allright subsidiary, Pennsylvania Parking. Within three years, this troubled Philadelphia company had been transformed into a very profitable one and he was tasked to turn around troubled subsidiary companies in Montreal and upstate New York. In 1976, Mr. Dane became Regional Manager for the Northeast and was responsible for direction of the activities of half a dozen City Managers as well as strategic vision, property acquisition, development and growth for his region.

In 1986, Mr. Dane became a Division Manager for Allright and extended his activities to the supervision of four Regional Managers and twenty subsidiary City Managers. He also became a director and shareholder of Allright Auto Parks, the parent company and became responsible for strategic thinking, acquisitions and operations for the company at large. In 1997, he was named Executive Vice President and directed a growth initiative and operational excellence program that ultimately led to the sale of the company in 1999 for \$650,000,000. When he joined the company in 1972 it was a regional enterprise with only a significant Southeast US presence in 25 cities with 2,000 employees. When he left the company in 1999, it had operations in 55 cities, owned 400 properties in the US and Canada and had 12,000 employees.

In 1999, Mr. Dane formed Dane & Company, Inc. as an advisory firm to provide consulting services on evaluations, acquisitions, dispositions and strategic thinking for owners of parking and transportation properties including both private and public entities. His public clients have included Harvard University, Massachusetts Bay Transportation Authority, MassDevelopment and the Christian Science Church. His private clients have included a diverse array of owners including Equity Office Properties, Biomed Realty (Blackstone), Hilton Hotels, Residences at 500 Atlantic Avenue, DLJ/RCEP Realty, Trinity Financial and many others. Project work has included transportation studies, land use, traffic studies and economic analysis.

Mr. Dane lives in Cambridge, MA and is an avid cyclist and golfer. He has been a member of the Committee on University Resources of Harvard University and, while he lived on the North Shore of Massachusetts, was a Director of the YMCA of the North Shore.



QUALIFICATIONS FOR CONSULTING SERVICES

Transportation Planning and Engineering

Trinity Development/Wellesley Square

May 14, 2018

MDM TRANSPORTATION CONSULTANTS, INC.
Planners & Engineers

28 Lord Rd., Suite 280 | Marlborough, MA 01752 | 508-303-0370 | Fax: 508-303-0371 | www.mdmtrans.com

ABOUT OUR FIRM

MDM Transportation Consultants, Inc. (MDM) is a full-service transportation engineering and planning firm led by Managing Principals Robert J. Michaud, P.E and Ronald D. Desrosiers, P.E., PTOE. Through their diverse and complementary experience, MDM is prepared to guide any project, from small to large, through the state and local permitting process, into design and ultimately construction. We offer responsive, comprehensive and cost effective solutions to our public and private sector Clients. We recognize that every Client has unique needs, schedules and budget constraints. As such, we pride ourselves on meeting these objectives to develop strategic “real world” solutions to today’s challenging transportation infrastructure needs.

Since our founding in June of 2003, MDM has provided transportation services on over 600 individual projects ranging from peer reviews for Cities and Towns to major infrastructure improvements for public and private sector Clients. MDM provides a complete range of planning and engineering services required for successful transportation projects, from start to finish. We offer reliable, expert services from the initial project feasibility to concept design, local and state permitting, as well as engineering design and construction services. Our expertise spans both the public sector and private land development markets, with an emphasis on facilitating, permitting and implementing complex transportation projects. Our solid approach results in viable, cost-effective transportation solutions for every type and size project.

REPRESENTATIVE PLANNING & ENGINEERING SERVICES

- Traffic Impact & Access Studies
- Environmental Impact Assessments
- Parking Studies & Layout Design
- Transportation Master Planning
- Transportation Demand Management
- Independent Traffic Assessments & Design Reviews
- Public Presentations & Consensus Building
- Transportation Air Quality Modeling



- Highway Engineering & Intersection Design
- Advanced Traffic Signal System Design
- Traffic Signal Equipment Evaluations
- Traffic Calming Studies & Design
- Traffic Management Planning & Design
- Construction Management & Monitoring
- Federal and State Construction Funding Assistance
- Expert Witness Testimony

PROJECT PORTFOLIO

MDM has worked on numerous transportation projects for Cities and Towns as well as private developers throughout New England. Our vast experience in a wide array of transportation projects, from peer review and corridor studies for communities to the permitting and design of roadway improvements attest to the depth of our qualifications.

PROJECT PORTFOLIO

TRANSPORTATION PLANNING STUDIES

- Route 110 Corridor Study - Westford, MA
- UMass Campus Shuttle Study - Lowell, MA
- Regional Traffic Evaluation - Weston/Waltham, MA
- LNG Facility Traffic Assessment - Fall River, MA
- Greenwich Rd. Truck Route Evaluation - Hardwick, MA
- Cubist Commuter Survey - Lexington, MA



TRAFFIC IMPACT & ACCESS STUDIES

- Wellesley Sportsplex - Wellesley, MA
- Forest Hills Residential TOD - Jamaica Plain, Boston
- South Bay Center Mixed-Use - Dorchester, Boston
- Hillside Center for Sustainable Living - Newburyport, MA
- Lakeway Commons Mixed-Use - Shrewsbury, MA
- Fountain Street Apartments TOD - Framingham, MA
- Target Retail Center - Hanover, MA

ROADWAY IMPROVEMENT PROJECTS

- Arlington Street - Dracut, MA
- Pond Street (Rt. 126) - Ashland, MA
- Adams Street - Westborough, MA
- North Street - Bellingham, MA
- Concord Road - Billerica, MA
- Washington Street (Rt. 53) - Hanover, MA



INTERSECTION IMPROVEMENT PROJECTS

- Brewer's Corner - Quincy, MA
- Boston Tpke. (Rt. 9) at South Street - Shrewsbury, MA
- Central St. (Rt. 12) at Lancaster St. - Leominster, MA
- E. Main St. (Rt. 30) at Flanders Rd. - Westborough, MA
- Cambridge St. (Rt. 3) at Bedford Rd. - Woburn, MA
- Mechanic St. (Rt. 140) at Maple St. - Bellingham, MA

RESIDENTIAL PORTFOLIO

MDM has prepared traffic due diligence memorandums, Traffic Impact and Access Studies and traffic mitigation plans for numerous land development projects. The following list provides a representative sample of residential development projects for which we have provided professional traffic planning and/or engineering services, including projects that were created under Massachusetts' Comprehensive Permit Law (Chapter 40B).

NAME	PROJECT TYPE	SIZE	LOCATION
Archstone	Apartments (40B)	640 units	Woburn, MA
Chrysler Apartments	Apartments (40B)	404 units	Natick, MA
Arboretum	Duplexes	376 units	Worcester, MA
Summit Place	Apartments (40B)	280 units	Methuen, MA
MaxPax Redevelopment	Condominiums	229 units	Somerville, MA
Archstone	Apartments (40B)	204 units	Reading, MA
Jefferson at Westford	Apartments (40B)	200 units	Westford, MA
Shovel Shop Square	Apartments (40B)/ Offices	182 units/35 ksf	Easton, MA
Junction Shop Mills	Apartments	181 units	Worcester, MA
Wingate at Silver Lake	Senior Community	120 units	Kingston, MA
Settlers Hill	Senior Community	119 units	Sutton, MA
Pine Tree	Single Family	115 units	Holden, MA
Wall Street	Apartments	90 units	Worcester, MA
Rocky Hill	Single Family / Senior Comm.	84 units	Groton, MA
Emerald Pines	Townhouses/Golf Course	75 units	Methuen, MA
Hamilton Farm	Townhouses	62 units	Winchester, MA
Main Street	Senior Community	60 units	West Newbury, MA
Hillside Center	Sustainable Apartments	60 units	Newburyport, MA
Residences at Carriage Pines	Senior Community	54 units	Rowley, MA
Coolidge Commons	Townhouses /Apts. (40B)	40 units	Manchester, MA
Tower Farms	Townhouses (40B)	40 units	Ipswich, MA
Summer Street	Apartments (40B) / Retail	38 units	Manchester, MA
Deer Run Subdivision	Single Family	38 units	Holden, MA
St. Mary's of French Hill	Condominiums	36 units	Marlborough, MA
Point Breeze Club	Luxury Condominiums	32 units	Nantucket, MA
Beaver Creek Lane	Condominiums	19 units	Wareham, MA
Miacomet Road	Single Family	19 units	Nantucket, MA
Main Street Re-development	Residential/Commercial	10 units / 3,700 sf	Rowley, MA



COMMERCIAL PORTFOLIO

MDM has prepared traffic due diligence memorandums, Traffic Impact and Access Studies and traffic mitigation plans for numerous land development projects. The following list provides a representative sample of commercial development projects for which we have provided professional traffic planning and/or engineering services.

NAME	PROJECT TYPE	SIZE	LOCATION
Target	Shopping Center	230,000 sf	Hanover, MA
South Bay Center	Mixed-Use	730ksf/450 units	Boston, MA
Lakeway Commons	Mixed-Use	105ksf/250 units	Shrewsbury, MA
Fore Kicks II	Indoor Sports Complex	130,000 sf	Marlborough, MA
Harrington Farms	Shopping Center	115,000 sf	Shrewsbury, MA
Shaw's	Supermarket	68,400 sf	Carver, MA
Price Chopper	Supermarket	64,500 sf	Shrewsbury, MA
Price Rite	Supermarket	58,000 sf	Worcester, MA
Merrimack Street Plaza	Mixed-Use	48,000 sf	Methuen, MA
Dartmouth Mall Expansion	Department Store	54,000 sf	Dartmouth, MA
Mansfield Crossing	Mixed Use	29,000 sf	Mansfield, MA
West Central Street Plaza	Mixed Use	18,000 sf	Natick, MA
Walgreen's	Pharmacy	14,500 sf	North Reading, MA
Medway Cooperative Bank	Bank	7,350 sf	Mendon, MA
McDonald's	Restaurant	4,075 sf	Milford, MA
Bear Rock Café	Restaurant	4,000 sf	Woburn, MA
South Adams Savings Bank	Bank	2,750 sf	Lee, MA
Starbucks	Coffee Shop	1,750 sf	Hudson, MA
Quiznos Subs	Restaurant	1,740 sf	Framingham, MA
Marriott	Extended Stay Hotel	124 rooms	Worcester, MA
Holiday Inn Express	Hotel	83 rooms	Middleborough, MA
Stop & Shop Fueling Facility	Gas Station	12 fueling positions	Hudson, MA
National Amusements	Movie Theater	12 screens	Brockton, MA



RESIDENTIAL DEVELOPMENTS

Whether it's for a single family subdivision, apartment complex or age-restricted community, MDM provides the necessary transportation planning and engineering services to support residential developments of all sizes. MDM's residential portfolio includes the following projects:

Forest Hills Residences – Jamaica Plain, Boston

As part of the City of Boston's Large Project Review (Article 80B) process, MDM evaluated transportation impacts, parking needs and access for a 252-unit apartment transit-oriented development at Forest Hills Station in Jamaica Plain. The project is supported by a 130-space garage and incorporates safe and convenient pedestrian access to the MBTA Forest Hills Station and adjoining Arborway Bikeway.



Fountain Street Residences – Framingham, MA



MDM prepared transportation studies, permitting and access design services for a conversion and expansion of an existing historic mill building into 258 loft-style studio, one- and two-bedroom apartment residences. The project will entail renovating the mill into 160 residences, and constructing a new six-story building featuring 98 residences and a 224-space parking garage. 34 additional surface parking spaces will be located on site, for a total of 258 spaces. 26 residences at 59 Fountain Street will be designated affordable. The site is a Transit Oriented Development located within a 5-minute walk of the Framingham MBTA commuter rail station.

Hillside Center for Sustainable Living – Newburyport, MA

A sustainable residential development along Route 1 within walking distance of the Newburyport MBTA station, this project includes 58 new residential apartment units (48 apartments and the long range build-out of a 10 room residence for the YWCA). Sustainable features include edible landscape, urban gardens, a year-round greenhouse, shared electric vehicles, and solar canopy over parking. MDM prepared traffic studies, parking evaluation, and MassDOT access design/permitting.



Archstone Community – Reading, MA



Located off of West Street and adjacent to the I-93 corridor, this 204-unit residential development underwent a comprehensive review by the Town's Zoning Board of Appeals under the Massachusetts 40B (affordable housing) regulatory process. MDM's principals focused on public input relative to the scenic character of the roadway, historic properties and traffic safety along West Street. MDM effectively developed a mitigation improvement project that retained the scenic/historic character of the roadway and addressed long-standing traffic control and safety needs at the West Street/South Street

COMMERCIAL & MIXED USE DEVELOPMENTS

South Bay Center - Dorchester, Boston

MDM provided transportation planning and engineering services to support development of a 1.4 Million Square Foot mixed-use urban development comprising 475 residential units, a hotel, movie theatre, retail space and 1,050 parking spaces including three garages adjoining the South Bay shopping center. Roadway improvements follow "Complete Streets" design standards and connect neighborhood streets as part of a new urban street grid system. The site is proximate to MBTA services at Newmarket and Andrew Square and incorporates transit shuttle connections to these stations.



Wellesley Sportsplex - Wellesley, MA

The Wellesley Sportsplex is a 101,350 sf multi-sport recreational complex located at the former St. James property along Route 9 in Wellesley. Facilities include a swimming pool, 2 ice rinks, athletic sports field, elevated track and conditioning/therapy rooms. MDM provided transportation and parking studies, and MassDOT access design and permitting for improved (signalized) access along Route 9.



Lakeway Commons - Shrewsbury, MA

MDM prepared a detailed Transportation assessment and access improvement plans supporting the re-development of the former Spag's discount retail properties on Route 9 into a vibrant commercial and residential complex that includes a Whole Foods supermarket, 250 apartment units and more than 50,000 sf of retail uses. The project is subject to MEPA review, local permitting and MassDOT design/permitting for access improvements along Route 9.



ROADWAY IMPROVEMENT PROJECTS

Reconstruction of Arlington Street - Dracut, MA

MDM prepared preliminary and final design plans, specifications and construction cost estimate for traffic safety improvements along 1.6 miles of Town owned and maintained roadway. Improvements include geometric modifications, horizontal and vertical realignment of the roadway, full depth construction, milling, leveling and resurfacing, installation of curbing, sidewalk, retaining walls, culverts, a closed drainage system, BMP's for stormwater management, driveway reorganization, water main improvements, overhead utility relocation and acquisition of 60 +/- land takings in fee or as permanent easements for right-of-way purposes.



Brewer's Corner Traffic Improvements - Quincy, MA

MDM prepared preliminary and final design plans, specifications and cost estimate for traffic operation and safety improvements. The design involved traffic signal reconstruction, removal of an obsolete flashing warning beacon, closed loop communications, countdown pedestrian indications, vehicle loop detectors, Opticom emergency preemption, mast arms, signs, pavement markings and traffic management during construction. Existing and future capacity analysis, crash data analysis and parking evaluation were reviewed to support the proposed improvements.



Reconstruction of Adams Street - Westborough, MA

MDM prepared concept level design plans and construction cost estimates for reconstruction of 2.0 miles of Adams Street, a Town-owned and maintained roadway. MDM worked with Town officials to develop a context sensitive design that addresses vehicular and pedestrian safety, traffic operations, roadway widening, roadway drainage and flooding, sewer and water system deficiencies, right-of-way constraints and abutter impacts.



Concord Avenue Improvements - Lexington, MA

MDM, on behalf of the Town of Lexington, prepared preliminary design plans for modifications to Concord Avenue to accommodate pedestrian, bicycle and motor vehicle traffic along the 1.1 mile roadway. MDM evaluated several cross-section scenarios in order to balance the needs of all road users and limit the impact of the project on abutting properties. The design involves installation of hot mix asphalt berm, guard rail, ADA compliant wheelchair ramps, drainage system modifications, retaining walls, landscaping, signs and pavement markings.



KEY PERSONNEL

MDM Transportation Consultants, Inc. has a full complement of professional staff in all disciplines appropriate to transportation projects, such as traffic engineers, civil engineers and transportation planners. The following provides an overview of the firm's Principals (detailed resumes available upon request).

Robert J. Michaud, P.E. (MA #38101, RI #9038, NH #12925)

Mr. Michaud is a managing principal in charge of MDM's Transportation Planning and Permitting practice. He has 30 years experience directing and participating in numerous transportation planning and engineering projects in the New England States. He has proven this talent through the successful transportation permitting for New England's most prominent urban projects including several South Boston waterfront developments, large-scale office and retail developments in Boston's financial and Back-Bay neighborhoods, and the world class medical and research institutions in Boston's renowned Longwood Medical area. He also enjoys a long and successful track record in permitting of suburban-based projects in a host of New England communities in a range of market areas including residential, commercial, retail, and institutional. He is well versed and experienced in permitting under the Massachusetts Environmental Policy Act (MEPA), the Boston Redevelopment Authority's Article 80 environmental review, and the requirements of various state and local agencies.

Ronald D. Desrosiers, P.E., PTOE (MA #39712, NH #10700, ME #7974)

Mr. Desrosiers is a managing principal in charge of MDM's Traffic Engineering Division and has 30 years of experience in roadway design, specializing in unsignalized and signalized intersections operations as well as roadway reconstruction. He is responsible for supervision and administration of all traffic engineering projects. Mr. Desrosiers has previously managed over 100 transportation projects in communities including Billerica, Bellingham, Carver, Dartmouth, Dracut, Wareham, Everett, Worcester, Waltham, Wrentham, Westford, Lowell, Ipswich, Reading, Randolph, Methuen, and Saugus. He has also assisted many Towns in applying to MassDOT and regional planning agencies for construction funding under MassDOT's Transportation Improvement Program. These Towns include Dracut, Billerica, Rockland, Marblehead, Bellingham, Groton and Westford.

Daniel J. Mills, P.E., PTOE (MA #41753)

Mr. Mills is a principal of the firm with 24 years of traffic engineering experience. He has completed conceptual and final design plans and related documents for numerous intersection and roadway improvement projects throughout Massachusetts. Mr. Mills has conducted intersection operation and crash analyses, speed studies, truck route assessments, traffic impact assessments, corridor studies and independent peer reviews. He has also prepared traffic impact studies, planning studies and design reports for various public and private development projects. Mr. Mills' most recent experience includes the preparation of a Corridor Master Plan for Route 126 in Ashland, MA, traffic impact studies for a the Boston Preparatory Charter School in Mattapan, MA and a residential development in Medford, MA, and ongoing independent traffic peer review services for the Towns of Bellingham and Burlington and City of Beverly, MA.

Robert J. Michaud, P.E.
MDM Transportation Consultants, Inc.

Position: Managing Principal, Transportation Planning & Permitting

Years of Professional Experience: 30

Education Northeastern University, M.S.C.E., 1999; Worcester Polytechnic Institute, B.S.C.E., 1988

Affiliations American Society of Civil Engineers; Institute of Transportation Engineers; Boston Society of Civil Engineers - Transportation Committee, Chair 1999-2000 - Nominating Committee 2000-2002

Registration Registered Professional Engineer: Massachusetts #38101; Rhode Island # 9038; New Hampshire # 12925; Connecticut #29401

SUMMARY OF EXPERIENCE

Mr. Michaud has 30 years of experience directing and participating in numerous transportation planning and engineering projects in the New England States. Included in his experience are studies and design efforts encompassing traffic operations and analysis, highway engineering and design, signal system planning and design, parking studies, traffic impact studies, transportation planning, transportation air quality analysis, and transportation peer review for various municipalities. He has conducted these efforts for state governments, cities and towns, and private sector clients.

Transportation Studies

Mr. Michaud has directed and participated in more than 600 transportation impact studies identifying impacts and designing mitigation measures for residential, retail, commercial, office, industrial, institutional, recreational, medical, and hotel facilities throughout New England. He has presented testimony to over 200 Boards of Selectmen, City Councils, Planning Boards and Zoning Boards of Appeal.

Industrial Projects include: Palmer Renewable Energy & Batch Asphalt Plant facility (38mw), Springfield MA; Weavers Cove LNG facility (200,000 m³ Tank), Fall River MA; Pioneer Renewable Energy biomass facility (50 mw), Greenfield MA; Hardwick Landfill Evaluation, Hardwick MA; Boston Beer Works manufacturing/distribution facility (315,000 sf), Freetown MA; National Grid Warehouse/Distribution facility (87,500 SF), Northbridge MA; Central Steel Warehouse/Distribution facility (58,000 sf), Marlborough, MA; American Ice Co Manufacturing facility (27,000 sf), Boston MA; Tresca Brothers Batch Concrete Facility (4 acres), Wilmington, MA.

Residential Projects include: Meadow Creek 200 unit Golf Course Subdivision, Dracut, MA; 50-unit residential subdivision, Stratham, NH; 54-unit condominium development; S. Boston, MA; 640 unit (40B) residential development - Archstone Communities, Woburn, MA; 436 unit (40B) residential development - Archstone Communities, Methuen, MA; 232 unit (40B) residential development - Archstone Communities, Reading, MA; 300-unit residential condominium development, S. Boston, MA; 404-unit (40B) residential development - Chrysler Apartments LLC, Natick, MA; 200 unit (40B) residential development, JPI Inc., Westford, MA; 196 Unit (40B) residential development - North Andover Holdings, North Andover, MA.

Institutional & School Projects include: Children's Hospital Clinical and Research Buildings, Boston; Harvard Institute of Medicine Research Tower, Boston, MA; Boston College Middle Campus Dormitory Expansion, Chestnut Hill, MA; Medi-Plex Nursing Home/Medical Building, Concord, MA; Massachusetts General Hospital Campus Expansion Program, Boston, MA; Northampton State Hospital Redevelopment, Northampton, MA; Biotechnology Park, Worcester Foundation, Shrewsbury, MA; UMass Lowell Campus Transit Master Plan; Next Generation Child Care Centers (NGCC), Hopkinton MA, Walpole MA and Acton, MA; LEAP Schools Concord MA and Lexington MA; Brooke Charter School Mattapan, MA; MATCH Public Charter Schools, Jamaica Plain and Roxbury, MA; Bresnahan Model School Newburyport MA; KIPP Academy Charter School, Lynn MA; Neighborhood House Charter School, Dorchester MA; Excel Academy Charter School, E. Boston, MA; Algonquin Regional High School, Northborough, MA.

Mixed-Use projects include: Fan Pier development, S. Boston, MA (3 Million Square feet); Millennium Place Development, Boston, MA (1.4 million square feet); Mashpee Commons Neighborhood Development, Mashpee, MA; Boston Waterfront Hotel and Residences at Parcels F2, G and J, South Boston, MA.

Retail Projects include Wonderland Marketplace Shopping Center, Revere, MA; Costco Wholesale Warehouse, Dedham and Waltham, MA; The Home Depot, Shrewsbury and W. Roxbury, MA; Westpark Retail development, Framingham/ Natick, MA; Shaw's Supermarkets, Concord NH, Worcester, Wareham, Carver, and West Bridgewater; Stop & Shop Store fuel facility program - New England (various locations); Target Retail Center (200,000 sf retail), Hanover MA; Harrington Farms Shopping Center (113,000 sf retail), Shrewsbury MA; Walgreens Pharmacy locations in Holden, N. Reading, Worcester, Leominster and Lakeville MA.

Recreational Projects include: Hartford NFL Stadium Transportation Study, Hartford, CT; Nashawtuc Senior PGA Classic Traffic Management Plan, Concord, MA; Fore Kicks II Recreation Center, Marlborough MA; Recreational Field Complex, Town of Dedham, MA; Community Park Complex, Winchester Soccer Club, Winchester MA.

Highway Planning and Engineering

Mr. Michaud's highway planning and engineering expertise include numerous highway/ traffic operation and design studies including all phases of analysis and design from initial concept development stage to construction inspection. Project examples include:

Biddeford - Saco Short-term Corridor Planning Study, Biddeford and Saco, ME; Tewksbury Commons Transportation Improvement Project, Tewksbury, MA; Winchester Square Transportation Improvement Project, Springfield, MA; Route 140 Relocation Project, Franklin, MA; Rutland Bypass Corridor Design Project, Rutland, VT; US Route 1 Long-Range Safety Improvement Environmental Assessment, Walpole-Wrentham, MA; Metropolitan Springfield Integral Transportation Systems Strategic Deployment Plan, MA; MassPike Boston Extension Ramps Feasibility Study.

Transportation and Air Quality Modeling

Mr. Michaud has expertise in conducting mobile source air quality evaluations and transportation systems modeling for numerous private land development projects, and state departments of transportation. Representative projects include:

Great Hartford Carbon Monoxide Re-designation Request Transportation and Air Quality Modeling (Connecticut Department of Transportation); Rhode Island Congestion Management and Air Quality Analysis (Rhode Island Department of Transportation); Connecticut Department of Transportation Incident Management Program Transportation and Air Quality Evaluation (ConnDOT); Metro Boston Intelligent Vehicle Highway Systems Strategic Deployment Plan Transportation and Air Quality Coalition (MassHighway Department); Florida Department of Transportation 1-595 Advanced Traffic Management System Transportation and Air Quality Evaluation (FDOT); New Bedford/Fall River Commuter Rail Project Traffic and Air Quality Evaluation (Massachusetts Bay Transit Authority); Mesoscale and micro-scale transportation and air quality studies to support various mixed-use retail, commercial and office developments in Massachusetts, and Maine.

