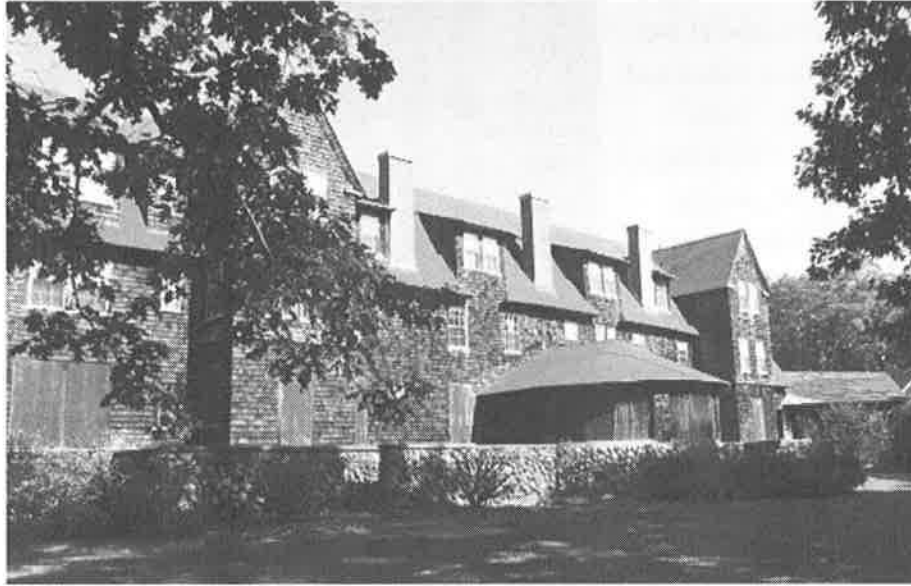


# *Concord Square Planning & Development, Inc.*

## Response to the Request for Proposals by the Town of Petersham for Consultant for Nichewaug Inn & Academy Property



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December 11, 2015  
Contents of Proposal

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  - b. Albert Richter & Tittmann
  - c. Bonz & Company, Inc.
  - d. Douglas MacLeay

# *Concord Square Planning & Development, Inc.*

## **1. Project Understanding**

The Town of Petersham (the Selectboard) is hiring a consultant to help resolve the future the of the Nichewaug Inn and Academy property (the Property) on the historic Town Common.

The 6.6-acre, long-vacant, Town-owned property is located at the intersection of N Main Street and Common Street, with nearly 100,000 square feet of buildings, including the original shingle-style inn building built in 1899 with some subsequent modifications, and a large brick-clad addition built out the back when the inn was converted into a parochial girl's school in the 1950s. The Town acquired the Property in 2007. The Property is in the Petersham Common Historic District.



A number of studies have been conducted to assess the existing conditions of the Property, and some architectural plans were prepared recently. Early this year, the Town issued a Request for Proposals for the Transfer, Reuse and Redevelopment of the Nichewaug Inn portion of the Property, and received two proposals. A third potential developer declined to submit a proposal. One proposal was withdrawn, and the third was not approved by the September, 2015, Town Meeting.

The main purposes of the consulting services are to:

- 1) Form a vision for the property by looking creatively at the entire property and considering a wide range of options, and to propose realistic and implementable options that would also benefit the Town economically;
- 2) Make recommendations on real estate development strategies for the property, with hard data to prove the economic feasibility;
- 1) Gather and incorporate community input into the vision and recommendations.

A major difficulty with the property is the location of Petersham and its low population. There are fewer than 400 households in the community – about 1,200 people in total. This means that there is minimal local demand based on the local population.

Secondly, the community is located just north east of the Quabban Reservoir. It is a 45-minute drive to Amherst and Worcester, and an hour to Northampton and Springfield. It is a significant commute to any of the adjacent employment centers. This distance and relative isolation negatively affects demand for any of the potential uses of the property.

On the plus side, however, is the charm and quality of the Petersham Village Center. It contains many historic buildings, most of which are in excellent condition, well cared for and very attractive. The Town Green and the surrounding buildings are beautiful. It is in many respects the quintessential New England Village. Many in the community are retired; it is an attractive place in which to live.

The former Nichewaug Inn is an exceptional building. If it were to be renovated back to its original charm and beauty, it would add dramatically to the overall charm and attractiveness of the Village Center. It has given an historic flavor to the area for over 100 years. Finding a way to save and renovate the building would enhance the long term future of Petersham.

The buildings have been vacant for over 30 years. There is substantial deterioration, evidence of mold and other hazardous contaminants. Further, the layout of the historic Inn Building is problematic for conversion to certain uses, such as apartments.

In other words, the Nichewaug Inn represents a substantial development challenge.

After years of redevelopment efforts, many in the community have concluded that the only realistic solution to the problem is the demolition of all the structures.

The assignment also includes investigating possible solutions to the need for water and septic systems for the Town Library, which is adjacent to the Nichewaug Inn.

A key element in the assignment is developing a vision for the future that is practical and realistic, and that can be economically justified.

## 2. Proposed Scope of Services and Timeline

Concord Square Planning & Development, Inc. (CSPD) has assembled a team of professionals to address the problems posed by the Request for Proposals. This team is made up of the following:

1. **Concord Square Planning & Development, Inc.** Lead consultant. Years of experience in community development, housing development, planning and zoning, and financial analysis.
2. **Albert Richter & Tittmann, Architects.** ART is a prominent Boston Architect with a commitment to the design aesthetic of HH Richardson. They design beautiful single family homes with historic sensibilities, multifamily housing, commercial properties, and have made a significant commitment to zero energy, passive home design.
3. **Bonz and Company, Inc.** Bonz and Company is a well-known, highly experienced market analyst. They specialize in housing market studies, and have recently done market studies in Fitchburg and Northampton in association with Concord Square. Thus, coming into this project, they have a good sense of the overall market conditions in this part of Massachusetts.
4. **Douglas MacLeay, Engineer.** Mr. MacLeay is an engineer formerly with SVE Associates in Greenfield. He has carried out a number of water and sewer design and analysis projects in Petersham, including the study done in 2009 on the Nichewaug, and also the design work for the renovated Village General Store. He therefore comes to this assignment with a clear understanding of the problems associated with the project.

The team proposes to conduct the following general tasks to fulfill the requirements in the RFP, as follows:

### A. Research and Evaluate the Property (January 4 – February 29, 2016)

This task will include:

- Review existing studies and reports about the buildings and the site;
- Conduct a walk-through inspection of the Properties;

- Gather property information including building plans, zoning, tax information, etc.;
- Bonz & Company will gather preliminary information about the relevant markets;
- Interview key stakeholders to gather additional information and suggestions. Potential interviewees include the Town Administrative Coordinator, members of the Selectboard, Council on Aging, Historic District Commission, and the Petersham Committee, Inc., as well as others that the Town Administrative Coordinator may suggest.

**B. Explore Preliminary Potential Development Options  
(March 1 – April 29, 2016)**

This task will include:

- Based on input from the above meetings and conversations, conduct preliminary analysis of potential options for the disposition of the Property;
- Propose zoning (zoning amendment) recommendations for the purpose of facilitating the proposed development and value increment;
- Produce a Preliminary Findings and Recommendations Report (Preliminary Report), which would be submitted to the Town Administrative Coordinator (and other relevant parties that the Town Administrative Coordinator may suggest), and to be presented to the community.

**C. Gather feedbacks from the Town and the community  
(May 2 – May 31, 2016)**

This task will include:

- Present the Preliminary Findings and Recommendations to the Town Administrative Coordinator, the Selectboard, and other entities that the Town Administrative Coordinator would suggest, to gather their feedbacks;
- Hold one to two community meetings to present the Preliminary Findings and Recommendations to the neighborhood and gather their feedbacks.

**D. Incorporate Town and Community Feedbacks  
(June 1 – August 31, 2016)**

This task will include:

- Expand and modify the Preliminary Findings and Recommendations Report based on the input from the Town and Community;
- Hold additional public meeting(s) when necessary.

**E. Final Report**

**(September 1 – September 30, 2016)**

- Submit a Final Findings and Recommendations Report to the Town Administrative Coordinator and Selectboard.

**Initial Vision of the Team:**

The team has spent some time evaluating the property and considering what development opportunities may be present. John Tittmann has walked through the properties (with a former potential developer). Joanne Shelton (Bonz & Company) has done market studies for market-rate multifamily rental housing in Fitchburg and Northampton over the last few years and is therefore well familiar with the area. Ted Carman and Concord Square has done extensive consulting and development work in Greenfield, Fitchburg, Northampton, Springfield and Southbridge, Mass and has an excellent understanding of the area. Douglas MacLeay has done several engineering jobs in the Village Center and is well aware of the issues at play.

As a result of their knowledge and understanding of the region, the team believes that it is very unlikely that any development plan to renovate the entire complex will prove feasible, and do not intend to spend much time investigating any large scale renovation concepts. Neither the local office market, other commercial uses, or housing, either rental or condominiums, will support such an undertaking. The market is simply not there.

We believe it may (and the **may** should be emphasized) be feasible to develop a plan to renovate / substantially rebuild the front portion of the original Nichewaug Inn into a small number of good sized condominium units. This might involve demolishing the kitchen portion of the original building and keeping the front portion, the original chapel, and the back wing. The potential market for such condominium units would be retired families, second homes, as well as for families who need or want to be in the area because of nearby jobs, family connections, or other circumstances.

A small scale development makes it much easier, and therefore feasible to deal with the water and septic issues.

Further, we believe that focusing the planning on highly energy efficient buildings could provide an end product that would have several attractive features – the homes would be green and energy efficient, they would be located in the Petersham Village Center, next to the library (now with resolved water and septic systems), and they would be architecturally distinguished.

It might be possible to build three to six additional single family, net zero, homes on the land that will become available in the six-acre site. These also would be highly energy efficient. Please note the ART house description that Albert Righter & Tittmann have produced which is included with this Proposal. It shows how a standard house model can be designed to have an exterior appearance that would fit into the overall context of the Petersham Village Center.

The issue will be to determine the overall economics of such a proposal, including how the plan will impact the finances for the Town of Petersham. It is important to figure out how the transaction can be structured to result in the Town being net ahead at the same time as having the Inn restored and viable for the long term in the community.

In this regard it should be noted that Ted Carman has extensive experience in developing cost analyses for public undertakings. These include doing the detailed ten year projections for costs and revenues that led to the State passing Chapters 40R in 2004 and Chapter 40S in 2005. Chapter 40S calls for the State to assume excess school costs under certain conditions in Chapter 40R Smart Growth Districts, so potentially had significant cost implications for the Commonwealth. In addition, Concord Square did an extensive financial analysis related from the point of view of the Town for four buildings in Swampscott, Ma, as well as for a current project looking at the re-use of an underutilized school in Pepperell.

We bring this preliminary concept and vision to the assignment, but believe that the first step should be one of listening to the wisdom and experience of the people in Petersham who have been working on this issue for the last ten years. Therefore, we would go into the first sets of public meetings with an open mind. We would collect the ideas presented, then proceed with an evaluation of what could make sense in the context of everything that we learn.

### **3. Comparable Assignments of Concord Square Planning & Development**

CSPD and the Team have extensive experience in providing consulting services to properties that are similar to this Property, and in communities that are comparable to the Town of Petersham. Below are the statements from the RFP (in italics), and a summary response of the experience and qualifications of the team. This is followed by a description of five comparable assignments that have been carried out by CSPD.

- a) Balanced professional expertise and sufficient technological resources of the applicant and any named sub-contractors to perform the work required to complete the project within the specified time period;*

The Project Team contains the profession skills and experience to analyze the situation and develop a viable development plan for the Nichewaug Inn. The team has extensive development, financial analysis, market study, architectural design and costing, and water and septic engineering skills and experience.

- a) Demonstrated knowledge by the applicant and any named sub-contractors of the principles of economic development, project financing, zoning and permitting, historic preservation, land use, and rural planning issues;*

Concord Square and Ted Carman have done extensive planning and economic development work for decades in many Western Mass communities, such as Williamstown, North Adams, Pittsfield, Great Barrington, Fitchburg, Northampton, Springfield, Southbridge and Worcester. Much of this work has involved historic preservation and the use of Historic Tax Credits. Concord Square had the initial ideas for and wrote the studies that led to Chapters 40R and 40S, Smart Growth Zoning in Massachusetts and similar legislation in Connecticut. It has done planning and other consulting for over three dozen communities in Massachusetts and Connecticut.

- b) Knowledge of restoration and reuse planning and experience with vacant properties;*

Ted Carman has been the primary developer of renovated buildings in Pittsfield (three buildings, 200 units), Adams (40 units), Exeter, NH (140 units), Portland, ME (36 units), Windsor, CT (432 units), Johnston, RI (132 units). Boston, MA (3 units in the South End). Concord Square (Ted Carman) was the financial

consultant for the renovation of buildings in Greenfield (5 buildings, 2 developers, mixed use, New Market and State and Federal Historic Tax Credits), Springfield (one building for the headquarters of New England Public Radio – New Market Tax Credits), Worcester (T&G building renovations for Quinsigimund Community College classrooms, New Market and Federal Historic Tax Credits, \$35.0 million cost), and Northampton (the old Clark School for the Deaf Campus – 10 buildings, State and Federal Historic Tax Credits). **Ted Carman did the financial pro formas that worked out and demonstrated project feasibility in all of these projects.**

- c) *Demonstrated ability by the applicant and any named sub-contractors to conduct a public process, including consensus building and conflict resolution;*

Concord Square has extensive experience in over a dozen communities in getting Smart Growth Housing Zoning Districts passed by two thirds town meeting or City Council Votes since 2005. In addition, many of its consulting assignments have involved consensus building in communities.

- d) *Number of years the firm has been in business;*

Concord Square has been in business for 20 years

Albert Righter & Tittmann has been in business for over 30 years

Bonz & Company has been in business for over 30 years

Doug MacLeay has been a professional engineer for over 40 years

- e) *Years of professional experience of personnel assigned to the Project;*

Ted Carman: 40 years

John Tittmann: 30 years

JB Clancy: 15 years

Joanne Shelton: 18 years

Doug MacLeay: 40 years

- f) *Demonstrated experience by the applicant and any named sub-contractors in performing similar work in rural and semi-rural communities in New England*

For Concord Square, please see its qualifications information for a list of the communities in which it has worked. Ted Carman lived in Lanesborough, MA for many years, and has done extensive professional work in Pittsfield, Adams, North Adams, Williamstown, Greenfield, Northampton, Fitchburg, Worcester, and Southbridge, Doug MacLeay has worked in small communities around Greenfield for decades.

- g) *Review of the applicant's supporting references;*  
To be determined by the Town of Petersham
- h) *Content, organization and presentation of the proposal;*  
To be determined by the Town of Petersham
- i) *Responsiveness of the applicant during interviews;*  
To be determined by the Town of Petersham
- j) *Knowledge of central Massachusetts.*  
Concord Square, Doug MacLeay and Bonz and Company have carried out multiple professional assignments in Central Massachusetts for many years. Please see their qualifications documents for details.

#### **Selected prior comparable projects of Concord Square**

- b) *New England Log Homes Site & Searles / Bryant Schools Development Feasibility Report, Great Barrington, MA (2007)*

In 2007, CSPD, in collaboration with Bartram & Cochran, was engaged by the Town of Great Barrington to conduct a market, feasibility, and development analysis of two sites in the town. The 8.5-acre New England Log Homes site was formerly used for industrial purposes which resulted in significant soil contamination. Most of the buildings were destroyed by a fire in 2001. This site was to be acquired by a local non-profit, the Community Development Corporation of South Berkshire County. The Town was seeking development guidance on the site for the benefit of the CDC. In addition, there were two schools, the Searles and the Bryant, both vacant, and on a 3.3-acre site adjacent to the Housatonic River. The Town planned to issue a Request for Proposals for the sale of the schools to a private developer.

The final report was based on an in depth regional and local market analysis for both commercial and housing uses. It included a review of environmental and regulatory issues, and provided a number of development scenarios, including financial projections for both sites. It made recommendations regarding the issuance by the Town of an RFP for the Searles and Bryant buildings.

*c) Powder House School Real Estate Analysis, Somerville, MA (2009)*

From March 2009 to August 2009, CSPD conducted an evaluation and scenario analysis regarding potential uses for the 1.9-acre Powder House School site at 1060 Broadway in Somerville. The site was owned by the City, and was used by the City as an elementary school before becoming vacant in 2005. The City was seeking for redevelopment or repurposing opportunities to better utilize the site and to prevent further deterioration.

CSPD examined a number of possible public and private uses for the site. Public options include municipal offices and apartments, park and recreational uses; private options include renovating the existing building for private office uses, demolishing the existing building and constructing new office space or multi-family housing. Based on detailed financial projections, the scenario analysis compared the Capital Cost to City, Land Sales Revenue, and Property Tax Revenue across the alternative options. Assisting CSPD in the work was CB Richard Ellis (detailed market study), D.G. International, Inc. (cost estimating), and Rob Emslie (real estate consultant).

This assignment included a number of well attended public meetings to gather input and understand neighborhood sentiment.

*d) Town-owned properties reuse/redevelopment options evaluation, Swampscott, MA (2008)*

During 2008, CSPD, in collaboration with the Design Partnership of Cambridge, on behalf of the Town of Swampscott, conducted a detailed analysis on the reuse/redevelopment options for the former Temple Israel (then being used for Town Offices), Phillips Avenue Fire Station and the Greenwood Avenue school property, all of which were owned by the Town.

Four main tasks were carried out, including an analysis of different options for the reuse of each property, the development of preliminary assessments of municipal revenues potentially to be generated for each of the options (including estimates of potential sales proceeds and potential tax revenues), generation of preliminary assessments of development costs the Town might incur under each option (including development of use restrictions and possible zoning changes), and preparation of a matrix to facilitate a systematic comparison of each options for

each property. Suggestions regarding next steps to be taken to move forward with the preferred development options were also provided.

Concord Square also assisted with an extensive public outreach process that resulted in a series of recommendations to Town Meeting, all of which were passed with near unanimous votes.

*e) Land Subdivision and Development Analysis for Merlier Property, Westport, MA (2011)*

From January 2011 to May 2011, CSPD conducted a site and zoning analysis on a property of approximately 7 acres on Drift Road in Westport, Massachusetts. CSPD analyzed several alternative subdivision and development scenarios and proposed an initial development plan. The work was carried out in two phases. Phases 1 included site assessment, and identified development alternatives under existing zoning; Phase 2 included revised subdivision plans, and a proposed development plan with financial projections (a pro forma) that was based on the most cost-effective option.

*f) School Reuse analysis, Pepperell, MA*

This is a recent assignment, now underway for the Town of Pepperell, and primarily involves a re-use analysis of an existing school containing three wings built in three separate phases from the 1930s through 1994. The school contains approximately 80,000 square feet.

#### **4. Proposed Fee**

The fee for the proposed work will be an amount not to exceed \$25,000. Billings will be made for the work at a cost per hour of the following:

- Ted Carman – work time @ \$175.00
- Ted Carman – travel time @ \$87.50
- Yuqi Wang – work time @ \$75.00
- Yuqi Wang – travel time @ \$40.00

In addition to the time charges, reimbursement will be requested for out of pocket costs, such as travel at \$.50 per mile, and costs for third party work of the sub-contractors, with amounts for each to not exceed:

- Bonz & Company - \$4,000
- Albert, Richter & Tittmann - \$5,000
- Douglas MacLeay - \$2,000

Some adjustments in these amounts may be made as the needs of the project work become more apparent.

In no event will the total charges exceed \$25,000.

