

# Nichewaug Inn and Academy Consultant

Proposal prepared for  
Town of Petersham, Massachusetts



MacRostie Historic Advisors LLC

Bringing strategy, equity, and experience  
to historic building development

**KIRK & COMPANY**  
*Real Estate Counselors*

## | Proposal of Consulting

The MHA | Kirk & Co. team will begin the process by conducting site visits and undertaking basic research in order to get a better understand the Nichewaugh Inn and Academy site and the surrounding area in advance of any public meeting. This research will focus both on the physical building and the market conditions in Petersham and the surrounding area. In order to facilitate a productive public meeting, we feel there is a need to have a stronger understanding of these issues as it can help direct the discussion in a much more result driven manner. This initial research will also include a review of the specifics related to water supply and septic disposal constraints, as this will be an important part of the use evaluation process.

Kirk & Company will undertake an initial market analysis as a component of this first phase. We feel it is important to have real baseline numbers to work with when talking to the public. Additionally, we have found that more rural locations or smaller towns can sometimes underestimate the value of their location and the actual real numbers related to their marketplace. Having the market study component done in early in the project can help with this issue.

The results of this initial research will be compiled and will inform how the public process moves forward. We may choose to deviate slightly from the three public meetings and have one-on-one info gathering sessions with important stakeholders in order to inform the public conversation with residents. The information gathered in these one-on-one sessions will be included in the public information session. We propose that the public meeting be structured as a charrette where information is presented based on the initial research in a more structured fashion. For example, if housing was a use that has a market, we might present the number of units that will need to happen to make the project viable. Presenting these real questions allows us to produce a report that is a much more tangible document for our client and one that can produce a successful path forward.

The team will provide the town with monthly updates leading up to the presentation of the preliminary report on April 22, 2016. Based on the public meeting process and the preliminary report, the team will spend the next months refining the course of action and undertaking some diagrammatic architectural planning to have the report address as many specific areas of the reuse of the property. The team may also engage a cost estimating sub-consultant to develop more refined construction budgets in order to finalize development pro formas. If appropriate, the team may also reach out their network of clients to solicit input on the preferred uses and as a numbers check relative to real market experiences. The team will continue to provide the town with monthly updates during the period between the preliminary and final reports. If selected, the team will provide a more defined scope and timeline for the project taking into consideration the required delivery dates.

## | Primary Consultants

### **MacRostie Historic Advisors LLC** **Historic Tax Credit Consultants**

Since 2003, MacRostie Historic Advisors LLC has been a national leader in historic tax credit consulting, assisting real estate developers nationwide obtain project equity through federal and state historic tax credit programs. Our partners have over 60 years of combined experience in the field of historic preservation and have managed more than 1,000 federal historic rehabilitation tax credit certification applications for developments in 39 states across the country, including Alaska and Hawaii. All of our associates meet the Secretary of the Interior's *Professional Qualification Standards* for Architectural History and maintain strong professional relationships with review staffs at the National Park Service and State Historic Preservation Offices.

In our practice, we place particular emphasis on providing clients with a strategic approach to the historic tax credit certification process, ensuring timely and successful project certification with a minimum of design changes. We work collaboratively with clients and project teams to identify creative solutions that balance client and project objectives, regulatory requirements, and historic preservation principles. With extensive contacts in the equity syndication and corporate investor communities, we also are able to facilitate connections between our developer and corporate investor clients.

Our diverse portfolio of work includes consulting for affordable housing, market-rate housing, student housing, military housing, hotels, commercial office and retail space, arts and entertainment venues, civic and educational facilities, and research and technology campuses.

We currently have five offices in key locations around the country: Washington, DC; Boston; Chicago; Charleston, SC; and San Jose. Our locations provide for efficient and customized client service wherever our projects are located while taking advantage of a greater network of resources and support.

Our headquarters location in Washington, DC and the involvement of our senior partner Bill MacRostie in industry advocacy on Capitol Hill reinforces our position as leaders in the historic tax credit field. The proximity to the DC-based National Park Service headquarters strengthens our relationship with decision makers for federal rehabilitation tax credit certification applications and gives us a competitive advantage by allowing us to work directly with reviewers to swiftly resolve issues that may arise in any given application.