Expert Peer Review and Testimony

Mr. Michaud has conducted numerous peer-review studies on behalf of municipal governments in Massachusetts and Rhode Island and has been recognized as a qualified expert in the area of transportation planning and engineering in the Commonwealth of Massachusetts, Connecticut, New Hampshire, and Rhode Island. Representative municipal governments include:

- Town of Burlington, Massachusetts
- Town of Dracut, Massachusetts
- Town of Westford, Massachusetts
- Town of Westborough, Massachusetts
- Town of Weston, Massachusetts

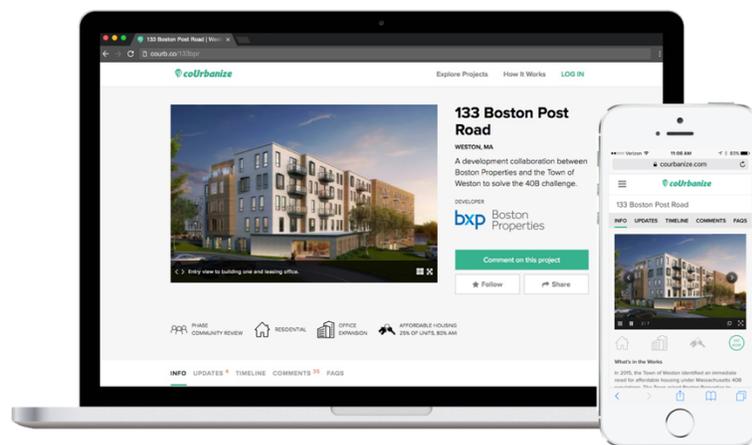
Mr. Michaud has also served as expert witness in the area of traffic engineering to law firms on various matters including motor vehicle incidents, land development projects before the Massachusetts Land Court, and matters before the Massachusetts Housing Appeal Commission (HAC).

About coUrbanize

coUrbanize is a community engagement platform for real estate development projects. Community members use coUrbanize to learn about projects and easily share their input. Using the purpose-built coUrbanize platform, project teams create an interactive website to educate the community with accessible information and gather feedback from broader audiences to supplement the in-person meeting process.

Supplementing Meetings with Online Education & Data Gathering

The traditional approach for conducting community outreach for large-scale development projects relies heavily on in-person meetings that are often limited in their ability to engage a broad, representative population. The result is a time-intensive process with limited feedback. The coUrbanize platform keeps community members informed throughout the development lifecycle and serves as the online home-base for project information and community engagement. Built-in reporting analyzes feedback while scalable outreach capabilities allow the project team to engage community members online and supplements in-person meetings.



coUrbanize Platform

Examples of Existing Work

MARTA [TOD Projects](#)



Atlanta’s transit authority, MARTA, and their real estate development partners needed to communicate the value of a transit-oriented development adjacent to a suburban rail station. The goal: inform and educate a community with high rates of car ownership leading up to a rezoning application for the TOD project. On coUrbanize, MARTA framed the conversation around public benefits—open space, retail options, and affordable housing—and showed that community input was welcome. Additionally, MARTA leveraged coUrbanize to post and email frequent project updates to online followers, and to promote a survey on community priorities using gift cards to local businesses. More than 500 survey participants and 90 community comments later, MARTA was equipped to demonstrate community support for TOD zoning.

Boston Properties [Kendall Square Urban Renewal Plan](#)



Boston Properties and the Cambridge Redevelopment Authority needed help to reshape Kendall Square with 1 million sf of new development, an area defined by innovation but lacking in streetscape. coUrbanize capitalized on heavy pedestrian traffic, soliciting input from people going about their daily routines via signs inviting them to text in ideas. By lowering the barrier to participation to a simple text message, the project team was able to reach a wider and more diverse audience. Over 275 comments came from a wide variety of residents who appreciated being asked to shape their community in a simple and accessible way.

New York City Department of Housing Preservation & Development [Brownsville Neighborhood Planning Process](#)



New York City's Housing Preservation & Development (HPD) needed to connect with Brownsville—an isolated, diverse community where public housing predominates. For the initial data gathering phase, coUrbanize created an online map of ideas based around the question “What’s great about Brownsville, and what could be even better?” In tandem with HPD’s in-person events, coUrbanize coordinated an inclusive online and on-site outreach campaign. coUrbanize’s community engagement team created social media (Facebook, Twitter and Instagram) posts which tagged local community groups and leaders. To reach residents with limited Internet or computer access, coUrbanize designed signs that asked for input via SMS on more than 20 different questions about the neighborhood. Residents texted and sent in over 120 ideas in less than a month. The result? Rather than a list of Brownsville’s problems, HPD gained a roadmap of optimistic ideas for Brownsville’s future.



May 1, 2018

Trinity Financial, Inc.
75 Federal Street, 4th Floor
Boston, MA 02110

Attention: Mr. Dan Drazen

Reference: Tailby Parking Lot and Railroad Parking Lot; Wellesley, Massachusetts
Statement of Qualification

Ladies/Gentlemen:

Pursuant to your recent request, we are pleased to provide our Statement of Qualifications related to the Request for Proposal that was issued by the Town of Wellesley for the proposed development of the Tailby Parking Lot and Railroad Parking Lot parcels. Our Statement of Qualifications, which is attached to this letter, provides a brief history of McPhail as well as a summary of representative projects we have completed in the Town of Wellesley and the New England area. In particular, McPhail has extensive experience in geotechnical and geoenvironmental consulting for residential developments which include many transportation oriented development sites that have been recently constructed within the Greater Boston area.

We appreciate the opportunity to submit our Statement of Qualifications for this proposed development project. Should you have any questions, please contact us.

Sincerely,

McPhail Associates, LLC

A handwritten signature in blue ink, appearing to read "William J. Burns". The signature is fluid and cursive, with a prominent initial "W" and "B".

William J. Burns, L.S.P.



Statement of Qualifications

Firm Profile

The engineering firm of McPhail Associates, LLC was established in 1976 by the late Robert E. McPhail, P.E. to provide consulting geotechnical engineering services. Around 1983, our scope of services expanded to include consulting geoenvironmental engineering services to address the development of sites which contain or have the potential to contain the presence of oil and/or hazardous materials (OHM).

Our professional staff consists of approximately sixty 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.

The ownership of McPhail consists of three principals who collectively have more than 80 years of consulting experience. Our associates and project managers work on the day to day aspects of projects and consult with the principals on a regular basis. The principals, associates and project managers are supported by a staff which includes project engineers, a drafting department, administrative personnel, and field engineers. The relatively small size of our company allows the principals to have a direct hand with every project that we are involved with. Our associates have an average of fifteen years' experience working with our principals.

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 Licensed Site Professionals (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. We are organized to provide timely and efficient design assistance to the design team which ensures proper implementation of the geotechnical design recommendations and geoenvironmental requirements into the Contract



Documents. Design assistance includes consultation, preparation of earthwork and other geotechnical-related specifications, environmental site remediation specifications, review of foundation plans, details and notes, and coordination with other technical sections and the bid form. In summary, we are able to provide both in-house geotechnical and geoenvironmental services for our projects, maximizing efficiency and coordination between these interrelated disciplines.

We provide comprehensive consulting services associated with preparation of ASTM Phase I and II environmental site assessments, environmental remediation designs, review of remediation proposals prepared by contractors, preparation of remediation recommendations based on site assessment information, providing field monitoring during remediation and providing LSP services through the completion of the site remediation and the regulatory compliance process.

Representative Projects

The Residences at Center and Main (Enterprise Block); Brockton, Massachusetts

Performed both geotechnical and geoenvironmental engineering analysis for the development of a new 4-story multi-unit residential building with a partial level below grade parking. Subsurface explorations were performed to define the subsurface soil and groundwater conditions as they relate to geotechnical and foundation design and construction, as well as to assess possible environmental impacts to soil and groundwater on the subject site based upon the historical use of the subject site. In addition, the excess soil was pre-characterized for off-site disposal in accordance with applicable Massachusetts Department of Environmental Protection policies. A Release Abatement Measure (RAM) Plan and a Permanent Solution Statement were completed for the site.

One Canal Street; Boston, Massachusetts

Performed both geotechnical and geoenvironmental engineering analysis for the development of a new 3 to 11-story multi-unit mixed-use building. The proposed building encompassed majority of the site area including the portion of the site underlain by the MBTA and CA/T tunnel structures. Subsurface explorations were performed to define the subsurface soil and groundwater conditions as they relate to foundation design and construction, as well as to assess possible environmental impacts to soil and groundwater on the subject site based upon the historical use of the subject site. In addition, the excess soil was pre-characterized for off-site disposal in accordance with applicable Massachusetts Department of Environmental Protection policies.

Ashmont Tire; Dorchester, Massachusetts

Performed both geotechnical and geoenvironmental engineering analysis for the development of a new 6-story steel-framed mixed-use building, including one-level of below grade parking. Subsurface explorations were performed to define the subsurface soil and groundwater conditions as they relate to geotechnical and foundation design and



construction, as well as to assess possible environmental impacts to soil and groundwater on the subject site based upon the historical use of the subject site. In addition, the excess soil was pre-characterized for off-site disposal in accordance with applicable Massachusetts Department of Environmental Protection policies. A Release Abatement Measure (RAM) Plan and a Permanent Solution Statement were completed for the site.

Georgetown Homes; Hyde Park, Massachusetts

Performed geotechnical engineering analysis for the proposed renovations and the construction of approximate 225 square-foot single-story mechanical room additions with no below grade space. The mechanical rooms were constructed as additions to existing townhouse buildings. Subsurface explorations were performed to define the subsurface soil and groundwater conditions as they relate to geotechnical and foundation design, concrete walkways, parking areas, and retaining walls.

McPhail Associates, LLC has provided geotechnical and/or geoenvironmental engineering consulting services for numerous transit-oriented development (TOD) projects including the following:

- Avenir, 101 Canal Street; Boston, MA
- One Canal, 1 Canal Street; Boston, MA
- Parcel 1B, 97-115 Beverly Street; Boston, MA
- Enterprise Block; 50 Centre Street; Brockton, MA
- The Carruth; 1916 Dorchester Avenue; Dorchester, MA
- Ashmont TOD 2, 1971-1977 Dorchester Avenue; Dorchester, MA
- 66 Summer Street; Stamford, CT
- 225 Centre Street; Jamaica Plain
- Appleton Mills; 219 Jackson Street; Lowell

McPhail Associates, LLC has provided geotechnical and geoenvironmental engineering consulting services for numerous other residential buildings and structures in New England as well as in Wellesley:

- Mattapan Heights Phase 5; Mattapan, MA
- Parcel 13; Boston, MA
- 60 King Street; Providence, RI
- Former Van Brodie Building; Lawrence, MA
- Washington Village; Norwalk, CT
- 102 Border Street; East Boston, MA
- Orient Heights; East Boston, MA
- Fairfax Gardens; Taunton, MA
- Hamilton Canal District; Lowell, MA
- Washington Beech; Roslindale, MA
- Franklin Hill; Boston, MA
- Maverick Landing; East Boston, MA
- Orchard Gardens; Boston, MA



- Academy Homes II; Boston, MA
- Newport Heights; Newport, RI
- Quinnipiac Terrace; New Haven, CT
- University Park at M.I.T.; Cambridge, MA
- 150 Centre Street; Dorchester, MA
- Island Creek Village; Duxbury, MA
- Colonial Estates; Springfield, MA
- 555 Pleasant Street; Watertown, MA
- Talbot Commons; Dorchester, MA
- Madison Park Village III; Roxbury, MA
- Shovel Shop Square; Easton, MA
- Town of Wellesley Town Hall
- Town of Wellesley Fire Station
- Town of Wellesley Police Station
- Town of Wellesley Middle School
- Isaac Sprague Elementary School
- Katherine Lee Bates Elementary School
- Babson College (Putney Hall)
- Babson College (Webster Center)
- Babson College (Horn Computer Center)
- Babson College (Olin Hall)
- Babson College (Donald W. Reynolds Campus Center)
- Babson College (Arthur M. Blank Center for Entrepreneurship)
- Wellesley College (Davis Arts Center)
- Temple Beth Elohim

Project Personnel

The following are the key personnel that will be assigned to this project:

- Principal-in-Charge: Ambrose J. Donovan, P.E., L.S.P.
- Project Manager: William J. Burns, L.S.P.

Resumes are attached herein.



AMBROSE J. DONOVAN, P.E., L.S.P.

Title	Principal
Education	Bachelor of Arts in Mathematics (1981) Bachelor of Engineering in Civil Engineering (1981) Trinity College; Dublin, Ireland Master of Science in Geotechnical Engineering (1984) Northeastern University; Boston, Massachusetts
Professional Registration	Registered Professional Engineer: Massachusetts Licensed Site Professional: Massachusetts
Professional Experience	<p>Mr. Donovan has acquired over 30 years of extensive geotechnical and geoenvironmental engineering experience covering a wide range of projects in Massachusetts. His 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).</p> <p>Several notable projects for which Mr. Donovan has been responsible for the geotechnical or geoenvironmental design or provided major consultation include:</p> <p>The Fan Pier; South Boston, MA Westin Boston Waterfront Hotel; South Boston, MA Marriott Renaissance Boston Waterfront Hotel; South Boston, MA Park Lane Seaport Apartments; South Boston, MA World Trade Center Seaport Hotel, E. and W. Office Buildings; South Boston, MA Massport Parcel K – 315 Northern Avenue; South Boston, MA Van Ness and 1325 Boylston Street; Boston, MA SixTen Main Street; Cambridge, MA The Intercontinental - 500 Atlantic Avenue; Boston, MA Trilogy Mixed Use Development; Boston, MA Liberty Hotel (formerly Charles Street Jail); Boston, MA University Park At M.I.T.; Cambridge, MA Novartis Institute for Biomedical Research; Cambridge, MA Waterworks Park; Chestnut Hill, MA</p>
Professional Affiliations	American Society of Civil Engineers Boston Society of Civil Engineers Licensed Site Professional Association NAIOP Massachusetts American Council of Engineering Companies of Massachusetts (ACEC/MA)



WILLIAM J. BURNS, L.S.P.

Title	Senior Project Manager
Education	Bachelor of Science in Environmental Science and Policy (2000) University of Maryland; College Park, Maryland Certificate in Geographic Information Systems: University of Maryland Personnel Protection and Safety Training for Hazardous Waste Site Activities in compliance with OSHA Standard 29 CFR 1910 and SARA section 126(d) (1988)
Professional Registration	Licensed Site Professional: Massachusetts (No. 4381)
Professional Experience	<p>William Burns has served as a field engineer and project manager for a variety of geoenvironmental and geotechnical engineering projects with McPhail Associates spanning a period of over sixteen years. His geoenvironmental responsibilities have included development and coordination of field exploration programs, completion of ASTM Phase I and II environmental site assessments, soil management plans, preparation of various comprehensive response action reports, management and monitoring of site remediation operations, and environmental risk assessment 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 (MCP), and project coordination with other design disciplines. His geotechnical experience includes coordination of subsurface exploration programs, preparation of foundation engineering reports, technical specifications and oversight of construction control.</p> <p>Several notable projects for which Mr. Burns has been responsible for the geotechnical or geoenvironmental design include:</p> <p>Kendall Square Initiative South of Main; Cambridge, MA Former Van Brodie Building; Lawrence, MA 60 King Street; Providence, RI The Green District; Allston, MA 399 Congress Street; Seaport District of Boston, MA Novartis Global Research Campus Expansion; Cambridge, MA MIT Media Lab; Cambridge, MA Massachusetts General Hospital Museum and History Center; Boston, MA 640 Memorial Drive; Cambridge, MA The Box District; Chelsea, MA Equiserve Parking Garage; Canton, MA Maverick Gardens Housing Development; East Boston, MA Intercontinental Hotel; Boston, MA Marriott Boston Renaissance Hotel; Seaport District of Boston, MA Shaw's Market at the Chestnut Hill Shopping Center; Chestnut Hill, MA</p>
Professional Affiliations	Licensed Site Professional Association Environmental Professionals' Organization of Connecticut American Council of Engineering Companies of Massachusetts (ACEC/MA)

KERTZMAN & WEIL, LLP

Kertzman & Weil, LLP is a Wellesley based law firm providing individualized real estate services to its clients. The firm concentrates its practice in real estate transactions, representing individuals, lenders and corporations in a broad range of legal issues relating to real estate, including buying and selling residences and commercial properties, land use, permitting and zoning, relocation services, financing advice and assistance, and title examination, analysis and insurance.

Kertzman & Weil offers experienced, efficient and pragmatic legal advice. We have the knowledge and judgment to close your deal expertly and efficiently. With a significant presence in Wellesley since 1979, members of the firm are deeply involved in the community and the network of real estate brokers, lenders, and developers who service Wellesley and its neighboring communities.

We are a specialty law firm. Our forte is real estate. We limit our practice and provide our clients with first-class service at a fair price.

Our services include:

- Real estate acquisitions and sales.
- Residential and commercial mortgage loan closings for lenders.
- Residential and commercial mortgage loan closings representing buyers.
- Zoning and Land Use issues.
- Municipal permitting issues.
- Executive relocation assistance.
- Construction and architectural agreements for new construction and major renovations.
- Condominium purchases, sales and formation and review of documentation.
- Title insurance.
- Leases.
- Representation of builders, developers and non-profit conservation entities.

KERTZMAN & WEIL, LLP
40 Grove Street
Wellesley, MA 02482

David K. Kertzman
Amy J. Weil
Laurence D. Shind
Jared Mardeuse
Christopher Swanson

Phone: 781-237-8701
Fax: 781-237-6361

PRINCIPALS

Laurence D. Shind, Esquire

Boston University School of Law, J.D. 1980
Clark University, B.A. 1977
Real Estate and Land Use Attorney, WilmerHale, (formerly Hale and Dorr), 1985-2002
Member, Town of Wellesley Board of Selectmen, 1999-2005
Member, Town of Wellesley Permanent Building Committee, 2016-present
Jazz Announcer, WGBH 89.7 FM, Boston, 2003-present

David K. Kertzman, Esquire

Suffolk University Law School, J.D. cum laude 1978
Member, Suffolk University Law Review
Boston State College, B.A. cum laude 1975
Brandeis University, 1968-1970
Boston Latin School, 1963-1968

Amy J. Weil, Esquire

Suffolk University Law School, J.D. 1992
Babson College, B.S. 1987
American University, 1983-1985

LAURENCE D. SHIND, ESQ.

Laurence D. Shind joined the firm of Kertzman & Weil, LLP as a partner in 2002 after 16 years at Hale and Dorr LLP (now WilmerHale) in Boston. Larry concentrates his practice in the areas of residential and commercial real estate conveyancing, zoning, land use and development. In addition, he represents clients in connection with residential and commercial leasing.

A Wellesley resident, Larry is active in town government, where he currently serves on the Permanent Building Committee and is an elected town meeting member. He was a member of the Wellesley Board of Selectmen from 1999-2005, serving as Chairman in 2000. He was also a member of the Wellesley Advisory Committee from 1995-1998, serving as Chairman in 1998. Larry also spent many years as a paralegal instructor at Newbury College in Boston, teaching courses in real estate law and legal research and writing. Mr. Shind is a 1977 graduate of Clark University and a 1980 graduate of Boston University School of Law. He is a member of the Massachusetts Real Estate Bar Association where he has been a guest lecturer and contributing author.

By night, Larry can often be found pursuing his passion for jazz on WGBH radio, 89.7 FM in Boston, where he is the primary fill-in host for the popular weekend program, "Jazz on WGBH, with Eric Jackson".

FIRM EXPERIENCE WITH LOCAL COMMERCIAL PROJECTS

Kertzman & Weil's attorneys offer pragmatic, efficient, and affordable representation for suburban-scale commercial real estate projects. We have experience with commercial development and land use, zoning, and permitting issues and often appear on behalf of commercial clients before local town boards and committees in the Wellesley area. We know who to call and how to get things done when land use and zoning issues arise with your commercial project. Our clients include developers, owners, landlords and tenants involved in developing and leasing suburban office buildings, retail stores, restaurants, and multi-family housing and condominiums.

Recent cases include:

- Land use and permitting representation of a regional sports facility developer for the construction of a multi-use sports complex containing ice hockey rinks, swimming pools, and indoor soccer field.
- Representation of a local developer with permitting issues for the creation of a small-scale mixed-use "smart growth" town center project featuring residential and commercial space.
- Representation of a national restaurant chain franchisee with licensing and leasing issues for the establishment of a fast-casual restaurant in a new large-scale commercial town center project.
- Representation of a local automobile dealership with wetlands and permitting issues in connection with construction of a parking deck.
- Representation of an out-of-state developer in a multi-property and multi-community Like-Kind Exchange involving the sale of a large apartment building and the purchase, financing and leasing of a restaurant, day care center and auto mall.

TRINITY MANAGEMENT

**75 Federal Street, Fourth Floor
Boston, Massachusetts 02110**

**1350 Broadway
New York, New York 10018**

Tel: 617-542-3019; FAX: 617-542-2213

Tel: 212-267-8400

TDD: 1-800-545-1833 x945

**www.trinitymanagementllc.net
info@TrinityManagementLLC.net**



Enhancing Communities, Changing Lives



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

Management Expertise

- ◆ Apartments
- ◆ Condominiums
- ◆ Resident Associations
- ◆ Cooperatives
- ◆ Affordable Housing
- ◆ Market-rate Housing
- ◆ Commercial properties

- ◆ LIHTC
- ◆ Public Housing
- ◆ Transit-oriented Housing

- ◆ Lead-Safe Certified Firm, U.S.EPA
- ◆ Better Buildings Challenge Partner, U.S. Department of Energy

TRINITY MANAGEMENT

Trinity Management, LLC was launched on February 24, 2012 by the principles of Trinity Financial, Inc., to provide exceptional property management services for real estate investment partnerships, condominiums, resident associations, cooperatives, community development corporations, non-profit and for-profit developers. Since our inception, Trinity Management, LLC has consistently demonstrated our 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, now, New York. We presently have more than 7,000 residential units, of

which approximately 20 percent are market and home-ownership, and more than 550,000 square feet of commercial and retail space.

The residential portfolio consists of a mix of affordable, mixed-income, market rate, and condominium properties. 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, HOME and CDBG resources, among others.



The fountain at Trinity Terrace in Dorchester, Massachusetts, is one of the many landscaping features that residents enjoy.



Enhancing Communities, Changing Lives



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.



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, irrespective 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 encourage other property owners to take pride and interest in the well-being of the neighborhood.

TMLLC provides management services for a wide-array of ownership entities throughout Massachusetts, Rhode Island, Connecticut and, soon, New York. We presently have over 6,000 residential units and more than 530,000 square feet of commercial and retail space. The residential portfolio consists of a mix of affordable, mixed-income, market rate, and condominium properties. TMLLC's managed 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, HOME and CDBG resources, among others.

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 — one that indicates a high level of expertise.

Three national organizations sponsor the certification: the National Affordable Housing Management Association, the National Apartment Association Education Institute, and the LeadingAge (formerly The American Association of Housing and Services for the Aging).

The award is designed to recognize 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, local laws; provide equal employment and house opportunities; professionally manage the properties by avoiding disclosure of confidential information, maintaining accurate records, maintaining fiduciary obligations to clients, and protecting all clients' assets; and use 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 Glenn Kulbako

Trinity Management's corporate philosophy includes a dedication to a personal, hands-on approach to 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 over 225 is thoroughly engaged and committed to realize their full potential by effectively using their talents, creativity and professionalism on each client's project. Our success 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 multi-family 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.



Enhancing Communities, Changing Lives





Enhancing Communities, Changing Lives



The Trinity Team

Kathleen D. Franco, CPM, Chief Executive Officer



Ms. Franco is a graduate of Cambridge College with a Master in Management degree and a certification in Organizational Development. She has received many distinguished designations in the housing industry. For more than 35 years, Kate has been involved with all aspects of property management for a multitude of federal/state assisted, tax credit, conventionally financed and public housing programs, as well as condominiums, office buildings and commercial buildings in diverse marketplaces throughout New England and the West Coast. Kate

was previously responsible for providing supervision and direction in the effective management of MB Management Company's real estate management portfolio, creating new business opportunities and continued employee development. Kate served as President of the Institute of Real Estate Management's Boston Chapter, New Hampshire's Granite State Managers Association, and the New England Affordable Housing Management Association. Kate currently serves as the RHA President. Kate is a licensed real estate broker in Connecticut and New York.

Adam Ameden, CPA, Chief Financial Officer



Mr. Ameden leads the company's financial services group. He brings over 20 years of accounting experience to TMLLC. Prior to joining TMLLC, Adam was with Barkan Management

Company, where he was responsible for managing all the financial aspects of that company's growing multifamily real estate company along with providing accounting services to the Ritz Carlton. He has a Bachelor of Science degree in Accounting from Bentley College, and he is a licensed Certified Public Accountant in Massachusetts. He is also a Chartered Global Management Accountant.