## **5. Concord Square References, to accompany Resume and Qualifications**

### **Greenfield - 2008 to 2015:**

William F. Martin, Mayor  
Office of the Mayor  
14 Court Street,  
Greenfield, MA 01301  
413 772 1560  
Mayor William F. Martin ([mayor@greenfield-ma.gov](mailto:mayor@greenfield-ma.gov))

Developer of four buildings on Bank Row:

Jordi Herold  
Icarus, Wheaten & Finch  
One Short Street  
Northampton, MA 01060  
413-587-4581  
[jordiherold@earthlink.net](mailto:jordiherold@earthlink.net)

### **Worcester: Work on the Telegram and Gazette Building: 2013 - 2014**

Craig L. Blais, President  
Worcester Business Development Corporation  
89 Shrewsbury Street, suite 300  
Worcester, MA 01604  
508-755-5734  
Craig Blais ([blais@worcesterbdc.com](mailto:blais@worcesterbdc.com))

Work on the Printers Building:

Wyatt Wade, President  
Davis Publications  
50 Portland Street  
Worcester, MA 01608  
(800) 533-2847 x233  
Wyatt Wade ([wwade@davisart.com](mailto:wwade@davisart.com))

Proposal to the Town of Petersham, MA  
December 11, 2015

**Southbridge: 2012 - present**

Cassandra M. Acly  
Director: Economic Development & Planning  
City of Southbridge  
41 Elm Street  
Southbridge, MA 01550  
(508) 764-5402  
Sandy Acly ([cacly@southbridgemass.org](mailto:cacly@southbridgemass.org))

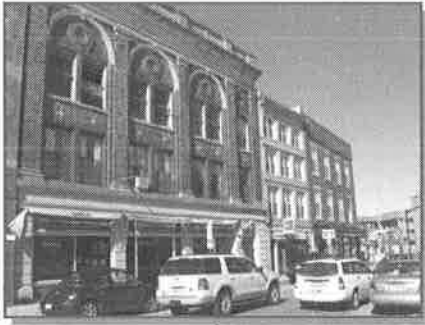
**Fitchburg: 2008 – 2015**

Mayor Lisa Wong  
City of Fitchburg  
166 Boulder Drive  
Fitchburg, MA 01420  
(978) 345-9550  
Lisa Wong ([mayor@ci.fitchburg.ma.us](mailto:mayor@ci.fitchburg.ma.us))

# CONCORD SQUARE PLANNING & DEVELOPMENT, INC.

Boston, Massachusetts

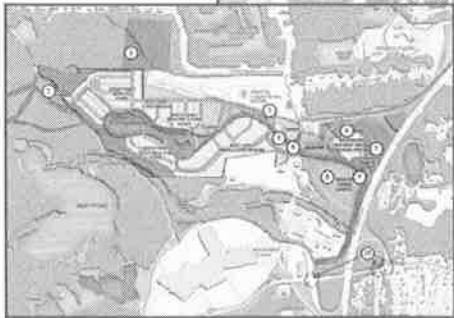
MIXED USE



SITE ANALYSIS



ZONING

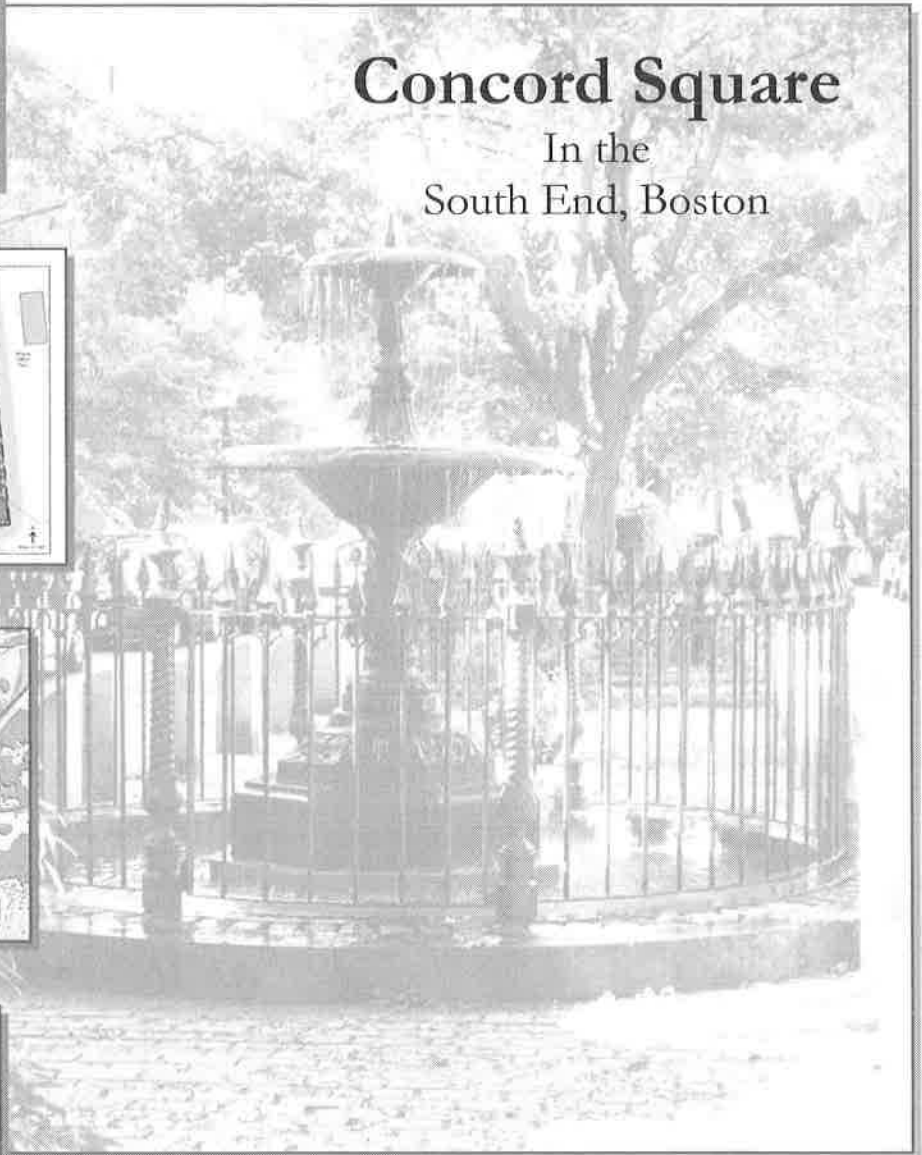


REDEVELOPMENT



## Concord Square

In the  
South End, Boston



294 Washington Street, Suite 454, Boston, MA 02108  
617-482-1997



**CONCORD SQUARE**  
PLANNING & DEVELOPMENT, INC.

[www.concordsquare.com](http://www.concordsquare.com)

# *Concord Square Planning & Development, Inc.*

## *Firm Background*

**Concord Square Planning & Development, Inc.** was established in 1995 as Concord Square Development Company, Inc. Its name was changed in 2007 to better represent the breadth of services it was offering. Since its inception in 1995, the firm has carried out a major historic renovation project, Holt Hall in Portland, Maine; provided development consulting on a 146 unit transit-oriented residential development in Charlestown; initiated and consulted on a 125 unit mill conversion in Westford; provided development consulting in Greenfield, MA; provided zoning and public policy consulting for three dozen communities in Massachusetts and Connecticut (see the next page for a list), developed a downtown Urban Renewal Parcel in Fitchburg, MA, provided financial consulting for four separate New Market Tax Credit transactions (two in Greenfield, one in Springfield, and one in Worcester), prepared a downtown revitalization plan for the Town of Southbridge, and provided financial consulting to a number of private developers in Greenfield, Northampton, Springfield and Providence.

The municipal consulting work included the areas of 40R/40S Smart Growth Zoning, 40A Zoning, 40Q District Improvement Financing, 43D Expedited Permitting, & I-Cubed (the Massachusetts "Infrastructure Investment Incentive" Program). Concord Square played a major role in the legislative adoption of M.G.L. c.40R and c.40S "Smart Growth Zoning" in Massachusetts. It worked as a consultant to the Partnership for Strong Communities in Hartford, CT in the design and legislative campaign for the 2007 passage of the Home Connecticut Program. It has provided consulting services for over a dozen communities in Connecticut.

In Massachusetts, Concord Square's work was recognized by the Massachusetts Chapter of the American Planning Association with four Outstanding Planning Awards for its work in developing 40R Smart Growth Districts in Belmont (2007 Award), Kingston (2007 Award), and Fitchburg (2010) and for its preparation of the Historical Preservation Plan in Hanover (2008 Award).

The company is dedicated to good land use planning and design. It has extensive experience with development public policy and local land use regulation. It is named after Concord Square, which is located in the South End of Boston between Tremont Street and Columbus Avenue. The Square, its buildings, and the fountain, epitomize high quality residential planning and architecture. Concord Square is a smart growth location – a short walk to the subway, to Symphony Hall, to shopping, and a longer, but comfortable, walk to the employment of the Financial District of Boston.

Ted Carman, President of Concord Square, has spent over thirty years in the residential real estate business. This experience has included the development, financing, and management of hundreds of units of market rate housing. Ted's development work has focused primarily on downtown redevelopment, mill conversions and historic renovation, and also includes many years of non-profit community development work, mostly with affordable housing, but also including live-work artist space, and extensive downtown revitalization and economic development. Two projects that he developed -- the Exeter Mill in Exeter, NH and Holt Hall in Portland, ME -- are on the National Register of Historic Places. Smart Growth planning concepts have formed the heart of his work.

Yuqi Wang, Planner, LEED AP ND, has a Masters in City Planning and an Urban Design Certificate from MIT, and a Masters Degree in Applied Economics from Tsinghua University in Beijing, China. She has extensive experience in Chapter 40 R, the subject of her Thesis at MIT. Her research on urban China's grassroots cooperative housing was published as a chapter in *Co-operative innovations in China and the West* (Gijssels, C. et al. 2014).

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## *Clients and Planning Policy Presentations*

### Partial Client List

#### *Public Sector (Massachusetts, except as noted)*

- Attleboro Redevelopment Authority
- Town of Belmont
- Town of Bolton (CT)
- City of Brockton
- Town of Canaan (CT)
- Town of Chelmsford
- Town of Cohasset
- Town of Cornwall (CT)
- Town of Ellington (CT)
- City of Fitchburg
- Town of Goshen (CT)
- Town of Great Barrington
- Town of Greenfield
- Town of Hanover
- Town of Hopedale
- Town of Kingston
- City of Leominster
- Town of Lynnfield
- Town of Marblehead
- Town of Maynard
- City of New London (CT)
- City of Pittsfield
- Town of Plymouth
- Town of Putnam (CT)
- Town of Reading
- Town of Salisbury (CT)
- Town of Sharon (CT)
- Town of Simsbury (CT)
- City of Somerville
- Town of Swampscott
- Town of Thomaston (CT)
- Town of Tyngsborough
- Town of Wallingford (CT)
- City of Worcester
- Town of Wrentham

#### *Private Sector and Institutional*

- Cathartes Private Investments
- Commonwealth Housing Task Force
- Cooley Manion Jones LLP
- Fantini & Gorga
- Federal Realty Investment Trust
- Holt Hall, Portland, ME
- National Governors Association
- New Jersey Future
- Northwestern Connecticut Regional Planning Collaborative
- Partnership for Strong Communities, CT
- Yule Development
- HGS Development
- Claremont Development

### Selected Planning Policy Presentations by Concord Square

- 40R as a Vehicle for New Urbanism. Boston Society of Architects (BSA). September 2009.
- Chapter 40R Legal Appeals: Natick and Kingston. Boston Bar Association, Land Use and Development Committee. Sept. 2009
- New Jersey League of Municipalities Educational Foundation, Inc. Statewide Housing Summit. March 2009.
- UMass Citizen Planners Training Collaborative (CPTC) Annual Conference, Worcester, MA, March 2009
- Southern New England Planning Conference, Providence, RI, September 2008
- "Incentive Payments to Increase the Affordable Housing Supply: A Tool for Promoting Regional Equity," Enterprise Foundation and Urban Land Institute online webinar within series of Regional Equity Live Online Events, April 2008
- Guest lecturer at Northeastern University Public Policy Studies course (G201), March 2008
- "The Northeast Housing Problem and Massachusetts Smart Growth Zoning," Northeast Climate and Competitiveness Summit, Baltimore, MD, February 2008
- "Massachusetts Smart Growth Zoning Policy Overview and Results to date," New Jersey Futures Smart Housing Steering Committee, New Brunswick, NJ, January 2008
- Smart Growth Toolkit session, Comm. of Massachusetts Smart Growth / Smart Energy Conference, Worcester, MA, Dec. 2007

## *Clients and Planning Policy Presentations*

- Municipal Coalition for Affordable Housing Conference, Tools for Housing session, Westborough, MA, October 2007
- MassNEAR (Northeast Association of Realtors ®) Smart Growth Symposium, UMass Lowell, October 2007
- Urban Land Institute – Boston, Seminar regarding 40R Smart Growth Zoning, Boston, September 2007
- Essex County Forum, Wakefield, MA, June 2007
- Forum moderator (Jim O’Connell & Aaron Gornstein), Massachusetts Assn. of Consulting Planners Annual Meeting, June 2007
- UMass Citizen Planners Training Collaborative (CPTC) Annual Conference, Worcester, MA, March 2007
- MAPC South Shore Coalition, Hingham, MA, March 2007
- Guest lecturer at AICP exam prep course, Tufts University, Medford, MA 2007
- Build Boston Annual Conference, Panel regarding 40R Smart Growth Zoning, Boston, November 2006
- MAPC North Suburban Planning Council, Wakefield, MA, November 2006
- “Ch. 40R: Case Studies in Smart Growth Zoning,” Boston Bar Association, Land Use and Development Committee, Nov. 2006
- Form Based Codes workshop sponsored by MA-APA and AICP Continuing Education Chapter Grant, Devens, MA, October 2006
- Guest lecturer at Boston Architectural College Smart Growth Planning course (TM 600/TM 7600), October 2006
- Guest evaluator, Northeastern Univ. School of Architecture, Urban Housing Studio taught by Hubert Murray, Fall 2006
- Massachusetts Association of Planning Directors Annual Conference, Form Based Codes panel sponsored by MA-APA and AICP Continuing Education Chapter Grant, Lowell, MA, June 2006
- Guest lecture, Boston Univ. Urban Environmental Issues course (UA 610) taught by Kwabena Kyei-Oboagye, Feb. 2006
- Massachusetts Association of Planning Directors Annual Conference, Quincy, MA, June 2005
- Faculty at Lorman Seminar, “Neighborhood Planning and Design in Massachusetts,” Boston, December 2005
- Board meeting of the Old Colony Planning Council, Taunton, MA November 2005
- Build Boston Annual Conference, Panel regarding 40Q District Improvement Financing, Boston, MA, November 2005
- MAPC South Shore Coalition, Hingham, MA, November 2005
- MAPC/MetroWest Arc of Innovation Low Impact Development Seminar, Westborough, MA, October 2005
- Commonwealth of Massachusetts Smart Growth Conference, Session regarding 40R, Worcester, MA, 2005
- Faculty, Suffolk University School of Advanced Legal Studies. Growing Smart with 40R Seminar Boston, MA, April 2005



## *Clients and Planning Policy Presentations*

### Publications

Ted Carman, President

Smart-Growth Zoning Initiatives Are Exceeding Expectations. Feature commentary article with Angus Jennings, Principal Planner, Concord Square Planning & Development, Inc. Banker & Tradesman. March 27, 2006.

"The Housing Puzzle." Op-Ed with Barry Bluestone. The Boston Globe. July 17, 2007.

Chapter 40R School Cost Analysis and Proposed Smart Growth School Cost Insurance Supplement, Center for Urban & Regional Policy at Northeastern University, May 2005.

Building on Our Heritage: A Housing Strategy for Smart Growth and Economic Development, Center for Urban & Regional Policy at Northeastern University, October 2003.



January 2015

Ted Carman is the President of Concord Square Planning & Development, Inc. He has spent over 30 years in the residential real estate business. During this period he has been the chief executive and operating officer of three development and management companies which have financed, acquired, built, and managed over 1,000 housing units. He founded two of the companies, including raising the capital required, and was the first President of the other, after it was organized by community leaders of Berkshire County. He also founded Advance Handle Company, LLC, in 2001, and raised \$500,000 of venture capital to fund its initial operations. A US Utility Patent was granted by the US Patent Office in 2009.



After graduating from Harvard College (1963) and receiving a master's degree from the University of North Carolina, he attended the Naval Officer Candidate School in Newport, Rhode Island. He served on active duty for 4 years on a Newport based destroyer and on the staff at OCS. His housing career began with the renovation of several historic homes in Newport. He spent the late 60s and 70s working for and running non-profit, community development companies in Providence and in Berkshire County, Massachusetts. This work was primarily focused on affordable housing, but also involved downtown redevelopment efforts in Pittsfield, and a mill renovation into an arts complex in North Adams that was a precursor to Mass MOCA (Museum of Contemporary Art). In 1971 he conceived and organized what is believed to be the first instance in the country of a non-profit Community Development Corporation using for-profit syndication techniques to finance affordable housing – which generated development fees which could be used to pay for operating costs and assure the continuity and longevity of the CDC. This technique has since become standard practice for public interest development companies.

He moved to Boston in 1980 and since that time has worked in the real estate finance and development fields, primarily focused on market rate housing. He was the developer of the Exeter Mill in Exeter, NH, and, with a partner, of Holt Hall, in Portland, Maine. Both are market rate rental housing built in historic buildings, and both are on the National Register of Historic Places. He worked with several artist groups to develop live-work loft spaces in the Fort Point and South End sections of Boston. He worked for a year with Urban Edge, a Community Development Corporation operating in Boston's Roxbury and Jamaica Plain.

In the early 1980's, responding to a request for new ideas by the campaign organization for the second Dukakis administration, he wrote a paper that laid out the concept for a new state housing production program. After the election was won, the ideas were adopted and implemented by the Administration as the **Sharp Program**, administered by MHFA. During the 1980s and into the 1990s tens of thousands of housing units were built using **Sharp** financing.

In 2003 through 2005, working with The Center for Urban and Regional Policy of Northeastern University and Eleanor White, he was the principal author of two reports:

*“Building on our Heritage, A Housing Strategy for Smart Growth and Economic Development”, and “Chapter 40R, School Cost Analysis and Proposed Smart Growth School Cost Insurance Supplement”.* These reports were adopted by the Commonwealth Housing Task Force and led to the passage by the State Legislature of Chapter 40R and Chapter 40S in 2004 and 2005. These programs provide for State Incentives and School cost payments to Communities that pass high density zoning in Smart Growth Locations.

This program has resulted in the passage of zoning that allows over 12,000 housing units to be built as-of-right in Massachusetts.

Similar work was done for the Partnership for Strong Communities in Hartford, CT in 2006 and 2007. The report and analysis led to the passage in 2007 of Home Connecticut Legislation which provides for Incentive Housing Zones in a manner similar to that set forth by Chapter 40R.

From 2005 through 2011 Concord Square provided planning and development consulting services to 35 municipalities in Massachusetts and Connecticut. Much of this work was associated with the implementation of the Smart Growth Zoning in these two states.

Other work has included re-use studies and analyses of surplus school buildings, as well as extensive development consulting in Greenfield, Ma. The Greenfield work was based on financing techniques using Tax Credit programs in conjunction with conventional financing, and resulted in the renovation of six downtown buildings. He has provided financial consulting work to New England Public Radio in Amherst, Mass with regard to moving their headquarters to downtown Springfield using New Market Tax Credit financing. He provided similar financial consulting to the Worcester Business Development Corporation with regard to the \$35 million redevelopment of existing buildings in downtown Worcester for new classroom space for Quinsigamond Community College. Concord Square worked with local government officials, private property owners and other stakeholders in producing a Downtown Revitalization Plan for the Town of Southbridge in 2012 and 2013. A lengthy final report was delivered in December, 2013. A \$1,000,000 revitalization project has been approved for a downtown building as a direct result of the overall Plan.