## **Kirk & Company** **Real Estate Counselors**

Kirk & Company is a real estate consulting firm that has been providing appraisal and valuation, market analysis, and counseling services to sophisticated investors since 1993. Kirk & Company provides clients with real estate counseling and valuation services for all types of income-producing property on a national basis. Our specialized services include development and operating feasibility, marketability, valuation, and due diligence services for development, redevelopment, historic rehabilitation, adaptive reuse, financing, investment, disposition, and litigation. Kirk & Company has specialized expertise in valuation of all types of multifamily housing, fractional interests, air rights, and ground leases; and metropolitan markets in the northeastern United States. Our clients include developers, non-profit organizations, institutional investors, lenders, and public and government agencies.

Kirk & Company provides counseling services to financial institutions, non-profit groups, developers and public agencies to assist with their real estate opportunities and problems. Our work includes counseling on marketability and feasibility, highest and best use analysis, due diligence assistance, portfolio strategy, asset repositioning, alternative financing methods and adaptive reuse of historic properties.

We appraise commercial property of all types, and have a specialty in affordable housing analysis. We are an approved provider of real estate appraisal and advisory services to the Massachusetts Turnpike Authority. We are approved appraisers for Massachusetts Housing Finance Agency (MassHousing), Massachusetts Housing Investment Corporation (MHIC), and Massachusetts Housing Partnership (MHP).

We provide real estate counseling for marketability, feasibility, and diligence for real estate development, investment, and disposition. Our expertise is available for litigation support, expert testimony and consulting on an as needed basis. We provide counseling services to financial institutions, non-profit groups, developers and public

agencies to assist with their real estate opportunities and problems. Our work includes counseling on marketability and feasibility, highest and best use, due diligence assistance, portfolio strategy, alternative financing methods and adaptive reuse of historic properties.

We perform housing market studies for existing, planned and repositioned properties. Our assignments are completed for lenders, investors, developers and non-profit sponsors. The reports are used for planning, underwriting, financing, investment and acquisition/disposition. Within the last five years, we have completed more than 50 market studies in over 45 communities in Massachusetts.

Our counseling assignments provide advice and direction to our clients throughout the various stages of the development process, and establish lasting relationships that allow clients to rely on us through the many phases of real estate transactions. On the basis of our analytical results, we take counseling one step further by recommending practical development and investment strategies that provide value added services to our clients. We identify local programs or regulations that may benefit or burden the project; we advise recommendations on amenity packages, floor plans, marketing methods, and alternative financing to maximize the market positioning of the project.

Litigation support includes research and advice on court, arbitration, and mediation of real estate disputes for government agencies and non-profit entities. Our counsel is based on the Counselors of Real Estate (CRE) standard of professionalism and is unbiased, knowledgeable and confidential.

## | Key Staff

### **Albert Rex** **Partner | Director, MHA Northeast** **MacRostie Historic Advisors LLC**

Albert Rex is a partner at MHA and Director of the MHA Northeast office. A Massachusetts-based historic real estate consultant and strategist with 20 years of experience in the Northeast, Albert has worked with clients that include developers and organizations, municipalities, and institutions that have complex preservation, permitting, and zoning issues.

During his career, Albert has focused on the economic impact of historic rehabilitation. He was one of four authors of the original legislation that created the Massachusetts Historic Rehabilitation Tax Credit (MAHRTC) and has consulted on that matter as a technical advisor to Preservation Massachusetts, Inc., the statewide non-profit advocacy organization. Albert provides his clients with a unique understanding of the MAHRTC application criteria as a result of his involvement in the creation of the program. He has also represented clients on federal, state, and local preservation matters, including regulatory compliance and local landmark review.

Albert is a former Executive Director of the Boston Preservation Alliance, Boston's citywide non-profit preservation advocacy organization. While at the Alliance, he was involved in numerous projects and planning processes that focusing on historic preservation's role as an economic development tool. Previously, Albert was the Program Manager for Preservation Massachusetts. He was the Executive Director of Friends of the Wentworth in New Castle, New Hampshire from 1995-1998.

Albert has a B.A. from the University of Rhode Island, a Master's degree in Historic Preservation from Boston University, and is currently pursuing an MBA at Babson College.