Robert E. Cuttle, CPM, Executive Vice President

Mr. Cuttle has more than 20 years of experience in the property management industry. Before joining TMLLC, Bob was responsible for the oversight of The Simon Companies' residential portfolio. In 2001, Bob earned his Certified Property Manager (CPM) designation from the Institute of Real Estate Management (IREM). He served as Chapter President of IREM's Greater Rhode Island Chapter in 2009 and was Regional Vice President for IREM in 2012 and 2013, with oversight of local IREM Chapters in Connecticut, Rhode Island, and Massachusetts. Bob serves now as a Governing Councilor and as Chairman of the Income and Expense Advisory Board for IREM National. He has been designated a Specialist in Housing Credit Management (SHCM) by the National Affordable Housing Management Association (NAHMA) and a Registered Cooperative Manager. He was promoted to Vice President of Property Management at Trinity in September 2014 and to the position of Executive Vice President in March





The Trinity Team



Madeline Stein, Vice President of Building Operations and Systems

Ms. Stein joined the corporate office team in February 2016, moving downtown from her former job as Facilities Director at the Trinity-managed, 775-unit apartment complex known as Mission Park. Maddie has earned designations as a Certified Property Manager and a licensed Real Estate Salesperson. She started her career in her native Rhode Island before moving to Massachusetts and working at many different types of developments, including cooperative housing, mixed-use commercial and residential properties, luxury condominiums and apartments. She joined the Mission Park staff in 2000 as an Assistant Facilities Manager just as it began its “Millennium Project” to renovate the property. Before long she earned the promotion to Facilities Director. Every year, she recommended specific capital improvements, sought the bids, authorized and managed approximately \$4 million a year in capital improvements. After 15 years, Maddie was ready for this new challenge as VP of Building Operations and Systems.



Lisa Morishanti, MSW, LICSW, Vice President of Policy and Strategic Engagement: Ms. Morishanti is a licensed, independent clinical social worker who has extensive experience working with survivors of sexual and interpersonal violence and with individuals with chronic psychiatric conditions and developmental delays. Employed in the social service field for the past decade, she has developed initiatives, educational trainings, and programs to address tenant-related issues, organized communities around self-identified issues, and guided individuals and families towards better physical, emotional, and mental health. Lisa currently sits on the steering committee for the RoxVOTE Coalition, the Board of Directors for the Network La Red, and uses her relationships with numerous social service organizations for the benefit of our housing communities.



Courtney Phillips, Vice President of Marketing and Business Development

Ms. Phillips has more than 10 years of experience in strategic and operational sales and marketing primarily focused in multi-family residential. She also has extensive knowledge of risk management, asset re-positioning, employee recruitment, team leadership and property operations in many diverse housing markets across the country. Before joining Trinity Management, Courtney was the Vice President of Sales and Marketing for a startup where she scaled the marketing efforts and expanded the national sales portfolio. Prior to that, she was a General Manager at Building and Land Technology overseeing the operations of the largest historical residential renovation in the country consisting of 6 high-rise buildings with 1,154 units. She also worked as a Senior Manager for Aspen Square Management evaluating, transitioning and rebranding newly acquired assets. Courtney graduated Magna Cum Laude from Bay Path University and now serves as a member on their Alumni Association Counsel. She gives back to her community as a member of the Board Seat Initiative Committee for the Boston Junior League.



Jill Rioles, Vice President of Program Compliance

TMLLC welcomed Jill Rioles as Vice President of Program Compliance in April of 2018. With 20 + years in affordable housing, she has been a Multi-family Compliance Supervisor at Rhode Island Housing Finance Authority, Compliance Director for Preservation of Affordable Housing, and a Compliance Director at Property Advisory Group. Jill received her Bachelor of Science degree from Rhode Island College. Jill is a member of the Institute of Real Estate Management and New England Affordable Housing Association.



The Trinity Team

Maribel Concepcion, CPM, Portfolio Director



Ms. Concepcion began her property management career 17 years ago, quickly winning promotions to site management and multi-site management. Fluent in Spanish, she has become expert at managing staff, property finances and resident income certifications for tax credit, HOME and project-based Section 8 properties. Maribel most recently worked for National Investments,

Ltd, in Rhode Island, as the Director of Property Management. Maribel's property management credentials include: Certified Property Management (CPM), Accredited Residential Manager (ARM), National Affordable Housing Professional Executive (NAHP-e), and Specialist in Housing Credit Management (SHCM). Maribel is currently working on a business management degree at Roger Williams University in Rhode Island.

Kobby Obiri-Mainoo, Portfolio Director



Kobby Obiri-Mainoo joined Trinity Management in 2014 as the Community Manager for Franklin Hill in Dorchester; by 2016, he had become Senior Community Manager; and in March 2017 has been rewarded for his exemplary financial and leadership responsibilities with promotion to Regional Director.

Kobby has 14 years of experience in the field. He has many professional

designations including, C8P (Certified Credit Compliance Professional), Specialist in Housing Credit Management (SHCM), Certified Professional of Occupancy (CPO), Fair Housing Specialist (FHS) and Tax Credit Specialist (TCS). Kobby received a BA in Business Management from Clark University and an MBA from Nichols College. He also served for 8 years in the Massachusetts National Guard, where he was awarded two Army Achievement Medals and the "Sergeant Major Coin Award."

Jonathan Donahue, CPM, Portfolio Director



Mr. Donahue has more than 20 years of experience in the property management industry. Jonathan has served as a portfolio manager of several condominium communities from the South Shore to the North Shore of Boston as well as two prestigious affordable housing towers in Boston. Jonathan received his Bachelor of Science degree from Westfield State College in 1993. He received his

Accredited Residential Manager (ARM) designation in 1996 and his Certified Property Management (CPM) designation in 2007 from the Institute of Real Estate Management (IREM). Jonathan previously served as an IREM Chapter President. He has also been designated a Specialist in Housing Credit Management (SHCM) by the National Affordable Housing Management Association (NAHMA).

Jennifer Mitchell, Portfolio Director



Ms. Mitchell came to Trinity Management with over 16 years of experience in the property management field most recently from The Dolben Company, where she served as a Regional Director. Prior to Dolben, Jennifer served as an Assistant Vice President at Lincoln Properties overseeing a portfolio of over 6,000 properties.

Jennifer has earned the Accredited Resident Manager (ARM) and Certified Apartment Portfolio Supervisor (CAPS) designations. Jennifer has received numerous awards for her professional achievements and industry accomplishments. Jennifer received a degree in Business Administration from Northeastern University.



Recent Awards and Accomplishments



Washington Beech was named a Community of Quality by NAHMA and an Exemplary Family Development by NEAHMA in 2015.

Vanguard Award, 2015, Glenark Mills/Oaks, in the major rehabilitation category, from the National Affordable Housing Management Association (NAHMA).

Vanguard Award, 2016, Bristol Commons/Lenox Green, in the New Construction, More than 100 Units category (NAHMA).

Community of Quality designations, 2015, Washington Beech (Boston, MA), Appleton Mills (Lowell, MA), The Blakeley (Lawrence, MA), and Newport Heights (Newport, RI) from NAHMA.

Community of Quality designations, 2016, Forest Hills (Boston, MA), Countryside Village (Oxford, MA), The Rowe (New Haven, CT), Franklin Hills (Boston, MA).

Exemplary Family Development award, 2016, Washington Beech, from the New England Affordable Housing Management Association (NEAHMA).

Top 100 Affordable Property Management Company, 2015, 2016, 2017

MassHousing, Company Awards, Multi-Million Dollar MBE and Million Dollar WBE (contracts with minority and women-owned businesses), 2015, 2016, 2017



Glenark Mills/Glenark Oaks won NAHMA's Vanguard award for a major rehab in 2015.



Left, Bristol Commons won a Vanguard Award in 2016 in the New Construction, More than 100 units category.



Left, Appleton Mills was designated a Community of Quality by NAHMA in 2015.



Enhancing Communities, Changing Lives





Enhancing Communities, Changing Lives



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.



NEI has greened over 140,000 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
 - Rebates and Incentives
 - 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
- Monitoring and Optimization
- Operations & Maintenance Planning and Training
- Owners Representative Services

“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 basically are 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*



Projects

The Anne M. Lynch Homes at Old Colony

A phased demolition and new construction redevelopment of an 845-unit 1940's-era public housing project.

- LEED Homes and LEED Homes Midrise Platinum certification - Residential Buildings
- LEED New Construction Gold - Community Building
- Enterprise Green Communities compliance
- HERS score of 53 (average)
- \$279,000 in utility rebates and incentives



Bristol Commons

A two-parcel demolition and 160-unit new construction, HUD Hope VI residential development comprised of townhomes, duplex, apartment units and community center.

- Energy Star for Homes v3 certification
- Enterprise Green Communities certification
- HERS score of 54 (average)
- Near Passive House standards of air infiltration (0.84 ACH 50)



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 work on hundreds of building projects a year and 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.



Qualifications and Experience

New Ecology's work is to bring the benefits of sustainable development to the community level, with a concerted emphasis on underserved populations. A mission-driven nonprofit, we seek 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 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 through our relationships with MIT and Tufts graduate schools of planning 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 LEED certification, 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.

NEI provides consulting services to approximately 80 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. NEI also provides services and expertise to national green building actors such as LISC, Enterprise Community Partners, Neighborworks, the US Green Building Council and the Home Depot Foundation. NEI was an advisor to the revisions to the Enterprise Green Communities Green Criteria. Additionally, we have raised millions of dollars in funding for greening our projects from a variety of sources, including foundations, government agencies, and utility companies.

New Ecology is also the designated green technical assistance partner to the Connecticut Green Bank and an energy auditor for the Maryland Department of Housing & Community Development. New Ecology was competitively selected by the MA Division of Capital Asset Management and Maintenance (DCAMM) and the MA Department of Energy Resources in 2015 as a pre-qualified statewide contractor to state and local agencies in 7 categories of Energy Consulting Services.

LAUREN A. BAUMANN, LEED AP, NaCPHC
New Ecology, Inc.
15 Court Square, Suite 420, Boston, MA 02108
baumann@newecology.org 617-557-1700 ext. 7023



SUMMARY

Ms. Baumann joined New Ecology, Inc. in 2005. She has more than ten 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 and LEED 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. June 2005-Present
Boston, Massachusetts

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 June 2003-August 2004
Melville, NY

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, NaCPHC

California Public Interest Research Group

Berkeley, CA

Fall 2002

UC Berkeley Campus Organizer

- Coordinated campaigns for non-profit student organization that addressed environmental, democratic, and social justice issues
- Recruited students 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, LEED AP, C.E.M., CBCP
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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 Bachelor 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, LEED AP, 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

1998

Bachelor of Science, Chemistry, Physics

University of Massachusetts, Amherst, MA

2005

Master of Landscape Architecture

CERTIFICATIONS:

Association of Energy Engineers (AEE) – Certified Building Commissioning Professional (CBCP)

Association of Energy Engineers (AEE) – Certified Energy Manager (C.E.M.)

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:

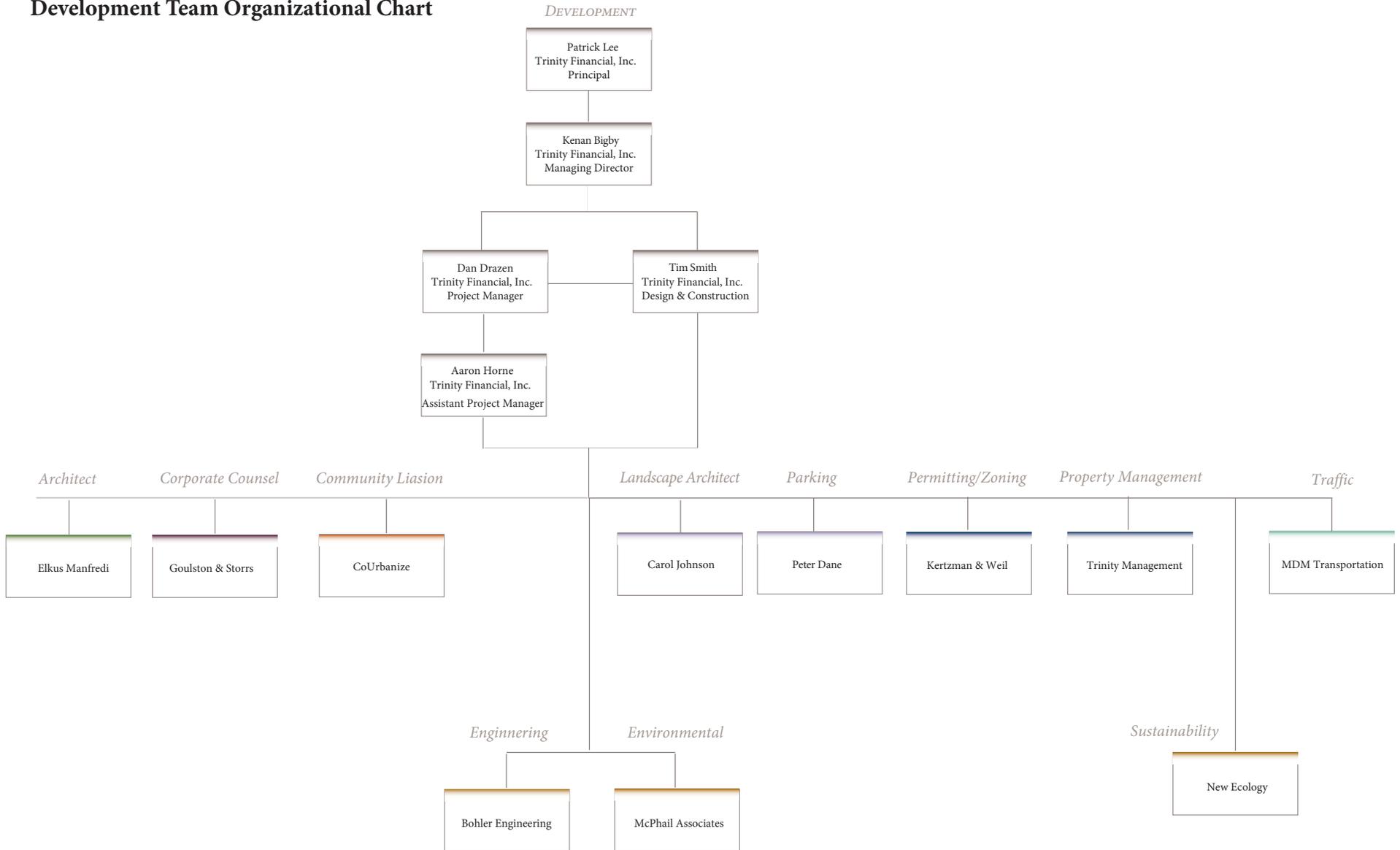
Microsoft Office Suite, Adobe Suite, QuickBooks, Delta Controls (BMS), AutoCAD, eQuest, Dialux, Rhino, Microsoft Projects, Primavera, ArcGIS

Section 1: Table of Business References

Trinity References				
<i>Name</i>	Rob May	Bernard Lynch	Sheila Dillon	Mark Boyle
<i>Relevant Project(s)</i>	Brockton Phase 1	Appleton Mills	Carruth, Treadmark	One Canal
<i>Organization</i>	City of Brockton	City of Lowell	City of Boston	MBTA/MDOT
<i>Title</i>	Director of Planning and Economic Development	Former City Manager	Department of Neighborhood Development	Office of Real Estate and Asset Development
<i>Address</i>	45 School Street, Brockton, MA 02301	One Saddleback, Plymouth, MA 02360	26 Court Street, Boston, MA 02108	Ten Park Plaza, Suite 5720, Boston, MA 02116
<i>Phone Number</i>	508-580-7113		617-635-4353	617-222-3255
<i>Fax Number</i>				
<i>Email Address</i>	rmay@xcobma.us	blynch@communityparadigm.com	sheila.dillon@boston.gov	mboyle@mbta.com

Wellesley Square Development

Development Team Organizational Chart



Section 2 – Development Concept

1. An indication of whether or not the respondent proposes to lease both the Tailby Parcel and the Railroad Parcel or only one of the parcels.

Trinity Financial, Inc. proposes to lease both the Tailby and Railroad parcels for development.

2. Proposed use of the property, project total SF, and SF by use, number and type of facilities, info on parking, amenities.

A Note About Community Outreach

As part of our initial due diligence, Trinity reached out to several community groups in Wellesley as well as some of the abutting property owners. Through this engagement effort, we had discussions with members from the following organizations:

- Wellesley Arts Alliance
- Wellesley Theatre Project
- College Heights Neighborhood Association
- Sustainable Wellesley

The feedback we received from these conversations has helped to inform the design and program for the Project that is described in this section. If Trinity is designated as developer by the Town, we would plan to engage with these groups, as well as business owners and residents, to ensure that the Project responds to the needs of the local community.

We also contacted the owners of the One Hollis office building next to the Tailby Lot, but we were not able to speak with them prior to the submission of this proposal. Trinity also sent a letter to the owner of the standalone, two-family building located at 127 Linden Street, but we did not hear back from the individual who owns this property.

Introduction

The Trinity plan for the Wellesley Square redevelopment envisions a vibrant mixed-income and mixed-use project incorporating residential condominiums and rental apartments and cultural/arts spaces, maintaining commuter and public parking, improving access to public transportation, supporting adjacent open space and commercial businesses, and enhancing the overall Wellesley Square experience.

The built program totals are summarized as follows:

Tailby Lot

- Condominium: 45 units (two- and three-bedrooms) totaling 116,200 square feet
- Open Space: 16,000 square foot Planted Deck
- Parking: 405 Spaces
 - 90 spaces for Condominium Units
 - 293 spaces: Replacement Town Spaces
 - 22 spaces: Flex Spaces

Railroad Lot

- Cultural/Arts Space: Black Box Theatre and Support Space totaling 9,200 SF
- Rental Apartments: 45 units (one, two- and three-bedrooms), including 10 artist live/work units totaling 76,500 square feet
- Open Space: 3,700 square foot Roof Deck
- Parking: 45 Spaces

Overview

On the Tailby Lot that is north of the MBTA tracks we propose to replace all of the 293 town-managed public spaces on a single level at grade that occupies the entire site, and in a second level parking deck at the eastern side of the parcel. The remainder of the Tailby Lot to the western edge will be revitalized with 45 luxury condominium apartments in a four-story building fronting on Linden Street with parking on the second deck level under the condominium structure. Access to the town-managed parking and the private spaces will continue to be from Linden Street as currently configured. The Tailby Lot will also yield an additional 22 spaces which shall be flexibly assigned to guests, management company, service vendors, shared vehicle spaces such as Zipcar, etc. The parking shall be visually concealed from public rights-of-way. The structure supporting the condominium will feature a planted and landscaped deck of approximately 16,000 SF which shall meet or exceed the open space requirements of the Town. The landscaped spaces shall be visible from the street in the form of planted front yards; a two-story portal shall provide passersby with long view corridors into the interior of the court while preserving privacy for condominium residents.

On the Railroad Lot that is south of the MBTA tracks we propose to construct 45 mixed-income rental apartments with 45 parking spaces at grade, under the building, and concealed from public view. A roof deck of approximately 3700 SF provides a private open space amenity for residents. Of particular note is the addition of a 9,200 SF cultural center that serves to provide direct and material support to the visual and performing arts in Wellesley. Since the theatre's main after-hours of operation are likely to complement daytime use, these synergies assure that the town-managed parking spaces will be available to more Wellesley and visiting users and parking will be used more efficiently.

The discrete parts of this proposal are backed by commitments to improve the pedestrian access patterns particularly in regard to transportation access. Currently deficient by any definition of accessibility, we propose to begin working immediately with the MBTA to provide the first accessible train platforms in Wellesley. To accomplish this objective at a difficult railway crossing, we propose to build two elevators to solve the vertical access deficiencies. These interventions will transform this experience for pedestrians of all abilities.

3. Discussion of physical plan and arch character; how various program and physical elements relate to one another

Trinity's proposal for Wellesley Square is organized around four primary working principles:

- Placemaking and Presence
- Access
- Community Arts
- Sustainable Design

Placemaking and Presence

The Tailby and Railroad parking lots have served the commercial and transportation needs of shoppers and commuters since the mid-20th century. The plan acknowledges the preferences of the Town to maintain this parking. However, the active mixed-use character of Wellesley Square and its physical nature strongly suggests that parking is not the only best use for these parcels. The plan responds to the Town's vision to enhance and further activate Wellesley Square by bringing residences "downtown" and adding cultural offerings in the form of a flexible arts and theatre space. We recommend that the alignment of Railroad Avenue be modified to accomplish two important objectives: to remove a dangerous and ambiguous intersection at the corner of Railroad Ave and Central Street (drivers often veer left into this oblique street from Crest Road); as importantly and without any detriment to the traffic patterns, to create a front "porch" or plaza for gathering or events in front of the proposed arts space. This new plaza space belongs to the Town as a result of this development and enhances the importance of this civic square.

Finally, by locating mixed-income housing in this location, daily pedestrian activity is increased which directly contributes to safer streets, and benefits local merchants and businesses. In terms of the form of the buildings and massing, the Railroad Lot building formally "completes" the square with a prominent building that is appropriately scaled for this location given the open space that fronts onto the parcel. At four stories, the Railroad building complements other Wellesley Square buildings of similar height. The Tailby condominiums form an attractive curved edge to the Linden Street experience with a landscaped recess to complement the massing. Views through a portal into the interior court are provided from Linden Street to perforate the street wall and provide longer views. The height of the buildings at four stories maintains the massing of the two- and three-story residential buildings that are at a higher elevation in the College Heights neighborhood. Articulation of the Linden Street façade will be residential in character to respond to the single-family neighborhoods to the north and west.

Access

The plan generally maintains the current vehicular patterns at Tailby. Pedestrian access and circulation is improved between the sites and the commuter rail, and between the site and Wellesley Square. Despite efforts to provide ramped access to platforms, there are no commuter rail stations in Wellesley that provide accessible boarding and de-boarding of trains. This is unacceptable. The unique aspect of these parcels at Tailby and Railroad, which bookend an important commuter rail stop, provides an obvious and "can't miss" opportunity to vastly improve the pedestrian experience for all users, especially for those with physical challenges. We expect to engage the MBTA on this private-public effort to rectify a long-deficient condition for the immediate benefit of Wellesley citizens and visitors. The master plan incorporates elevators, platforms, and ramps to solve this condition.

Also, the plan responds directly to the Town's stated preferences for maintaining convenient and safe commuter access to the MBTA trains.

Community Arts

The central location of the Railroad Parcel in Wellesley Square offers another opportunity for this redevelopment to be responsive to resident use and patronage. Many Wellesley children and adults participate in organizations devoted to the visual and performing arts. However, it appears certain that few spaces exist within the Town that offer appropriate and affordable venues to support their efforts. The development team has been in contact with several organizations to gauge interest and support and believes such a use and facility is good for the arts and beneficial to the Town.

The master plan includes a flexible arts center as a “give back” to the community. Its location fronting on an enhanced sidewalk/plaza (described above) as well as its adjacency to public open space creates limitless possibilities for art shows, theatre productions, after school programs, arts-in-the-park, etc.

Sustainable Design

In every project we develop we seek to achieve the highest level of sustainability. Often perceived as energy-efficient design and renewable materials, sustainability may include these objectives (as we describe elsewhere) but also convey a much broader concept. We offer the following ideas for your consideration: 1) by definition, our proposal is Transit Oriented Design (TOD) due to its proximity to a major commuter railway. Residents and users of the non-residential space can come and go without vehicular use; increased reasonable density near transit lines is a sustainable principle; 2) located near the central business district of Wellesley Square, the adjacency encourages walking and biking for shopping and entertainment; 3) there are environmental concerns that need to be evaluated as described herein; we expect to remediate any contaminated soils and structures that may have been paved over when environmental concerns were less understood and deliver a site that meets all environmental requirements for new construction; 4) the improvement of an existing parking lot assures that no virgin land will be taken as a result of this project; 5) the Project will retain its stormwater run-off thus reducing the strain on the Town’s infrastructure; and 6) the quality of construction and materials assure a development that is built to last, itself a sustainable concept. Thus, in addition to the material choices and energy-efficient approaches described below, we place a high value on this site as being truly sustainable for more holistic reasons.

4. Environmental impacts, including lighting, noise, and traffic, during construction and operation phases of the project. Mitigation should be proposed as necessary and appropriate.

Environmental Considerations

From our preliminary due diligence, we know that the Tailby lot is situated on the site of a former plant nursery and greenhouse before it was converted in the 1940s to surface parking. It might be expected that any new work in this parcel will encounter subgrade materials or underground storage tanks that may have contained fuel. Also, given its history, pesticides may be located in the soils. However, we expect the environmental issues and remediation caused by the nursery to be relatively minor in nature. More significantly, preliminary research has indicated history of a large release of a contaminant further northeast on Linden Street, which is now occupied by several non-residential uses. Since the Tailby Lot is downgradient of the site, groundwater monitoring may have to be executed to document the location and impact of this release. However, since our plan proposes a ventilated garage structure at grade level, we believe any impacts can be mitigated with normal construction methods.

Historic documents of the Railroad Lot indicate past structures containing an “oil room and tanks”. These types of conditions are not unusual in towns that have a long history of commercial and industrial uses. Also, since these lots are near a railroad, other soil measures (lead, ash, etc) will be part of any Phase I and Phase II environmental site assessments that occur as some of the earliest steps in the development process. Since Trinity has extensive experience redeveloping heavily urban sites, we are accustomed to, and highly experienced in, managing the testing, remediation, and clearance of parcels that are very much like the Tailby and Railroad Lots. Means and methods for all testing and remediation work will strictly follow all local, state, and federal requirements and will be communicated clearly to town merchants and residents.

