



White Cliffs Mansion Northborough, MA

December 5, 2022

RESPONSE TO REQUEST FOR PROPOSALS



CONTACT

Caitlin Madden

ADDRESS

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T: (617) 923-3505

WEBSITE

<https://metrowestcd.org/>



December 5, 2022

John Coderre
Town Administrator
Town of Northborough
63 Main Street
Northborough, MA

Re: White Cliffs RFP

Dear Mr. Coderre,

Metro West Collaborative Development, Inc. (Metro West CD) is pleased to present this response to the Request for Proposals issued for the Redevelopment and Reuse of the White Cliffs Mansion in Northborough.

Metro West CD is a private non-profit community development corporation with a mission to undertake programs, projects and policies that help our target communities reach and maintain their affordable housing goals. We maintain ownership of our properties and take pride in the long-term stewardship of the homes we create.

We believe that our acquisition of the historic White Cliffs estate will create a significant community benefit by providing new 100% affordable rental housing units for Northborough, while at the same time preserving the landmark mansion for enjoyment by future generations through a preservation restriction and the application of historic tax credits.

Our proposed project creates 52 units of intergenerational affordable rental housing for families and seniors earning up to 60% of the Area Median Income (AMI), with a portion of those units set aside for households earning just 30% of AMI. The new building will be ADA accessible, incorporating the principals of Universal Design to ensure all units are visitable for those with disabilities, and will draw on our decades of experience as a developer of affordable apartment buildings, including historic renovation projects.

Our commitment to sustainable design will bring substantial improvements to the HVAC systems and envelope of the historic structure, while we envision developing a 100% electric new building to maximize the benefit of future renewable generation connected to the grid. Finally, all homes created by Metro West CD will remain affordable in perpetuity.

Given the position of this site at the gateway to Downtown and the proximity to the many shops and other amenities within a one mile radius, as well the excellent Northborough school district, we expect strong demand for housing at this location.

79-B Chapel Street, Newton, MA 02458
P: 617-923-3505 F: 617-923-8241
www.metrowestcd.org

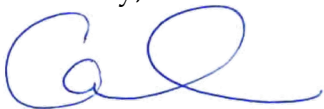
Other current Metro West CD projects include the re-development of the historic West Newton Armory, to be converted into 43 affordable units, the construction of 40 deeply affordable units in Hudson, and the creation of a 92-unit, 100% affordable, intergenerational community in Medway. There are no contract terminations or adverse litigation findings involving the organization.

We have assembled a team of highly respected architects, attorneys, and consultants for this proposal. Of note, the historic consultant for this project, Maureen Cavanaugh, Senior Planner at the Public Archeology Lab, is widely regarded as one the leading adaptive reuse experts in New England and sits on the Board of Directors for Preservation Massachusetts.

In pursuit of this development Metro West CD will mobilizes vast State and Federal subsidy sources. We have significant experience utilizing Low Income Tax Credits, HOME funds, as well as programs such as Community Based Housing (CBH) , the Housing Innovation Fund (HIF), and the Housing Stabilization Fund (HSF). Additional details about our funding sources and projected timeline for the project are included in the following pages.

The White Cliffs estate has been a Northborough landmark for well over 100 years. Metro West CD would proud to be part of extending and expanding that legacy. Please feel free to contact me with any questions.