**David S. Kirk, CRE, MAI, FRICS**

**Principal | Founder**

**Kirk & Company**

For over 45 years, David Kirk has served institutional clients and high net worth individuals as a property and investment counselor. In 1993, he established Kirk & Company as a continuation and expansion of his real estate counseling and investment activities during his 22-year tenure as a principal at the Boston Financial Group. Kirk & Company offers real estate consulting services to institutions, corporations, investors and developers. Services include advice, analysis and assistance on real estate investment, disposition, and development, including property valuation, marketability and feasibility studies.

Prior to founding Kirk & Company in 1993, he was a Senior Vice-President and Principal of The Boston Financial Group, and the Director of the Boston Financial Consulting Group, a division within the company that offers real estate consulting services. Lend Lease acquired Boston Financial in September of 1999 and subsequently MMA has acquired Lend Lease. Prior to 1971, Mr. Kirk was an account executive with Landauer Associates (New York City), real estate consultants, where he was an appraiser of commercial, industrial and residential properties for purposes of financing, joint venture, disposition and corporate merger/acquisition.

Mr. Kirk is a member of the Counselors of Real Estate (CRE) and Appraisal Institute (MAI). He was 2001 President of the Counselors of Real Estate and 2001 President of the Massachusetts Chapter of The Appraisal Institute. He is a member of Lambda Alpha International an honorary land economics society and a member of the board of directors of the Boston Chapter, and currently serves as President. He is a member of the Greater Boston Real Estate Board, and the National Association of Realtors. Mr. Kirk is a Certified General Real Estate Appraiser in the state of Massachusetts and a licensed real estate broker in the state of Massachusetts.

Mr. Kirk is a graduate of the University of Pennsylvania where he majored in Architecture and the Wharton Graduate School of Business where he majored in Finance. He has been a speaker and a panelist at conferences of, among others, the Urban Land Institute, the National Trust for Historic Preservation, the Mortgage Bankers Association of America, the Society of Real Estate Appraisers, and the Massachusetts Bar Association. He was chairman of an advisory working group on Troubled Properties for the United States Department of Housing and Urban Development.

Mr. Kirk has analyzed and opined on the fairness of a variety of related party real estate transactions for public and privately held entities. From 1993 to 1999, he served as a fiduciary and as a real estate investment advisor to the Prudential Retirement System, and he has similarly served the Virginia Retirement System. He has served as an arbitrator for the American Arbitration Association and the National Association Securities Dealers (NASD). He has been trained as an arbitrator by the NASD and as a mediator by the National Association of Realtors and NASD. He has qualified as a real estate valuation expert in federal district, bankruptcy and appellate tax courts.

Mr. Kirk was a member of the Board of Editors of *Banker & Tradesman* and a contributing writer to the New England Real Estate Journal, and a co-author of *Real Estate: A Hidden Corporate Asset* (American Society of Real Estate Counselors, 1986). He has written articles which have appeared in national real estate periodicals including *The Appraisal Journal* and *Real Estate Review*. His article "Using the Reversion/Shelter Approach to Appraise Subsidized Housing," co-authored with David A. Smith, was honored as the best *Appraisal Journal* article written in 1983, recipient of the Robert H. Armstrong Award.

**Brett N. Pelletier**  
**Kirk & Company**

Mr. Pelletier joined Kirk & Company in 2005 to assist in the appraisal and consulting process, which includes narrative appraisal reports, feasibility studies, acquisition analysis and customized market research. Kirk & Company offers real estate consulting services to institutions, corporations, investors and developers. Services include advice, analysis and assistance on real estate investment, disposition, and development, including property valuation, marketability and feasibility studies. Mr. Pelletier specializes in the appraisal and analysis of market-rate, mixed-income, and affordable housing properties; including senior housing, SRO housing, assisted and independent living facilities with supportive services, and other types of rental and for-sale housing.

Prior to joining Kirk & Company, Mr. Pelletier served as campaign intern with John Kerry for President and was a legislative intern in the Boston office of the late Senator Edward M. Kennedy. Mr. Pelletier received his Bachelor's Degree in Finance with minors in English and Government from Bentley College where he focused on Corporate Finance and Real Estate with coursework in Real Estate Law, Real Estate Financing and Urban Planning & Development. Mr. Pelletier has successfully completed extensive primary and continuing education courses with the Appraisal Institute, Massachusetts Board of Real Estate Appraisers, and other national and regional professional and educational organizations.