Lighting and Noise

Prior to construction, we will work with the Town and adjacent abutters to craft a construction logistics plan that delineates the impact the Project will have on the adjacent area with regard to vehicle access, mitigation to impacts on neighboring streets, construction hours, and generally what to expect of a project of this type and magnitude. Also, part of this discussion and plan is determine and assure that the plan complies with local ordinances with regard to noise, dust, and construction lighting.

As part of the design review process, we expect to work closely with the Town to review permanent lighting options. In general, we plan to select lighting fixtures that provide secure passage through the site without negatively causing unnecessary glare or light spills into the sky. Much progress has been done in developing and manufacturing attractive “dark sky” fixtures and we are experienced with specifying these fixtures to the best advantage of our development and our neighbors. As outlined in this proposal, this property will be managed by our award-winning affiliate Trinity Management LLC. Noise from the site which may be caused by residents will not be an issue as long as the property is properly and carefully managed. Noise from cars will be mitigated by the fact that most cars will be garaged. Construction hours will be structured so as to avoid noise during the early morning or late evening.

Storm Drainage & LID Techniques

The existing project site, comprised of the Tailby Lot and the Railroad Avenue Lot, is currently occupied by asphalt parking areas, sidewalks and landscape buffers. Based on visible features and record GIS information, runoff from the Tailby Lot Site is collected in on-site catch basins and directed to the municipal storm drain system in Linden Street, effectively un-treated, and the runoff from the Railroad Avenue Lot surface flows off the site, uncontrolled and untreated, and is collected downstream in catch basins within Railroad Avenue. Prior to design commencement, a field survey of the on-site collection system, as well as a video inspection of existing service connections to be re-used, will be completed to confirm conditions.

The proposed stormwater management system will be designed to comply with the Massachusetts Stormwater Handbook as well as the local Town of Wellesley requirements. Stormwater runoff will be collected and treated on-site, as necessary, and will be routed to on-site subsurface infiltration and detention systems in order to reduce the impacts on the municipal drainage system and promote groundwater recharge. The proposed drainage system will be comprised of a treatment train designed to provide at least 80% removal of Total Suspended Solids (TSS). The treatment train may consist of sweeping of parking, site driveways and drop-off areas, deep sump and hooded catch basins, proprietary treatment units and subsurface infiltrations systems. As none of the existing impervious surfaces have formal BMPs, the Project will result in a substantial improvement to overall stormwater quality.

The sub-surface infiltration and detention systems will be equipped with overflow connections to the existing storm drainage mains in the adjacent Linden Street and Railroad Avenue that will limit peak flow rates to be similar to, or below, the existing conditions. Since there currently is no existing drainage service connection from the Railroad Avenue Lot, a new connection is anticipated to the Railroad Avenue drain system. Routing of this connection shall be located to minimize construction trenching activities near the 150+ year old black oak tree known as the “Station Oak.”

The project site is also located within the Charles River watershed and will be designed to meet additional phosphorus TMDL (Total Maximum Daily Load) reduction standards. The drainage design

will incorporate a combination of infiltration systems and proprietary treatment devices to achieve the desired levels of phosphorous removal as required and in accordance with the Charles River standards.

Several other Low Impact Development (LID) techniques are being considered throughout the Project to further enhance not only the stormwater quality and rates of runoff, but also the aesthetics of the property and overall pedestrian experience and comfort. Specifically, there are courtyard areas being developed above the podium levels of parking that will act as green roofs. The courtyards are anticipated to be a combination of soft scape areas inclusive of ornamental flowering trees and other lower plantings as well as portions of hard scape elements, which will be light colored and highly reflective materials. These green roof areas will have a number of benefits including enhanced stormwater runoff absorption, reduced runoff impact to the municipal system, air purification, creation of recreational amenity spaces and improved aesthetics.

An additional element of LID design is careful consideration of the site design itself. The proposed development approach greatly enhances the quality of the stormwater runoff by covering the majority of the parking with buildings and courtyards, thereby generating more landscape and roof runoff in place of the current vehicular parking lot runoff. This approach to site design results in a significant level of improved stormwater quality over existing conditions and over conventional surface-parked development projects of similar size. The majority of the site will be comprised of buildings producing clean roof run-off, green roof courtyards, landscaping, and interior parking garage space that produces no stormwater run-off. This is a significant improvement over existing conditions, and would also be a reduction over conventional developments with all surface parking, regardless of BMPs.

In summary, the stormwater system and associated discharges from the development will be greatly enhanced over current conditions through the implementation of a variety of BMP and LID techniques. The overall system will be compliant with the Massachusetts Stormwater Handbook, the local Town of Wellesley requirements and the TMDL requirements of the nearby Charles River. Additionally, a long-term operations and maintenance plan will be used to assist the Property Manager in maintaining the stormwater BMP's in appropriate operational condition.

5. Construction mitigation plan outlining the phasing for construction or relocating public parking if not displace local merchants, commuters, or any public parking.

Given the Town's desire to keep as many commuter spaces in operation as possible during construction, the Phasing of the work presents as great a challenge as any site undergoing redevelopment. The transportation needs of commuters have to be balanced with an expeditious approach to construction in order to minimize the disruption to Wellesley Square neighbors and merchants. There are significant constraints and concerns for both sites: landlocked by public ROW, private property, and MBTA tracks, construction access is difficult at best; the safety concerns of commuters and construction workers cannot be compromised; the liability exposure to the Town and Developer must be carefully considered; and the construction team will also require staging, buffer zones, and laydown areas for materials and equipment.

Trinity proposes to work with the Town to develop a construction phasing plan that will allow approximately 150 parking spaces (at least 51% of the spaces) to remain open during the construction by phasing the construction of the two lots and managing the construction of the Tailby lot to allow parking during construction, consistent with a construction schedule agreed upon with the Town. Trinity will also pursue leasing private, off-site parking spaces in lots that are proximate to the site.

6. Description of the benefits and detrimental impacts of the project to the surrounding area and to the Town of Wellesley including, without limitation, discussion of:
 - a. Any Town services that will be required;
 - b. A description of any other community benefits associated with the Facility; and
 - c. Analysis of the ways in which the proposal satisfies the Development Guidelines in Section 3 of this RFP.

Trinity's proposal for Wellesley Square provides a number of benefits to the Town of Wellesley and the community, which are responsive to the Town's objectives and are described below.

Mixed-Income Housing and SHI Inventory: The residential component of Trinity's proposal calls for a total of 90 units: 45 for-sale condominiums and 45 mixed-income rental units. Of the 45 rental units: 23 will be affordable at 80% of area median income and the remaining 22 will be market-rate units. All 45 rental units will count towards the Town of Wellesley's Subsidized Housing Inventory for 40B.

Replacement Parking: Trinity's proposal replaces all 293 existing surface parking spaces on the Railroad and Tailby Lots with a new structured parking facility located on the Tailby Lot, at an estimated hard and soft cost of approximately \$15.69 million. At the completion of construction, the Town of Wellesley will own and may, if it chooses, manage this new structured parking facility. All of the parking revenue generated by the 293-space structured parking facility will go to the Town of Wellesley.

Community Arts: The arts are one of Wellesley's most valuable cultural assets. Our proposal works to strengthen the community arts by including a publicly accessible arts space, including a 200-seat black box theater, rehearsal space, an art gallery space, and administrative/support space. The residential component of Trinity's proposal also includes 10 artist live/work units. We have had some initial discussions with the Wellesley Arts Alliance and its member organizations to design the arts space. Our program for the arts space reflects the feedback we received during these conversations. A letter of support from the Wellesley Arts Alliance is included in the Appendix at the end of this Section.

Improved Access: Pedestrian and ADA access across the commuter rail tracks is challenging. Trinity's proposal responds to this need by incorporating elevators and stairs on both sides of the commuter rail lots that will service a new ADA accessible commuter rail train platform, the parking and residential levels of the Project, as well as Crest Road.

Parking Revenue and Hold Harmless Fund: We understand that the Railroad and Tailby Parking Lots are generating approximately \$300,000 annually for the Town of Wellesley. Trinity's development budget includes a \$600,000 "Hold Harmless" line item to reimburse the Town for the revenue that it will not be able to capture while parking is taken off line and the project is being constructed. The "Hold Harmless" fund is sized assuming our projected 30-month construction period.

Massing and Design: At three to four stories, the massing, design and height of Trinity's proposal respects the character of Linden Street, the College Heights neighborhood, and Wellesley Square.

Financial Incentive with 40R: By adopting a 40R district, which is a smart growth overlay enabled by Massachusetts law, the Town of Wellesley could benefit financially by up to \$311,000: a \$200,000 incentive payment from the Commonwealth’s Smart Growth Housing Trust Fund and a density bonus payment of approximately \$111,000.

Other Revenue to the Town: Perhaps as, if not more significant is the increase in projected property tax revenues to the Town. With total development costs of approximately \$102.3 million and excluding the aforementioned \$15.69 million attributed to the parking facility that will be given to the Town, it is reasonable to estimate that the assessed value of the Tailby and Railroad lots will increase from the current \$2.4 million to approximately \$86.61 million, if not more. At the current mil rate of \$11.95 and assuming no property taxes are currently being collected from the Lots, that \$86.61 million estimated assessed value for the Trinity proposed development is projected to generate more than \$1 million in new additional tax revenues to the Town.

Finally, as part of our proposed “purchase price” to the Town, we propose to pay the Town an additional sum that is detailed in our Price Proposal” submission.

7. A detailed description of the manner in which the construction and operation of the Facility will be financed, including, but not limited to, approximate amount of equity and construction financing (separately identified), identification of investors, banks, mortgage companies, real estate investment trusts or other financial institutions providing financing, the extent to which the Facility or income derived from the Facility’s operation will be used to secure financing and the nature of the security.

As a result of working on prominent, large-scale development projects for the last 30 years, Trinity Financial is well known by many large investors and private lenders in the industry. Trinity has a long history of working with local, regional and national lending institutions to finance sizeable and complicated projects. A particular strength that Trinity provides is its extensive experience and acumen working collaboratively with public partners to structure financing that is mutually favorable for all parties. This provides an opportunity for the Town to work with the developer throughout the predevelopment process to ensure that the Town’s goals and objectives are met while also maintaining a feasible development strategy and perspective.

For the Wellesley Square development, Trinity has had preliminary conversations with its network of lenders and investors who have expressed interest in the development. Our financing plan for the development contemplates 65% of the required capital will be debt and the remaining 35% will be equity. This approach is similar to what we have used on several of our recent development projects. The following is the approximate amount of equity and construction financing that we are projecting for the Wellesley Square Project.

Financing Source	Total
Debt - 65%	\$66,520,000
Equity - 35%	\$35,820,000
Total	\$102,340,000

8. The proposal must include a Management Plan for the ongoing management and operation of the Facility, including proposed operators/managers and their experience.

The Management Plan is included at the appendix located at the end of this Section.

- 9. A 20-year operating pro forma highlighting the key assumptions that demonstrates the projects financial viability. The pro forma should include debt service and property taxes, capital improvements and lease payments to the Town.**

See Section 6, Project Financing and Financial Analysis, for the 20-year operating pro forma.

- 10. Parking and traffic management, pedestrian and bike safety are key concerns; underlying assumptions of the needs of the site for different hours of the day as well as the traffic mitigation and parking plans. Given the constraints of the site, including the MBTA, the Dev is encouraged to propose creative solutions to traffic and parking for the proposed uses, and to include any details of any solutions including contingencies and conditions for implementing those solutions.**

Pedestrian Access

Overall access to the train station and train station parking is significantly improved by the proposed Trinity Financial development because of improved elevator access. This is a guiding principle of the development and the features of this development will markedly enhance the pedestrian experience. As has been found at many new developments, the construction of new buildings at each of these lots will have a traffic-calming influence on vehicles passing by on Central, Crest, and Linden. This has a direct impact on pedestrian and cyclist safety. We would also like to engage with the Town on innovative traffic calming measures on Central Street and intersecting ways to enhance the pedestrian character of Wellesley Square.

Finally, and as mentioned previously, it is critical that this redevelopment project address and achieve significant improvements in accessibility between the sites and to commuter trains. There is an unmistakable opportunity to vastly improve pedestrian access to the commuter rail that cannot be overlooked. Engaging the MBTA at the earliest possible juncture will assure progress to achieve this end.

Needs of the Site at Different Times of Day

Our proposal consolidates all commuter parking on the Tailby lot. Over the course of a typical day, it is anticipated that the commuter parking spaces will be used not only by commuters but also by shoppers, attendees to the new theatre, and others requiring publicly provided parking.

The new garage will give the Town the opportunity and the ability to control rates and other operational issues, to adjust rates and operating practices to increase or reduce out of town parking so as to either increase the revenue stream to the Town or to create more spaces for Wellesley Square shoppers and employees depending on their requirements. If the Town made no change to current rates, it should be expected that traffic would largely remain the same as existing with respect to overall volumes and hourly traffic counts. Should the Town elect to adjust rates in the new garage, traffic volumes would need to be studied as they may then change.

Of the current Railroad Lot spaces approximately 75% were for short term, non-habituated clients for whom we will have to install way finding signage to direct them to the Tailby Garage. This means that there will be slight increases in car counts over the railroad bridge along Crest Road and Linden between 9 AM and 4 PM of perhaps ten to fifteen cars per hour in each direction. The Town may

elect to control either access for out-of-town commuters or for all commuters through rate adjustment.

Traffic Analysis and Findings

The residential units themselves generate very little increase in traffic. For the 135 residential parking spaces created, it should be expected that only half to three quarters of those vehicles will move on any given day such that total vehicle trips from the two residential buildings will not make a material impact on traffic in the area.

- Based on current survey of parking and trip activity, relocation of short-term spaces from the Railroad Lot to the Tailby Lot will result in a modest shift of approximately 30 vehicle-trips (15 entering and 15 exiting) during peak traffic hours representing an inconsequential impact to travel on Central Street, Washington Street, Crest Road and Linden Street.
- Survey of existing traffic activity at the Tailby Lot shows a consistent peak directional flow of 88 vehicles entering or exiting the lot during peak hours, which will be augmented by a modest increase of 15 peak directional vehicles reassigned from the Railroad Lot short-term parking activity.
- US Census data for the site locus and adjoining neighborhood shows transit use averaging 12 percent for commuter travel. Given the Site's immediate proximity of commuter rail, actual mode share for transit is expected to be greater for the Project, but analysis assumes existing neighborhood trends and holds 12 percent for planning purposes.
- Based on ITE Trip Generation 10th Edition trip rates, and conservatively assuming a 12 percent transit mode share, the Project is projected to generate a net total of between 36 and 44 vehicle-trips during peak traffic periods between the two lots. This represents a net total of between 18 and 22 vehicle-trips for each lot with 45 units of multifamily units on each lot.
- Existing traffic volumes at "gateway" intersections proximate to each lot range from 1,150 vehicles at Linden Street/Crest Road; 1,450 to 1,650 vehicles at Central Street/Crest Road/Railroad Avenue, and 2,050 to 2,400 vehicles at Washington Street/Grove Street during peak hours. Relative trip increases for the project represent a modest 0.5% to 1% change at these locations relative to existing conditions – an immaterial increase.

Proposed Traffic Mitigation

- Railroad Avenue in its current alignment presents unconventional geometry that directly conflicts with turns to/from Crest Road and that creates an awkward (and potentially unsafe) pedestrian environment. Railroad Avenue is also used as a "bypass" to Central Street by eastbound commuters to avoid queues extending from the nearby Washington Street signal.
- Realignment of Railroad Avenue as a one-way road (toward the Post Office) with a traditional "T" type intersection at Central Street improves the pedestrian environment at the Crest Road corner, eliminates use of Railroad Avenue as a convenient "bypass" to Central Street and accommodates the ingress requirements of the Railroad Lot, Post Office and Town Hall from Central Street.

- While closure of Railroad Avenue was considered, doing so would require conversion of the Washington Street signal to allow left-turns onto Grove Street (toward the Site, Post Office and Town Hall). This modification would potentially create additional delays for eastbound travel on Central Street that are otherwise avoided by the realignment and conversion of railroad Avenue to a one-way operation to accommodate these uses and the associated replacement of short-term public parking spaces.



Section 2 Appendix:

- Letter of Support: from Wellesley Arts Groups
- Management Plan

Wellesley Arts Alliance

May 31, 2018

Board of Selectmen's Office
c/o Meghan Jop, Assistant Executive Director
528 Washington Street
Wellesley, MA 02482

Ms. Jop:

The Wellesley Arts Alliance is pleased to submit this letter of support for Trinity Financial's (Trinity) proposal for the redevelopment of the Railroad and Tailby parking lots in Wellesley Square.

The Wellesley Arts Alliance is a non-profit organization comprised of the following visual and performing arts groups, all of which are based here in Wellesley:

- Wellesley Choral Society
- Wellesley Symphony Orchestra
- Wellesley Theatre Project
- Wellesley Players

Wellesley has long had a vibrant arts community, which has enriched our town's quality of life and culture. However, the growth of the arts in Wellesley has been stymied because we do not have the benefit of a community performing arts space. Without a theater here in town, many performing arts groups have to pay to rent space, typically outside of Wellesley, to rehearse and stage their productions. This not only draws the arts out of Wellesley, but the cost of renting theater space places a significant financial burden on these artist groups.

Trinity's proposal responds to this need for a community performing arts space by incorporating a publicly accessible 200-seat black box theatre, art gallery, and administrative/support space, which represents a total investment of roughly \$3 million. We are also supportive of the ten live/work apartments that Trinity has included in their program; these units will save artists from the cost of having to rent both a living space and a separate studio space.

We appreciate your consideration of this letter, and we urge the town of Wellesley administration to select Trinity as the developer for the Railroad and Tailby parking lots. By developing a community arts space along with much-needed mixed-income housing, Trinity's proposal will help to breathe new life and vitality into Wellesley Square and strengthen the town's arts community.

Sincerely,



Michael Scholl, President

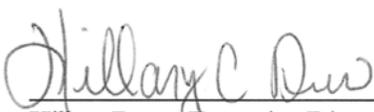
Wellesley Arts Alliance



Darlene Howland, President, Wellesley Players



Leslie Holmes, President, Wellesley Symphony Orchestra



Hillary Drew, Executive Director, Wellesley Theatre Project



SECTION ONE

DESCRIPTION OF OUR COMPANY BACKGROUND/ PROFESSIONAL EXPERIENCE

A. An Introduction to Trinity Management LLC

Trinity Management, LLC's (TMLLC) mission is to meet the programmatic and financial goals of our owners by providing exceptional, customer-focused property management services. Our goal is to aid in the revitalization of communities, enhancing the lives of our residents and neighbors, strengthening local commerce, and fostering opportunities for positive growth.

TMLLC was launched on February 24, 2012 to provide exceptional property management services for condominiums, resident associations, cooperatives, community development corporations, non-profit and for-profit developers. TMLLC manages properties throughout Massachusetts, Rhode Island, Connecticut and New York, with more than 7,000 residential units and more than 550,000 square feet of commercial and retail space.

The residential portfolio consists of a mix of affordable, mixed-income, market rate, cooperative and condominium properties. TMLLC's managed 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, HOME and CDBG resources, among others.

Our maintenance program is proactive and stresses preventative maintenance. 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. TMLLC has demonstrated expertise in managing properties during all stages of the development process, from providing valuable input in the conceptual stage, to marketing properties during the initial lease-up period, through successful management of stabilized properties years after construction is complete. We are dedicated to a very personal, hands-on approach to all the details of management.

At TMLLC, every member of our staff of over 230 is thoroughly engaged and committed to realize their full potential by effectively using their talents, creativity and professionalism on each client's project. Our success is based firmly on the success of each property we manage using our greatest asset – our employees.

The expertise of our staff is unsurpassed, and the diversity of our personnel matches the diversity of our portfolio. TMLLC is proud of its record as an employer committed to a diverse workforce with over 68% of our Team members being minorities and over 40% working in communities in which they live. 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 multi-family 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 in fulfilling the needs of owners and residents, contributing to the success of the communities in which we operate.

TMLLC is an Equal Opportunity Employer, and does not discriminate against any employee or applicant on the basis of race, color, creed, age, religion, sex, national or ethnic origin, ancestry, class, familial status, disability or handicap, legal source of income, military veteran status, sexual orientation, or other basis prohibited by law.

B. Our Professional Affiliations

TMLLC is an active member of the following real estate management industry groups and, in most cases, have taken significant leadership roles:

- Citizens' Housing and Planning Association
- Community Associations Institute
- Institute of Real Estate Management
- National Affordable Housing Management Association
- New England Affordable Housing Management Association
- National Apartment Association
- National Association of Housing Cooperatives
- Rental Housing Association
- Greater Boston Real Estate Board

Kathleen Franco, the Company's Chief Executive Officer, is the current President of the Rental Housing Association and is a Past President of the Institute of Real Estate Management – Boston Chapter, New England Affordable Housing Management Association, and Granite State Managers Association. Both Robert Cuttle, Executive Vice President, and Jonathan Donahue, Portfolio Director, are Past Presidents of Chapters of the Institute of Real Estate Management.

C. Recent Noteworthy Achievements

- Designated, Specialist in Housing Credit Management Company - 2013
- MassHousing – Multi-million Dollar MBE and WBE Award Winner - 2013, 2014, 2015, 2016, 2017
- Vanguard Award Winner - 2015, 2016
- Community of Quality Award Winner - 2013, 2014, 2015, 2016
- Top 100 Affordable Property Management Company - 2015, 2016, 2017
- Partner, U.S. Department of Energy – Better Buildings Challenge

SECTION TWO

DESCRIPTION OF OUR MANAGEMENT SERVICES

A. Highlights of Our Company's Approach to Providing Management Services

Our Company's Approach to Management

Having a history of successfully provided rental and condominium residential property management services to owners, we are confident that through the diligent application of an extensive array of real estate management services that are administered in a careful, detailed, and attentive manner, we will be able to directly contribute to the appreciation of the owner's and each condominium unit owner's valued investment.

We direct our full and complete effort toward the achievement of this objective through the application of expense control procedures that moderate expenses while maintaining and providing the physical attractiveness of the property in order to protect and build investment value.

Owner, Investor, Condominium Association, and Resident Relations

TMLLC recognizes the importance of establishing and maintaining a close working relationship with various ownership interests, residents, as well as the community. This is a crucial component to our success as a management company in that it enables us to gain a clear understanding of the investment objectives of the owners so that we can precisely direct our ongoing effort toward their achievement. We have a strong ability to consistently communicate actual performance through the preparation of monthly reporting systems, which clearly inform owners of the ongoing financial position, the physical condition, and all other significant operating issues affecting the property.

Our objective is to provide the owners with exceptional management service. In doing so, we propose to conduct a very detailed approach to management, providing active site inspections and fully coordinating the range of management services as described in this plan.

We will inform the owners of all issues and findings that emerge as a result of our inspections. In this proactive manner, we will become aware, on a first hand basis, of any property areas requiring immediate attention, coordinating their completion through maintenance and repair service contractors and the direct involvement of our Service Team. Our assigned Portfolio Director, will personally communicate with the owners to discuss these issues.

Pro-Active Approach to Real Estate Management

Our detailed approach to the management of each property is best characterized as pro-active, hands on, and detailed. It's an approach that is supported through a comprehensive system of management practices including property repair and maintenance, landscaping and grounds care, preventative maintenance, and quality assurance. We have developed strong, effective and timely financial management reporting systems that serve to clearly and directly inform owners of the financial performance of the property as well as other issues to which we direct our continuing attention. As real estate managers, we are guided by the principle of providing responsive service to all owners and our internal management systems are designed to ensure that repair requirements and other problems are resolved expeditiously and effectively. As a result of the successful application of this approach, we are able to provide assurance that these issues are being consistently, capably, and responsibly addressed.

Marketing and Leasing

TMLLC has successfully marketed market-rate, mixed-income, and workforce income restricted, for-sale and rental housing. To further enhance its successful marketing and leasing program, Trinity has engaged a Vice President of Marketing and Business Development. Trinity will bring its full body of experience and the resources of its full property management team to the planning, pre-marketing and leasing stages of the marketing program.

The owner, lender(s), investors, and Management Agent, TMLLC, 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 its Agents, 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 staff involved in the marketing and leasing of the property 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 approved Marketing and Tenant Selection Plans, (3) applicable regulations governing the selection of applicants for the housing, including, but not limited to, Title VIII of the Civil Right Act of 1968; Title VI of the Civil Rights Act of 1974; Executive Order 11063, November 29, 1962; M.G. L. Chapter 151B: Executive Order 11246, September 9, 1965, the Fair Housing Amendments Act of 1988 and the Americans with Disabilities Act. In addition the appropriate complaint procedures will be explained so that applicants may avail themselves of that process if they feel discrimination has occurred. Marketing staff will receive training on the use and appropriate review of the paperwork and processing required in the marketing of the units.

Public Space Management

TMLLC has extensive experience in managing spaces within our properties that serve as an amenity for our owners/residents and as a benefit to the community at large. From managing community meeting rooms, to art galleries open to the public, to public right walkways, kayak launches, and green space, TMLLC knows and understands the nuisances of engaging the community at large while maintaining the security and comfort of our residents and owners. TMLLC works collaboratively with community agencies, art groups and associations, and the local population to offer spaces and programming that complements and enriches the community and adds value to the property.