**Current consulting and development projects in early 2015 include:**

- the development of a CVS retail and pharmacy in Fitchburg, MA;
- a New Market Tax Credit and Historic Tax Credit project in Greenfield for a 60 Room new Boutique Hotel on the top three floors of Wilson’s Department Store;
- The preparation of development pro-formas for four separate projects in Springfield with Develop Springfield;
- Financial analysis and pro forma development for a proposed 125 bed hotel for MGM as part of the Springfield Casino project;
- Financial consulting and the preparation of pro formas for the development of the former Clarke School for the Deaf in Northampton, Ma (nine historic buildings in a campus setting on Round Hill Road).

## Ted Carman

## Background and Experience

- Financial Consulting for the sale of a 60,000 s.f. commercial building in downtown Providence for a private owner;
- Financial Consulting – preparation of the development pro forma for a private developer in Providence for a proposed \$20 million mixed use – housing, office, and retail – development in downtown Providence.
- Administrative support for the Town of Southbridge for a \$850,000 EDF grant to renovate a downtown mixed use (retail and housing) building in Southbridge.
- Amendments for 40R Zoning District in Brockton, MA
- Consulting for the development of a District Increment Financing proposal in Brockton, MA

## YUQI WANG LEED AP ND

### EDUCATION

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**Massachusetts Institute of Technology**, Cambridge, MA June 2014

- School of Architecture + Planning, Master in City Planning, Urban Design Certificate (GPA 4.8/5.0)
- Master Thesis: State Zoning Legislation and Local Adaptation: an evaluation on the implementation of Massachusetts Chapter 40R Smart Growth Legislation

**Tsinghua University**, Beijing, China July 2010

- School of Public Policy & Management, Master of Applied Economics - Regional Economics (GPA 90.9/100, Rank 1/38, Top Grade Scholarship)
- Focused Areas: urban economics, housing/ land development markets and policies

**Renmin University of China**, Beijing, China July 2007

- School of Economics, Bachelor of National Economic Management (GPA 3.95/4.0, Rank 1/49, Honorary Title of Excellent Student)

### SPECIALTIES & SKILLS

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#### *Specialty Areas*

- Zoning and land use plan, Neighborhood planning, Urban design
- Economic & Financial analysis, Real Estate development strategy, Public policy
- Smart Growth, LEED, Sustainability

#### *Skills*

- Graphic: Adobe Creative Illustrator, Photoshop, InDesign, AutoCAD, SketchUp
- Data: GIS, R, Agent-based simulation modeling
- IT: Python, HTML/CSS, Bootstrap, WordPress
- Language: Mandarin

### WORK EXPERIENCE

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**Concord Square Planning & Development, Inc.**, Boston, MA November 2014 -

*Urban Planner; Real Estate Analyst* Present

- Provide consultancy in zoning, neighborhood plan, Smart Growth, and development feasibility study to public and private sector clients in the New England area, with focuses on downtown revitalization, building renovation and adaptive reuse

- MIT China Real Estate Innovation Conference, Cambridge, MA** April 2015 - Present  
*Chief Operating Officer*
- Coordinate conference themes, panel topics & speakers, dual-language online & social media marketing strategies and operation
- MIT Samuel Tak Lee Real Estate Entrepreneurship Lab, Cambridge, MA** January 2015 – September 2015  
*Project/Communication Coordinator*
- Assisted with the Lab's launching and industrial/academic network building, research/education projects development; Develop and maintain dual-language online and social media platforms
- City of Bellevue - Environmental Stewardship Initiative, Bellevue, WA** June 2013 - August 2013  
*Analyst - Energy Efficiency Economic Development Strategy*
- Conducted stakeholder outreach on energy benchmarking policy and energy efficiency industry clustering development; Drafted report and graphics
- Hong Kong & Macao Office of China's State Council, China** June 2010 - July 2012  
*Urban Development Policy Analyst*
- Led the research projects on HK's housing and land development policies and initiatives and their socioeconomic impacts

## **PROJECT EXPERIENCE**

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### *Neighborhood Vision and Land Use Planning*

- Smart Growth Zoning Overlay District Amendment, Brockton, MA** October 2014 – December 2014
- Provided technical assistance to the City of Brockton in updating its downtown Chapter 40R zoning district and applying for State Smart Growth grants
- Downtown Revitalization and Complex Mixed-Use Real Estate Development, Sao Paulo, Brazil** Spring 2014
- Led a four-student team to propose a development proposal with program and public space design for a 10-hectare site in Sao Paulo historic downtown
- Transit-oriented Neighborhood Visionary Plan and Land Use Planning, Somerville, MA** Fall 2013
- Worked in a student team to propose a Transit-oriented neighborhood plan & design, zoning recommendations, catalyst projects, incentive policies

### *Real Estate Development Strategy*

- Historic Theater Renovation and Reuse Strategy, Lowell, MA** April 2015 – June 2015
- Provided renovation and adaptive reuse programs and financing strategies to the historic Smith Baker Center theater building in downtown Lowell

**Real Estate Property Re-evaluation and Redevelopment Proposal,**  
Cambridge, MA

Spring 2014

- Led a four-student team to re-evaluate a 789,574 s.f. mixed-use property developed in the early 1980s, proposed extension and repurpose plans

**Mixed-Income Housing and Amenities Development,** Cambridge, MA

Fall 2013

- Led a three-student team to propose a mixed-income residential infill project; Produced plan drawings, financing strategy, project proposal package

*Data Visualization & Modeling*

**Simulating Urban Landscape and Eco-system,** Haifa, Israel

Summer 2014

- Worked in Complex City Research Lab at Israel Institute of Technology to build simulation model to analyze urban landscape and wildlife movement

**Visualizing and Regulating Airbnb,** Boston, MA

January 2014

- Led a three-student team to map and analyze the space distribution of Boston's Airbnb hosts, and propose regulation strategies

**PUBLICATION**

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**Wang, Y.** (2014) "The Grassroots Co-operative Housing in Urban China: The Case of LINECITY", In Gijssels, C. et al. (ed.), *Co-operative innovations in China and the West*. Palgrave Macmillan, pp.248-263

**Wang, Y.** and Zhang, X. (2006) "Lessons to learn: an exploration into the Urban & Land Use Planning Practice of Britain" (Chinese), *Urban Development*, 2006(07), pp.55-56

**Wang, Y.** (2006) "The Problems of the Satellite Towns System in Beijing" (Chinese), *Brands Times*, 2006.5.26

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**PROFESSIONAL  
EXPERIENCE**

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**Concord Square Development Company, Inc., Boston, MA  
PRESIDENT**

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**1995 to Present****Development and Consulting work in Real Estate and General Business.**

- Extensive financial consulting work with projects in Greenfield, North Adams, Worcester, Springfield, Northampton, Fitchburg, Southbridge and Brockton.
  - Development consulting for the Town of Greenfield, MA; resulting in the organization of the Town, 5 owners, two local banks, and \$9,000,000 of financing for the renovation of five downtown mixed use buildings – completed in December, 2010.
  - Built Concord Square into a leading consultant to municipalities with regard to Smart Growth Zoning and neighborhood revitalization. Over 35 assignments with communities and developers in Massachusetts and Connecticut since 2006.
  - Assisted ten communities in Massachusetts with the passage of Chapter 40R Smart Growth Zoning Districts.
  - Working with thirteen communities in Connecticut towards the passage of Incentive Housing Zones.
  - Consultant, with CURP and Eleanor White to the Partnership for Strong Communities in Hartford, CT with regard to the passage of HomeConnecticut, modeled directly on Chapter 40R in Massachusetts. 2006 and 2007. Legislation passed in June, 2007.
  - Conceived and developed a Smart Growth Plan for High Density Overlay Zoning Districts in Massachusetts. Original paper written in October, 2002.
  - Consultant for the Commonwealth Housing Task Force, through the Center for Urban and Regional Policy of Northeastern University (2003 – 2009)
    - Working with CURP and Eleanor White was the principal author of the report: *Building on Our Heritage, A Housing Strategy for Smart Growth and Economic Development, October, 2003.*
    - Also working with CURP and Eleanor White was the principal author of the report: *Chapter 40R, School Cost Analysis and Proposed Smart Growth School Cost Insurance Supplement.*
    - Participated in the drafting of legislation and negotiations leading to the passage and signing by the Governor of Chapter 40R, the new Smart Growth Zoning Ordinance, in June, 2004, and Chapter 40S in November, 2005, both based on the reports cited above.
  - Consultant to Cathartes Investments for the development and new construction of 145 condominium units at the Sullivan Square T Station in Charlestown, MA (2003 – 2005).
  - Development and consulting work on the Abbot Mill, Westford, Massachusetts. 125 - 180 units of market rate housing in a historic textile mill. Obtained zoning amendment allowing residential use. Consulting to Yule Development Co. (2000 – 2005).
  - Consulting to Fantini & Gorga (Mortgage Brokers) with regard to the organization of a HUD approved Mortgagee, Eastern Mortgage Capital. Wrote the initial business plan. This became a new business operation for Fantini & Gorga and Eastern Bank in 2004. (2002 and 2003).
  - Development partner and owner with John Moriarty & Associates, Inc., in the renovation of
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Holt Hall, Portland, Maine (1998). 36 market rate apartments, 7,000 s.f. of office space. Holt Hall is on the National Register of Historic Places. Ongoing supervision of management and operations. Financed with a HUD 221 (d)(4) mortgage

- Consultant to The Cohousing Center, Watertown, MA, and to Carman Electric, Inc., Jackson, WY (1994 - 1995).

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**Advance Handle Company, LLC**  
**PRESIDENT****2001 to Present**

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- Invention and development of the Advance Handle, a retail product that enhances the ability to exert force on a shaft or handle, such as a broomstick or paint roller, that is held in one hand.
  - Raised \$500,000 of Venture Capital.
  - Product Design by Design Continuum of Newton, MA
  - US Utility Patent issued in December, 2009.
  - Development of commercial products underway based on the 2009 patent

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**Urban Edge Housing Corporation, Roxbury, MA**  
**DIRECTOR OF DEVELOPMENT / DIRECTOR OF OPERATIONS****1992 - 1993**

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**The Arbor Group, Boston, MA**  
**FOUNDER, PRESIDENT of Arbor Development Company, Inc.**  
**and Arbor Management Company, Inc.****1983 - 1991**

- 
- Raised \$1,200,000 of venture capital to fund the Arbor Group in 1983.
  - Purchased, developed and managed three multifamily housing properties with 70+ units and total costs in excess of \$50 million: Arbor On the Farmington (432 units in Windsor, CT.), The Exeter Mill (140 units in Exeter, NH) and Arbor Hill (132 units in Johnston, RI). Acted as Managing General Partner and property manager of each of the partnerships. Arranged debt and equity for each development.
  - Organized and carried out \$4 million of improvements to two existing properties and \$18 million of construction in The Exeter Mill.
  - Provided development consulting, leasing and management for 164 units of new construction for Metropolitan Real Estate Investments: Applebriar Apartments, in Marlboro, MA.

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**Boston Financial Technology Group, Boston, MA.**  
**VICE PRESIDENT, ACQUISITIONS & SYNDICATION****1980 - 1983**

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- Worked on the acquisition and syndication of apartment properties financed with debt plus private placements of equity.

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**Berkshire Housing Development Corporation, Pittsfield, MA**  
**PRESIDENT, Berkshire Housing Development Corporation**  
**PRESIDENT, Berkshire Housing Services, Inc. (management company)****1975 - 1980****1971 - 1973**

- 
- First President, organized staff and initial operations in 1971.
  - Developed six multifamily, affordable housing projects totaling 330 units, using financing from HUD and Mass. Housing Finance Agency.
-

## Ted Carman

## Background and Experience

- Half time for four years spent as a consultant to the City of Pittsfield and the Chamber of Commerce for an \$80+ million downtown urban retail center (ultimately not built).
- Organized and built property management company into profit center, operating over 600 units in 7 separate developments, including two housing authorities.
- Developed an accounting system to provide accrued monthly financial statements with cash flow comparisons to budget for 9 separate accounting entities.
- Pioneered use of tax shelter syndication proceeds to generate operating income for Berkshire Housing, a non-profit community development corporation.

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<b>Hoosac Community Resources Corporation, North Adams, MA</b>	<b>1973 - 1975</b>
<b>CORPORATION MANAGER</b>	

- Economic Development / Crafts and Arts Center in the Windsor Print Works, a historic textile mill. Precursor of the Massachusetts Museum of Contemporary Art (Mass MOCA).

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<b>Carman, Inc., Newport, RI</b>	<b>1971 - 1973</b>
<b>PRESIDENT</b>	

- Financed, syndicated, and built a \$900,000, 40 unit, HUD- insured project under the Section 236 program in Providence, RI, for own account. Served as general partner until sale of property in 1985.

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<b>Citizens United Renewal Enterprises, Providence, RI</b>	<b>1969 - 1970</b>
<b>TECHNICAL ASSISTANT, and then DEPUTY DIRECTOR</b>	

- Responsible for financing and general project development work for numerous HUD subsidized housing projects. Non-profit development company. Extensive work in South Providence.
- Wrote the initial concept and business plan for and became an original founder of the Church Community Corporation (Non-profit CDC) in Newport (1969).

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<b>Acquisition of Historic Properties</b>	<b>1964-1970</b>
<b>Principal Owner</b>	

- Acquisition and restoration / renovation of three eighteenth and nineteenth century buildings containing 8 apartments in Newport, R.I. (1964 – 1971)
- Acquisition and renovation of a large early 19<sup>th</sup> century farmhouse in Lanesboro, MA (1971 – 1985)
- Acquisition of gutted shell and complete rebuilding into three condominium units of a 4,000 s.f. brick row building in the South End of Boston (1988)

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<b>United States Navy, Newport, RI</b>	<b>1964 - 1968</b>
<b>LIEUTENANT (highest rank)</b>	

Active Duty. Served as MPA, DCA, R Division Officer, and Fleet Officer of the Deck on USS Glennon (DD 840) from 1964 to 1967. On Staff of Officer Candidate School, Newport, R.I. 1967 -1968.

## Ted Carman

## Background and Experience

EDUCATION	University of North Carolina, Chapel Hill, NC MA, European History	1963 - 1964
	Harvard College, Cambridge, MA BA, Magna Cum Laude, European History	1959 - 1963
OTHER	<hr/> <p>Member, Commonwealth Housing Task Force Member, Citizens Housing and Planning Association, Boston, MA Member and Member Emeritus of Advisory Board of the Housing Development Reporter, Washington, D.C., 1975 - 1990 Lecturer and moderator on real estate syndication at numerous East Coast seminars for the Northwest Center for Professional Education 1983 - 1990. Board of Directors, Operation Clapboard, Newport, Rhode Island Board of Directors, ACT, Inc., and Historic Massachusetts, Inc., Boston, Mass Author of a paper on <u>The Master Builder</u> by Henrik Ibsen (1999) President of the Harvard Mountaineering Club - prime mover in the construction of the Harvard Cabin 2 miles up the east side of Mt. Washington, in Huntington Ravine (1962). Member, American Alpine Club, and Harvard Mountaineering Club</p> <hr/>	

Development Projects					
Year	No. Units	Location	Type	Role	Financing
1964	2	Newport, RI	Rehab	Owner	\$15,000
1964	2	Newport, RI	Rehab	Owner	\$5,000
1968	4	Newport, RI	Rehab	Owner	\$17,000
1971	3	Lanesborough, MA	Rehab	Owner	\$75,000
1969 - 1970	30	Providence, RI	Scattered Rehab	Primary	\$300,000
	70	Manville, RI	Rehab	Consultant	\$1,200,000
	8	Providence, RI		Primary	\$150,000
	30	Providence, RI	New	Consultant	\$600,000
1971	40	Providence, RI	New	General Partner	\$900,000
1971 - 1980	90	Pittsfield, MA	Rehab	Primary	\$2,000,000
	40	Great Barrington, MA	New	Joint Venture	\$1,300,000
	40	Adams, MA	Rehab	Primary	\$1,200,000
	60	Williamstown, MA	New	Primary	\$1,800,000
	40	Pittsfield, MA	Rehab	Joint Venture	\$1,800,000
	60	Pittsfield, MA	Rehab	Joint Venture	\$2,500,000
1982	70	Westfield, MA	Rehab	Joint Venture	\$1,750,000
1983 - 88	50	Boston, MA	Artist Housing	Consultant	\$3,000,000
1983	N/A	Boston, MA	Venture Capital	Owner/ Gen. Partner	\$1,250,000
1984	432	Windsor, CT	Rehab	General Partner	\$21,000,000
1985	132	Johnston, RI	Rehab	General Partner	\$7,700,000
1987	140	Exeter, NH	New and Rehab	General Partner	\$33,200,000
1988	3	Boston, MA	Rehab	Owner	\$900,000
1997	36+Office	Portland, ME	Rehab	Co-Owner	\$5,000,000
1999 - 2004	130	Westford, MA	Rehab	Primary/ Consultant	\$20,000,000
2003 - 2004	145	Boston, MA	New Condos	Consultant	\$35,111,000
2008-2010	6	Greenfield, MA	Mixed Use	Consultant	\$9,000,000
2011 -2015	62 + Retail **	Fitchburg, MA	Housing + CVS	Developer	\$18,000,000
2011 - 2014	Office	Springfield MA	NEPR HQR	Consultant	\$6,500,000
2012 - 2014	Mixed use	Worcester, MA	WBDC / QCC	Consultant	\$35,000,000
<b>Total</b>	1,791				\$211,273,000.

Notes to List of Projects

- **Owner** means purchased, owned and developed as an individual.
- **Primary** means had primary development responsibility.
- **General Partner** means had primary development responsibility, obtained the financing, plus served as individual general partner in the ownership entity.
- **Consultant** means served as consultant to the owner/developer
- **Joint Venture** means shared development responsibility with another firm or individual
- **The Fitchburg Project \*\***: planned as mixed use with 62 apartments; the NMTC funds necessary for feasibility in 2014 did not become available. Development is proceeding in 2015 with a free-standing 13,225 s.f. CVS.