Mr. Pelletier is a Licensed Real Estate Appraiser Trainee in the Commonwealth of Massachusetts, a Practicing Affiliate Member of the National and Massachusetts Chapter of the Appraisal Institute, an Emerging Leader Member of the Real Estate Finance Association (REFA) and a member of the National Council of Housing Market Analysts (NCHMA, an affiliated council of National Housing and Rehabilitation Association).

Since 2010, Mr. Pelletier has served as an elected member of the Tiverton, RI Town Council. In that capacity, Mr. Pelletier has served as liaison to the Economic Development Commission, Planning Board, Harbor & Coastal Waters Management Commission, Historic Preservation Advisory Committee, Library Construction Coordination Committee, Library Board, and the Real Estate Property Tax Exemption Review Committee. He serves as an ex-officio member of the Land Use Procedural Improvements Committee and the Seaside Gas Station Ad-hoc Committee, designed to improve land use planning and redevelopment strategies for town-owned property.

Mr. Pelletier is a member of the Herreshoff Marine Museum, the Preservation Society of Newport County, and the Fall River Historical Society, non-profit organizations that preserve and protect the maritime and architectural heritage of the region. Additionally, Mr. Pelletier serves as the president of the board of directors of the Striving Artists Theatre Company of Beverly, Massachusetts; a non-profit performing arts organization dedicated to enriching the community with innovative theatre arts.

| Sub-Consultant

**Daniel Benoit**  
**Benoit Design Group**

Daniel Benoit is a registered architect in Massachusetts and a Principal at Benoit Design Group. Formerly with the City of Worcester's Planning Department, Mr. Benoit has worked closely with MHA as the lead architect on several successful historic tax credit projects. Mr. Benoit is the Project Architect for the North Brookfield Town House, a similar type project and has a strong understanding for the Secretary of the Interior's *Standards for Rehabilitation*.

Mr. Benoit has a broad background of architectural and project management experience with commercial, institutional, residential and municipal planning projects. Prior to starting his own firm, Mr. Benoit worked in the public sector and has extensive experience in urban redevelopment, public participation and project implementation. A sample of Daniel's projects include: Southbridge Downtown Redevelopment Plan – project architect; Blackstone Canal Feasibility Study (Worcester, MA); City Hall Council Chamber Restoration (Worcester, MA); Worcester Fire Department Credit Union – project architect; Station Marketplace (Worcester, MA); 379 Main St. Micro-loft Apartments (Worcester, MA); Beacon/Oread Neighborhood Revitalization (Worcester, MA); Worcester Convention Center – development office project manager; Central Street Gateway – development office project coordinator; Downtown Vision plan – development office project coordinator; Union Station Revitalization – development office project coordinator.

Mr. Benoit received a Bachelor of Arts degree from Assumption College (Worcester, MA) in 1982 and a Bachelor of Architecture degree from the Boston Architectural Center in 1992.

## **| Professional Qualifications**

(As outlined by the Consultant Selection Criteria)

### **Expertise**

As joint applicants MacRostie Historic Advisors (MHA) and Kirk & Company, bring a depth of experience in real estate, both from a financial perspective both in evaluating uses through traditional market studies and understanding financing to a strong understanding of historic buildings and public process. Kirk & Company are licensed and certified General Real Estate Appraisers, and all MHA staff meet the Secretary of the Interior's Standards for Architectural Historian. Dan Benoit, Benoit Design Group, will be working on the team and is a Worcester based architect registered in Massachusetts. MHA and Kirk & Company have work closely on several projects that have required a tight turn around and have the knowledge and staffing to execute the project as described.

### **Demonstrated Knowledge**

See DSB Form

### **Knowledge of Restoration and Reuse Planning**

Albert Rex and the MHA staff have worked on a large number of vacant properties taking them through the approval process required to receive state and federal historic tax credits. Prior to joining MHA, Mr. Rex consulted on a number of public projects to determine the future of long vacant buildings. His career started with organizing conferences in Massachusetts focused on reuse, such as Red Brick Elephants, which addressed the large number of vacant state hospitals. Mr. Rex was also the project manager on The Boston Historic Theater Charrette, which analyzed the reuse of three significant theater buildings on lower Washington Street in Boston's Downtown Crossing Neighborhood.