Promoting Attractiveness and Value

TMLLC offers a unique focus on the enhancement of the property as an investment asset, both on a property wide basis and for each condominium unit owner on a personal basis, we focus a great deal of our concentration on promoting and enhancing the property's physical integrity and attractiveness both on a short and long term basis. In addition, the expertise of TMLLC's Vice President of Building Operations and Systems is an available resource to provide the property with services ranging from maintenance support, comprehensive physical needs assessment as a basis for reserve planning and budgeting, property improvement plan and specification development, contractor bid review and negotiation, and close independent monitoring of contractor performance to ensure that all authorized capital improvement work is completed in a cost effective manner and in strict accordance with detailed performance specifications and workmanship standards. .

Financial Controls and Accountability

TMLLC has developed a structured and systematic financial control system that includes detailed budget development including supportive explanations substantiating all projected income and expense assumptions, clear, precise and timely financial reporting for owners and investors, and formalized management reporting enabling us to closely monitor the financial operation of the property during the year. We undertake systematic rent and condominium fee collection procedures as well as the evaluation of required fee structures to assure they are established at levels no greater than required, yet sufficient to support operating and authorized improvement requirements. We consistently scrutinize operating expenses to determine ways to achieve appropriate reductions. We utilize a strict system of purchasing controls to ensure that all expenditures have been properly reviewed and authorized. The strength of our financial control system is

applied before an expense is committed to ensure that the value of service provided is consistent with the authorization. We apply our procedures to (1) properly assess the extent of the work/service to be performed, (2) review detailed specifications used for the solicitation of proposals and/or bids, (3) obtain comparative proposals and/or bids, (4) determine appropriateness of the proposed cost compared to estimated expense, (5) obtain owner review/approval, (6) authorize contractor provision of work/service, first obtaining contractor Certificate of Insurance, (7) monitor the complete provision of work service compared to specifications, (8) approve process/final payment invoices, and (9) obtain check approval, as appropriate, providing supportive documentation.

As part of our ongoing effort to control operating expenses, the property would be able to benefit from our ability to acquire certain supplies and equipment at reduced rates through our National Purchase Program.

Maintenance Management

TMLLC stresses in its ongoing training programs the importance of a pro-active approach to the provision of residential management services in the area of maintenance management. Properties are continuously inspected and reviewed for existing and potential operating problems, maintenance service request systems are administered to ensure the assignment and completion of needed repairs, preventive maintenance schedules are maintained and administered for buildings and physical operating systems, and landscaping and grounds maintenance schedules are applied. A 24 hour/day, 7 day/week maintenance response capability is established to ensure prompt response to all emergency situations.

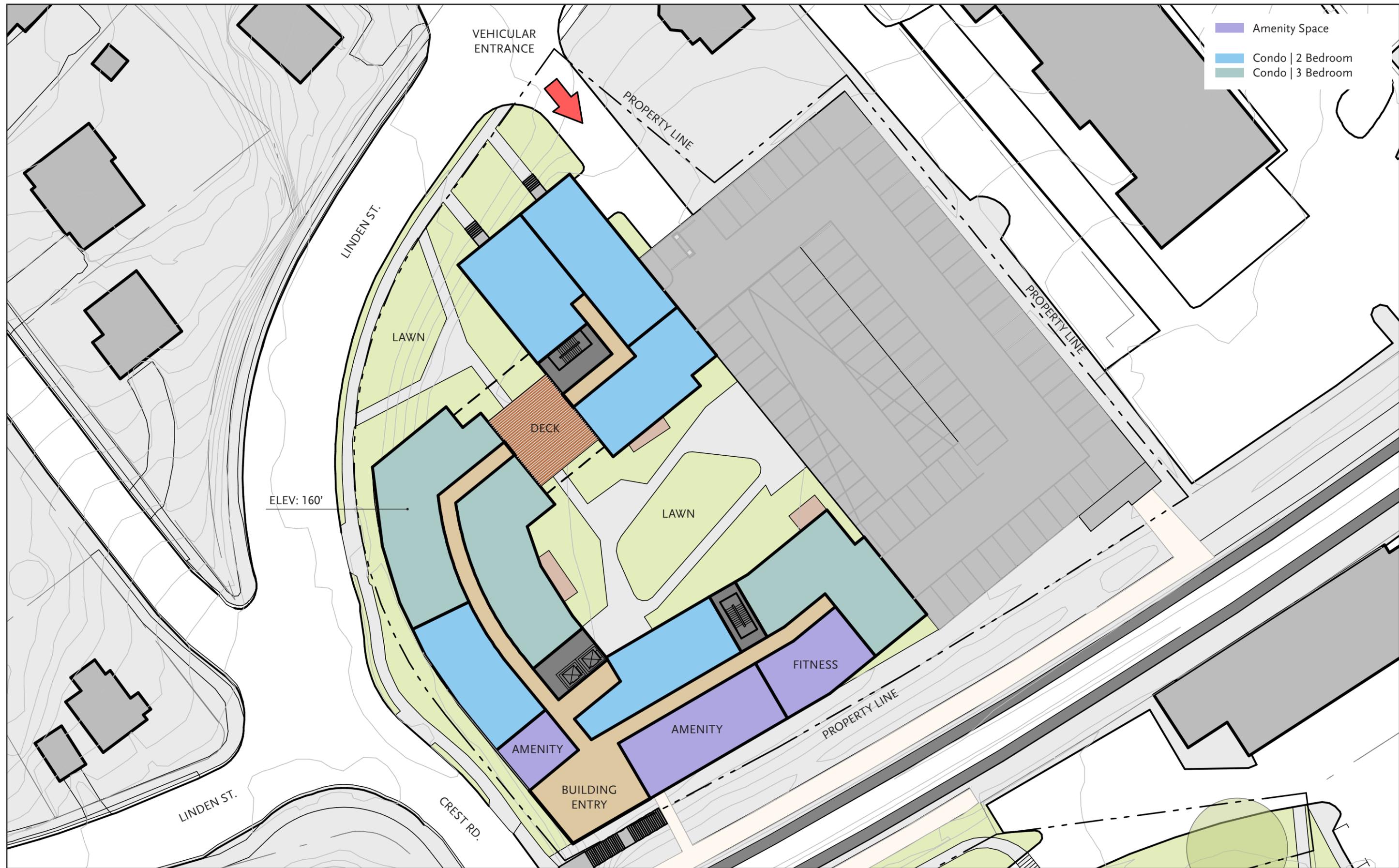
Contractor and Vendor Relationships

Our vendor and contractor selection standard is to ensure that all contracted services, both maintenance and physical improvement related, are provided in such a manner as to continuously promote the attractiveness and physical integrity of the property. As we engage the services of contractors performing work at the property, our guiding principle is that we represent one primary interest: the ownership. TMLLC emphasizes the establishment and maintenance of professional and independent business relationships with vendors and contractors providing services. These relationships are characterized by our requirement for the provision of quality and reliable service provided on a reasonable, competitive, professional and “arms-length” basis. We also have a stringent review of each contractor’s insurance coverage performed to ensure that the interests of the property are well protected. To the extent feasible, TMLLC uses local vendors and contractors as well as, MBE, WBE, and disadvantaged businesses in the provision of goods and services.



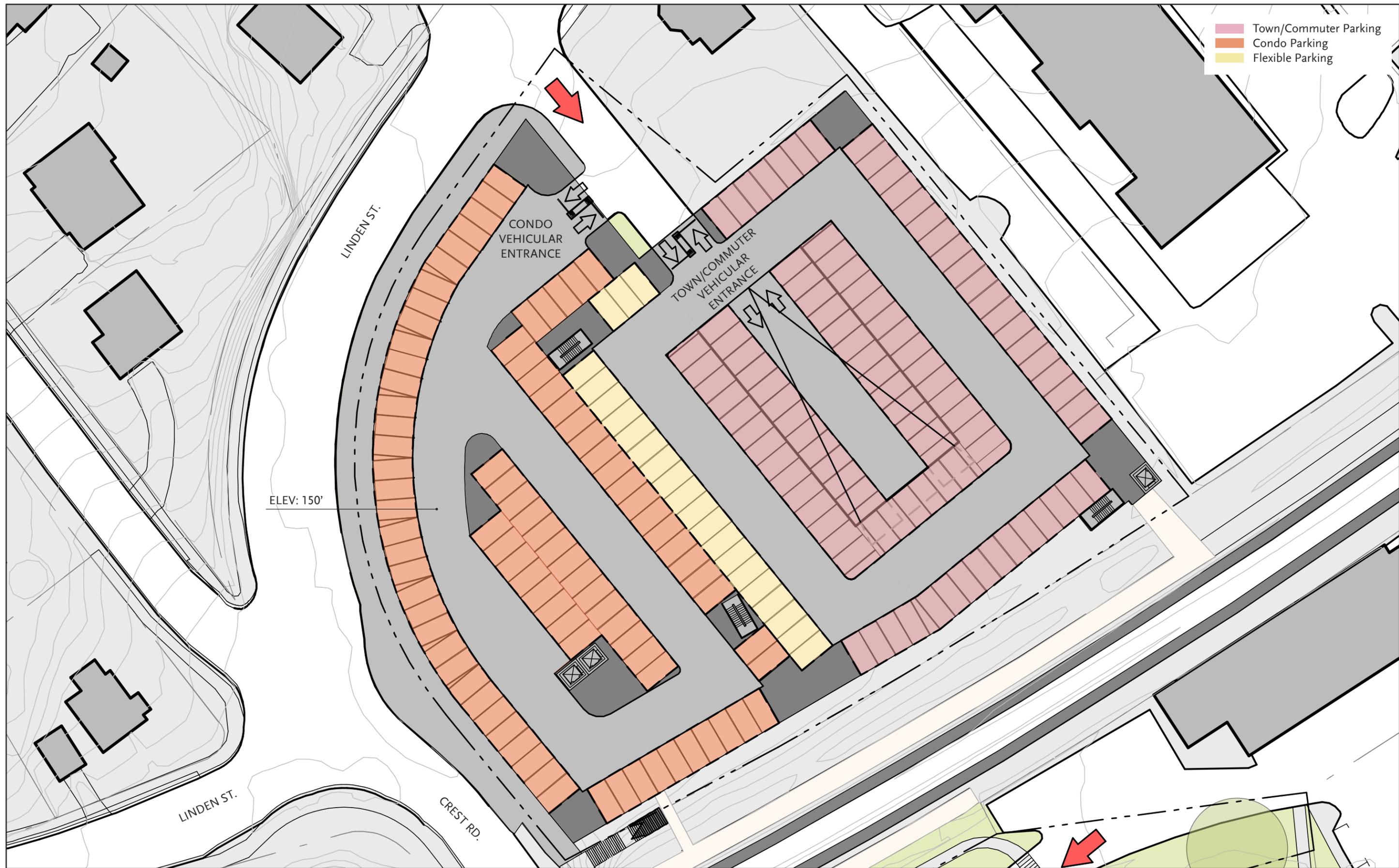
1.1 Proposed Site Plan





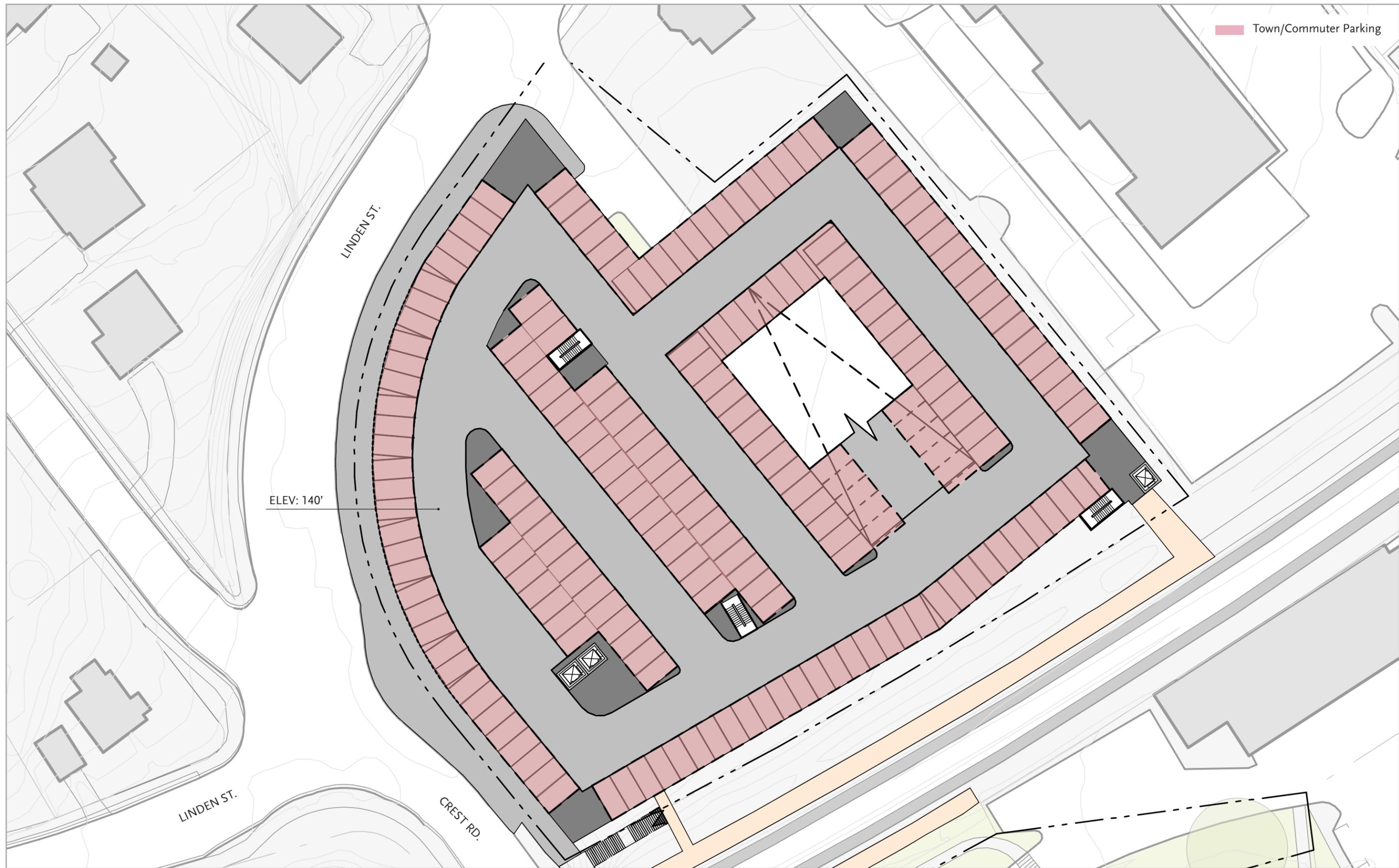
1.2 Proposed Ground Floor Plan | Tailby Lot at Elevation 160'





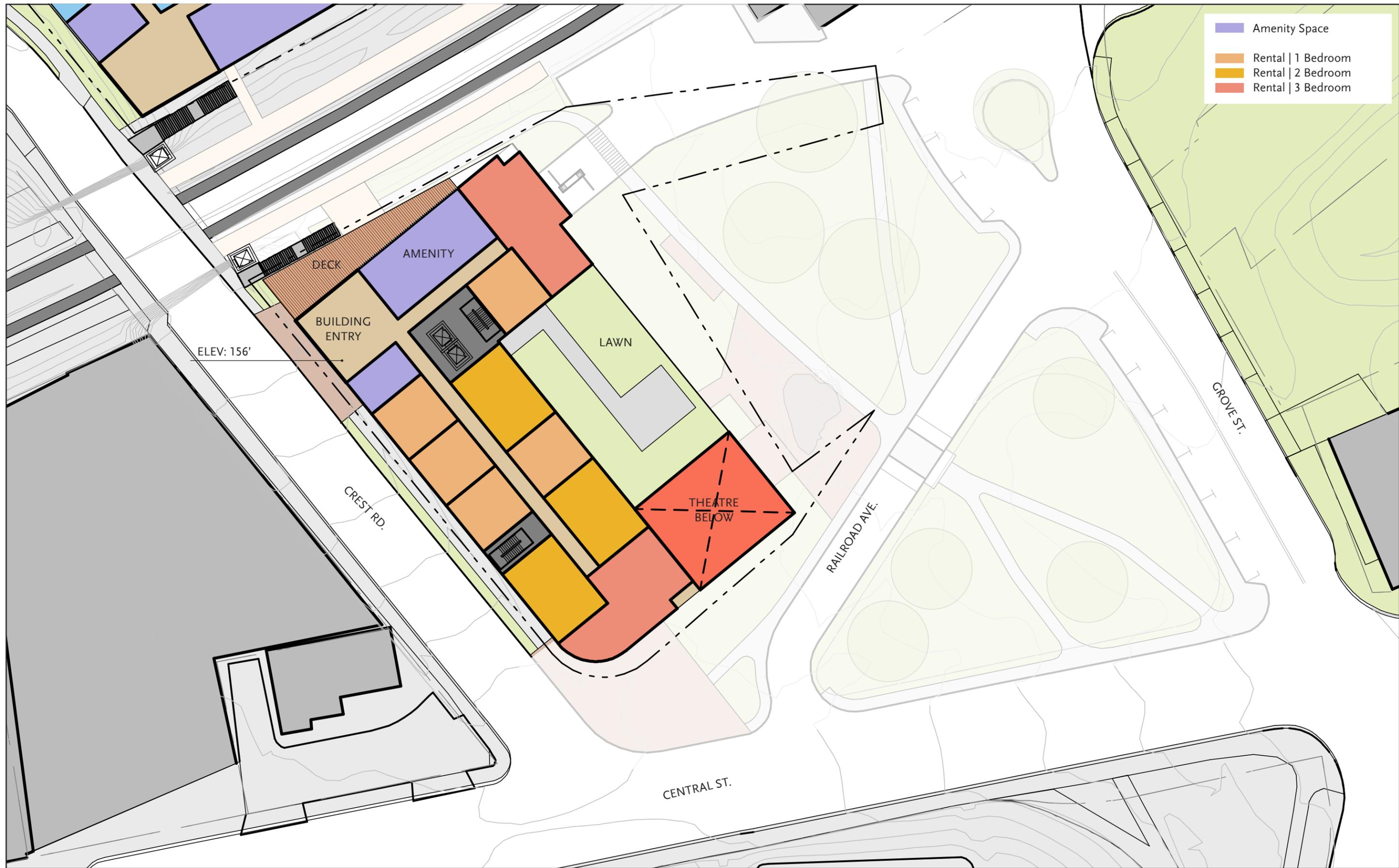
1.3 Proposed Parking Lot Layout | Tailby Lot at Elevation 150'





1.4 Proposed Parking Lot Layout | Tailby Lot at Elevation 140'





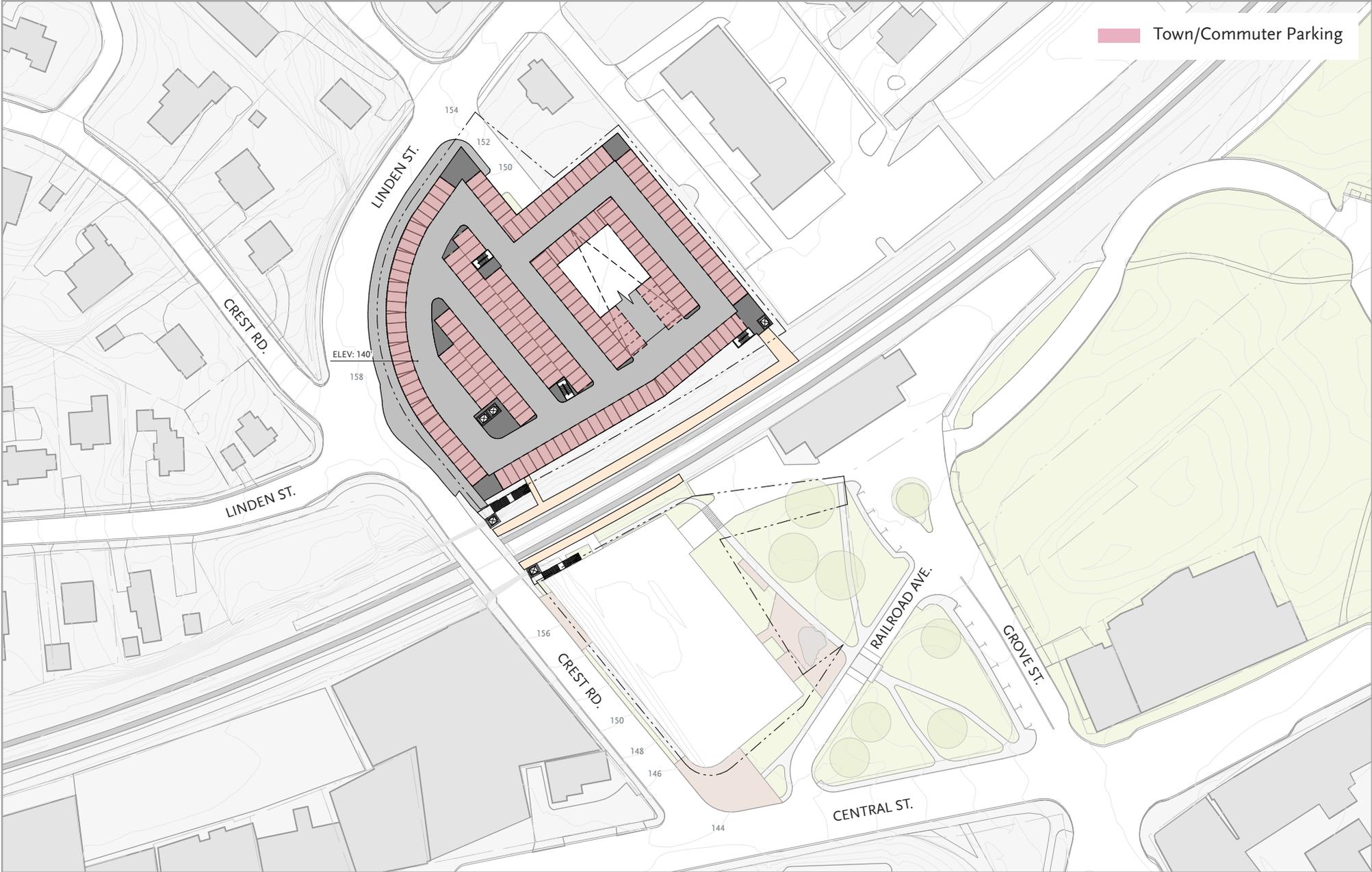
1.5 Proposed Ground Floor Plan | Railroad Lot at Elevation 156'





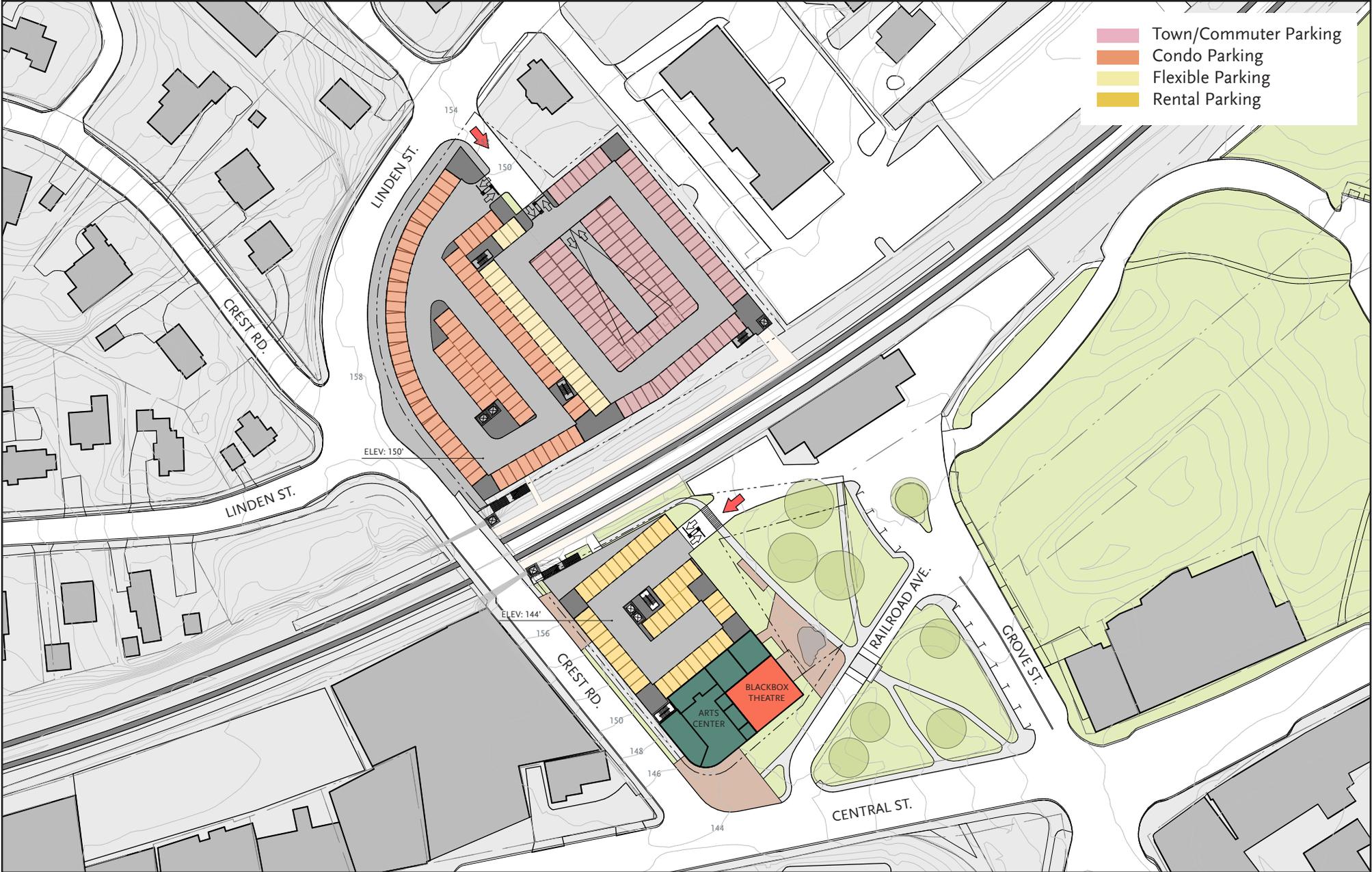
1.6 Proposed Parking Lot Layout | Railroad Lot at Elevation 144'