# *Concord Square Planning & Development, Inc.*

## **Additional Information**

### **Concord Square – Background and Experience**

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**The following Pages include the following:**

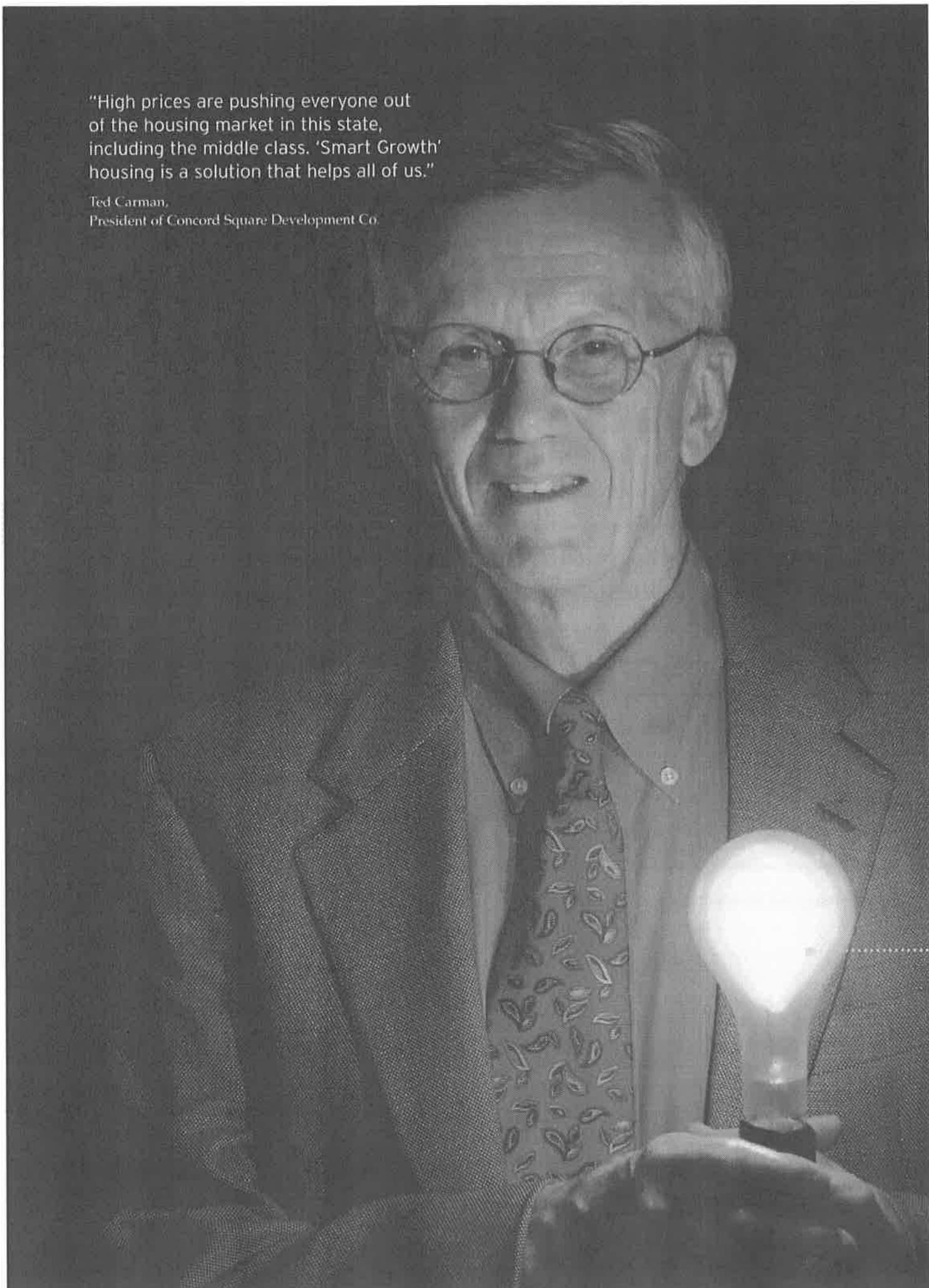
- 1. An excerpt from the 2006 Annual Report of the Boston Foundation that highlights the work of Ted Carman with Smart Growth Zoning – Chapters 40R and 40S – in Massachusetts.**
- 2. A description of the financing program in Greenfield, Ma using a combination of New Market Tax Credits plus State and Federal Historic Tax Credits – responsible for the renovation of five downtown Greenfield mixed use buildings.**
- 3. A description of the Exeter Mill development, in Exeter, New Hampshire**
- 4. A description of the Holt Hall development, in Portland, Maine**



# Turning the Corner

"High prices are pushing everyone out of the housing market in this state, including the middle class. 'Smart Growth' housing is a solution that helps all of us."

Ted Carman,  
President of Concord Square Development Co.



## Turning the Corner in Housing & Community Development

# How Great Leadership is Working for "Smart Growth" Housing

**T**ed Carman's great idea for addressing the housing crisis in Massachusetts came to him one morning in the summer of 2002 while walking to the commuter rail station in Melrose. He'd just moved to Melrose and was enjoying what he calls "a highly civilized way" to get to and from work every day. As a longtime developer of housing, he'd been thinking for years about the crisis of high housing costs in Massachusetts. It was clear to him that the heart of the problem could be summed up in one word: zoning.

Mr. Carman was acutely aware that for good reasons—such as financial concerns and traffic congestion—zoning laws typically prohibited housing in sufficient quantities to make a difference. He asked himself what it would take to break through these constraints. The answer: have the state provide financial incentives to towns and cities that develop dense housing near transportation nodes and town

centers—and give communities the right to develop the design standards to control the appearance of the housing. In this way, the state would stimulate the development of housing in Smart Growth locations by taking advantage of the 120 commuter rail lines that radiate many miles out from downtown Boston.

He approached the *Commonwealth Housing Task Force*, convened by the Boston Foundation, with the idea and the group immediately liked it. With a \$40,000 grant from the Foundation, Mr. Carman and two other members of the Task

"Smart Growth zoning will foster distinctive and attractive communities, preserve open space, reduce urban sprawl and provide for a range of new housing options that will ease the housing crisis we face in the Commonwealth."

Massachusetts Senator Harriette L. Chandler





"This innovative housing policy, which the Boston Foundation advocated for, seeks to bring partnership and cooperation to housing development in Massachusetts."

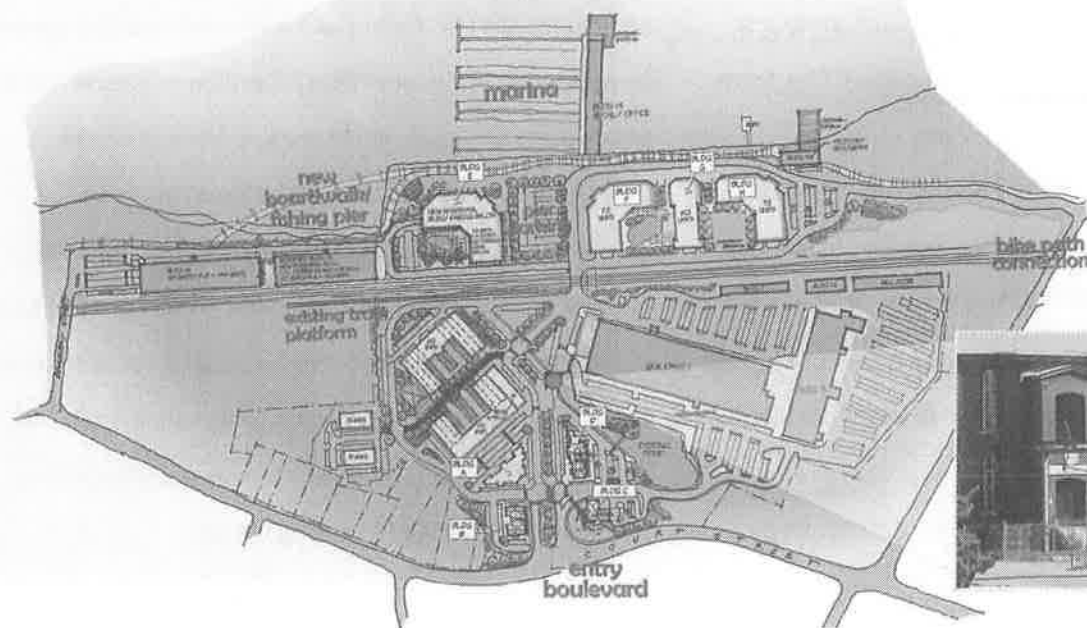
Massachusetts Representative Kevin G. Honan

Force—Barry Bluestone, Director of the Center for Urban and Regional Policy at Northeastern University, and Eleanor White, President of Housing Partners, Inc., wrote a report called "Building on Our Heritage: A Housing Strategy for Smart Growth and Economic Development" in 2003.

But reports don't become legislation without the support of visionary public policymakers. Meet Massachusetts Senator Harriette L. Chandler and Representative Kevin G. Honan, two lawmakers who are passionate about the need for new housing in the state. Senator Chandler (D-Worcester) is former Co-Chair of the Joint Committee on Housing and currently Co-Chair of the Community Development & Small Business Committee.

"To thrive as a community, we need people to live here and support our businesses. The people of Plymouth see the benefits in developing Cordage Park. They want this to happen."

Lee Hartmann,  
Director of Planning and Development,  
Town of Plymouth



Representative Honan (D-Brighton) is Co-Chair of the Joint Committee on Housing. With their support, the backing of many other legislators and the farsightedness of Senate President Robert Travaglini and Speaker of the House Salvatore DiMasi—the landmark Smart Growth Housing Act (Chapter 40R), was passed in 2004.

While towns and cities across the Commonwealth were interested in the opportunity, there was still a hurdle. The Chapter 40R legislation had not incorporated the Task Force's recommendation to include funds for educating the children whose families move into new housing. This was a crucial element in making it acceptable for communities to pass Smart Growth Zoning. Moving quickly, the Task Force prepared a second report that outlined a legislative solution. As a result of ongoing leadership in the Senate and House, this report became the "Smart Growth School Reimbursement Act" (Chapter 40S), which was passed in November of 2005.

The next steps had to come from towns and cities themselves. As of this fall, seven communities have stepped up to the plate, approving Smart Growth districts that will be home to some 2,000 units of housing—and sending a total of \$5 million in state funds to their coffers. One town alone, Plymouth, has plans for 675 units.

Lee Hartmann, Director of Planning and Development for Plymouth, and developers Joseph and Louis Jannetty, the owners of Cordage Park LLC on the site of an historic rope factory, worked together with many others in crafting the Smart Growth zoning proposal to the town. At a Town Meeting in May of 2006, the project was approved for appealing condos and rental units on the Atlantic Ocean



"At one time, Cordage Rope Company was the largest provider of rope in the world—so it's deeply rooted in this community. The train stops here; there are hiking and biking trails; and it's right on a deep-water channel. It's going to be a great place to live."

Joseph Jannetty, co-owner, Cordage Park LLC  
(left, with Louis Jannetty and Lee Hartmann)

and next to the Old Colony commuter rail line. The project is expected to bring more than \$2 million in Smart Growth payments to the town, in the process creating a model development to inspire many more communities.

Smart Growth legislation alone will not solve the housing crisis in Massachusetts, but it is an important step—and a terrific example of the kind of progress that can be made when philanthropic, public, nonprofit, private and government parties come together in partnership with a common goal to make something happen.

# GREENFIELD—REVITALIZATION THROUGH FINANCING

## Downtown Greenfield, Massachusetts

Greenfield Upper Story Program – Concord Square began working in the Town of Greenfield in January 2008 to assist the Town and private property owners with redevelopment of five buildings, bringing new life to downtown. Part of this work was to prepare a major amendment to the Bank Row Urban Renewal Plan, which enabled purchase and disposition of several key properties in the Urban Renewal Area.



Concord Square was hired to prepare a plan for the redevelopment of retail and upper story space in three buildings that had been vacant for decades and that were in the process of being acquired by the Greenfield Redevelopment Authority. Working with Massachusetts Housing Investment Corporation, a financing plan was designed that included New Market Tax Credits, State and Federal Historic Tax Credits, conventional financing from local banks, and owner equity. The details of the financing plan were worked out for specific buildings, and assistance was provided to individual building owners in obtaining each element of the financing.

3 BANK ROW



BANK ROW  
BUILDINGS  
BEFORE & AFTER



Five buildings have had their financing closed, construction completed and all the spaces leased and occupied. The total financing for these first five buildings is \$9 million.



21/23 & 25 BANK ROW



CONCORD SQUARE

294 Washington Street, Suite 638, Boston, MA 02108 ■ 617-482-1997 ■ Fax 617-482-0997  
1500 North Main Street, Palmer, MA 01069 ■ 413-284-4328 ■ Fax 413-284-4434  
[www.concordsqdev.com](http://www.concordsqdev.com)

# Exeter Mill

## Exeter, New Hampshire

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The first building of Exeter Mill was built in 1828 on the eastern shore of the Squamscott River, just downstream of the rapids and the dam that limited the extent ocean-going ships from Europe could proceed inland. The town of Exeter, founded in 1638, has its center and business district directly across the river from the

mill buildings. The mill produced high quality cotton goods until the mid 1950s. For the next 25 years it focused on specialty fabrics, eventually becoming an early producer of simulated suede for Nike athletic shoes.

In the mid-eighties the mill was sold to a local real estate broker who had New York partners. After obtaining key zoning approvals for conversion of the buildings to housing, in 1986, the entire complex was sold to Arbor Development Company, Inc. (of which Ted Carman was the President and CEO). It took approximately one year for the Arbor Company to complete the planning of the renovations, to obtain the local zoning and other approvals, and to arrange the financing. Demolition work took place during that period. A closing was held in the fall of 1987, and construction began at that time.

Financing was provided through a bank loan, plus equity participation from four savings banks and Berkshire Life Insurance Company. Construction was carried out through a construction management contract with Joseph Francese, Inc., a general contractor from Pittsfield, MA. Paul Francese, the president, was a principal of Arbor



Development Company, and had built three projects for Mr. Carman and Berkshire Housing Development Company in Pittsfield.



By the summer of 1989 the renovation work was completed. The development had two components; 84 units plus several thousand s.f. of office space were built in the existing mill buildings, and 56 new construction units were built on both ends of the property. An indoor swimming pool was created. A number of existing buildings were demolished, most of which were of recent construction, and had little historic interest. The property was placed on the National Register of Historic Places. The renovation work was eligible for historic tax credits.

It was believed that the site was an exceptional one, because of its proximity to the river and the center of Exeter, and that the housing should therefore be designed and built to be of outstanding quality. The units were large – the average size was 1,400 s.f. – and the finishes all built on and related to the quality of the existing mill buildings and the views of the river. Berkshire Life Insurance Company is the current owner of the property.



# Holt Hall

## Portland, Maine

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Holt Hall was built as the Maine Eye and Ear Infirmary in Portland, ME in 1886. It is a handsome building, designed by Calvert Stevens, a prominent Portland architect. It is on the National Register of Historic Places.

Over the decades after its construction, the nearly 50,000 s.f. building was used for a number of health care purposes, including housing nursing students. By the early 1980s it had been declared

surplus by its then owner, Maine Medical Center, and was vacated. It was sold to a housing developer who managed to acquire adjacent land sufficient to provide parking for 80 cars. The real estate recession in the early 1990s aborted that attempt for re-use, and the property, including the land for parking, was foreclosed on and subsequently offered for sale by Fleet Bank.

John Moriarty & Associates (“JMA”), a large commercial builder with its headquarters in Winchester, MA acquired the property in 1993. JMA had provided construction services during the construction of the Exeter Mill, and therefore had a pre-existing relationship with Ted Carman and knew Concord Square Development Company. After an initial re-development attempt failed, JMA asked Concord Square to evaluate the situation and make recommendations. In 1996 a site inspection and market evaluation was completed, and Concord Square proposed that the property be re-developed into market rate apartments, using the HUD 221 (d) (4) program for financing. Since the building was on the National Register of Historic Places, it was also eligible for a Historic Tax Credit equal to 20% times the cost of renovation.



Holt Hall before redevelopment



A joint venture was formed between Concord Square and JMA, in which Concord Square would perform all the development functions, arrange the financing, and JMA would provide the building, required capital, and carry out the construction. Over the next year the building was carefully studied and architectural and engineering plans were prepared. The plans resulted

in 36 high-end rental apartments on the upper floors, and commercial space for the entire first floor, which was unsuitable for residential use.

The required zoning variances and other local approvals were obtained, and a 20 year Tax Increment Financing Agreement was signed with the City. A long-term lease with Maine Medical Center was negotiated for the entire first floor of the building. A lease for a cell phone antenna on the roof was negotiated. A \$3,650,000, fixed rate, 40 year, HUD insured loan was arranged. The loan was closed in 1997, construction was completed in 1998, and by mid-1999 the building was fully occupied.

The building offered a number of difficult development challenges. It had been vacant for nearly 15 years, the roof leaked, and one entire section of the building, roughly 20 by 50 feet in size, was rotted out from the top of the building to the basement. This required full removal of the deteriorated building materials, temporary shoring, and then complete new framing and new construction for seven stories, from the bottom to the top of the building, inside the exterior walls.

In addition, the wood frame bearing partitions did not line up from floor to floor, necessitating complex floor plan adjustments on each level. The site sloped from the front up to the back, so that street level at the front was 10 feet below street level at the rear, substantially complicating the plan to lease the first floor. The top floor was 14 feet in height, behind a massive slate-covered mansard roof with only a few dormers, requiring careful planning and skylights to use the space effectively. The rear of the building had seen



Before and after of interior space

multiple additions of cheap, balloon-frame wood construction up the full seven stories, all of which had to be removed. Much of the brickwork on the rear of the building had been damaged or removed.



As the photographs demonstrate, JMA did an outstanding construction job, using slate and copper for roof repairs, restoring the brickwork to like-new condition, and using high quality materials throughout the building. The apartments included washer-dryers, gas-log fireplaces, and wood floors. Rent-up went smoothly, and the building has operated at over 96% rental collections since 1998. Its apartments consistently rent at the top of the market in Portland.

Concord Square provides ongoing management supervision at the property. It directs and oversees the work of the local property manager. It has prepared a rent-roll database to keep track of occupancy and the demographic characteristics of the tenants. It has developed a recurring maintenance item control program, to ensure that all recurring maintenance work is done on schedule. Neither of these control programs is available commercially.

## BONZ AND COMPANY, INC.

*Real Estate Advisors*

**B**onz and Company, Inc. provides comprehensive real estate advisory, consulting, and valuation services to financial institutions, public agencies, corporations, nonprofit organizations, investors, educational institutions, and developers, in the United States and abroad.

With an approach that combines sophisticated analytical techniques with practical real estate experience, the firm provides clients with creative and pragmatic solutions to today's complex real estate and valuation problems. Our broad client base, diverse project experience, wide geographic coverage, and knowledgeable staff enable us a unique perspective in key service areas: feasibility consulting, acquisition and disposition consulting, due diligence analysis, and the appraisal of most types of commercial and multi-family property.

As in past years, real estate owners, investors, developers, and public agencies continue to face major challenges. In this constantly changing real estate climate, our goal is to draw upon our experience, skill, and creativity to enable our clients to maximize their real estate objectives.

### Services of the Firm

An extensive client base and diversity of project experience enable Bonz and Company to provide sound advice in a wide range of real estate situations. The firm has undertaken complex real estate assignments throughout the United States and abroad. The value added constant in Bonz and Company service is the unique combination of sophisticated analytical tools, a creative problem solving approach, and the pragmatic orientation of first hand real estate experience.

**Housing Studies** – Bonz and Company undertakes development, financial, and market feasibility studies for market rate apartments and condominium developments, senior housing, and affordable housing developments, including mixed-income communities financed with federal and state housing assistance programs.

The market rate housing studies encompass downtown high-rise and suburban low and mid-rise rental apartment and condominium properties. These studies include feasibility studies for new development, adaptive reuse of former industrial and other properties, the redevelopment of older residential properties, and residential components of mixed-use developments.

The firm has undertaken numerous market and financial feasibility studies for affordable and mixed-income rental and condominium properties, low-income housing tax credits, HUD mandated rental comparable studies, valuations for tax abatement, market studies and appraisals for LIHTC financing, analyses for federal bankruptcy court, and studies pursuant to various federal and state programs.

Bonz and Company has undertaken a wide variety of senior housing studies, including development feasibility studies, market and financial analyses, and appraisals. These studies encompass housing products addressing the active empty nester and retiree markets, age-restricted rental and condominium products, independent living facilities, assisted living facilities, congregate housing development, and nursing homes.

**Feasibility Consulting** – Bonz and Company provides a variety of feasibility services from market analyses and economic studies to detailed financial analyses of complex projects. Our feasibility studies have a common thread of thorough research, sophisticated analysis, an understanding of real estate trends, an objective evaluation of future conditions, and pragmatic real estate judgment. Our objective is to identify the likely market niche, strategy, and conditions necessary to maximize the clients' objectives while minimizing the attendant risks. Our diverse background includes assignments involving office, retail, hotel, multi-family residential, mixed-use, and industrial projects as well as ski and golf resorts, interval ownership housing, parking facilities, marinas, art museums, and other specialized properties, including the redevelopment of former military bases and large industrial facilities.

**Revitalization/Redevelopment Studies** – Bonz and Company and its predecessor firms have undertaken numerous market and financial feasibility studies for downtown revitalization and specific redevelopment projects in New England and elsewhere. These studies involve thorough analyses of economic and demographic trends, market support for local businesses, analyses of the existing and emerging competitive position of the area being studied, and a thorough analysis of the real estate economics affecting the property. The analyses are designed to identify realistic market opportunities, formulate a program and development strategy that responds to current and anticipated potentials, provide a realistic development budgets, identify potential sources of funding, and formulate an implement plan that can accommodate changing economic and market conditions during the development and operation of the project.