Sincerely,



Caitlin Madden
Executive Director



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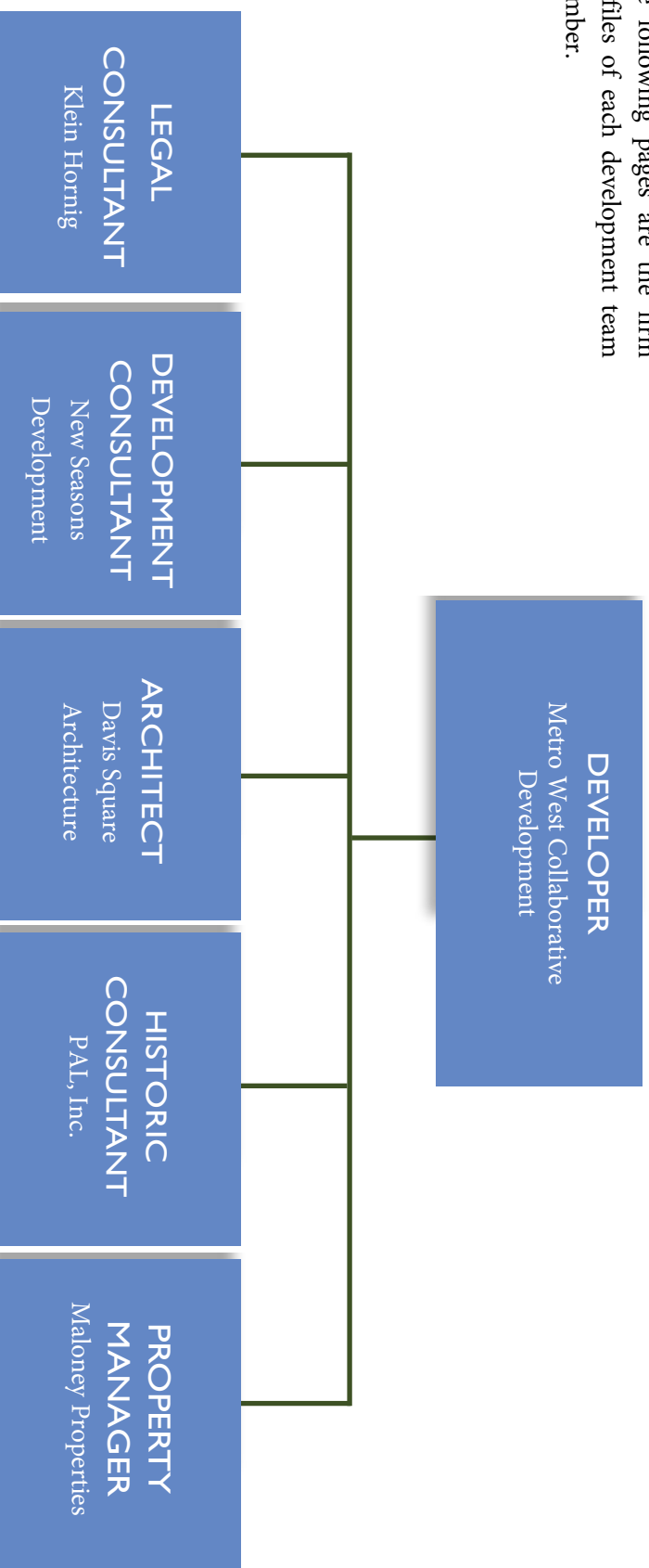
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Statement of Qualifications

- Development Team Structure
- Metro West CD Organization Experience, & References
- Development Team Firm Profiles

ORGANIZATIONAL STRUCTURE OF DEVELOPMENT TEAM

Diagram below is the organizational structure of the development team. The following pages are the firm profiles of each development team member.





Description of the Organization

Metro West Collaborative Development Inc. is a private non-profit Community Development Corporation (CDC) founded in 1991 to address the shrinking supply of affordable housing in the Metro West region of Massachusetts. We are a certified Community Housing Development Organization (CHDO), which is a HUD designation reserved for non-profit developers with a demonstrated ability to develop, construct, and manage affordable housing, as well as a recognized 501(c)3 organization.

As a CDC, we serve a defined geography of target communities, including Northborough, helping each to achieve their affordable housing goals. The mission of Metro West CD is to organize residents, mobilize resources, and identify ideas that improve the quality of life for residents. We accomplish this mission by creating and preserving affordable homes; supporting economic development that strengthens neighborhoods, towns and our region; and by building alliances with partners and constituencies throughout the region in order to increase awareness and build support for community development.

Membership in Metro West CD is open to anyone who lives or works in a target area community. The organization is led by a Board of Directors and a professional staff. Directors are elected at the Annual Meeting each year and represent our broad geography and diverse constituencies. As a CHDO, the Board must include residents of income restricted housing developments.

In addition to real estate development, Metro West CD responds to over 3,000 calls each year from individuals and families with housing questions or crises. Metro West CD also works with private developers and municipalities in their efforts to comply with local and state affordable housing regulations.

Metro West CD is a DHCD and MassHousing approved Affordable Housing Monitor and lottery agent, and is acting Consultant to the Assabet Regional Housing Consortium (ARHC), a regional planning body.

Recent accomplishments include:

August 2022: Closed on the financing for Glen Brook Way Phase II, a 44-unit, 100% affordable senior rental development in Medway. This project was awarded federal and state LIHTC, along with other subsidy sources by DHCD.

January 2022: Won a competitive RFP to redevelop the historic West Newton Armory. Metro West CD's proposal features 43 units of 100% affordable housing and includes an extensive renovation of the existing structure plus a new construction component.

August 2021: Completed construction on Glen Brook Way Phase I, a 48-unit, 100% affordable family rental development in Medway. Glen Brook Way is the result of significant support from the Town of Medway, which provided \$2.1 million in local financial support.

April 2021: Awarded project through competitive RFP to develop 40 units of affordable housing at the former Hudson Police Station. The total development cost is projected to be \$21 million.