Kirk & Company has completed market analysis or consulting assignments for 21 vacant historic preservation or adaptive reuse properties within the last 5 years, including:

- Easthampton, MA – 50 units mixed-income rental housing within vacant mill
- Holyoke, MA – 50 units market-rate rental housing within former school/church campus

- Fitchburg, MA – 96 units affordable rental housing within vacant mill
- New London, CT – 68 units mixed-income rental housing within vacant mill
- Athol, MA – 120 units affordable rental housing within vacant mill
- Dudley, MA – 164 units luxury rental housing within partially vacant mill
- Northborough, MA – 19,000 square-foot vacant mansion – adaptive reuse
- Quincy, MA – 46 units luxury condominium housing within former school building
- Chinatown, Boston, MA – 40,000 square-foot partially vacant mixed-use building
- Somerville, MA – 25 units affordable rental housing within vacant water works building
- North Brookfield, MA – 9,300 square-foot former townhouse building – currently vacant
- Worcester, MA – 90,000 square-foot historic office building mixed-use redevelopment
- Newport, RI – 13 units luxury condominiums within former schoolhouse
- Sanford, ME – 140 units mixed-income rental housing within former mill
- Rochester, NY – 850,000 square-foot historic department store office building – mixed-use redevelopment
- Brockton, MA – Vacant church and supporting buildings
- Easton, MA – Vacant church and supporting buildings
- Roxbury, MA – Vacant church and supporting buildings

### **Demonstrated Ability to Conduct Public Process**

In addition to the two processes listed above, during his time as the Executive Director of the Boston Preservation Alliance (BPA), Mr. Rex managed many public meetings specifically focused on the reuse of historic buildings. He selected by DCAM to Chair the Chestnut Hill Waterworks Reuse Committee, which managed the disposition of the Chestnut Hill Waterworks site that straddled two Boston neighborhoods and one Brookline neighborhood. The process included a reuse study and charrette undertaken by the BPA and then a developer RFP and zoning change undertaken by the committee he chaired. More recently Mr. Rex and Mr. Pelletier have been working with the Friends of the North Brookfield Town House, which has included several public meeting in front the of the Selectmen. David S. Kirk has previously served as an arbitrator for the American Arbitration Association and the National Association Securities Dealers (NASD). He has been trained as an arbitrator by the NASD and as a mediator by the National Association of Realtors and NASD to serve in conflict resolution and mediation. Additionally, since 2010, Mr. Pelletier has served as an elected member of the Tiverton, RI Town Council. In that capacity, Mr. Pelletier has served as liaison to the various boards and commissions including: Economic Development, Planning Board, Historic Preservation Advisory Committee and he serves as an ex-officio member of the two committees tasked with improving land use planning and redevelopment strategies for town-owned property.

### **Years in Business**

MHA | 12 Years

Kirk & Company | 22 years

### **Years of Professional Experience by Key Staff**

Albert Rex has been directly involved in historic preservation planning and reuse for 21 years. David S. Kirk has been serving institutional clients as a property and investment counselor for 45 years. Brett Pelletier has been directly involved in advising clients in real estate valuation, feasibility, and market analysis for 10 years.

## Demonstrated Experience in New England

As noted in previous sections, combined, the Team has over 76 years of real estate experience, mostly in New England. They have worked in over 200 of the Commonwealth's 351 cities and towns and large number of these projects have been west of Worcester and in central Massachusetts. The Team has strong knowledge of the financing tools that are Massachusetts specific as well as national programs, such as federal historic tax credits or new market tax credits.