**Fiscal and Economic Impact Studies** – Cities and towns are becoming increasingly concerned with the fiscal and economic impact of major new development and redevelopment projects upon their municipal budgets. This is particularly the case where older industrial, institutional, or government properties are proposed for large-scale redeveloped for residential and mixed-use redevelopment. Many public agencies are also concerned about the economic impacts of a proposed development and whether the proposed use will maximize the economic development potential of the property. To address these issues, we provide independent fiscal and economic analyses for municipalities, public agencies, developers, and other clients.

**Valuation and Appraisal Services** – The firm provides valuation services for investors, financial institutions, property owners, government agencies, corporations, and the legal community. We specialize in the appraisal of multi-family residential properties, low, moderate, mixed-income and market rate housing and the valuation of HUD and state agency financed properties, as well as more traditional appraisals.

## Professional Staff

The professional staff combines training in sophisticated analytic approaches with practical real estate experience in finance, deal structuring, market analyses, due diligence services, urban planning, economic and feasibility analyses, valuation and investment analyses to provide our clients with the ability to solve a wide range of real estate problems. Mr. Salisbury and Ms. Shelton are the principals of the firm and participate in all projects, assisted by experienced associates and research staff.

### **Joanne F. Shelton – Director/Principal**

Ms. Shelton is a real estate professional with over 18 years of experience in commercial real estate appraisal, financial analysis, and market feasibility. Previously Ms. Shelton was employed by Plymouth Development Corporation, England, and Laganside Development Corporation in Belfast, Northern Ireland, two of the thirteen development corporations in the United Kingdom.

She holds a Bachelor of Science in Estate Management (Real Estate Studies), University of Ulster, Jordanstown, Northern Ireland. She has also completed extensive appraisal courses and seminars offered by the Appraisal Institute as well as real estate financial classes at Boston area universities. Ms. Shelton is a Massachusetts, Rhode Island, New York and Maine licensed Certified General Real Estate Appraiser and is MAP Certified and HUD Approved for appraisals and market studies completed as part of the financing requirements for HUD's Multi-Family Accelerated Processing

Ms. Shelton real estate experience encompasses: commercial properties, including suburban and downtown office buildings, large office parks, retail districts, shopping centers, box retail facilities, specialty retail facilities; mixed-use developments, and related properties; Housing and related development assignments, including market-rate, low, moderate, and mixed income housing ranging from town-house development to high-rise condominiums and rental apartments; Industrial and related special purpose properties such as R&D facilities, research laboratories, industrial parks, distribution facilities, and manufacturing facilities; and Special Purpose Properties such as institutional facilities, theaters and schools, and other such properties.

## **Robert S. Salisbury – Director/Principal**

For the past 20 years, Mr. Salisbury has served as a real estate project manager, consultant and appraiser to a wide variety of private and public clients throughout New England and California. In Mr. Salisbury's valuation and consulting experience, he has undertaken detailed market and feasibility studies, highest and best use and most profitable use analyses, land planning and development strategies, financial analysis of real estate portfolios, market surveys of commercial and industrial space, regional office market studies, and has participated in appraisals and valuation studies for urban and rural properties. He has worked on a full range of property types, including, office, industrial, retail, residential, historical rehabilitation, hotels, and major mixed-use developments, with a primary focus on market rate, mixed-income, and affordable multi-family development.

Mr. Salisbury holds the degree of Bachelor of Arts from the University of Wisconsin at Madison, Wisconsin and a Master's in Public Policy from the Kennedy School of Government at Harvard University in Cambridge, Massachusetts. He has completed extensive real estate and appraisal courses and related seminars offered by the Appraisal Institute as well as real estate financial classes at Boston area universities.

### **Clients of the Firm**

Bonz and Company, Inc. and its predecessor firms have served a diverse constituency of clients. A representative list of clients served by the firm includes:

#### ***Educational and Other Institutions***

Boston University; Brigham Surgical Group; Bryant University; Episcopal Divinity School; Harvard University; Massachusetts College of Art; New England Conservatory of Music; Newton Wellesley Hospital; Northeastern University; Northfield Mount Hermon School; Harvard Pilgrim Healthcare; Springfield College; and Wellesley College, among other educational and other institutions

#### ***Developers and Real Estate Companies***

Archstone Communities, Barkan Management, Beacon Companies, Beacon Residential Properties, Brownfields Recovery, Continental Wingate, Corcoran Management, Cornerstone Group, Cornu Management, Edward A. Fish Associates, Erickson Retirement Communities, Hall Keen, LLC, HRPT Medical Buildings Realty Trust, Intercontinental Real Estate Corporation, John Drew Company, Kensington Investment, Kohl Partners, Lennar Partners, Marketplace Development, Mass Innovation, McCall and Almy, Mitchell Properties, Mugar Enterprises, New Atlantic Development Corp., New England Development, Ocean Properties, Oxford Development LLC, Pembroke Real Estate, RAM/Aries Development, Raymond Property Company, REIT Management and Research, Inc., Roseland Property Company, RSJ Development, RS Roth, Inc., Spaulding and Slye Colliers, Starwood Partners, State Street Development Company, The Gatehouse Group, and Winn Management Company, among other development and real estate companies.

#### ***Financial Institutions/Mortgage Brokers***

Advest, Inc.; Bank of America; Banknorth; Boston Community Capital; Boston Federal; Boston Private Bank; Brookline Savings Bank; Cambridge Savings Bank; Camden National Bank; Century Bank; Citizens Financial Group; Columbus Bank and Trust; Compass Bank; Danvers Savings Bank; Eastern Bank; GE Capital; Goedecke and Co.; Granite Bank; Gravestar; Key Bank; Lennar Partners;

Local Federal Bank; Massachusetts HEFA; Massachusetts Housing Finance Agency; Massachusetts Housing Partnership; Mellon Bank; Nations Bank; People's Bank; Plymouth Savings Bank; PNC Bank Corporation; Rockland Trust; Rockport Mortgage; Salem Five; TCF Bank; US Bank; United Cooperative Bank; US Bancorp; Wachovia Small Business Capital; Walker & Dunlop, Wainwright Bank; and Wells Fargo, among other financial institutions and intermediaries.

### ***Public Agencies/Government Agencies***

City of Boston, MA; City of Concord, NH; City of Lawrence, MA; Massachusetts Division of Capital Asset Management; U.S. Internal Revenue Service; Massachusetts Department of Mental Health; MassDevelopment; MassHousing; Massachusetts Housing Investment Corp.; Massachusetts State College Building; Authority; Massachusetts Port Authority; Massachusetts Turnpike Authority; Rhode Island Housing; Rhode Island Economic Development Commission; and numerous other municipalities and other public agencies.

### ***Law Firms***

Bingham McCutchen; LLP; Brown Rudnick Freed and Gesmer; Choate Hall and Stewart; Cleveland Waters and Bass; Cooley Manion and Jones; Foley Hoag, LLP; Friedman, Gaythwaite, Wolf and Leavitt; Gadsby Hannah, LLP; Goodwin Procter and Hoar; Hale and Dorr; Masterman Culbert and Tully, LLP; McDermott, Will and Emery; Nutter McClennan and Fish, LLP; Palmer and Dodge, LLP; Posternack Blankstein and Lund; Regante, Sterio and Osburne, LLP; Robinson and Cole, LLP; Rubin Rudman, LLP; Weil, Gotshal and Manges, LLP; Weston Patrick Willard and Redding, PA, among other law firms.

### ***Non-Profit Entities***

Affirmative Investments; Allston Brighton CDC; Boston Aging Concerns; Chelsea Neighborhood Housing Services Corp.; Codman Square CDC; Combined Jewish Philanthropies; Congregational Retirement Homes; East Boston CDC; Falmouth Housing Corp.; Fenway CDC; Groundwork Lawrence, Haverhill YMCA; Homeowner's Rehab; Horizons For Youth; Jamaica Plain Neighborhood Development, Corporation Lawrence Community Works; Lawrence YWCA; Madison Park Development Corp.; Massachusetts Association Of Realtors; Massachusetts Conference United Church of Christ; the Roman Catholic Archdiocese of Boston; South Shore Housing Associates; Tenants Development Corp.; Urban Edge and YWCA of Boston, among other non-profit entities.

## Relevant Experience

The following is a list of affordable housing developments that we have completed and appraisal for within the last 18 months that received acquisition credits under the LIHTC

1. Bishop Allen Apartments, Cambridge, MA
2. Putnam Square Apartments, Cambridge, MA
3. St. Botolph Apartments, Boston, MA
4. Commonwealth-Glenville Apartments, Allston, MA
5. Mashpee Village, Mashpee, MA
6. Middlebury Arms, Middleboro, MA
7. Constitution Hill, Woonsocket, RI
8. Charlesgate, Providence, RI

## SUMMARY OF EXPERIENCE

DOUGLAS J. MacLEAY P.E.

DECEMBER 11, 2015

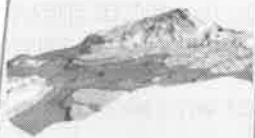
- 1972 GRADUATED GREENFIELD COMMUNITY COLLEGE WITH HONORS ASSOCIATE DEGREE IN CIVIL ENGINEERING TECHNOLOGY.
- 1972-1973 WORKED FOR SITE CONTRACTOR DOING SITE LAYOUT ON CONSTRUCTION SITES
- 1974-1980 WORKED FOR USDA SOIL CONSERVATION SERVICE AS ENGINEERING TECHNICIAN ADVANCING TO AREA ENGINEER IN 1978. IN CHARGE OF ENGINEERING SERVICES FOR PLYMOUTH COUNTY, BRISTOL COUNTY, CAPE COD, MARHTAS VINEYARD AND NANTUCKET
- 1978 GRADUATED FROM THE UNIVERSITY OF MASSACHUSETTS IN AMHERST WITH BACHELOR IN SCIENCE IN CIVIL ENGINEERING
- 1981 JOINED E.J. FLYNN ENGINEERS AS OFFICE MANAGER NORTHBORO MA ENGINEERING AND SURVEY OFFICE.
- 1981 CHAIRMAN OF PRINCETON, MA BOARD OF HEALTH
- 1983 BECAME LICENSED AS A CIVIL ENGINEER IN MASSACHUSETTS AND FORMED MacLEAY ASSOCIATES CIVIL ENGINEERS LOCATED IN COLRAIN MA.
- 1992 INCORPORATED MacLEAY ASSOCIATES INC. AS SUBCHAPTER S BUSINESS LOCATED IN SHELBURNE FALLS MA.
- 1999 MEMBER OF MOHAWK TRAIL REGIONAL HIGH SCHOOL BUILDING COMMITTEE
- 2002 MEMBER COLRAIN, MA PLANNING BOARD
- 2006 SOLD MacLEAY ASSOCIATES INC. TO CERSOSIMO INDUSTRIES INC.
- 2009 MEMBER OF COLRAIN, MA. FINACE COMMITTEE
- 2006-2014 WORKED AS A PROJECT MANAGER FOR SVE ASSOCIATES INC. DIVISION OF CERSOSIMO INDUSTRIES GREENFIELD, MA. OFFICE.
- 2014 FORMED MacLEAY ENGINEERING CIVIL ENGINEERING COLRAIN, MA

I have worked in the field performing all kinds of survey since 1972. I have been designing septic systems homes schools and commercial properties since 1981. I have designed sub-divisions and roadways. I have been involved in engineering for the drilling and testing of public water supply wells since the early 1990's.



# MacLeay

Associates, Inc. civil engineers



*company profile*



*septic design*



*advanced technologies*



*site analysis*



*percolation testing*

*topographical survey*

*computer aided drafting*

*experience*

**102 Bridge Street Shelburne Falls, MA 01370**  
**Phone: (413)625-9774 Fax: (413)625-9704 Email: [macleay@crocker.com](mailto:macleay@crocker.com)**

## *company profile*



*MacLeay Associates is a small civil engineering firm founded in 1983 by current president Douglas J. MacLeay. Nestled in the small scenic village of Shelburne Falls, Massachusetts, the company offers professional engineering services to a wide variety of clients.*



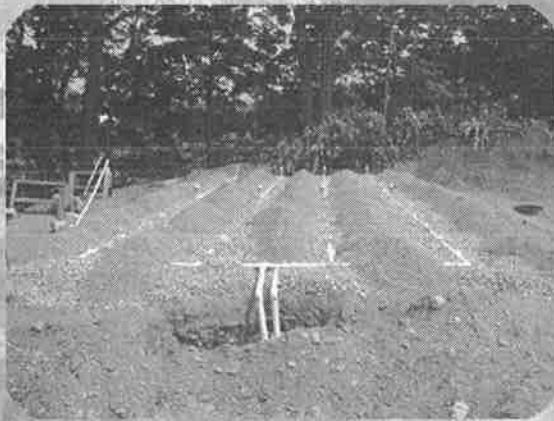
*The goal of the firm is to provide high quality, efficient engineering services to clients by incorporating the latest in digital technologies and surveying techniques. We back this with over twenty years of sound field experience.*



*The firm maintains two fully licensed, professional engineers on staff to serve your civil engineering needs. We are licensed to practice civil engineering in the states of Massachusetts, Vermont and New Hampshire.*



# *septic design*

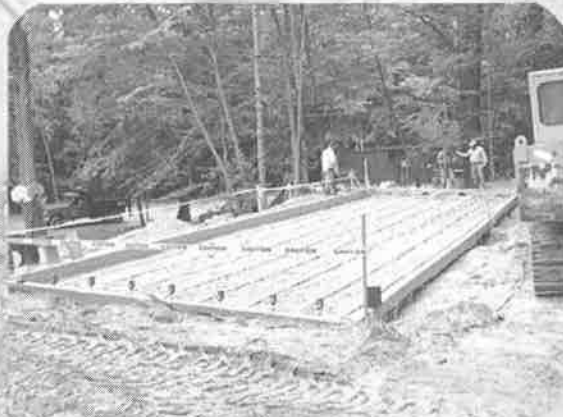


*Adhering to the new Title 5. guidelines for on site wastewater disposal systems has been a challenge to property owners since its revision in 1995. Compliance with the code is at the root of many system upgrades and constructions. Given the significant costs involved in constructing a Title 5. compliant system, hiring an experienced, informed engineer is one of the most important decisions you can make.*

*MacLeay Associates has twenty years of experience designing subsurface sewage disposal systems for individual homes, schools, campgrounds and other facilities throughout Western and Central Massachusetts.*

*With over 1000 residential jobs completed to date we maintain a strong reputation with town Boards of Health as well as good working relationships with local contractors. Our experience, coupled with cooperative problem solving and informed decision making can ensure that your project will progress smoothly and accurately to completion.*

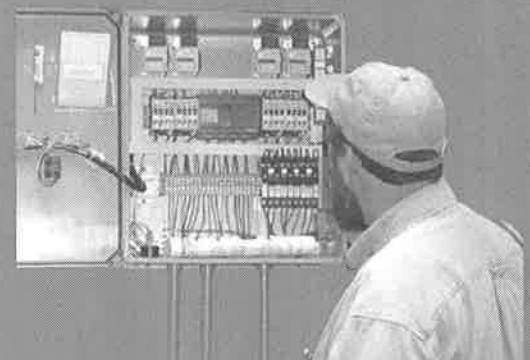
## *advanced technologies*



*Given today's strict wastewater disposal standards, and the ever increasing challenge of designing for a wide variety of site conditions there are times when a traditional system is not feasible and an advanced technology is the only solution.*

*MacLeay Associates is well versed in the design and appropriate implementation of technologically advanced wastewater treatment systems. We have successfully completed many projects, large and small, involving applications of technology such as Bioclere and Recirculating Sand Filtration systems.*

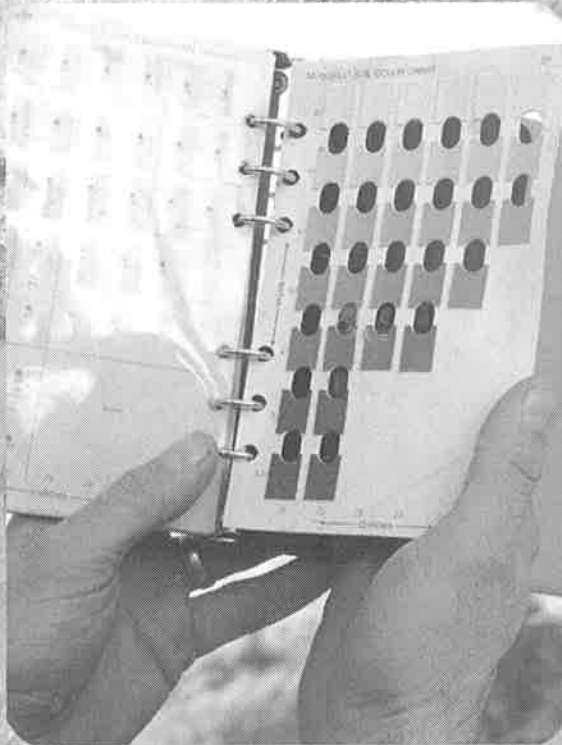
*Our firm also prides itself on staying up to date with the latest in technology within the wastewater treatment world. We are constantly searching for and investigating new on site disposal system technologies, filters and methods.*



The map shows the Montague, Massachusetts area, including the Connecticut River, Deerfield River, and Mill River. Key locations labeled include Greenfield, Montague City, Deerfield, and Montague. Major roads shown are I-90 and I-89. The map also indicates the locations of the Turners Falls Dam and the Central Vermont Railway. The map is oriented with North at the top.

*MacLeay Associates offers consultation and site analysis services to our clients before any development begins. We work closely with our clients through all phases of the construction process, from initial planning estimates through project completion. A thorough site analysis from one of our seasoned engineers can help you make better informed project decisions.*

# percolation testing



DEEP HOLE OBSERVATION LOG					
Depth from Surface (feet)	Soil Horizon	Soil Texture (USDA)	Soil Color (Munsell)	Soil Moisture	Soil (Structure, Stones, Rootlets, Contaminants & Notes)
0'-8"	Ap	Sandy Loam	10YR 3/2		MS, FR.
8"-19"	B	Sandy Loam	10YR 3/3		MS, FR.
19"-30"	C1	Medium Sand	5Y 4/2		Sy.
30"-40"	C2	Fine Sand	5Y 5/4		Sy.
40"-52"	C3	Coarse Sand (Gravel)	5Y 4/2	Ø 57" ± 10% 2.5YR 4/6	Sy. 25% Gravel & Stones

Thorough soil evaluation is crucial to sound civil engineering decisions. Percolation testing and test pit evaluations are the modern standard for designing on site subsurface disposal systems. Accurate soil analysis and testing must be performed to ensure long lasting, cost effective, and environmentally safe solutions.

Our firm specializes in providing proper soil evaluation and percolation testing. We have two experienced full time Massachusetts certified soil evaluators on our staff.

By allowing us to fulfill your soil analysis needs, you can save time and money on your construction project by streamlining the design process. Keeping the soil analysis and design process in house ensures reliable design data and more efficient service.



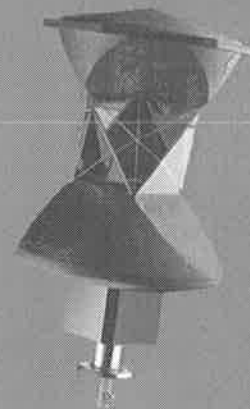
# topographical survey



Our experienced staff comes fully equipped with the latest in precision surveying equipment. Utilizing total stations outfitted with robotic laser telemetry our field data is electronically stored, then digitally transferred to our CAD systems. The resulting topographical information is superior in quality as well as quickly and efficiently processed.

Once in the field our equipment enables us to perform valuable field checks of site grading and elevations. This crucial information, coupled with dialogue with the contractor results in faster, more accurate, and cost effective construction.

Other services include staking out the proposed design directly onto the jobsite. On larger jobs with narrow tolerances, location becomes of paramount importance. Using the total station and downloaded coordinate files, we can lay out the proposed construction to fall precisely where designated according to plan.



# Computer Aided Drafting

Our computer systems work seamlessly with our surveying equipment. Field data is quickly downloaded and converted to workable topographic plans. This integrated system allows faster turnaround times and efficient service.