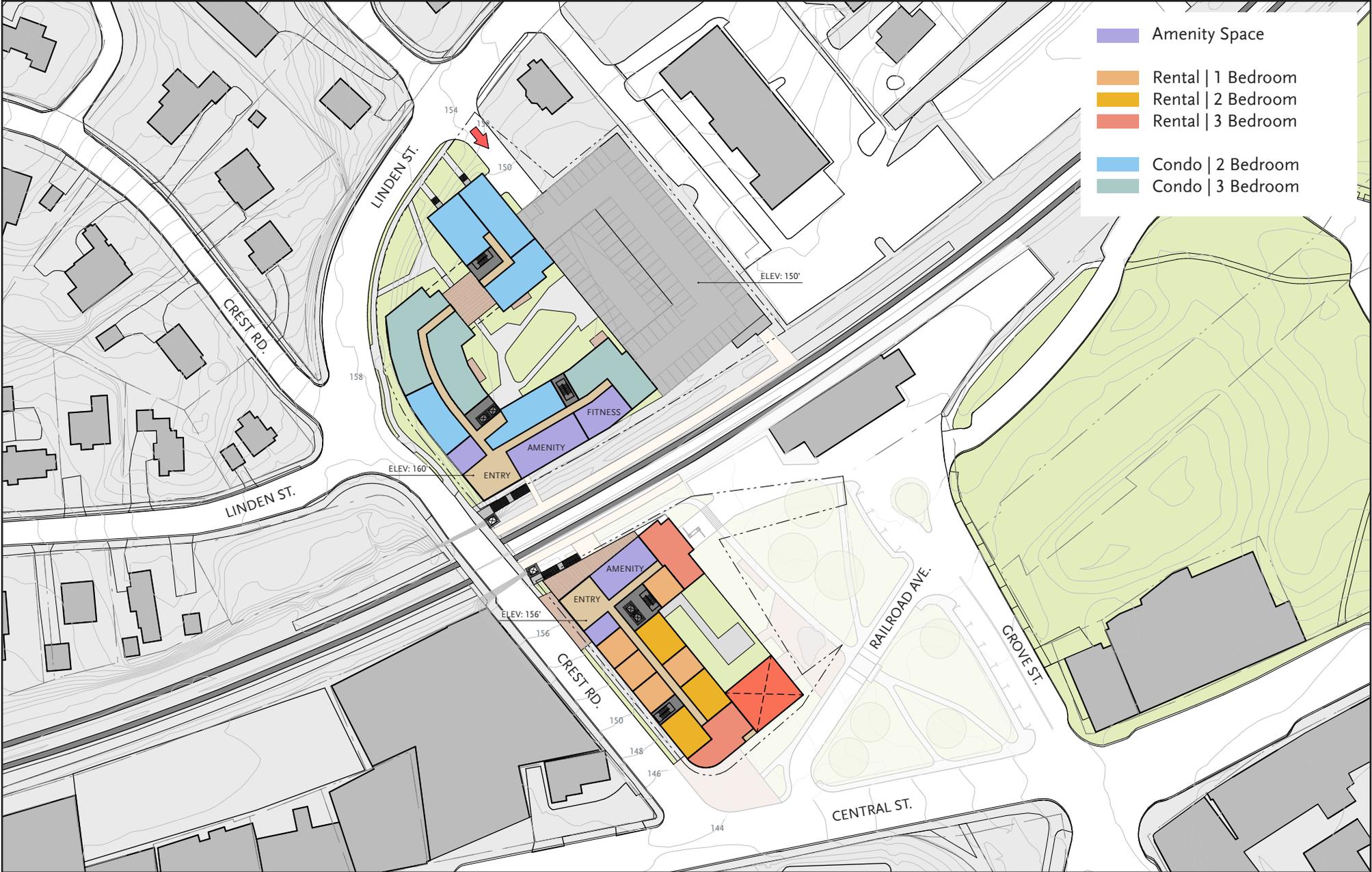
2.1 Proposed Plan | Elevation 140'





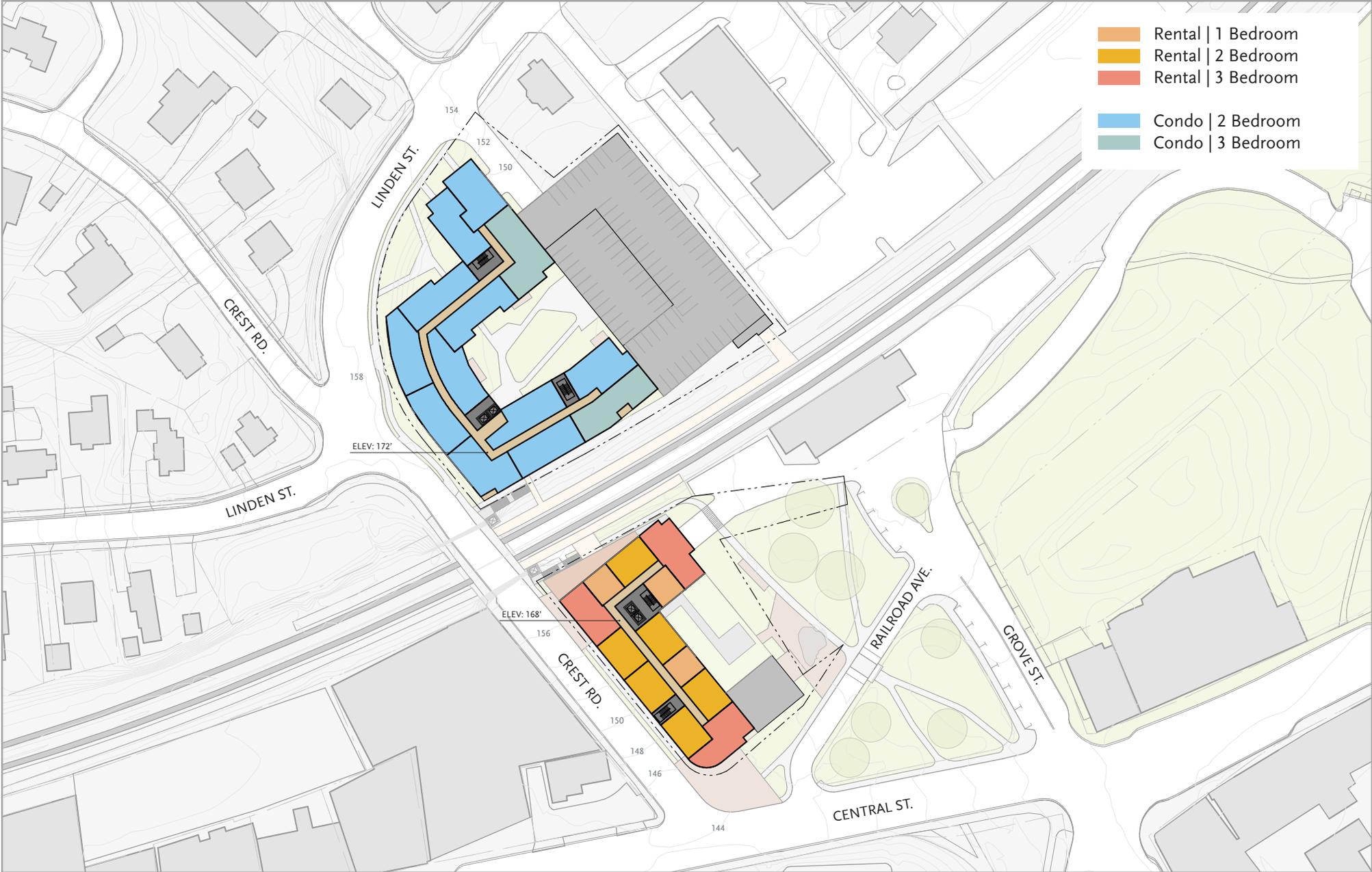
2.2 Proposed Plan | Elevation 144' & 150'





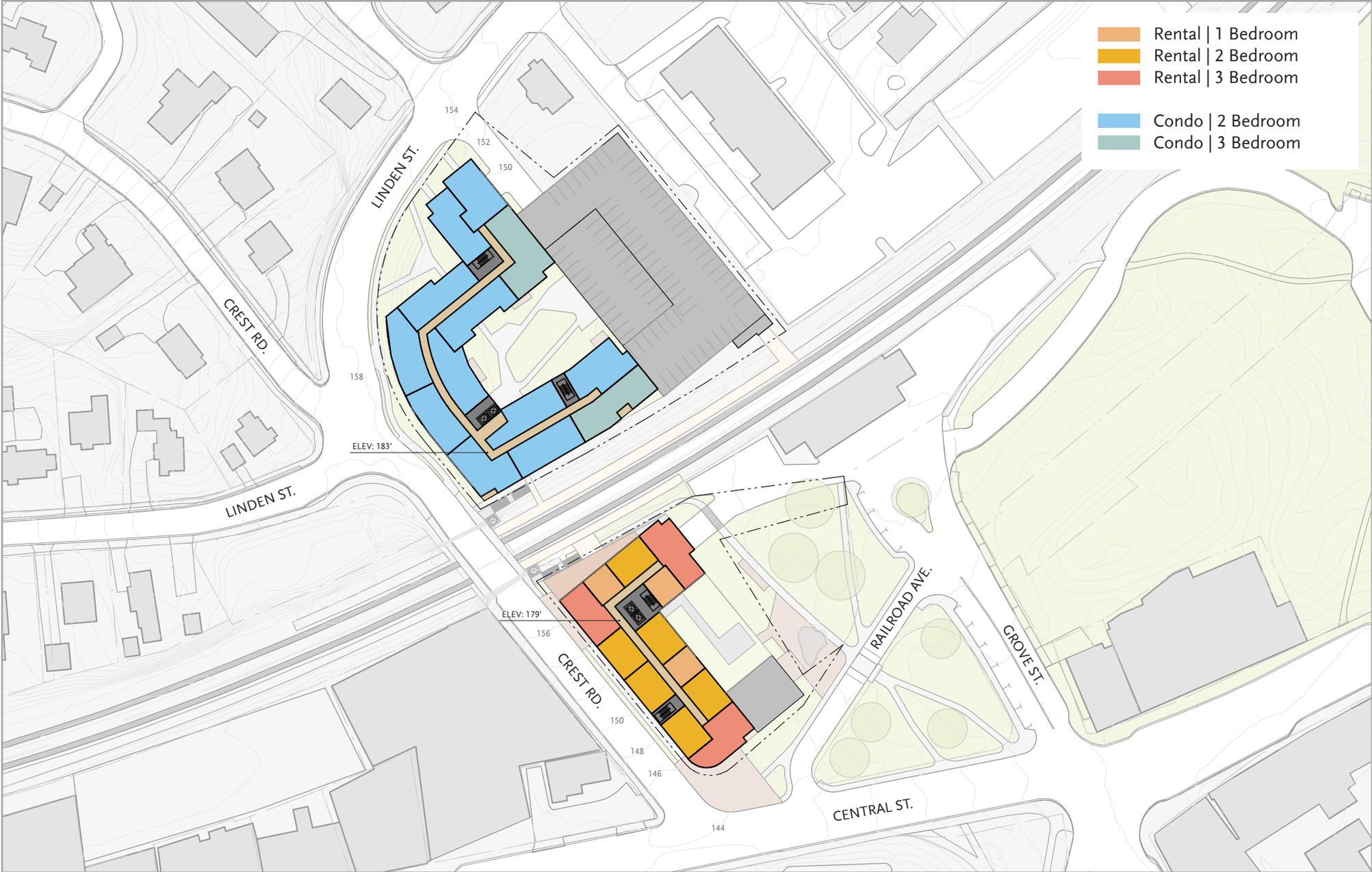
2.3 Proposed Plan | Elevation 156' & 160'





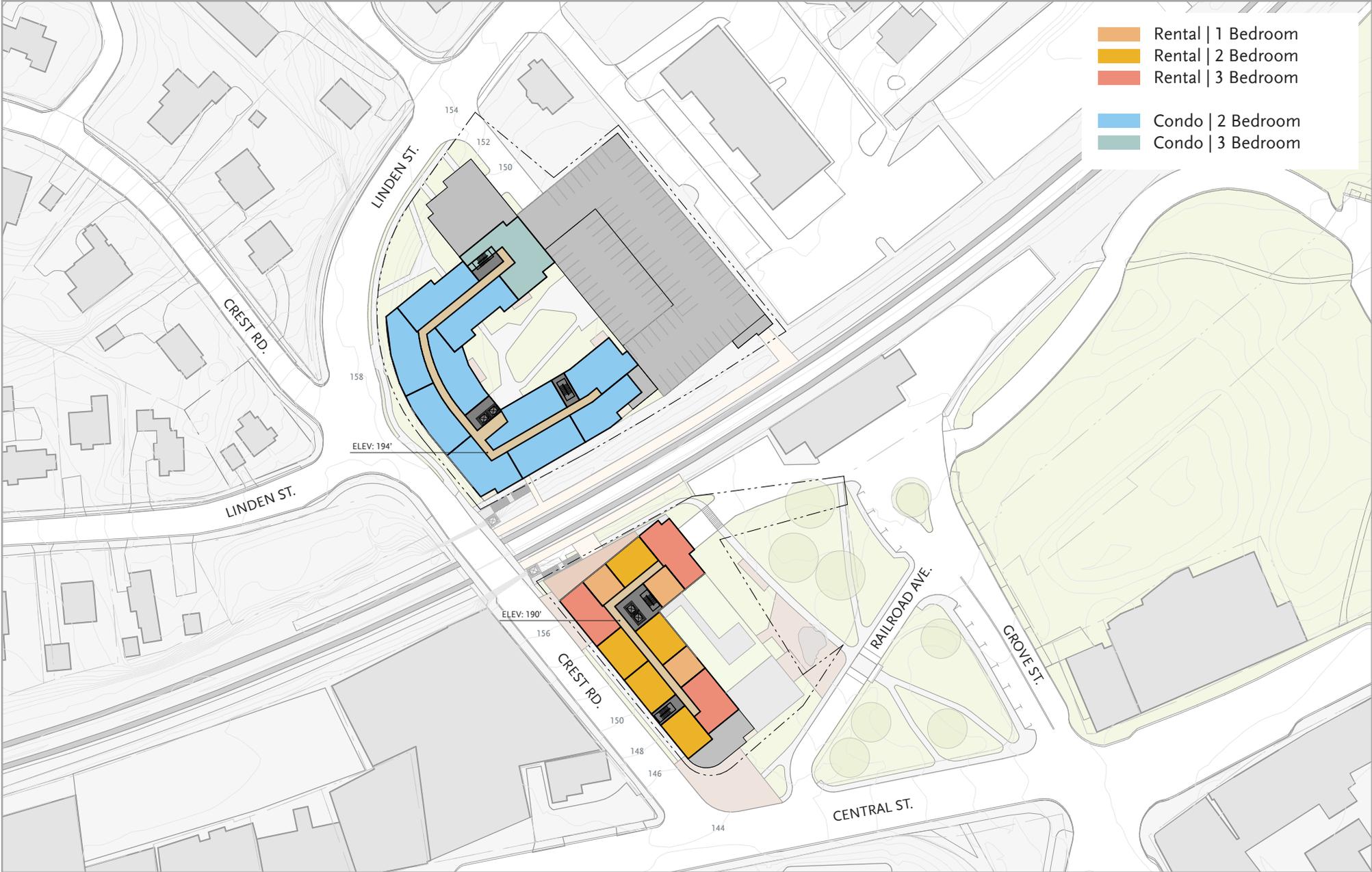
2.4 Proposed Plan | Elevation 168' & 172'





2.5 Proposed Plan | Elevation 179' & 183'





2.6 Proposed Plan | Elevation 190' & 194'





2.7 Daytime View From Central St. & Crest Rd.



2.8 Nighttime View From Central St. & Crest Rd.



2.9 Daytime View From Upper Crest Rd.



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2.10 Nighttime View From Upper Crest Rd.



2.11 Daytime View From Washington St.



2.12 Nighttime View From Washington St.



2.13 Daytime View From Linden St. & Crest Rd.



2.14 Nighttime View From Linden St. & Crest Rd.

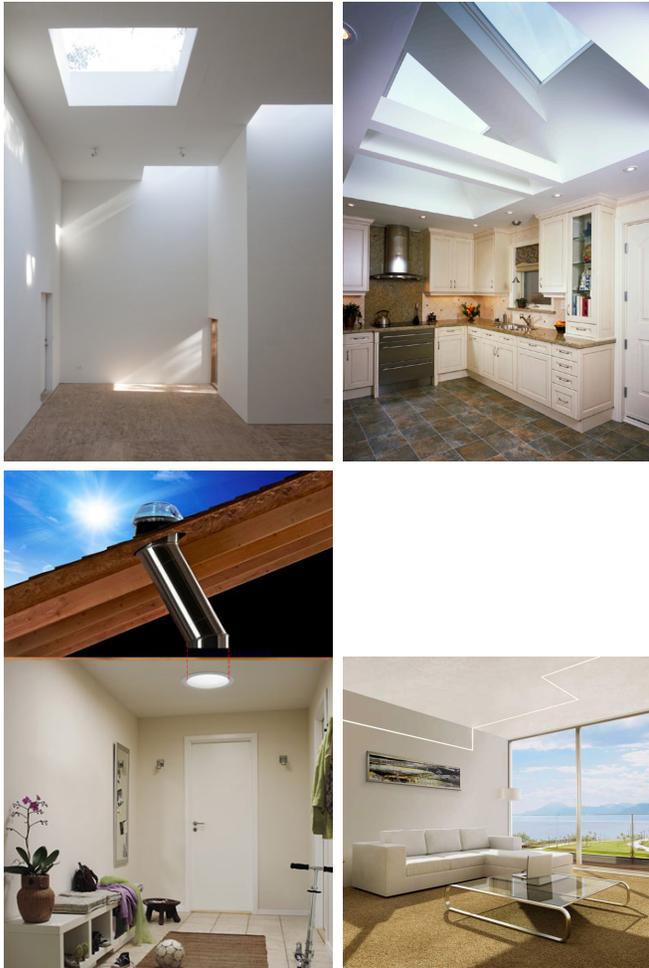


2.15 Rendered Aerial View

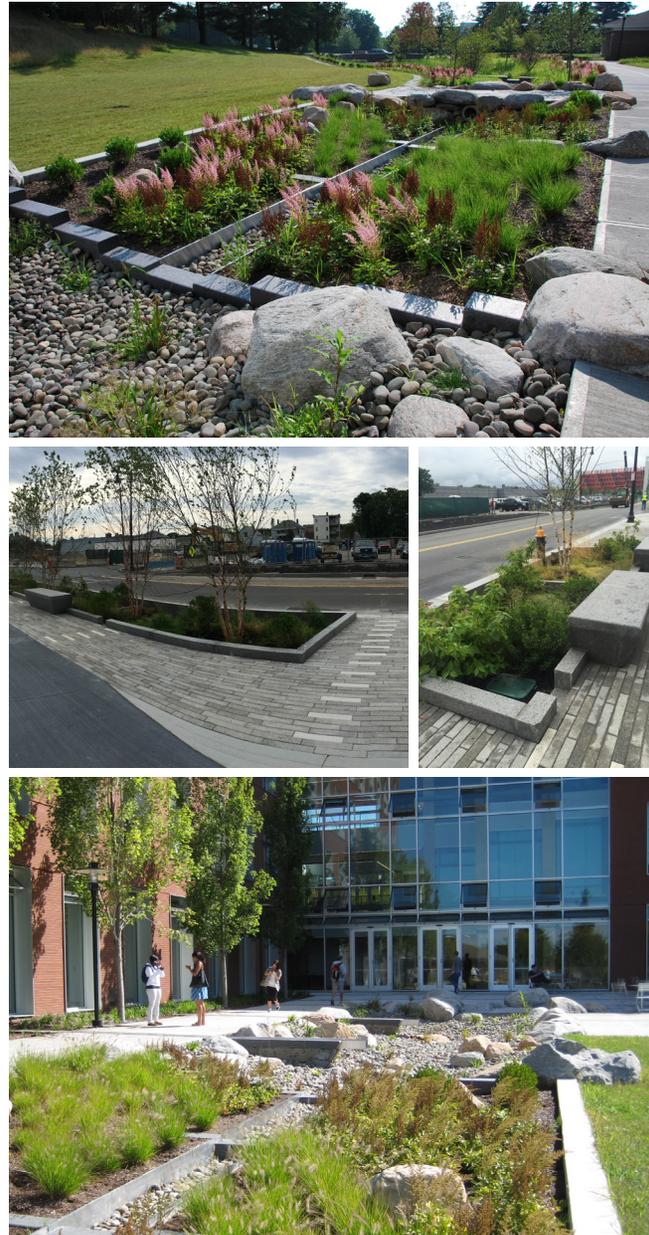


2.16 Proposed Exterior Elevation Rendering

Optimization of Daylighting & Other Solar Opportunities



On-site Stormwater Retention



“Smart” Irrigation System



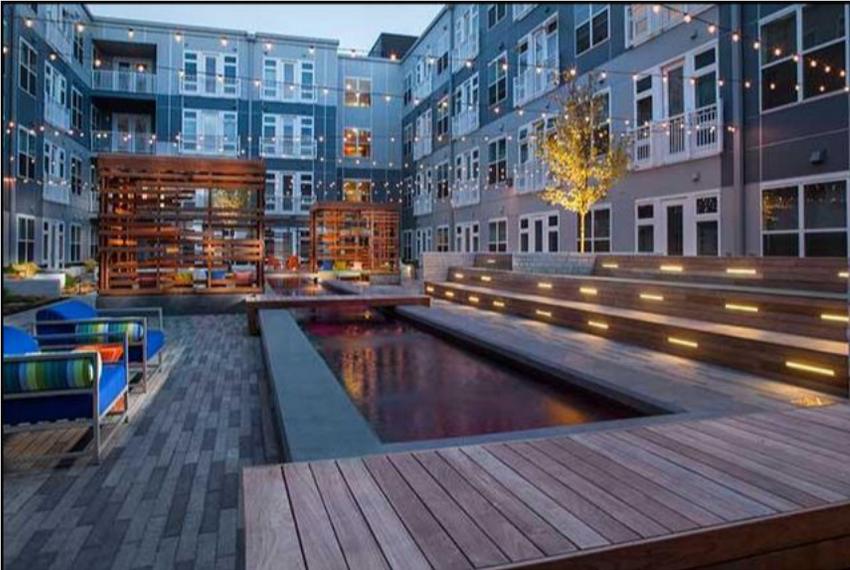
Native Plant Species



Drought-resistant Plantings



Roof Terraces



On-site Car Sharing

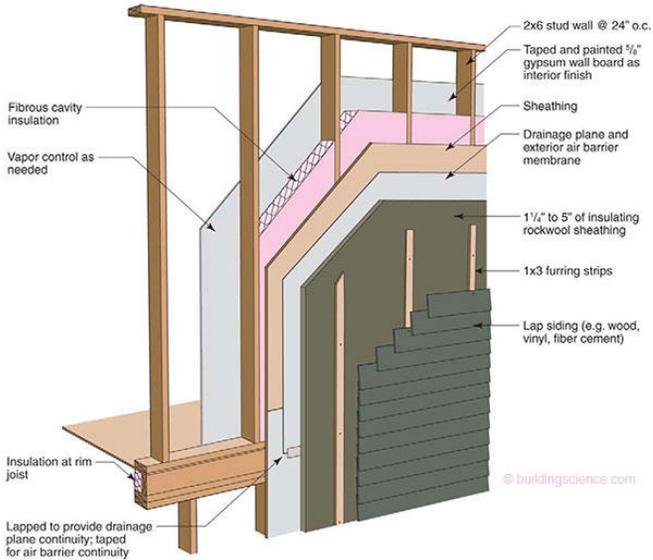


Bicycle Parking and Repair Facilities



High-performing, Thermally Broken Operable Aluminum and Fiberglass Windows

Thorough Insulation and Air-sealing on Exterior Walls



Energy Star Appliances

Low VOC Paints and Recycled Materials



Individually Controlled All-season Heat/Air Conditioning



Water-saving Plumbing Fixture



LED Lighting



Section 3 – Preliminary Plans

The following narrative serves as a complement to the compilation of images that appear on the preceding pages that answers the third bullet point listed in the Preliminary Plans section of the RFP:

The plans should also contain information about materials proposed to be used and should highlight sustainable features, such as renewable or energy efficiency aspects, low-impact development, and/or LEED certification or considerations.