Past Project Experience

Permitting and Zoning

Metro West CD has successfully navigated complex zoning and permitting processes, securing comprehensive permits for several projects including a 40-unit redevelopment of a former police station site in Hudson, a two phase 92-unit intergenerational project currently under construction in Medway, an 18-unit senior development in Norwell, and an 8-unit renovation of a historic home in Newton. All these projects are 100% affordable.

Our historic redevelopment work includes the successful renovation of the 25-unit St. Joseph Hall, built in 1917 as part of the Rosary Academy school in Watertown, and the aforementioned 8-unit repositioning of a historic house, built in 1868, in Newton. Metro West CD is also currently permitting the preservation and expansion of the historic National Guard Armory located in Newton. For the White Cliffs development, our project team will include leading historic consultant The Public Archaeology Laboratory (PAL) to assist with navigating the state and federal historic tax credit process.

Financing

The development of affordable housing in Massachusetts relies on a variety of federal, state, and local resources. Metro West CD and its consultants bring a depth of experience in navigating the funding application process for these types of projects. Metro West CD has developed 117 affordable rental units to date with 127 more units in the pipeline, the majority of which are affordable to 30% AMI, 50% AMI, and 60% AMI households.

In addition to our experience working with the Massachusetts Department of Housing and Community Development (DHCD) to secure Low Income Housing Tax Credits and a variety of soft subsidies, we have strong lending and equity partners with whom we partner to secure predevelopment, acquisition, construction, and equity funds.

Since the Massachusetts DHCD requires a local match for all projects seeking state subsidy, we will seek funds from the Northborough Community Preservation Committee. As part of our process, an Affordable Housing Restriction will be adopted for the proposed project, which will preserve affordability at the property in perpetuity.



Metro West Collaborative Development

Real Estate Development Project List



West Newton Armory, Newton – 2022-2026

The historic preservation of the West Newton Armory, awarded to Metro West CD by RFP, will create 43 new units of family affordable rental housing. The housing will be 100% affordable to households with incomes up to sixty percent (60%) of area median income. Our concept integrates the competing commitments for historic preservation, affordable housing, and sustainability - both within the building envelope and through thoughtfully designed new construction. Total development cost is forecast to be \$28 million.

Packard Street, Hudson – 2021-2024

The project, awarded to Metro West CD through a Town of Hudson RFP, creates 40 new units of affordable rental housing at a former police station site. The housing will be affordable to a variety of households with incomes up to 60% of the area median income (AMI), including a set aside for households with incomes up to 30% AMI. The design is a neighborhood-scale project that balances housing and open space. The total development cost is projected to be \$21 million.



Glen Brook Way, Medway – 2017-2022

This 92-unit rental development was permitted under Chapter 40B to help the Town of Medway obtain "Safe Harbor" status. The project utilizes \$2.1 million in local Community Preservation Act funds and has received various Dept. of Housing and Community Development subsidy awards. The property will be affordable in perpetuity. Construction of the 48-unit Phase I portion is complete, with the 44-unit Phase 2 targeting a Fall 2023 completion. The total development cost will be \$46 million.



236 Auburn St., Newton – 2016-2020

This circa 1868 house was relocated on the site and behind it were built two duplex units and a 5-bedroom congregate house which was sold to the Price Center. The project was awarded a Chapter 40B comprehensive permit in 2018 and secured all state and local funding to begin construction in early 2019. Total development cost for the 8-unit project was \$4.2 million.



Herring Brook Hill, Norwell – 2016-2019

This former Town owned Police Station, located in Norwell, is now home to 18 rental units for elderly households. Metro West CD won the development rights to the site through a competitive Request For Proposals process administered by the Norwell Community Housing Trust. The project utilized local Community Preservation Act funds, various Dept. of Housing and Community Development subsidy sources and a private loan from Eastern Bank for a total development cost of \$6.7 million. The property will be affordable in perpetuity. It was permitted under Chapter 40B and occupied in 2019.

St. Joseph Hall, Watertown – 2014

This former Catholic School was converted into elderly apartments in the 1980s by the Dominican Sisters of Peace. After 25 years, the Sisters could not keep up with the capital repairs needed by the historic building. Also, the property had a Section 8 contract that was nearing its expiration. Metro West CD purchased the property and assembled the financing to undertake a \$5.4 million project that will keep the 25 apartments in top condition and permanently affordable.