Design and drafting are all performed directly on the computer providing high quality drafted plans or plan changes in timely fashion. Additionally, all files are digitally stored and when necessary can be easily sent via internet.

Our CAD program utilizes three dimensional modeling of site topography. Consequently, we can provide accurate volumetric or area calculations, as well as cross sectional information far quicker than traditional methods.



# experience



## **RESIDENTIAL**

Over 1000 residential subsurface sewage disposal systems, including gravity systems, pump systems, pressure distribution systems, tight tank systems, Wisconsin mound systems, bioclere systems and recirculating sand filtration systems.

## **EDUCATIONAL**

Paper Mill Elementary School  
Westhampton Elementary School  
Granville Village School  
Swift River School  
Whately Elementary School  
Leyden Elementary School  
The Academy at Charlemont  
Warwick Elementary School  
Heath Elementary School  
Sanderson Academy

-Bioclere System

Bernardston Elementary School  
Lake Grove/Maple Valley School

-Bioclere System

Eagle Hill School

-Bioclere System

Leverett Elementary School  
Petersham Elementary School

-Recirculating Sand Filter System

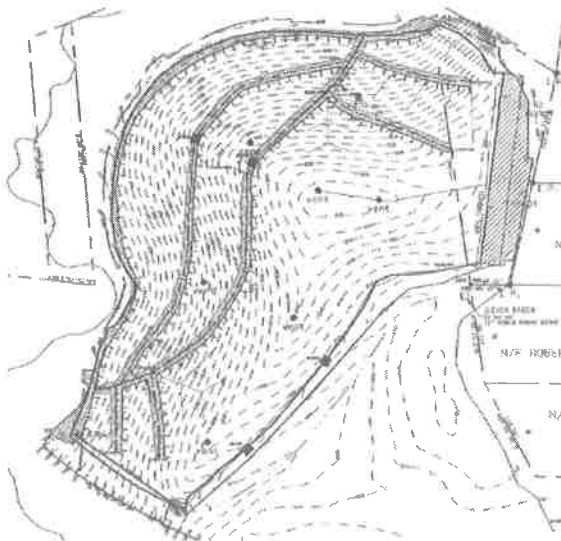
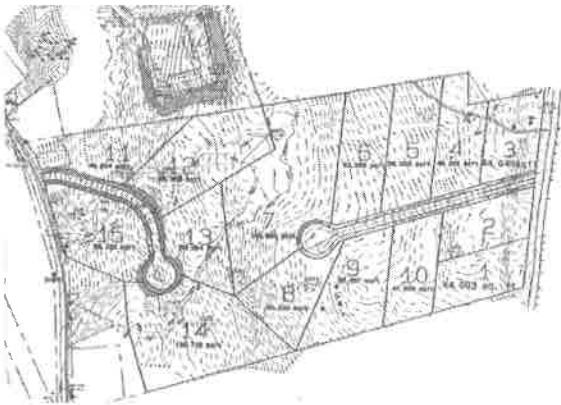
Hampshire Regional School

-Recirculating Sand Filter System

## **COMMERCIAL**

Dharma Foundation  
Insight Meditation Society  
Flagstop Restaurant  
Bernardston Inn  
Hillside Nursing Home  
Anchorage Nursing Home  
Whately Diner  
Whately Inn  
The Pines Campground

# experience



## **STUDIES & REPORTS**

Ashfield Village Study 1989

Barre Center Study 1985

## **SUBDIVISIONS**

**Evergreen Acres:** Orange, MA  
160 acre parcel with a 32 lot subdivision, 4000 foot roadway with associated drainage.

**Miranda Acres:** Greenfield, MA  
11 lot subdivision.

**Pinnacle Lane:** Shelburne, MA  
4 lot subdivision.

## **ROADWAY & DRAINAGE**

The Pines at O-Street, Montague  
Bears Den Road, Athol

Westbrook Acres, Orange

Teawaddle Lane, Amherst

Oakwood Street, Amherst

Swallow Farms Road, Amherst

Randall's Pond Road, Orange

Industrial Road, Orange

## **SITE PLANS**

Pete's Tire Barn, Gardner

Garlock Printing, Gardner

Seaman Paper, Orange

Demolition Dump Closure Plan;

Earl Drew, Orange, MA

Demolition Dump Closure Plan;

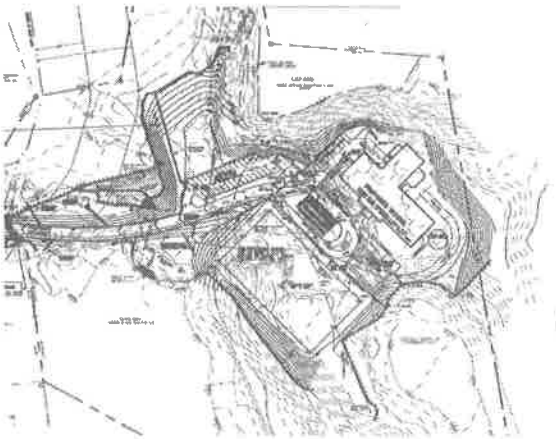
W.M. Clark, Shutesbury, MA

## **INDUSTRIAL WORK**

Indus-Rail; Shelburne Falls, MA

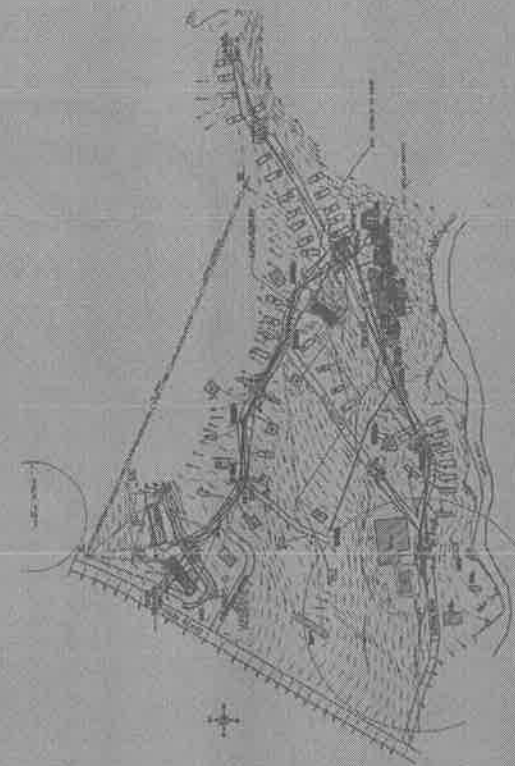
Site survey & layout of railroad track.

# experience



## **PUBLIC WATER SUPPLY WELL DESIGN & ENGINEERING**

Anchorage Nursing Home  
Buckland Recreation Area  
Crabapple Whitewater  
Sanderson Academy  
Warfield House Restaurant  
Warwick Elementary School  
Leverett Elementary School  
Lake Grove School  
Morgan Memorial Camp  
Petersham Elementary School  
Linden Hill School  
Eagle Hill School  
Heath Elementary School





Albert, Richter & Tittmann Architects is an award-winning professional practice which offers complete architectural services for projects of many types and sizes. The firm was founded in 1971. The experience of the partners includes museums, libraries, resorts and multi-unit residential buildings. However, we are best known for our many houses, both big and small, throughout New England and New York.

### *PRACTICE AND PHILOSOPHY*

Our emphasis on the appropriateness of a design to its setting; on the craft of making buildings; and on responsive service is applicable to all building types. We appreciate a full range of architectural languages and styles. We enjoy the play between memory and invention.

We are guided not by ideology but by curiosity. We are open-minded and willing to learn from anything, old or new, high art or the vernacular. We believe architecture can be creative while building on older traditions.

Listening to our clients, understanding and interpreting their needs, dreams, and aspirations, is key to the planning and architectural expression of a project. We combine a rigorous exploration of design ideas with pragmatic, thoughtful solutions to the realities each project's program, site, budget, and schedule. We believe that the finished project should be a reflection of the client and of its place. When it all comes together it will be fresh and alive yet may look as though it has always been there.

### *SUSTAINABILITY*

With a view towards sustainability we combine aesthetics and science, as well as past and the present. We employ the latest knowledge of insulation, air-sealing and building components for energy conservation with time-honored, commonsense techniques of solar orientation and appropriate design for the climate.

### *EXPERIENCE*

Albert, Richter & Tittmann architects is a 15 person studio. The firm provides a full range of services, including urban design, architectural design, interior design, furniture design, programming and master planning.

The principals will be deeply engaged in this project. We combine personalized attention from our firm with an assembled team of specialists that we have worked with on a variety of projects.

## JOHN B. TITTMANN, AIA

### REGISTRATION

Massachusetts, Connecticut, New York, Maine, NCARB

### PROFESSIONAL AFFILIATIONS

Albert, Righter & Tittmann Architects, Boston 1996-present  
Tittmann Associates, Boston 1991-1995  
Booth/Hansen & Associates, Chicago 1988-1991  
Skidmore, Owings & Merrill, Chicago 1987-1988  
Allan Greenberg, Architect, New Haven 1986-1987  
I.M. Pei, Paris 1985

American Institute of Architects  
Boston Society of Architects  
Institute of Classical Architecture, 2006-present  
New England Chapter • *Board Member*  
Congress for the New Urbanism, 2005-present  
New England Chapter • *Board Member*  
United States GSA • *Design Excellence Peer*

### RELATED PURSUITS

Family to Family Project • *Board Member* 1994-present

Tavern Club • *Building Committee* 2004-2006

Lecture on Sustainable Architecture, North Haven 2011  
Lecture on Innovation in Neo-Classicism, Palm Beach 2011  
Residential Design and Construction Conference • *Speaker* 2011, 2010  
Albert, Righter & Tittmann Book Tour Talks 2010-2011  
Traditional Building Conference • *Speaker* 2007, 2005  
Institute of Classical Architecture, New York • *Speaker* 2007  
Institute of Classical Architecture, Boston • *Speaker* 2007

### Recent Articles & Reviews

The Boston Musical Intelligencer 2012  
Period Homes, Architecture Boston 2006, 2008

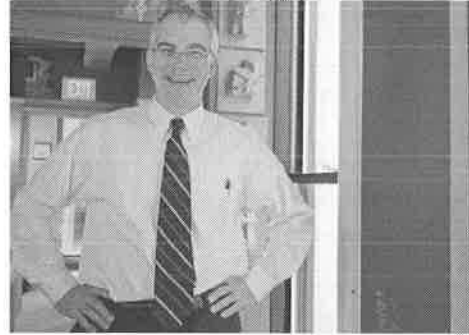
### TEACHING

University of Notre Dame, South Bend • *Visiting Juror* 2008, 2013  
University of Illinois, Chicago • *Adjunct Professor* 1987-1990  
Yale • *Teaching Assistant to Vincent Scully* 1983-1986

### EDUCATION

Yale M.Arch. 1986  
Yale B.A. 1981

*with distinction in Architecture*



## JOHN BARRON CLANCY, AIA

### REGISTRATION

Massachusetts, Vermont, NCARB

### PROFESSIONAL AFFILIATIONS

Albert, Richter & Tittmann Architects, Boston	2002–present
Arrowstreet, Boston	1997–2002
NYC 2008 Olympic Organizing Committee, New York	1996–1997
Urban Design Workshop, Yale	1995–1996

Passive House Certified Consultant

### RELATED PURSUITS

Burke Mountain Academy	
Board of Trustees past member	2004–2010
Campus Master Plan	1998
New Dormitory	1999

Town of Milton Alternate Energy Committee	2010–Present
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AIA Webinar • <i>Form Follows Energy</i>	2012
A.I.A. New England Conference • <i>Form Follows Energy</i>	2012
RDX Conference • <i>Low Energy Houses Really Perform</i>	2012
M.I.T. • <i>Passive House for Habitat for Humanity</i>	2010

### FILM AND RADIO

Balancing Act-A Feature Documentary	2013
Vermont Public Radio	2010

### EDUCATION

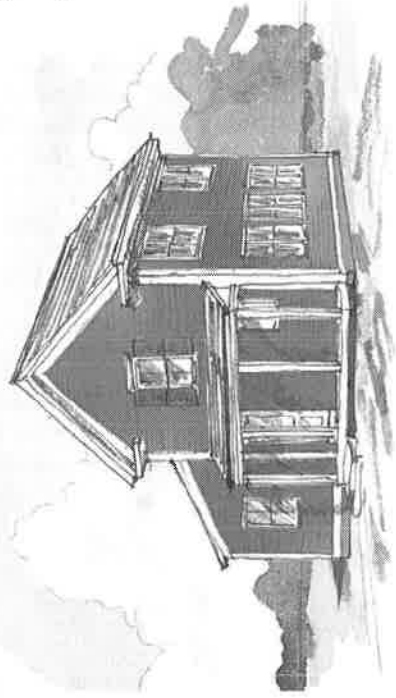
Yale M.Arch.	1996
Parsons Medal for Urban Planning & Design	
Brown A.B.	1992
Magna Cum Laude; Phi Beta Kappa	
Architectural Studies	

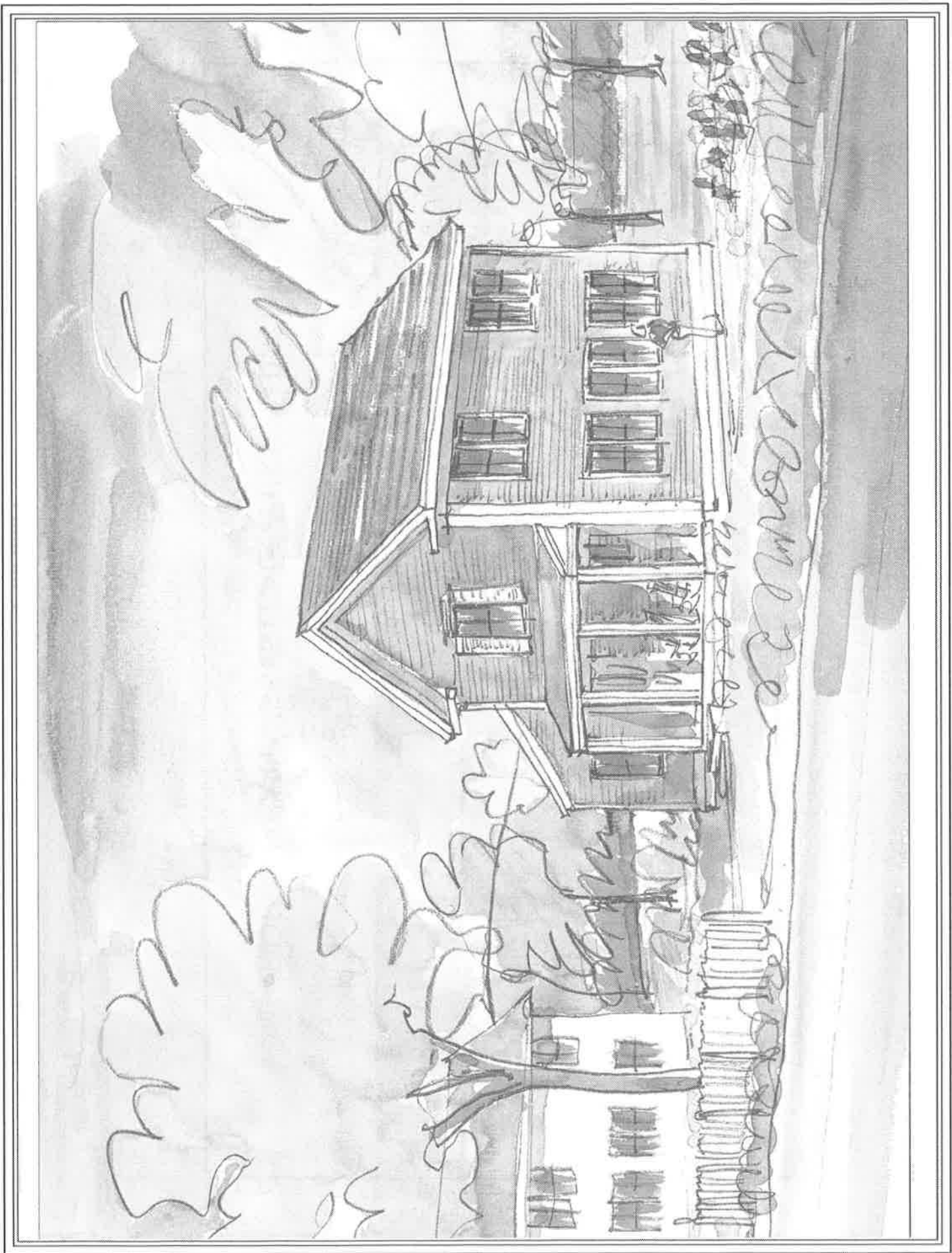


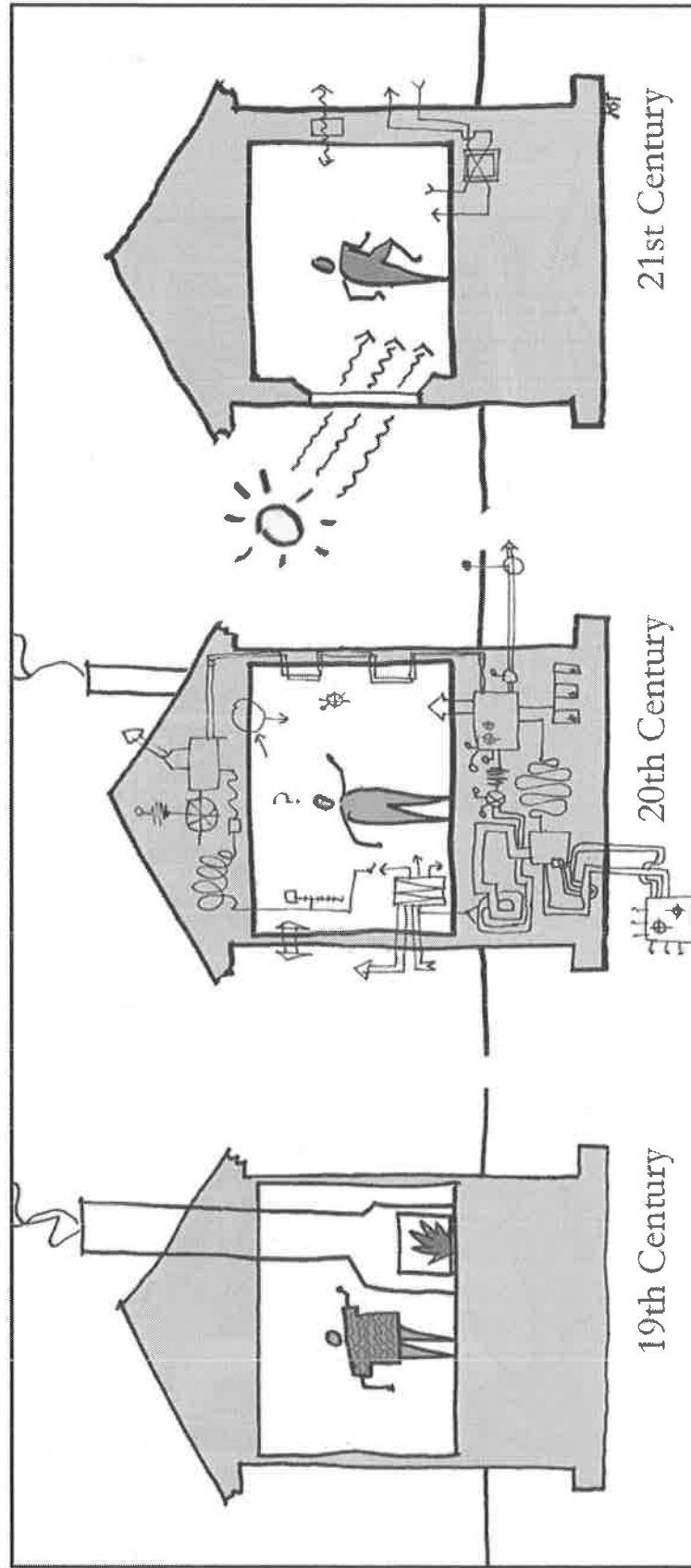
# ART HOUSE

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ARCHITECTS, INC.