## References

**Kathleen Polanowicz** | Office of Rep. Jim McGovern; Northboro CPA Committee

34 Mechanic Street, #1  
Worcester, MA 01608  
508-831-7356

**Jim Igoe** | Preservation Massachusetts

The Landmark Building  
34 Main Street Extension, Suite 401  
Plymouth, MA 02360  
617-723-3383  
jigoe@preservationmass.org

**Rich Relich** | Arch Street Development

112 Water Street  
Suite 600  
Boston, MA 02109  
781-424-7328  
[rich@archstreetdevelopment.net](mailto:rich@archstreetdevelopment.net)

**Adam Stein and Lawrence Curtis** | Winn Development

Six Faneuil Hall Marketplace  
Boston, MA 02109  
617-742-4500

## Knowledge of Central Massachusetts

MHA Northeast has worked on projects in central Massachusetts including active projects in Athol, North Brookfield, Wilbraham and Easthampton and former projects in Fitchburg, Northampton and Amherst. Kirk & Company has completed market studies or consulting assignments in ten Central Massachusetts communities within the last five years, including: Dudley, Athol, Holyoke, Northborough, West Boylston, Worcester, North Brookfield, Chicopee, Paxton, and Easthampton.

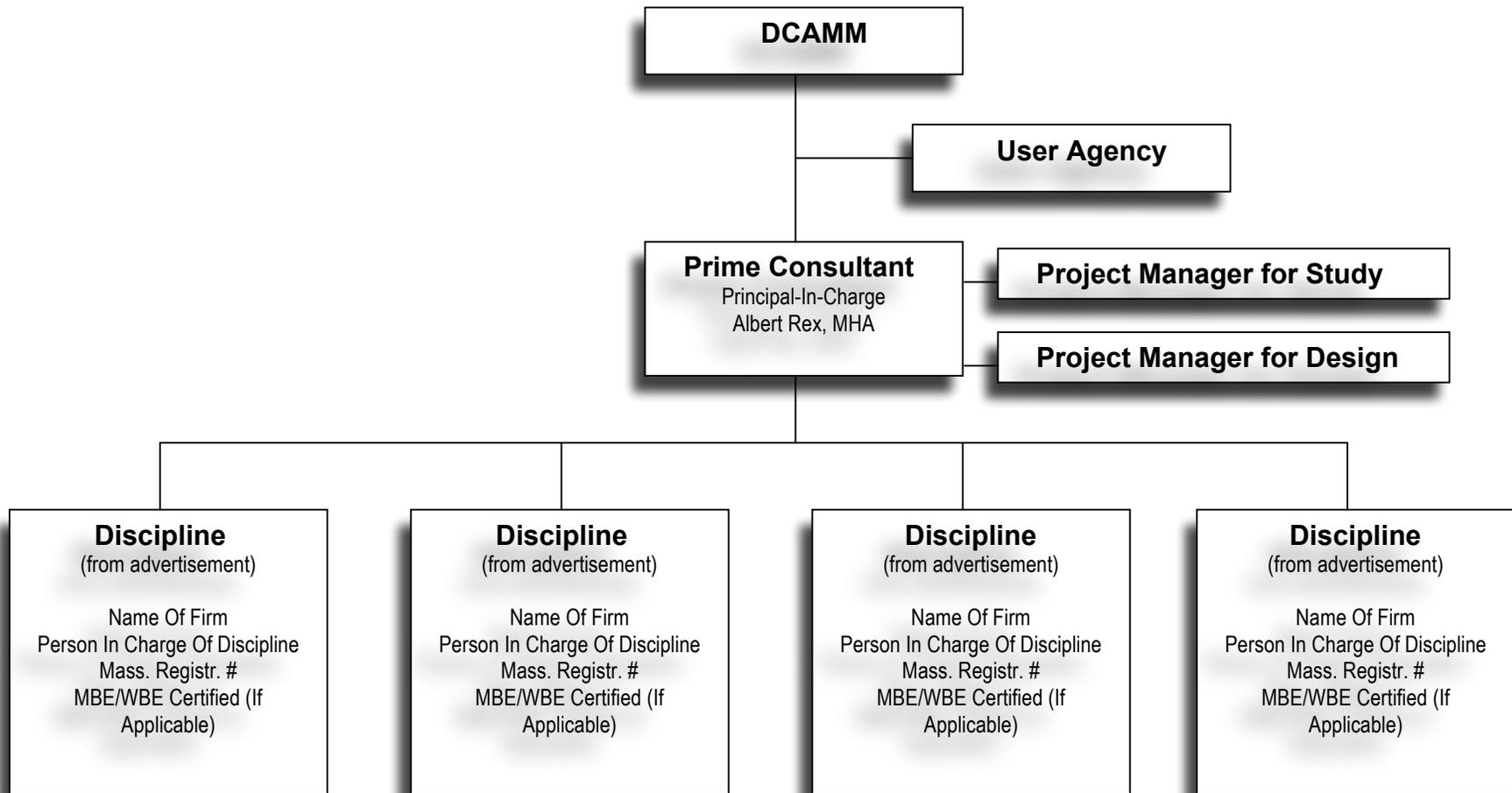
| Proposed Budget

<b>MacRostie Historic Advisors LLC</b>	\$10,000
<b>Kirk &amp; Company</b>	\$10,000
<b>Benoit Design Group</b>	\$ 5,000