Sustainability, energy efficiency, and resiliency are driving forces behind our vision for the Wellesley Square Development. Trinity understands the importance of a holistic, integrated design approach in achieving such ambitious goals, and has assembled a design team that has the experience and expertise necessary to realize this vision. Our team includes New Ecology Inc. (NEI) as our Sustainability Consultant, a leader in advising on cutting edge and state-of-the art green technologies. NEI will work closely with the Lead Architect and with the Civil, Landscape, Interior Design and MEP consultants who each have a LEED accredited professional as a prime member of their design team.

Trinity understands that the Town's Sustainable Energy Committee is currently working to develop a set of Sustainable Development Guidelines. If Trinity is designated as developer, we would work with the Town to incorporate as many of these development guidelines into our Project design as possible.

Building Envelope

Careful attention will be paid to design and construction of high R-value, durable, environmentally sensitive building assemblies. Continuous insulation that minimizes thermal bridging by wrapping the exterior assemblies will be a critical component of this design. The team will also focus closely on air sealing of the exterior envelope, and the demising walls between apartments. This starts with the development of comprehensive air barrier details, and continues into construction with careful air barrier inspections, testing, and verification. Improved resiliency resulting from this design and construction approach provides additional tenant, environmental, and financial benefits. A well-insulated building envelope will mean that the building will maintain habitable temperatures longer in the case of a power outage and allow for extended sheltering-in-place.

Mechanical Systems, Fixtures, and Appliances

The advanced building envelope will be complemented by mechanical systems that have been chosen and sized to meet heating and cooling loads and ensure comfort. Systems will be selected based on efficiency, durability, and maintainability. The team will focus not only on high efficiency pieces of equipment and fixtures but will design the systems associated with those pieces of equipment to minimize energy consumption and loss. Low flow fixtures with high occupant approval ratings will minimize both water and energy consumption without compromising comfort.

Appliances will be top performers in function, design, energy, and water efficiency. Electrical load will be reduced through smart lighting design that takes full advantage of the efficient, reliable, and attractive LED fixtures and lighting controls that are now available.

The Trinity Team will also investigate the opportunities associated with innovative and renewable sources of energy generation for the Project. At a baseline, the Project's will be designed to be "Solar Ready", incorporating the baseline infrastructure to ensure that renewable energy systems could be

integrated efficiently. Cogeneration and battery back up/storage will be investigated to further promote the sustainability and resiliency of the development.

Health

Of equally important consideration are the health impacts of our approach. Trinity is committed to providing individuals and families with a living environment that enhances their lives and health. We will accomplish this through three methods: active design, ventilation, and material selection. Best practices related to active design will be integrated into the building and site design process to allow the development to play an important role in encouraging daily physical activity. Ventilation systems will be designed to provide exhaust as well as fresh supply air directly to each apartment. Toxins and contaminants will be minimized through careful specification of materials that are low VOC and no added urea formaldehyde.

Site Design

Landscaping and site improvements will further emphasize the social and environmental priorities of this Project. Outdoor spaces will be designed to encourage social engagement, turf will not be used on the Project, and plantings will be drought tolerant and appropriate for the microclimates specific to each planting area. Irrigation systems will be designed to ensure efficient and targeted use of water.

The site will also play a critical role in the retention and infiltration of stormwater, and site design will be approached to not only address typical design conditions, but also with an eye to the future as it relates to the climatic variations that this building will experience during its life.

A focus on alternative and improved modes of transportation includes plenty of short term and long-term bike parking, car sharing availability on the property, and designated spots and charging stations for low emitting vehicles and electric cars.

Training, Testing, and Verification

Managing the transition from modeled performance to achieving real world performance is a critical component of a green project. During construction, a series of on-site trainings, inspections, and testing will be the primary tools used ensure designed and modeled approaches translate to performance achievement. Heating, cooling, ventilation, domestic hot water, lighting, and other mechanical systems will be commissioned to ensure proper installation and operations.

Certification and Operation

As we tally the benefits of the integrated approach we have outlined above, the result is a Project that exceeds the minimum requirements related to a LEED certification. Beyond certifications, we expect the investment in a highly sustainable design and construction process to yield significant operating and durability related dividends. At the same time, we actively acknowledge the role and importance of proper commissioning, optimization, and education to accomplish these goals. We will spend time and resources educating tenants about how to best take advantage of the comfort, health, and energy savings benefits of their apartments. We will ensure that our maintenance and management teams understand the building systems and have the training they need to operate the building at the designed level of performance. Once in operation, Trinity will track the performance of the building through the WEGO wise benchmarking tool to confirm that it is hitting performance expectations and will implement green policies and protocols.

KERTZMAN & WEIL, LLP
40 Grove Street
Wellesley, MA 02482

Laurence D. Shind
Email: larry@kertzmanweil.com

Phone: 781-237-8701
Fax: 781-237-6361

MEMORANDUM

TO: Wellesley Board of Selectmen, c/o Meghan Jop
FROM: Laurence D. Shind, Esq. on behalf of Trinity Financial, Inc.
DATE: May 31, 2018
RE: Anticipated Land Use/Zoning, Environmental, and Development Approvals for Trinity’s proposed Wellesley Square Project

The following memo is Trinity Financial Inc.’s (“Trinity”) response to the second bullet point of Section 4.3.4 of the RFP – Implementation Plan and Project Timetable, which asks for an:

Outline of required land use, environmental, operational and other governmental or regulatory approvals, including land use, zoning, development and environmental permits. The developer should provide a schedule for securing approvals as part of the proposal. The developer should note zoning variances or by-law amendments, special permits or modifications required, and should factor time into the proposed schedule for securing same.

For the purposes of this memo, the “Project” refers to the proposed redevelopment of both the Tailby Lot and the Railroad Lot.

1. Land Use/Zoning Approvals

1.1 Tailby Lot (“Tailby Parcel”)

1.1.1 Use Requirements: The current zoning of this parcel in the Limited Residence District would permit the parcel to be used as of right for (i) a one-family dwelling or any other use allowed in a Single Residence District or (ii) housing for the elderly as described in the Limited Residence District section (VI) of the Town of Wellesley Zoning Bylaws. The proposed use of the parcel for 45 for-sale condominium housing units would not be permitted in this District without a variance based on the current maximum allowable density of 17 units/per acre (32 total age-restricted units permitted).

- 1.1.2 Dimensional Requirements: The Tailby Parcel would require multiple dimensional variances for lot coverage (20% maximum permitted), height (2 ½ stories or 30 feet maximum permitted), and possibly setbacks.
- 1.1.3 Parking Requirements: The Tailby Parcel would meet parking requirements with 45 spaces required for the proposed residential use and 107 new spaces provided. In addition, 293 replacement public parking spaces would be provided as compared with the current 222 existing spaces.
- 1.2 Railroad Lot (“Railroad Parcel”)
 - 1.2.1 Use Requirements: The current zoning of this parcel in the Wellesley Square District would permit the parcel to be used as of right for the proposed art gallery/theater component of the proposed Project, subject to the Project of Significant Impact and Major Construction Project/Site Plan Review requirements detailed below, but would require a variance for the 45 proposed rental residential units (maximum of 16 permitted by right or 21 by special permit).
 - 1.2.2 Dimensional Requirements: The Railroad Parcel would require a dimensional variance for floor area ratio (maximum of .30 permitted).
 - 1.2.3 Parking Requirements: No specific parking requirements for residential use are contained in the current Wellesley Square District zoning classification.

2. Development Approvals

- 2.1 Project of Significant Impact (“PSI”): The Project proposes the addition of new floor area in excess of 10,000 square feet, and therefore would be subject to the PSI Special Permit process under the jurisdiction of the Planning Board (Section XVIA of the Zoning Bylaws). The PSI permit process involves review by four municipal departments in addition to the Planning Board: Department of Public Works for water, sewer and storm drainage; Municipal Light Plant for electric; Fire Department for fire safety; and Board of Selectmen for traffic and pedestrian safety (which is to include a review by the Police Department).
- 2.2 Major Construction Project/Site Plan Review: The Project would also require Site Plan Review and approval as a Major Construction Project under the jurisdiction of the Zoning Board of Appeals (“ZBA”) per Section XVIA of the Zoning Bylaws.
- 2.3 Design Review: Design Review is required with the Design Review Board for all Major Construction Projects as part of the Site Plan Review process, and for all PSI Applications.

- 2.4 Retaining Wall Bylaw: Given the topography of the parcels as a whole (and the Tailby parcel in particular), it is likely that the retaining wall Bylaw (Section XXIID of the Zoning Bylaws) would apply to the Project, requiring Design Review approval of any by-right retaining walls and Special Permit approval by the Zoning Board of Appeals for any retaining walls not complying with the Bylaw requirements.
- 2.5 MBTA: The parcels are separated by land owned by the MBTA for the Framingham/Boston commuter train line and which is located within the Transportation District of the Zoning Bylaws. Since Trinity is proposing new ADA accessible platforms on both the inbound and outbound sides of the tracks, MBTA approval would be required.
- 2.6 Natural Resources Commission: The Railroad Parcel is bordered by parkland under the jurisdiction of the Town's Natural Resources Commission. Since the proposed realignment of Railroad Avenue would involve reconfiguring the parkland parcels adjacent to the current location of Railroad Avenue, approval by the Natural Resources Commission would be required.
- 2.7 Building Permit: Prior to the commencement of any construction activities, a building permit would need to be issued by the Town's Building Inspector.
- 2.8 Signage: If the signage proposed by the design team is not allowed as of right, Trinity will need to seek a Special Permit for relief from the Town's Sign By-Law through the Zoning Board of Appeals.

3. Environmental Approvals

The Project is not located within any identified or mapped wetlands area so should not require any environmental review under MEPA or NEPA, nor would it be subject to the review of the Town's Wetlands Protection Committee.

4. Chapter 40R

The Commonwealth's Smart Growth Zoning Overlay District Act (Ch. 40R) would appear to be a perfect alternative permitting vehicle to allow for the proposed Project as a whole. The minimum definitional and density requirements would all be met for the proposed Project (a mixed-use project located near a town center and/or near a transit station, and containing at least 20 multi-family housing units per acre with at least 20% of the residential units classified as affordable). Adoption of 40R as a overlay zoning district for the Tailby and Railroad parcels would eliminate the need for multiple variances as the Wellesley 40R Bylaw could be tailored to permit the proposed development as a by-right use, subject to a site plan review process.

- 4.1 Process: The Town would need to adopt a 40R overlay district for both the Tailby and Railroad lots by a 2/3 vote of Town Meeting, with the proposed project parameters (including parking requirements) permitted as a by-right use, subject only to site plan review.

4.2 Financial Benefit: The Town would benefit financially from the adoption of a 40R Bylaw for the proposed Project as the 90 proposed total residential units would qualify for a \$200,000 incentive payment from the Commonwealth's Smart Growth Housing Trust Fund. Additionally, the Project would qualify for an additional "density bonus" payment of \$3,000/per qualifying unit from the Commonwealth as the 90 proposed residential units would exceed the underlying zoning district maximum total permitted units by 37 units resulting in a total qualifying density bonus payment of approximately \$111,000. As described above, currently a total of 53 units are allowed: 32 age-restricted units on the Tailby Parcel and 21 on the Railroad Parcel with a special permit.

5. Permitting Summary and Schedule Matrix

See Attached Matrix

5. Permitting Summary and Schedule Matrix

	<u>Referenced in Section X of Permitting Memo</u>	<u>Required</u>	<u>Possibly Required</u>	<u>Not Required</u>	<u>Governing Authority</u>	<u>Permit Schedule/Time Frame</u>
Town of Wellesley Permits/Approvals						
Density Variance	1	X			ZBA	3-6 months
Dimensional Variance – Lot, Frontage, Setback, Height, FAR, Coverage	1	X			ZBA	3-6 months
Project of Significant Impact Special Permit – Parking Max./Layout/Dimensional	1 and 2		X		Planning Board	3-6 months
Project of Significant Impact	2	X			Planning Board	3-6 months
Site Plan Review	2	X			ZBA	3-6 months
Design Review (including retaining walls)	2	X			Design Review Board	3-6 months
Natural Resources Commission	2	X			Natural Resources Commission	3-6 months
Building Permit	2	X			Building Department	3-4 weeks
Signage (if not allowed as of right)	2	X			ZBA	1-2 months
Wetlands	3			X	Wetlands Protection Committee	
State Permits/Approvals						
MBTA Approval for ADA Accessible Train Platforms	2	X			MassDOT	3-6 months
Environmental Notification Form	3			X	Office of Energy and Environmental Affairs	
Environmental Impact Report	3			X	Office of Energy and Environmental Affairs	
Adopt 40R Zoning Overlay District	4		X		Town of Wellesley Town Meeting and Mass Department of Housing and Community Development	6-12 months

Section 5 - Required Forms

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

NOTE: The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

Section (1): Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

Section (2): Identify the type of transaction to which this Disclosure Statement pertains --such as a sale, purchase, lease, etc.

Section (3): Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

Section (4): Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

Section (5): Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

Section (6): List the names and addresses of **every** legal entity and **every** natural person that has or will have a **direct or indirect** beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

Section (7): Write "none" in the blank if none of the persons mentioned in Section 6 is employed by DCAMM. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM.

Section (8): The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

Section (9): Make sure that this Disclosure Statement is signed by the correct person. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate

Division of Capital Asset Management and Maintenance

One Ashburton Place, 15th Floor, Boston, MA 02108

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

(1) REAL PROPERTY:

Tailby Parking Lot, 103 Linden Street, Wellesley, MA 02482 & Railroad Parking Lots, 7 Grove Street, Wellesely, MA 02482

(2) TYPE OF TRANSACTION, AGEEMENT, or DOCUMENT:

Long term ground lease

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

Town of Wellesley

(4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):

Trinity Financial, Inc. (corporation)

(5) ROLE OF DISCLOSING PARTY (Check appropriate role):

_____ Lessor/Landlord x Lessee/Tenant

_____ Seller/Grantor _____ Buyer/Grantee

_____ Other (Please describe): _____

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

NAME

RESIDENCE

James G. Keefe
Patrick A.T. Lee

43 Roslin Street, Dorchester, MA 02124
1 Avery Street #25B, Boston, MA 02111

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

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

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

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

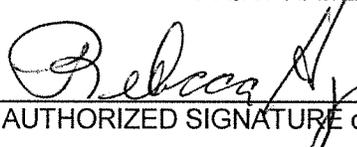
Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify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

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

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

Trinity Financial, Inc.

PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

	5/29/2018
AUTHORIZED SIGNATURE of DISCLOSING PARTY	DATE (MM / DD / YYYY)

Rebecca Hemenway, Vice President

PRINT NAME & TITLE of AUTHORIZED SIGNER

APPENDIX B
CERTIFICATE OF TAX
COMPLIANCE

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

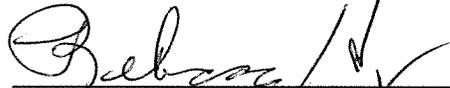
04 - 3075721

Social Security Number or

Federal Identification Number

Signature of Individual or

Corporate Name Trinity Financial, Inc.



Corporate Officer Rebecca Hemenway, Vice President
(if applicable)

APPENDIX C

**CERTIFICATE OF NON-COLLUSION: REQUIRED
FORM**

The undersigned certifies under the penalties of perjury that this bid or 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 M. V.P.
Signature of person submitting contract/bid

3/29/2018
Date

Trinity Financial, Inc.
Name of Business

APPENDIX D

MINIMUM EVALUATION CRITERIA FORM

- (1) Has the Respondent submitted one (1) original, ten (10) complete copies and one (1) complete electronic copy of the application with all required enclosures described in Section 4.3 and 4.4?

Yes _____ No _____

- (2) Has the Respondent proposed to build an affordable housing complex with public and private parking on the Properties?

Yes _____ No _____

- (3) Does the Respondent's submission include information and details necessary for the Board of Selectmen to have confidence that (a) the proposed plan can withstand the scrutiny of the Town's approval process (including without limitation, PSI Special Permit and Major Construction Project/Site Plan Review, and Wetlands review and/or other permitting), and (b) the Developer can obtain necessary permits within 18 months after the selection date, or an agreed upon date if zoning modifications are required? If zoning modifications are required, does the Respondent's submission include the proposed zoning change and a plan for presentation of that proposed change to a Wellesley Annual Town Meeting or Special Town Meeting?

Yes _____ No _____

- (4) Does the Respondent's submission clearly identify all traffic and stormwater/drainage required for permitting, with respondent to be solely responsible for all costs and expenses in connection with such work?

Yes _____ No _____

- (5) Does the Respondent's proposed project provide significant, clearly identified benefits to the Town and its residents?

Yes _____ No _____

- (6) Do the Respondent's project financial plans have clear assumptions and specificity that will allow the Town to have confidence the proposed plan can withstand the scrutiny of Town Meeting?

Yes _____ No _____

Section 6 – Project Financing and Financial Analysis

1. Sufficient information to demonstrate the developer's ability to obtain financing for the project in accordance with its schedule.

Trinity has organized more than 67 limited partnerships, through which it has completed or is currently developing over \$2.3 billion in a wide range of real estate projects, including over 8,000 units of housing and 560,000 square feet of commercial and retail space. In the past five years alone, Trinity has or is in the process of raising over \$1.4 billion in financing for its developments. Trinity has an established track record in securing financing for developments that have a range of complexities including long term ground leases, community, public agency and institutional reviews and complicated design, structural and construction challenges.

For the Wellesley Square development, Trinity has had preliminary conversations with its network of lenders and investors who have expressed interest in the project. The following is a more detailed description of complex projects for which Trinity was able to secure financing and then construct.

In 2007, despite the downturn in the condominium market, Trinity was able to reposition its Avenir project into luxury apartments and raise \$150 million in equity from Archstone Smith to close on the project and commence construction. In 2008, despite the looming financial meltdown, Trinity was able to raise \$42 million in equity from MetLife, for its Appleton Mills artist housing development in Lowell, Massachusetts.

Another example of Trinity's capacity to obtain financing for large, complicated projects is the \$195 million One Canal project in the Bulfinch Triangle, which was financed by AIMCO, a Real Estate Investment Trust headquartered in Denver. One Canal is located at the tip of the Rose Kennedy Greenway. As with Avenir, One Canal sits on parcels that were created by construction of the Central Artery Tunnel Project/Big Dig and submersion of the MBTA Green Line. One Canal Street involves a 99-year ground lease with MassDOT. Sitting above the MBTA's Orange and Green Lines as well as Interstate 93, Avenir posed a number of infrastructure challenges, all of which were overcome by working closely with the MBTA and MassDOT. One Canal Street was completed in 2016, and includes the development of approximately 435,000 square feet of residential and retail space including 310 units of luxury rental housing, 21,000 square feet of ground-floor neighborhood retail space, and 147 indoor parking spaces and bicycle storage. One Canal Street 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.

In July 2012, Trinity completed a deal with the City of Stamford for the Phase II portion of the Park Square West Project, a mixed-use project in Stamford, Connecticut. Rebranded as 66 Summer Street, the project completed construction in the summer of 2015. This transaction represents a public-private partnership with the City of Stamford and the Urban Redevelopment Commission. The building is centrally located in the heart of downtown Stamford, and consists of a 15-story, mixed-use retail and market rate rental development. Consisting of 209 residential units in a Class A apartment building, 6,800 square feet of ground-floor retail, and a 324-space structured parking garage.

In 2013, Trinity recommenced the permitting and development of Boston East. Boston East was a proposed 200-unit luxury apartment development on the East Boston waterfront. Up until 2013, the East Boston waterfront had been struggling to create market rate housing given high downtown construction costs and lower rents than were necessary to make the project financeable. To finance the \$71 million development, Trinity formed a partnership with one of the largest, privately held real estate investment firms in the country and secured competitive terms on a \$45 million construction loan with JP Morgan Chase. The project was completed in March 2018 and is currently more than 47% leased at its targeted rents.

2. A description of the entity funding predevelopment costs associated with the project, and demonstration of its capacity to fund such costs.

The predevelopment costs associated with the Project will be funded by Trinity Financial, Inc. Our firm's financial statements, which were sent to the attention of Meghan Jop under separate cover, underscore the strength of our balance sheet and our ability to fund predevelopment costs before we secure an equity investor. In addition to providing its own capital to fund predevelopment costs for its developments, Trinity maintains a mid-seven figure line of credit with TD Bank, NA to support company operations as needed.

3. A financial plan, presenting a detailed description of all "sources and uses" of funds as well as a statement and plan for financing the development.

Attached is Trinity Financial's plan for the Project, including development budget "sources and uses" of funds for the rental, condominium, arts space and parking components of the development. Our construction costs are based on estimates from a number of general contractors that reviewed our preliminary plans. The hard cost estimates take into consideration the differential cost of constructing parking below the residential buildings as well as outside of the footprint of those buildings. Additionally, our cost estimates include resources for the courtyard structure and finishes, the Black Box theatre and associated arts space, elevators, platform upgrades, site work and other hard costs reasonably expected for this development.

Our financing plan includes a 5% hard cost contingency. Our soft cost budget includes costs that are usual and customary for a development of this scale and complexity, including resources for architecture and engineering, traffic and parking studies, legal costs, builder's risk insurance, interest expense for the 30-month construction period, and an amount for developer's overhead and profit equal to 5% of hard and soft costs. Also, the soft cost budget includes resources for costs that are unique to this development, including resources to compensate the Town for lost parking revenues during the construction period, for example.

4. A financial plan of operations, including a debt amortization schedule, a depreciation schedule and a 20-year projection of the Facility including plan of replacing equipment within the Facility. Detailed revenue assumptions (e.g. rental rates or sales prices for both market and affordable units.) must be provided.

Attached is a financial plan of operations, including a debt amortization schedule, a depreciation schedule and a 20-year projection of the Rental Project. The following are the assumptions that underpin this financial plan.

- Debt Amortization Schedule: Assumes a 30-year amortization and a 5.50% interest rate on the permanent mortgage.
- Depreciation Schedule: Assumes a straight-line depreciation schedule over 27.5 years.
- The rental component of Trinity's proposal calls for 45 rental housing units, of which 23 will be affordable with rents restricted to households earning up to 80% of the area median income (AMI). The following are the annual income limits for a family earning up to 80% of AMI in Wellesley.

Income Limits

Household Size	80% AMI
1	\$60,400
2	\$69,040
3	\$77,680
4	\$86,240
5	\$93,200
6	\$100,080

- The monthly rental amounts shown in the chart below, by unit type, reflect an analysis of comparable rental properties in and around Wellesley. The following rent schedule assumes a monthly rent per rentable square foot of \$3.35, which is supported by our due diligence. The affordable rents are established by HUD and are based upon the AMI for Norfolk County. Note: In the 20-year operating pro forma, a utility allowance for electricity that is anticipated to be paid directly by the tenant is deducted from the rents listed below.

Type	# Units	Market Rent
1 Bedroom	8	\$2,764
2 Bedroom	10	\$3,853
3 Bedroom	4	\$4,858

Type	# Units	Affordable Rent
1 Bedroom	6	\$1,618
2 Bedroom	10	\$1,942
3 Bedroom	7	\$2,243

- To be conservative, there is no rent assumed for the arts space.
- Vacancy allowance of 5% was assumed for the market-rate units and the affordable units. Revenue is trended at 2% per year, and expenses are trended at 3% per year.
- Operating expenses of \$10,520/unit per year is assumed. This is based on input from Trinity Management LLC and Trinity's experience with comparable properties.

- An absorption rate of two units per month is assumed for the market-rate units with lease up completed in eleven months. The affordable units are underwritten at an absorption rate of three units per month with lease up completed in eight months.
- It is assumed that one parking space is included in the rent of both the market-rate and affordable rental units.
- For the for-sale condominiums, we have assumed average net square feet per unit of 2,200 sf and average gross sales prices of \$1,200 per square foot.

5. The Town will not make any financial or other commitments to investors, lenders, or donators to the project, including without limitation any guarantees of debt or security interest in the Properties.

Trinity understands that the Town of Wellesley will not make any financial or other commitments to investors, lenders, or donators to the project, including without limitation, any guarantees of debt or security interest in the Properties.

6. The financial analysis provided in this section must be sufficient to demonstrate the financial feasibility of the proposal and the timeframe within which the project will be completed.

The financial analysis provided in this section demonstrates the financial feasibility of Trinity's proposal and the roughly 30-month timeframe within which the Project will be completed.