- ♦ *Passivhaus standards*
- ♦ *LEED Platinum*
- ♦ *modular*







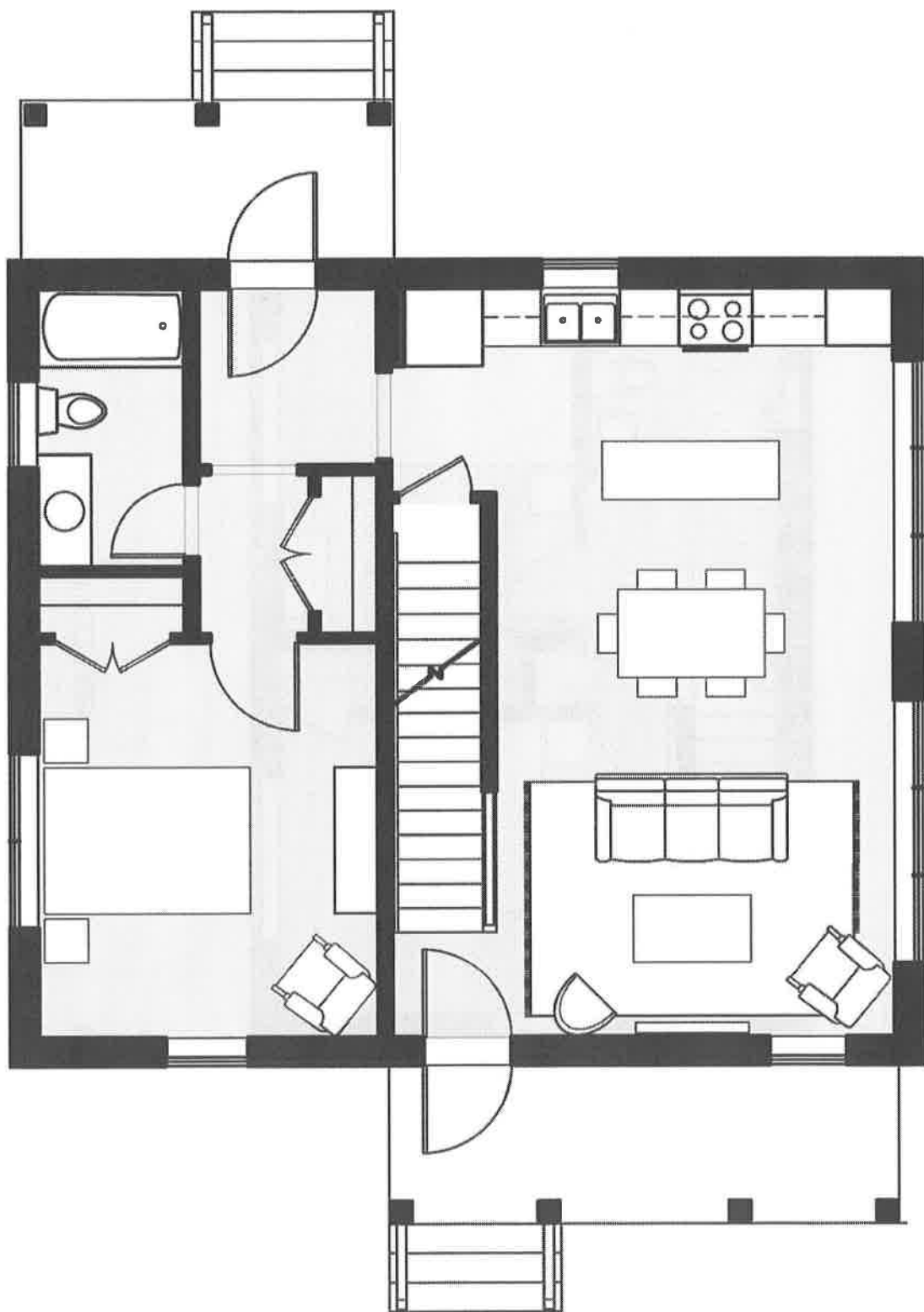
## HOUSE HEATING SYSTEMS: A BRIEF HISTORY

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ARCHITECTS INC.

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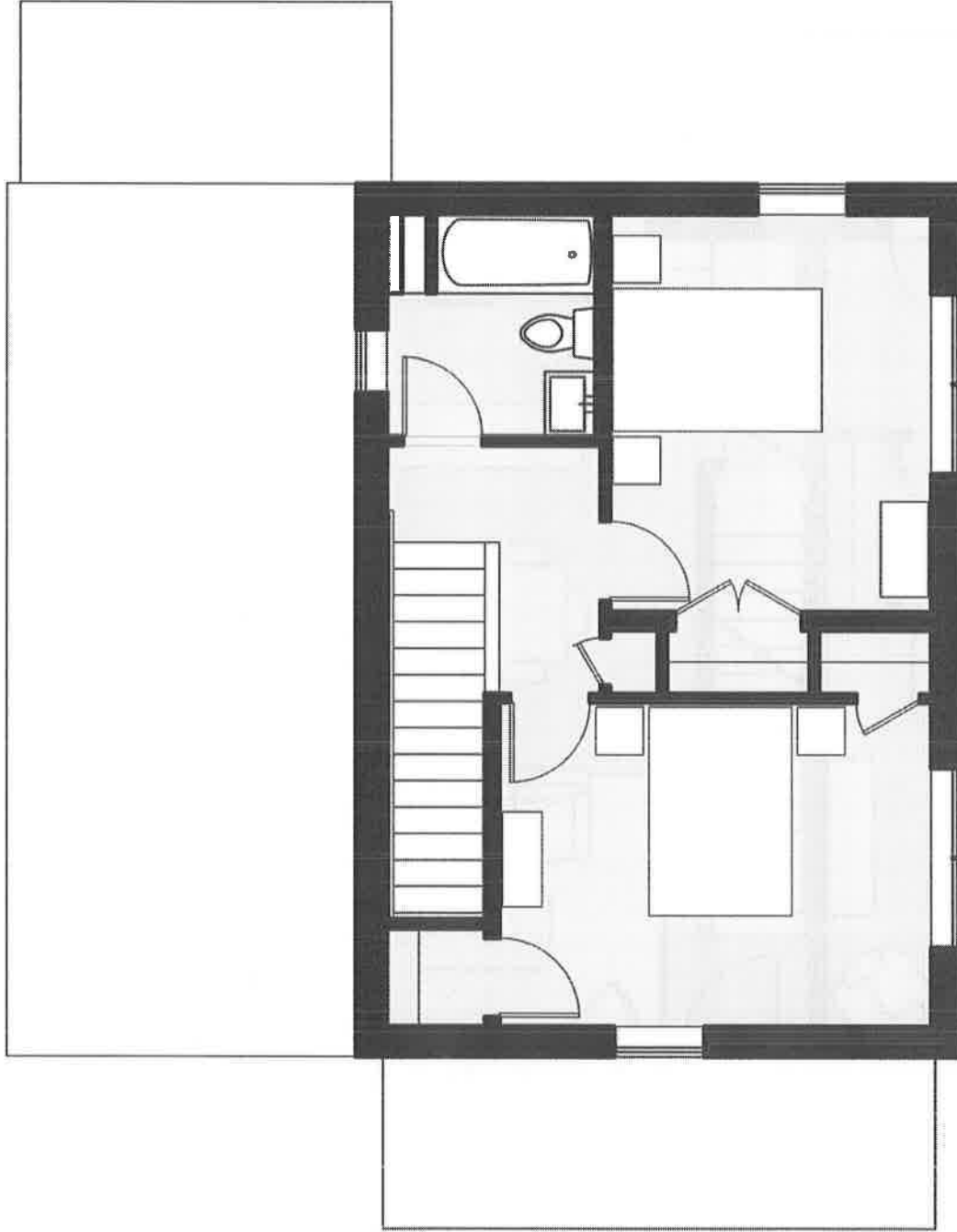


FIRST FLOOR PLAN

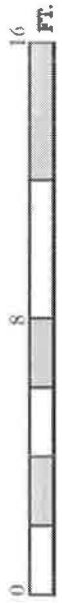


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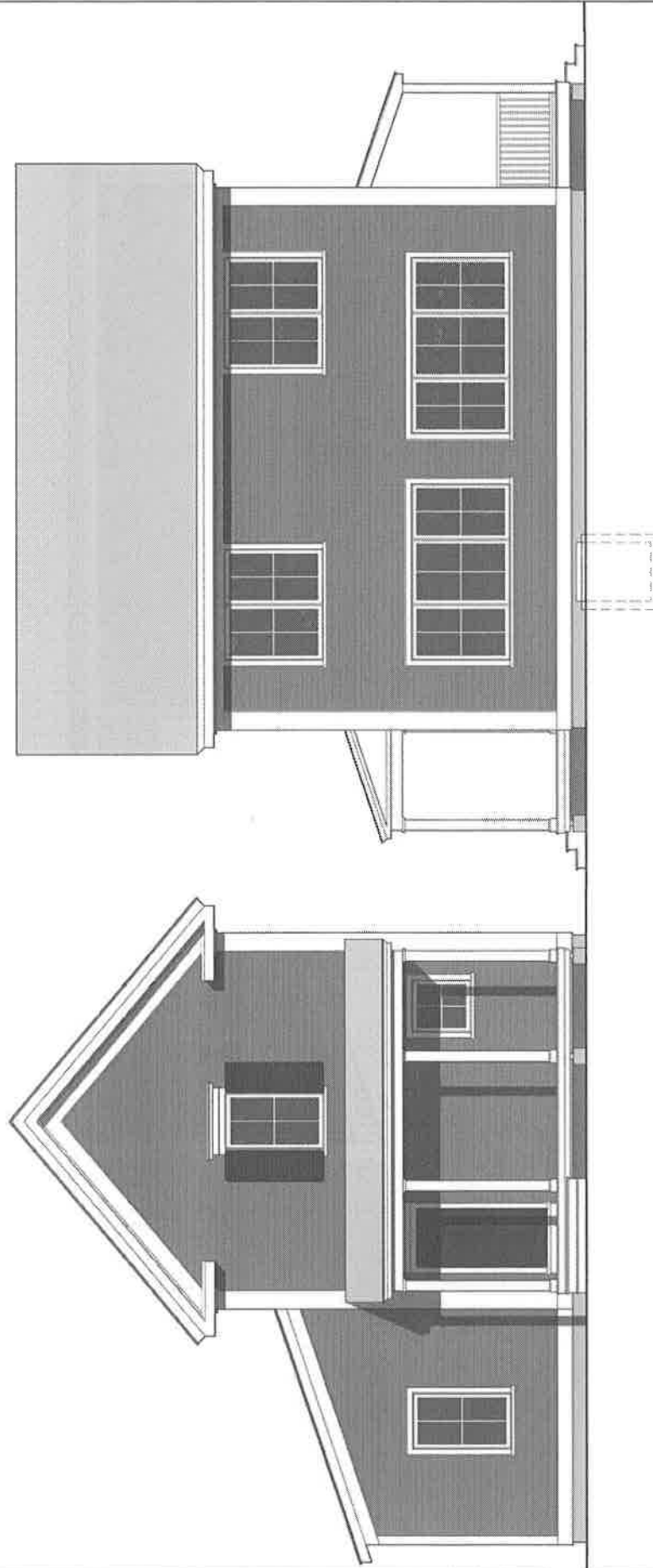


## SECOND FLOOR PLAN



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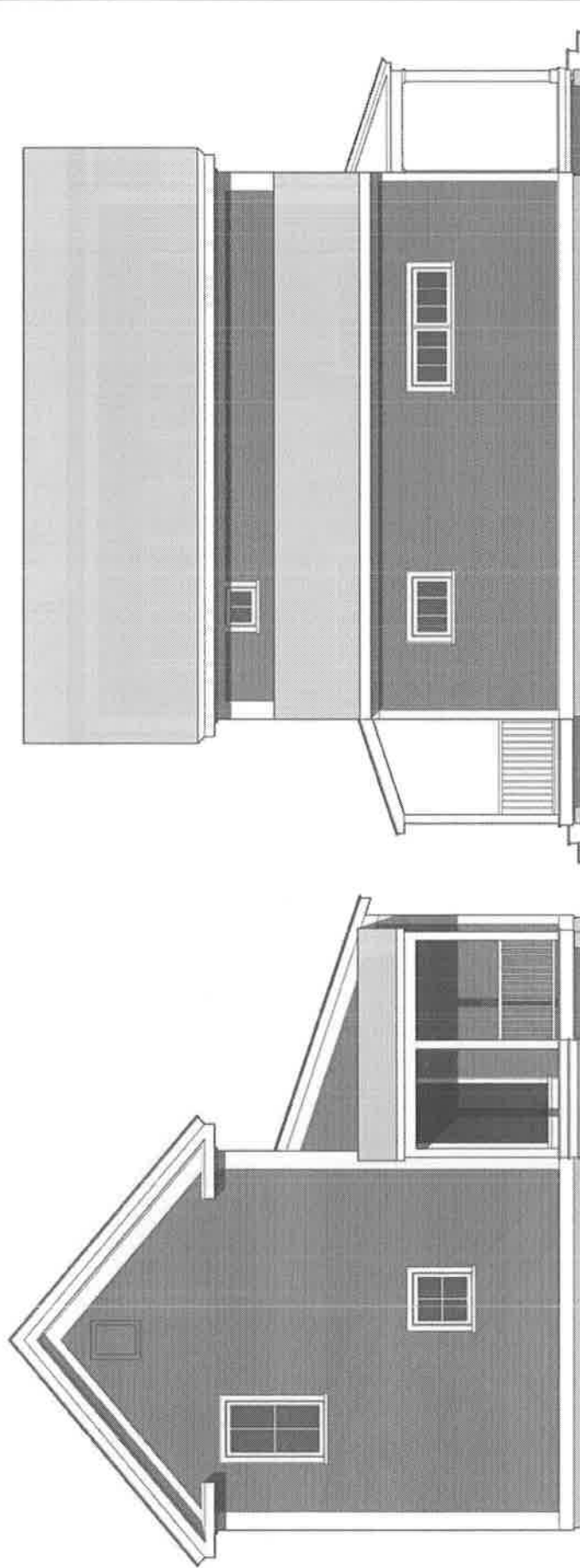


WEST AND SOUTH ELEVATIONS



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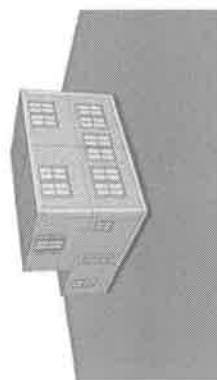
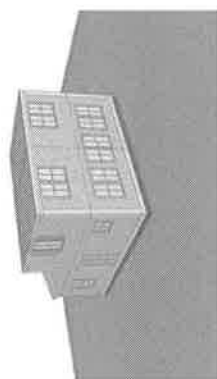
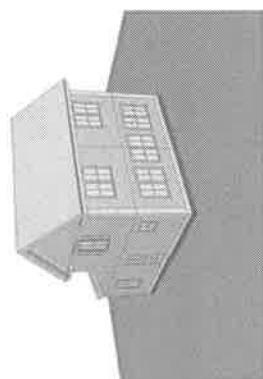
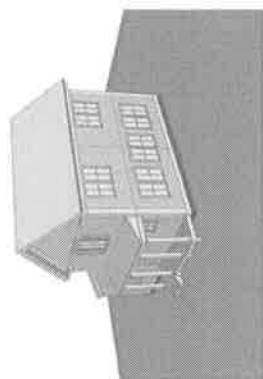
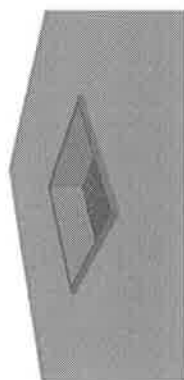
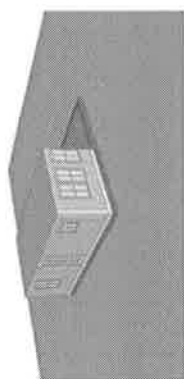
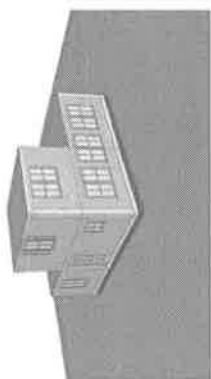


EAST AND NORTH ELEVATIONS



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ARCHITECTS INC.

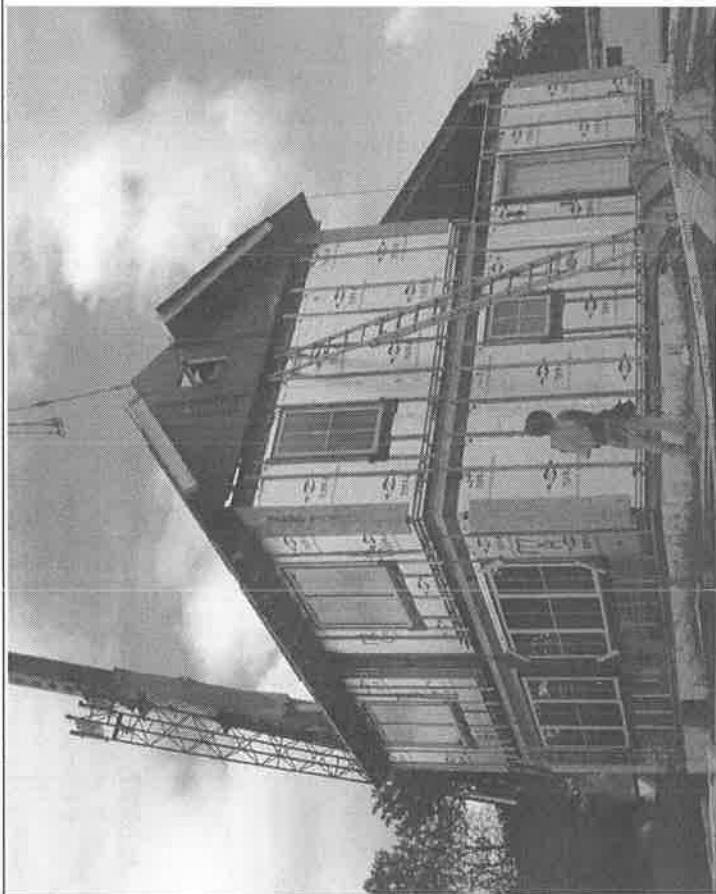
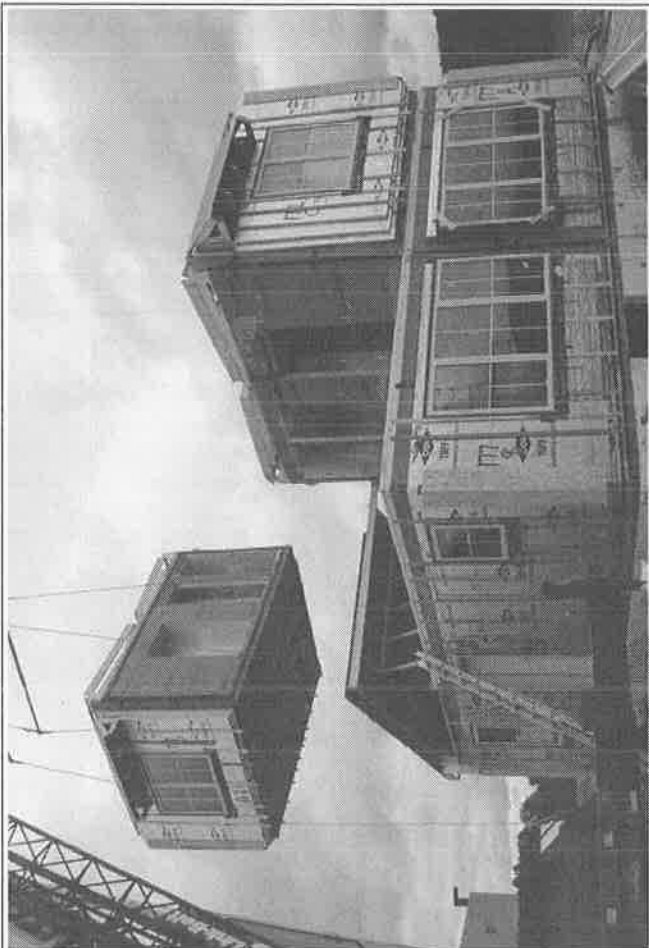
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Tel: 617-451-5740 Fax: 617-451-2309