\*A detailed budget is available upon request

<b>Commonwealth of Massachusetts DSB Application Form (Updated May 2014)</b>	1. Project Name/Location for Which Firm is Filing:	2a. DSB #	Item #
		2b. Mass. State Project #	
3a. Firm (Or Joint-Venture) - Name and Address Of Primary Office To Perform The Work:  MacRostie Historic Advisors, LLC 263 Summer St. 6 <sup>th</sup> Fl Boston, MA 02210	3e. Name Of Proposed Project Manager:  Albert Rex, Partner, MacRostie Historic Advisors LLC  For Study: (if applicable) For Design: (if applicable)		
3b. Date Present and Predecessor Firms Were Established:  NA	3f. Name and Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:		
3c. Federal ID #: 52-2336168	3g. Name and Address Of Parent Company, If Any:		
3d. Name and Title Of Principal-In-Charge Of The Project (MA Registration Required):  Email Address: Telephone No: Fax No.:	3h. Check Below If Your Firm Is Either: (1) SDO Certified Minority Business Enterprise (MBE) <input type="checkbox"/> (2) SDO Certified Woman Business Enterprise (WBE) <input type="checkbox"/> (3) SDO Certified Minority Woman Business Enterprise (M/WBE) <input type="checkbox"/>		
4. Personnel From Prime Firm Included In Question #3a Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline And, Within Brackets, The Total Number Holding Massachusetts Registrations):			
Admin. Personnel	_____ ( _____ )	Ecologists	_____ ( _____ )
Architects	1 ( 1 )	Electrical Engrs.	_____ ( _____ )
Acoustical Engrs.	_____ ( _____ )	Environmental Engrs.	_____ ( _____ )
Civil Engrs.	_____ ( _____ )	Fire Protection Engrs.	_____ ( _____ )
Code Specialists	_____ ( _____ )	Geotech. Engrs.	_____ ( _____ )
Construction	_____ ( _____ )	Industrial Hygienists	_____ ( _____ )
Cost Estimators	_____ ( _____ )	Interior Designers	_____ ( _____ )
Drafters	_____ ( _____ )	Landscape Architects	_____ ( _____ )
		Licensed Site Profs.	_____ ( _____ )
		Mechanical Engrs.	_____ ( _____ )
		Planners: Urban./Reg.	_____ ( _____ )
		Specification Writers	_____ ( _____ )
		Structural Engrs.	_____ ( _____ )
		Surveyors	_____ ( _____ )
		Other	2 ( _____ )
		Other	2 ( _____ )
		Total	_____ ( _____ )
5. Has this Joint-Venture previously worked together? <input type="checkbox"/> Yes <input type="checkbox"/> No			

6. List **ONLY** Those Prime and Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm and Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:



7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. <u>Include Resumes of Project Managers.</u> Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a. Name and Title Within Firm:	a. Name and Title Within Firm:
b. Project Assignment:	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides: <div style="text-align: right;">           MBE <input type="checkbox"/>            WBE <input type="checkbox"/> </div>	c. Name and Address Of Office In Which Individual Identified In 7a Resides: <div style="text-align: right;">           MBE <input type="checkbox"/>            WBE <input type="checkbox"/> </div>
d. Years Experience: With This Firm: _____ With Other Firms: _____	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number	f. Active Registration: Year First Registered/Discipline/Mass Registration Number:
g. Current Work Assignments and Availability For This Project:	g. Current Work Assignments and Availability For This Project
h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):	h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed , If Not Current Firm):