Section 6: Project Financing and Financial Analysis:

- Sources and Uses
- Debt Amortization Schedule
- Depreciation Schedule
- 20-Year Operating Pro Forma
- Valuation and Returns Analysis

Section 6. Sources & Uses of Funds

Hard Costs		Notes
Residential hard costs	45,675,000	GC estimates based on 182,700 gsf @ \$250/sf
Freestanding Parking Garage for Replacement Town Parking and Flex Spaces	4,350,000	GC estimates based on 145 spaces @ \$30K/spc
Replacement Town Parking within Condo Building	8,500,000	GC estimates for 170 spaces below the residential bdgs @ \$50K/spc
Condo Parking within Condo Building	4,500,000	GC estimates for 90 spaces below the residential bdgs @ \$50K/spc
Residential Rental Parking on Railroad Lot	2,250,000	GC estimates for 45 spaces below the residential bdgs @ \$50K/spc
Courtyard Structure and Finish	2,062,500	GC estimates
Roof Decks	862,500	GC estimates
Art space	3,000,000	GC estimates based on 10,000 gsf @ \$300/sf
Site work, platforms, elevators, etc.	5,450,000	GC estimates
	76,650,000	
Hard cost contingency	3,832,500	5% of hard cost budget
Total Hard Costs	80,482,500	
Soft Costs		
Architecture & Engineering	4,024,125	5% of hard costs
Geotechnical engineering	200,000	Allowance
Environmental engineering	250,000	Allowance
Construction management	375,000	Allowance
Appraisal/Market Study	35,000	Allowance
Permitting, traffic & parking analyses	100,000	Allowance
Surveys	25,000	Allowance
Materials testing, etc.	100,000	Allowance
Lender inspections	325,000	Allowance
Legal, title & recording	1,000,000	Allowance
Builder's risk insurance	804,825	1% of hard costs
Marketing/Advertising for leasing & sales	670,000	Allow \$10K per market rate unit
FF&E	500,000	Allowance
Carry costs	1,987,240	See Note 1 below
Financing fees	1,023,000	1% of debt & equity
Construction loan interest	4,571,875	Debt @ 5.5% interest rate for 30 months
Development overhead & fee	4,823,678	5% of hard and soft costs
Soft cost contingency	1,040,737	5% of hard costs
Total Soft Costs	21,855,480	
Total Development Costs	102,337,980	
Sources of Funds		
Debt	66,519,687	65% of total development costs
Equity	35,818,293	35% of total development costs
Total Sources of Funds	102,337,980	

Note 1

Resources to compensate Town for lost parking revenues during construction, to cover real estate taxes during construction, and to cover expenses during the sales period, etc.

Section 6. Financial Plan of Operations - Amortization Schedule

Total Permanent Mortgage	\$ 10,625,601
Interest Rate	5.50%
Term (Years, Months)	30
Payment	\$ 731,099

Year	Principal and Interest	Annual Debt Service Payment	Interest	Principal	Cumulative Principal Paid
1	\$ 10,625,601	\$ (731,099)	\$ (584,408)	\$ (146,691)	\$ 146,691
2	\$ 10,478,911	\$ (731,099)	\$ (576,340)	\$ (154,759)	\$ 301,449
3	\$ 10,324,152	\$ (731,099)	\$ (567,828)	\$ (163,270)	\$ 464,719
4	\$ 10,160,882	\$ (731,099)	\$ (558,848)	\$ (172,250)	\$ 636,970
5	\$ 9,988,632	\$ (731,099)	\$ (549,375)	\$ (181,724)	\$ 818,693
6	\$ 9,806,908	\$ (731,099)	\$ (539,380)	\$ (191,719)	\$ 1,010,412
7	\$ 9,615,189	\$ (731,099)	\$ (528,835)	\$ (202,263)	\$ 1,212,675
8	\$ 9,412,926	\$ (731,099)	\$ (517,711)	\$ (213,388)	\$ 1,426,063
9	\$ 9,199,538	\$ (731,099)	\$ (505,975)	\$ (225,124)	\$ 1,651,187
10	\$ 8,974,414	\$ (731,099)	\$ (493,593)	\$ (237,506)	\$ 1,888,693
11	\$ 8,736,908	\$ (731,099)	\$ (480,530)	\$ (250,569)	\$ 2,139,262
12	\$ 8,486,340	\$ (731,099)	\$ (466,749)	\$ (264,350)	\$ 2,403,612
13	\$ 8,221,990	\$ (731,099)	\$ (452,209)	\$ (278,889)	\$ 2,682,501
14	\$ 7,943,100	\$ (731,099)	\$ (436,871)	\$ (294,228)	\$ 2,976,729
15	\$ 7,648,872	\$ (731,099)	\$ (420,688)	\$ (310,411)	\$ 3,287,139
16	\$ 7,338,462	\$ (731,099)	\$ (403,615)	\$ (327,483)	\$ 3,614,623
17	\$ 7,010,978	\$ (731,099)	\$ (385,604)	\$ (345,495)	\$ 3,960,118
18	\$ 6,665,484	\$ (731,099)	\$ (366,602)	\$ (364,497)	\$ 4,324,615
19	\$ 6,300,987	\$ (731,099)	\$ (346,554)	\$ (384,544)	\$ 4,709,159
20	\$ 5,916,442	\$ (731,099)	\$ (325,404)	\$ (405,694)	\$ 5,114,853
21	\$ 5,510,748	\$ (731,099)	\$ (303,091)	\$ (428,007)	\$ 5,542,861
22	\$ 5,082,740	\$ (731,099)	\$ (279,551)	\$ (451,548)	\$ 5,994,409
23	\$ 4,631,192	\$ (731,099)	\$ (254,716)	\$ (476,383)	\$ 6,470,792
24	\$ 4,154,809	\$ (731,099)	\$ (228,515)	\$ (502,584)	\$ 6,973,376
25	\$ 3,652,225	\$ (731,099)	\$ (200,872)	\$ (530,226)	\$ 7,503,602
26	\$ 3,121,999	\$ (731,099)	\$ (171,710)	\$ (559,389)	\$ 8,062,991
27	\$ 2,562,610	\$ (731,099)	\$ (140,944)	\$ (590,155)	\$ 8,653,146
28	\$ 1,972,455	\$ (731,099)	\$ (108,485)	\$ (622,614)	\$ 9,275,759
29	\$ 1,349,842	\$ (731,099)	\$ (74,241)	\$ (656,857)	\$ 9,932,617
30	\$ 692,984	\$ (731,099)	\$ (38,114)	\$ (692,984)	\$ 10,625,601

Section 6. Financial Plan of Operations - Depreciation Schedule

Depreciable Property	\$	80,876,513
Less Site Work	\$	(5,000,000)
Less Personal Property	\$	(2,500,000)
Real Property	\$	73,376,513

Year	Real Property	Site Work*	Personal Property*	Total
1	\$ 2,668,237	\$ 5,000,000	\$ 2,500,000	\$ 10,168,237
2	\$ 2,668,237			\$ 2,668,237
3	\$ 2,668,237			\$ 2,668,237
4	\$ 2,668,237			\$ 2,668,237
5	\$ 2,668,237			\$ 2,668,237
6	\$ 2,668,237			\$ 2,668,237
7	\$ 2,668,237			\$ 2,668,237
8	\$ 2,668,237			\$ 2,668,237
9	\$ 2,668,237			\$ 2,668,237
10	\$ 2,668,237			\$ 2,668,237
11	\$ 2,668,237			\$ 2,668,237
12	\$ 2,668,237			\$ 2,668,237
13	\$ 2,668,237			\$ 2,668,237
14	\$ 2,668,237			\$ 2,668,237
15	\$ 2,668,237			\$ 2,668,237
16	\$ 2,668,237			\$ 2,668,237
17	\$ 2,668,237			\$ 2,668,237
18	\$ 2,668,237			\$ 2,668,237
19	\$ 2,668,237			\$ 2,668,237
20	\$ 2,668,237			\$ 2,668,237
Total	\$ 53,364,736	\$ 5,000,000	\$ 2,500,000	\$ 60,864,736

* Assumes bonus where all 100% of depreciation is taken in year 1.

Section 6. Financial Plan of Operations - 20-Year Operating Pro Forma

Affordable Units @ 80% AMI	# of units	Tenant Paid	Less Utility Allowance*	Net Rent	Net Revenue
Studio	0	\$1,510	(\$85)	\$1,425	\$0
1 Bedroom	6	\$1,618	(\$106)	\$1,512	\$108,864
2 Bedroom	10	\$1,942	(\$136)	\$1,806	\$216,720
3 Bedroom	7	\$2,243	(\$166)	\$2,077	\$174,468
Total	23				\$500,052

Utility Allowances from 2018 - High Rise (three or more floors)				
	Studio	1 BR	2 BR	3 BR
Electric Heat	\$62	\$80	\$107	\$135
Cooking Electric	\$7	\$10	\$13	\$15
Electricity Service Charges	\$16	\$16	\$16	\$16
Total	\$85	\$106	\$136	\$166

* Utility allowances includes electric cooking and other electric from Wellesley Housing Authority dated 1/1/2018.

Market-Rate Units	# of units	Square Footage	Rent Per Square Foot	Net Rent	Net Revenue
Studio	0	550		\$1,843	\$0
1 Bedroom	8	825	\$3.35	\$2,764	\$265,320
2 Bedroom	10	1,150		\$3,853	\$462,300
3 Bedroom	4	1,450		\$4,858	\$233,160
Total	22				\$960,780

Residential Trending Factors

Revenue	2.0%
Expenses	3.0%
Vacancy Rate - Affordable	5.0%
Vacancy Rate - Market-Rate	5.0%

Operating Pro Forma

Total Revenue		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20
Affordable Units @ 80% AMI		\$500,052	\$510,053	\$520,254	\$530,659	\$541,272	\$552,098	\$563,140	\$574,403	\$585,891	\$597,608	\$609,561	\$621,752	\$634,187	\$646,871	\$659,808	\$673,004	\$686,464	\$700,194	\$714,197	\$728,481
Vacancy		(\$25,003)	(\$25,503)	(\$26,013)	(\$26,533)	(\$27,064)	(\$27,605)	(\$28,157)	(\$28,720)	(\$29,295)	(\$29,880)	(\$30,478)	(\$31,088)	(\$31,709)	(\$32,344)	(\$32,990)	(\$33,650)	(\$34,323)	(\$35,010)	(\$35,710)	(\$36,424)
Market-Rate Units		\$960,780	\$979,996	\$999,596	\$1,019,587	\$1,039,979	\$1,060,779	\$1,081,994	\$1,103,634	\$1,125,707	\$1,148,221	\$1,171,185	\$1,194,609	\$1,218,501	\$1,242,871	\$1,267,729	\$1,293,083	\$1,318,945	\$1,345,324	\$1,372,230	\$1,399,675
Vacancy		(\$48,039)	(\$49,000)	(\$49,980)	(\$50,979)	(\$51,999)	(\$53,039)	(\$54,100)	(\$55,182)	(\$56,285)	(\$57,411)	(\$58,559)	(\$59,730)	(\$60,925)	(\$62,144)	(\$63,386)	(\$64,654)	(\$65,947)	(\$67,266)	(\$68,612)	(\$69,984)
Net Annual Revenue		\$1,387,790	\$1,415,546	\$1,443,857	\$1,472,734	\$1,502,189	\$1,532,233	\$1,562,877	\$1,594,135	\$1,626,018	\$1,658,538	\$1,691,709	\$1,725,543	\$1,760,054	\$1,795,255	\$1,831,160	\$1,867,783	\$1,905,139	\$1,943,242	\$1,982,106	\$2,021,749
Expenses	Per Unit Per Year																				
Payroll	(\$1,500)	(\$67,500)	(\$69,525)	(\$71,611)	(\$73,759)	(\$75,972)	(\$78,251)	(\$80,599)	(\$83,016)	(\$85,507)	(\$88,072)	(\$90,714)	(\$93,436)	(\$96,239)	(\$99,126)	(\$102,100)	(\$105,163)	(\$108,318)	(\$111,567)	(\$114,914)	(\$118,362)
Utility Expense	(\$1,455)	(\$65,475)	(\$67,439)	(\$69,462)	(\$71,546)	(\$73,693)	(\$75,903)	(\$78,181)	(\$80,526)	(\$82,942)	(\$85,430)	(\$87,993)	(\$90,633)	(\$93,352)	(\$96,152)	(\$99,037)	(\$102,008)	(\$105,068)	(\$108,220)	(\$111,467)	(\$114,811)
Repairs & Maintenance	(\$1,500)	(\$67,500)	(\$69,525)	(\$71,611)	(\$73,759)	(\$75,972)	(\$78,251)	(\$80,599)	(\$83,016)	(\$85,507)	(\$88,072)	(\$90,714)	(\$93,436)	(\$96,239)	(\$99,126)	(\$102,100)	(\$105,163)	(\$108,318)	(\$111,567)	(\$114,914)	(\$118,362)
Leasing & Marketing	(\$126)	(\$5,670)	(\$5,840)	(\$6,015)	(\$6,196)	(\$6,382)	(\$6,573)	(\$6,770)	(\$6,973)	(\$7,183)	(\$7,398)	(\$7,620)	(\$7,849)	(\$8,084)	(\$8,327)	(\$8,576)	(\$8,834)	(\$9,099)	(\$9,372)	(\$9,653)	(\$9,942)
Administrative	(\$400)	(\$18,000)	(\$18,540)	(\$19,096)	(\$19,669)	(\$20,259)	(\$20,867)	(\$21,493)	(\$22,138)	(\$22,802)	(\$23,486)	(\$24,190)	(\$24,916)	(\$25,664)	(\$26,434)	(\$27,227)	(\$28,043)	(\$28,885)	(\$29,751)	(\$30,644)	(\$31,563)
Real Estate Taxes	(\$4,336)	(\$195,120)	(\$200,974)	(\$207,003)	(\$213,213)	(\$219,609)	(\$226,198)	(\$232,983)	(\$239,973)	(\$247,172)	(\$254,587)	(\$262,225)	(\$270,092)	(\$278,194)	(\$286,540)	(\$295,137)	(\$303,991)	(\$313,110)	(\$322,504)	(\$332,179)	(\$342,144)
Insurance	(\$403)	(\$18,135)	(\$18,679)	(\$19,239)	(\$19,817)	(\$20,411)	(\$21,023)	(\$21,654)	(\$22,304)	(\$22,973)	(\$23,662)	(\$24,372)	(\$25,103)	(\$25,856)	(\$26,632)	(\$27,431)	(\$28,254)	(\$29,101)	(\$29,974)	(\$30,874)	(\$31,800)
Management Fee	(\$800)	(\$36,000)	(\$37,080)	(\$38,192)	(\$39,338)	(\$40,518)	(\$41,734)	(\$42,986)	(\$44,275)	(\$45,604)	(\$46,972)	(\$48,381)	(\$49,832)	(\$51,327)	(\$52,867)	(\$54,453)	(\$56,087)	(\$57,769)	(\$59,503)	(\$61,288)	(\$63,126)
Total Expenses	(\$10,520)	(\$473,400)	(\$487,602)	(\$502,230)	(\$517,297)	(\$532,816)	(\$548,800)	(\$565,264)	(\$582,222)	(\$599,689)	(\$617,680)	(\$636,210)	(\$655,296)	(\$674,955)	(\$695,204)	(\$716,060)	(\$737,542)	(\$759,668)	(\$782,458)	(\$805,932)	(\$830,110)
Net Operating Income		\$914,390	\$927,944	\$941,627	\$955,437	\$969,373	\$983,432	\$997,613	\$1,011,913	\$1,026,329	\$1,040,858	\$1,055,499	\$1,070,247	\$1,085,099	\$1,100,051	\$1,115,100	\$1,130,241	\$1,145,471	\$1,160,784	\$1,176,175	\$1,191,639
Debt Service Payment		\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099	\$731,099
Net Cash Flow		\$183,291	\$196,845	\$210,528	\$224,338	\$238,274	\$252,334	\$266,514	\$280,814	\$295,230	\$309,760	\$324,400	\$339,148	\$354,000	\$368,952	\$384,001	\$399,143	\$414,372	\$429,685	\$445,076	\$460,540
Debt Service Coverage Ratio		1.25	1.27	1.29	1.31	1.33	1.35	1.36	1.38	1.40	1.42	1.44	1.46	1.48	1.50	1.53	1.55	1.57	1.59	1.61	1.63

Annual Debt Service Payment	\$731,099
Interest Rate (estimate)	5.50%
Amortization	30
Permanent Loan Amount	\$10,625,601

Section 6. Valuation & Returns Analysis

Rental Component		
Projected NOI		\$914,382
Projected Cap Rate		5.00%
Projected Value		\$18,287,640
Less: Transaction Costs	5.00%	(\$914,382)
Projected Net Value		\$17,373,258
For-Sale Component		
Net square feet for sale		88,200
Projects NFS sales price		\$1,200
Projected Gross Sales		\$105,840,000
Less: Transaction Costs	5.00%	(\$5,292,000)
Projected Net Sales		\$100,548,000
Totals - Both Components		
Projected Net Proceeds/Value		\$117,921,258
Less: Outstanding Debt		(\$66,519,687)
Remaining Proceeds		\$51,401,571
Initial equity investment		\$35,818,293
Projected term (yrs)		3
Projected Internal Rate of Return		12.80%

Section 7 – Financial Qualifications

1 and 2. The proposal must include evidence of the financial status of the developer, demonstrating the financial strength to carry out the proposed development, including construction, management and operation of the facility. This shall include current financial statements for three (3) years from the developer.

Trinity Financial, Inc. has sent sealed copies of its current financial statements for three years to:

Meghan Jop
Assistant Executive Director
525 Washington Street,
Wellesley, MA 02482

3 and 4. Also, provide the name, address, telephone and fax numbers, and email addresses of a contact at one or more financial institutions that are familiar with your current financial status and past experience. Provide contacts for lenders on all projects carried out within the last five years, including all current projects.

Attached is a list of all projects completed by affiliates of Trinity Financial since 2012 and all current projects. For each project, the lending institution and point of contact are provided for both the construction lender and permanent lender (if applicable).



Section 7: Financial Qualifications:

- Letters Regarding Financial Statements
- Lender Contacts of Trinity Projects

TRINITY
DEVELOPMENT & MANAGEMENT

May 31, 2018

Meghan Jop
Assistant Executive Director
525 Washington Street
Wellesley, MA 02482
Via Fedex#8127 7688 4482

Re: Wellesley RFP - Audited Financials for Trinity Financial, Inc.

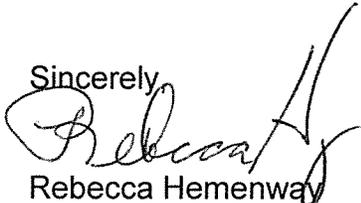
Dear Ms. Jop:

Enclosed please find the most recent three years of Audited Financial Statements for Trinity Financial, Inc. Our 2017 Audited Financials will not be available until late June.

These documents are delivered to you in confidence and with full expectation that they will be maintained confidentially and exempt from disclosure pursuant to the Freedom of Information Act, specifically C.G.S. §§ 1-210(b)(4) and 1-210(b)(5)(B).

Should you have any questions, please feel free to contact me at 617-720-8400 x1532

Sincerely,



Rebecca Hemenway
Chief Operating Officer

Section 7: Contact Information for Financial Institutions

	Van Brodie Mill - 9%	Van Brodie Mill - 4%	Boston East	Orient Heights Phase 1	66 Summer	Vela on the Park	Treadmark
Construction Lender(s)	TD Bank	TD Bank	JP Morgan	Citi Bank	TD Bank	Citizens Bank	Boston Private
Permanent Lender(s)	MassHousing	N/A	N/A	N/A	N/A	N/A	Boston Private
Contact Name	Tom McColgan	Tom McColgan	Jason Contegni	William Yates	Tom McColgan	Phillip M. Wadleigh	Peter Holands
Company	TD Bank	TD Bank	JP Morgan	Citi Bank	TD Bank		Boston Private
Address	203 Trumbull Street, Hartford, CT 06103	203 Trumbull Street, Hartford, CT 06103		390 Greenwich Street, 2nd Floor, New York, New York 10013	203 Trumbull Street, Hartford, CT 06103	28 State Street MS1570 12th Floor, Boston, MA 02109	Ten Post Office Square, Boston, MA 02109
Phone Number	860-757-5242	860-757-5242	212-648-2863	212-723-5535	860-757-5242	617-725-5628	617-912-3701
Fax Number	N/A	N/A			N/A		
Email Address	thomas.mccolgan@td.com	thomas.mccolgan@td.com	jason.a.contegni@jpmorgan.com	yatesw@citi.com	thomas.mccolgan@td.com	phillip.wadleigh@citizensbank.com	ghollands@bostonprivate.com
Contact Name	Deb Morse						Peter Holands
Company	MassHousing						Boston Private
Address	1 Beacon Street #27, Boston, MA 02108						Ten Post Office Square, Boston, MA 02109
Phone Number	617-854-1133						617-912-3701
Fax Number	617-854-1029						
Email Address	dmorse@masshousing.com						ghollands@bostonprivate.com
Contact Name							
Company							
Address							
Phone Number							
Fax Number							
Email Address							

Section 7: Contact Information for Financial Institutions

	Randolph Houses Phase 1	Randolph Houses Phase 2	60 King - 9%	60 King - 4%	Woonsocket	Washington Village Phase 1	Lucerne Gardens
Construction Lender(s)	TD Bank, NYCHA and HPD	Bank of New York, HPD, HDC	Citizens Bank	RI Housing	RI Housing	TD Bank	MassHousing
Permanent Lender(s)	NYCHA and HPD	HPD and HDC	N/A	N/A	RI Housing	TD Bank	MassHousing
Contact Name	Matthew Schatz	Clarence L. Burleigh	Mike Comiskey	Anne Berman	Anne Berman	Tom McColgan	Deb Morse
Company	TD Bank	Bank of New York	Citizens Bank	RI Housing	RI Housing	TD Bank	MassHousing
Address	2900 W Moreland Road, Willow Grove, PA	225 Liberty Street, 22nd Floor, New York, NY 10286	28 State Street, Boston, MA 02109	44 Washington Street, Providence, RI 02903	44 Washington Street, Providence, RI 02903	203 Trumbull Street, Hartford, CT 06103	1 Beacon Street #27, Boston, MA 02108
Phone Number		212-635-7658	617-725-5586	401-457-1269	401-457-1269	860-757-5242	617-854-1133
Fax Number			617-725-2410	N/A	N/A	N/A	617-854-1029
Email Address	matthew.schatz@td.com	clarence.burleigh@bnymellon.com	michael.comiskey@citizensbank.com	aberman@rihousing.com	aberman@rihousing.com	thomas.mccolgan@td.com	dmorse@masshousing.com
Contact Name	Lamar Fenton	Ian Shorts			Anne Berman	Tom McColgan	Deb Morse
Company	NYCHA	HPD			RI Housing		MassHousing
Address	250 Broadway, New York, NY 10007	100 Gold Street, Room 9U-5, New York, NY 10038			44 Washington Street, Providence, RI 02903	203 Trumbull Street, Hartford, CT 06103	1 Beacon Street #27, Boston, MA 02108
Phone Number	212-306-4024	212-863-5482			401-457-1269	860-757-5242	617-854-1133
Fax Number					N/A	N/A	617-854-1029
Email Address		shortsi@hpd.nyc.gov			aberman@rihousing.com	thomas.mccolgan@td.com	dmorse@masshousing.com
Contact Name	Joanna Kandel	Luke Schray					
Company	HPD	HDC					
Address	100 Gold Street, 9I-10, New York, New York 10038	110 William Street, New York, New York 10038					
Phone Number	212-863-6419	212-227-2765					
Fax Number		N/A					
Email Address	kandelj@hpd.nyc.gov	lschray@nychdc.com					

Section 7: Contact Information for Financial Institutions

	Mattapan Heights Phase 5A	Taunton	Harrison Tower	Northampton Tower	3160 Park Avenue
Construction Lender(s)	TD Bank	Bank of America	Citizens Bank	TD Bank	Capital One
Permanent Lender(s)	TD Bank	N/A	N/A	N/A	HPD, HDC, Bank of America
Contact Name	Tom McColgan	Elizabeth Gruber	Mike Comiskey	Tom McColgan	Fabian Ramirez, Senior Director
Company	TD Bank	Bank of America	Citizens Bank	TD Bank	Capital One
Address	203 Trumbull Street, Hartford, CT 06103	225 Franklin Street, Boston, MA 02110	28 State Street, Boston, MA 02109	203 Trumbull Street, Hartford, CT 06103	
Phone Number	860-757-5242	617-346-1060	617-725-5586	860-757-5242	646-761-5066
Fax Number	N/A	617-346-2724	617-725-2410	N/A	
Email Address	thomas.mccolgan@td.com	elizabeth.gruber@baml.com	michael.comiskey@citizensbank.com	thomas.mccolgan@td.com	fabian.ramirez@capitalone.com
Contact Name	Tom McColgan				Joanna Kandel
Company	TD Bank				HPD
Address	203 Trumbull Street, Hartford, CT 06103				100 Gold Street, 9I-10, New York, New York 10038
Phone Number	860-757-5242				212-863-6419
Fax Number	N/A				
Email Address	thomas.mccolgan@td.com				kandelj@hpd.nyc.gov
Contact Name					Luke Schray
Company					HDC
Address					110 William Street, New York, New York 10038
Phone Number					212-227-2765
Fax Number					N/A
Email Address					lschray@nychdc.com