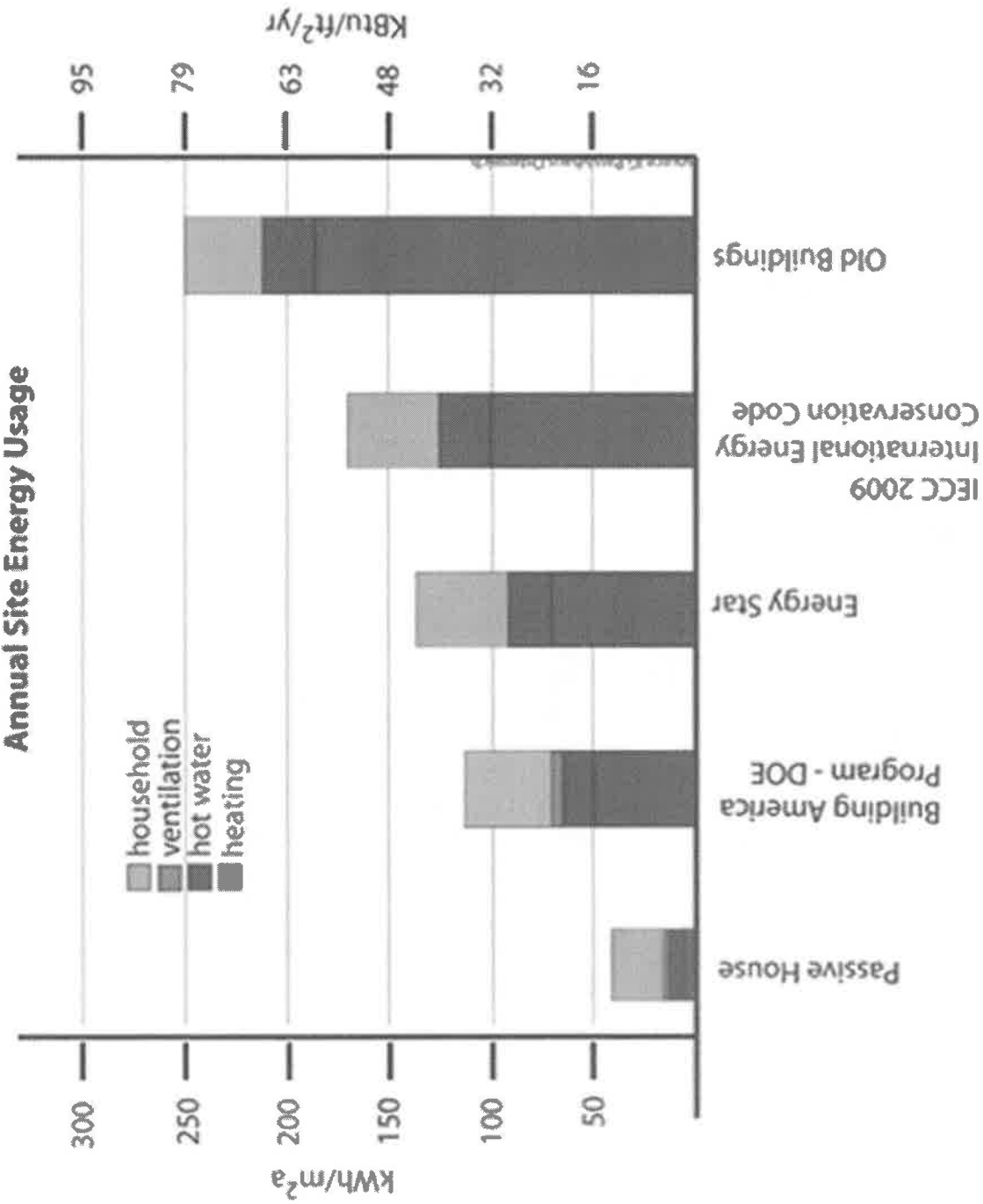
## MODULAR COMPONENTS

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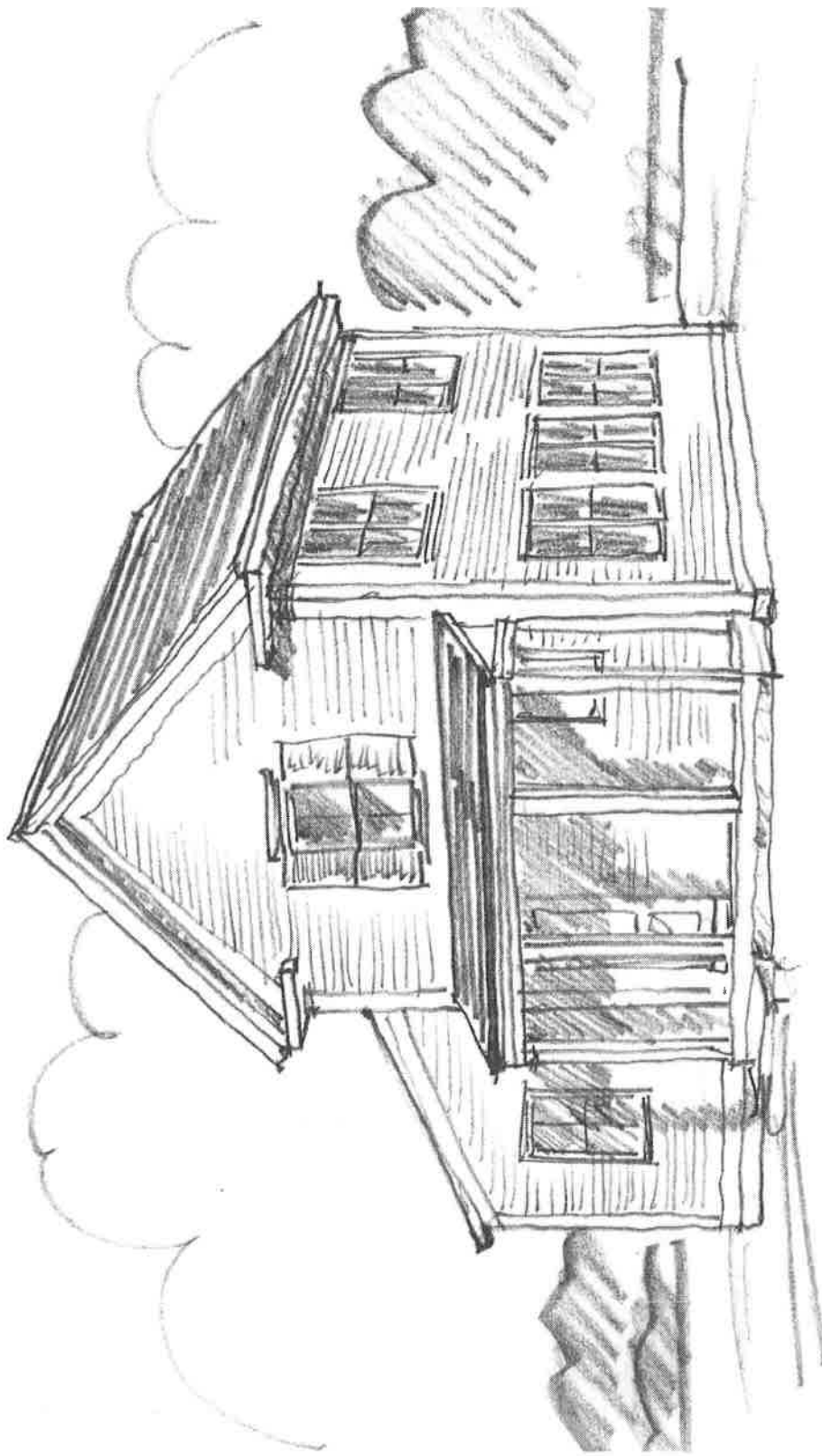
# Annual Site Energy Usage



## ENERGY CONSUMPTION

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## FARMHOUSE

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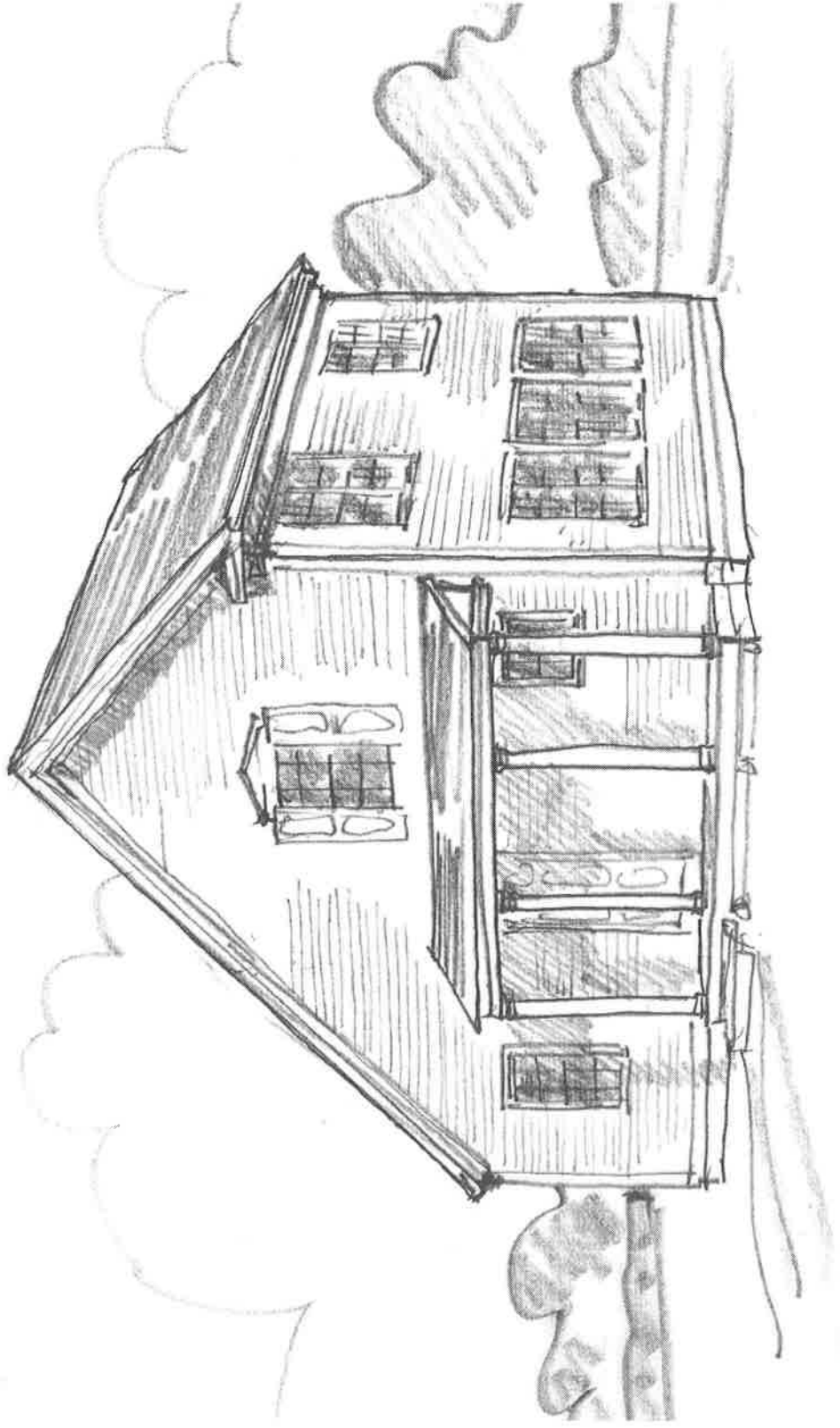
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ARCHITECTS INC.

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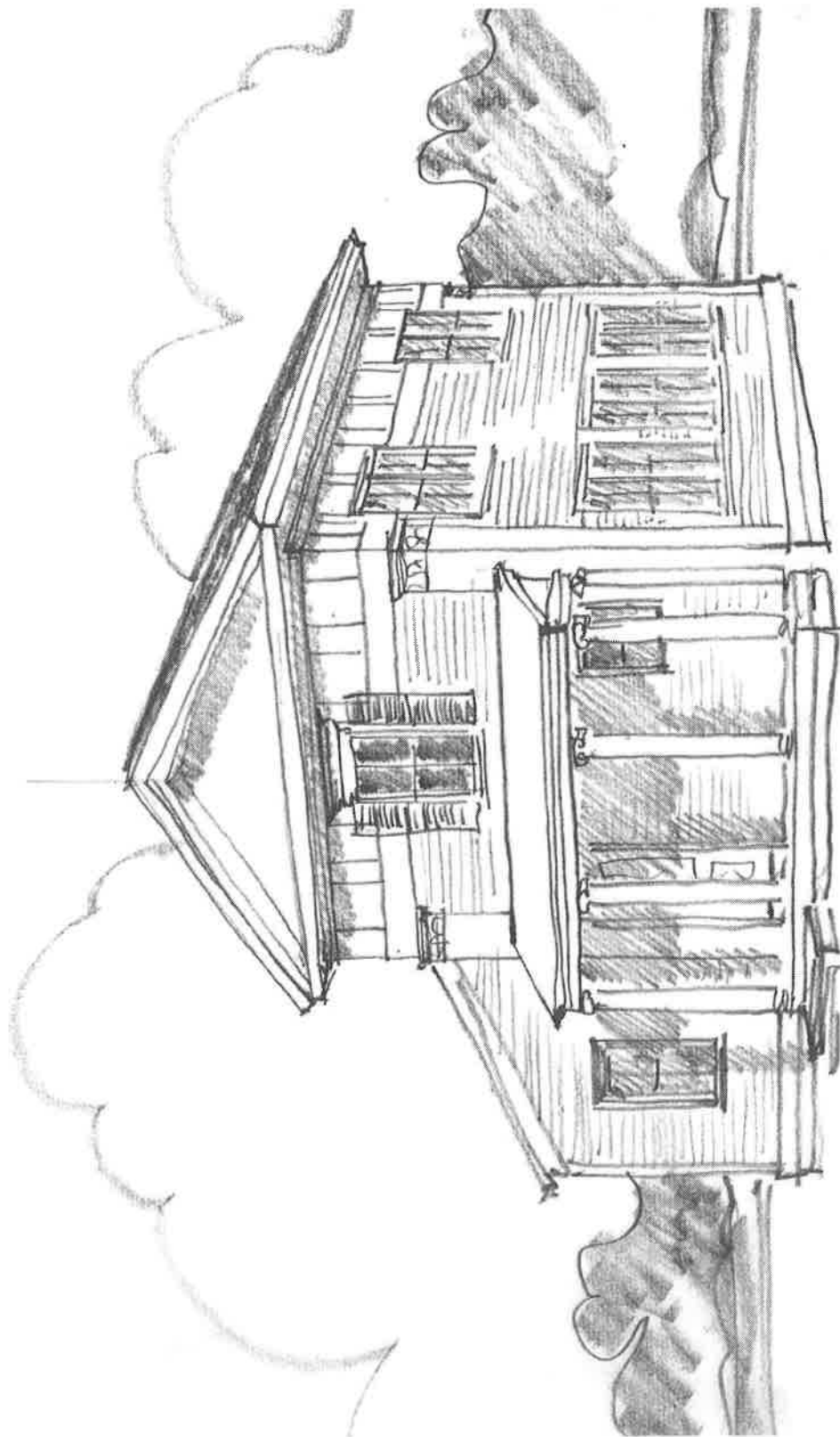
COLONIAL



## COLONIAL

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## GREEK REVIVAL

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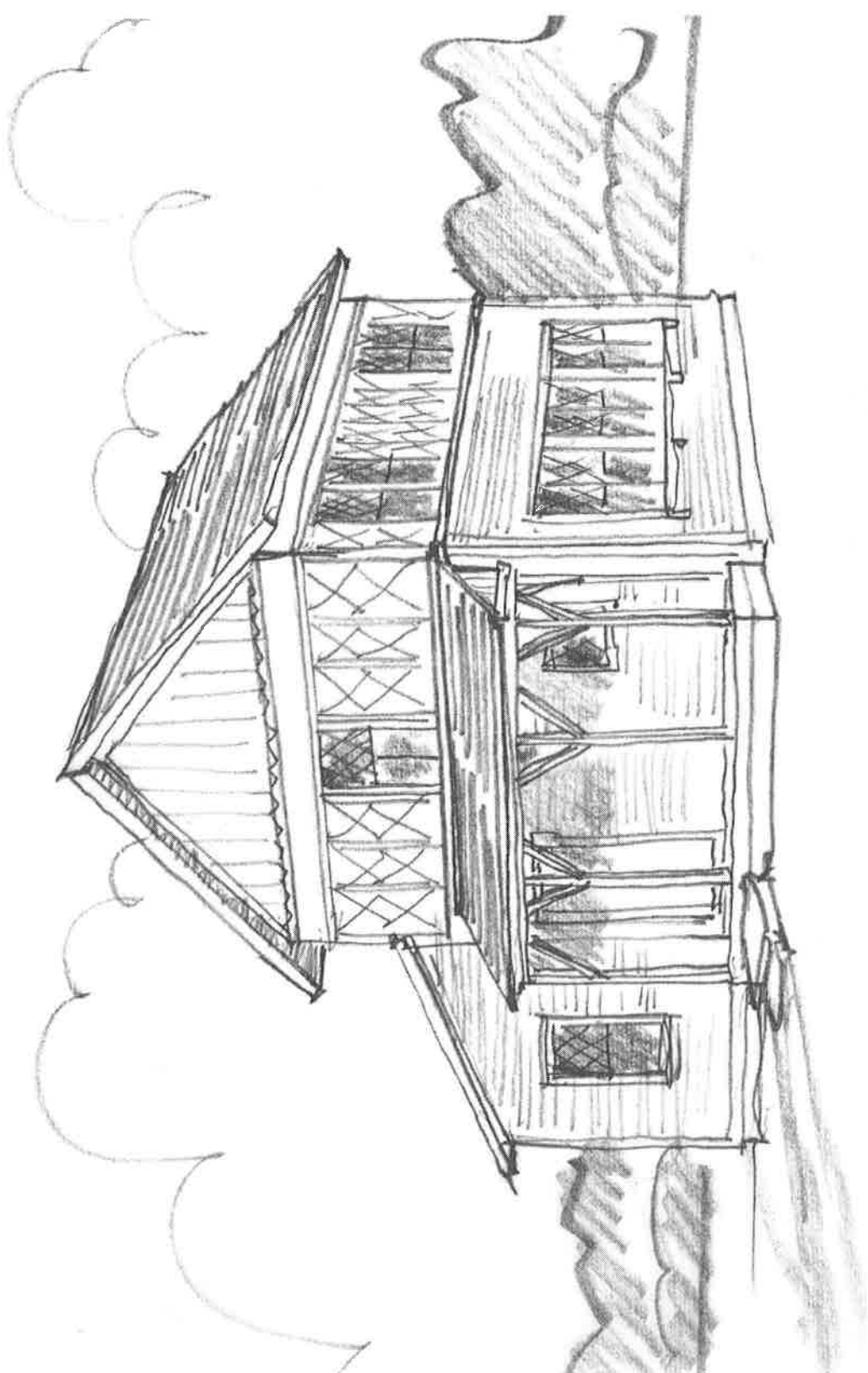
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## QUEEN ANNE

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ARCHITECTS INC.

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## STICK STYLE

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