8a. Current and Relevant Work By Prime Applicant Or Joint-Venture Members. Include <b>ONLY</b> Work Which Best Illustrates Current Qualifications In The Areas Listed In The DSB Advertisement (List Up To But Not More Than 5 Projects).					
a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs(Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was Responsible.
(1) North Brookfield Town House North Brookfield, MA	Financial feasibility, market study, historic tax credit consulting, fundraising, cost estimating and budgeting	Patricia Miller North Brookfield Town House Company, LLC 215 North Main Street North Brookfield, MA 01535 508-867-8692	June 2017	\$5 million	\$130,000.00
(2) Nashawannuck Mills – One Cottage Street Easthampton, MA	Historic tax credit consulting-National Register Nomination	Rich Relich Arch Street Development 112 Water Street, Suite 600 Boston, MA 02109 781-424-738	October 2105	\$18,867,000	\$38,300.00
(3) Union Twist Mill Athol, MA	Historic tax credit consulting-National Register Nomination Project Feasibility	Billy Hughes Historic Preservation Partners 300 S. Firestone Street Gastonia, NC 28052 404-543-1237	October 2019	\$72 million	\$170,000.00
(4) Osgood Bradley Building Worcester, MA	Historic tax credit consulting-National Register Nomination Project Feasibility – due diligence Project management	Rick Shaffer Vision Development 401 East Elm, Suite 150 Conshohocken, PA 19428 610-637-1122	June 2016	\$42 Million	\$120,000.00
(5) 24 Merrimack Street Lowell, MA	Historic tax credit consulting-National Register Nomination Project Feasibility – due diligence Project management	Tom Monahan 24 Merrimack Street LLC 141 Main Street Nashua, NH 03060 603-880-0502	February 2016	\$11,685,306	\$53,000.00

8b. List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement and They Must Be In The Format Provided.

Sub-Consultant Name:

a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)					
(2)					
(3)					
(4)					
(5)					

9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.

# of Total Projects:		# of Active Projects:	Total Construction Cost (In Thousands) of Active Projects (excluding studies):		
Role P, C, JV *	Phases St., Sch., D.D., C.D.,A.C. *	Project Name, Location and Principal-In-Charge:	Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, or Estimated if Not	Completion Date (Actual or Estimated) (R)Renovation or (N)New
		1.			
		2.			
		3.			
		4.			
		5.			
		6.			
		7.			
		8.			
		9.			
		10.			

\* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch. = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

10. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE APPLICATION EVALUATION - PROJECT EXPERIENCE REQUESTED IN THE ADVERTISEMENT.**

**Be specific – No Boiler Plate**

11. Professional Liability Insurance:

Name of Company	Aggregate Amount	Policy Number	Expiration Date
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12. Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of \$50,000 per incident? Answer **YES** or **NO**. If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary).

13. Name Of Sole Proprietor Or Names Of All Firm Partners and Officers:

Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

14. If Corporation, Provide Names Of All Members Of The Board Of Directors:

Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

15. Names Of All Owners (Stocks Or Other Ownership):

Name and Title	% Ownership	MA Reg.#	Status/Discipline	Name and Title	% Ownership	MA Reg.#	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

16. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7C, Section 44 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted By \_\_\_\_\_ Printed Name and Title \_\_\_\_\_ Date \_\_\_\_\_  
 (Signature)

**The following forms MUST be attached to only ONE (ORIGINAL Copy) application: 1. SDO Certification required for MBE/WBE Firms; 2. Sub-Consultant Acknowledgment.**

DSB S-CA	Commonwealth of Massachusetts Designer Selection Board <b>SUB-CONSULTANT ACKNOWLEDGMENT</b>
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**Project:** \_\_\_\_\_

**Applicant Designer:** \_\_\_\_\_

**Sub-consultant:** \_\_\_\_\_

**SUB-CONSULTANT ACKNOWLEDGMENT**

The sub-consultant named above hereby certifies that it has been notified by the Applicant Designer that it has been nominated to perform work on the Applicant Designer's team for the above Project, which is under consideration at the Designer Selection Board.

\_\_\_\_\_  
**Signature of Sub-Consultant Duly Authorized Representative**

\_\_\_\_\_  
**Print Name and Title**

Date \_\_\_\_\_

It is a requirement that all applicants supply this document signed, attached to the Original application, for each of the listed sub-consultants stating that they are aware and agree to being nominated by said applicant designer. Electronic signatures are accepted.