1060 Belmont Street – 2010

This blighted 18-unit rental property was purchased by Metro West CD in 2008 for \$2.1 million. Over the next two years \$3.4 million was raised to renovate the apartments and create three handicapped accessible units. Funds used included: Low Income Housing Tax Credits, HOME Program, Federal Home Loan Bank's Affordable Housing Program, Community Based Housing Initiative and a private loan from Watertown Savings Bank.

REFERENCES - Metro West CD

Project Reference I

Glenn Trindade

Select Board

Town of Medway

508-208-8299 | glenntrindade@gmail.com

Project: Glen Brook Way

Project Reference II

Barney Heath

Director of Planning and Development

City of Newton

617-796-1120 | bheath@newtonma.gov

Project: West Newton Armory

Project Reference III

Pam Helinek

*Asst. Director of Planning and Community
Development / Conservation Agent*

Town of Hudson

978-562-2948 | phelinek@townofhudson.org

Project: 62 Packard Street

Banking References

- Johanna Stone
Vice President, Eastern Bank
781-254-3180 | j.stone@easternbank.com
- Alma Balonon-Rosen
Sr. Relationship Manager, Massachusetts
Housing Partnership
585-764-6963 | almabr@mhp.net
- Kristen Duffy
Sr. Asset Management Officer,
Massachusetts Housing Investment
Corporation
617-850-1026 | duffy@mhic.com



FIRM PROFILE



WAVERLEY WOODS



SIMON-KUCHER & PARTNERS



HISTORIC SOUTH END APARTMENTS



FIRST CHURCH OF ROXBURY
EDUCATION & JUSTICE CENTER



BRIGHT HORIZONS BROOKLINE

We are an award-winning architectural design and planning studio with a simple mission: to create excellent design, to develop long-term relationships with clients, and to help build viable communities.

OUR CURRENT AREAS OF EXPERTISE INCLUDE:

- Multi-family housing
- Renovation and historic preservation
- Transit-oriented design
- Feasibility and needs assessment
- Commercial and corporate interiors
- Childcare centers
- Community spaces
- Learning spaces

PRINCIPALS/OFFICERS:

- President and Principal: Iric L. Rex, AIA, LEED AP
- Principal and Clerk: Ross A. Speer, AIA
- Principal: Clifford J. Boehmer, AIA
- Vice President: Laura Cella-Mowatt, RA
- Vice President: Eric Chamberlin, RA, LEED AP

COMPANY LEGAL NAME:

Davis Square Architects, Inc.

Founded in 1984, Davis Square Architects is a medium-sized firm organized into project-specific teams. We maintain the same team from schematic design through construction, under the direction of a Principal. As a result of this continuity, our clients come to know and rely on individual staff members over time, seeking them out for subsequent projects.

Our best work is achieved in collaboration with involved clients. Design solutions evolve through careful consideration of our clients' needs, constraints, and dreams. To this we add a commitment to architecture that is both beautiful and respectful of its surroundings.

Working within the design studio tradition, we have created an open collegial work environment where education is highly valued; where the exchange of ideas is encouraged; and where the most advanced technology supports the design process. Our success has allowed us to contribute a portion of our profits to worthy community service organizations, in the belief that strong communities and great architecture are mutually dependent. ■



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ARCHITECTS

FIRM PROFILE

davissquarearchitects.com

ADAPTIVE REUSE



**A WHOLE NEW LOOK:
BUILDING FROM THE PAST TO
SUPPORT THE FUTURE**



DAVIS
SQUARE
ARCHITECTS

Every building has a history — and the stories they tell is one of the main reasons why adaptive reuse is so critical in preserving history as well as creating opportunities for the present. Throughout the years, many of these buildings' original use becomes obsolete. Reclamation not only is beneficial to honoring these buildings' structural integrity and preservation, but also an excellent resource for giving them a new modern-day purpose.

“To restore a building is not to repair it, nor to do maintenance or to rebuild, it is to re-establish it in an ultimate state that never existed before.

—Eugène Viollet le Duc

PAST MEETS PRESENT

DAVIS SQUARE ARCHITECTS, INC. has always championed adaptive reuse and preservation throughout our 30-plus years of experience. At a time when real estate is a precious resource and its price at an all-time high, conserving existing property helps to alleviate unnecessary costs and also preserves the fabric of neighborhoods and communities, while helping to bolster their economies.

RENEWED AND RESTORED

When buildings become abandoned or fall into disrepair, repurposing becomes the ideal method of breathing new life into these historic jewels. We strive to maintain historic character as well as ensure the preservation and, where needed, historical accuracy for replication of architectural details. Modernizing these buildings for code requirements such as accessibility, buildings and life safety systems is also a top priority, as well as paying homage to the architectural integrity of the original buildings and its context. Planning for current and future needs is something we establish at the beginning of every project.

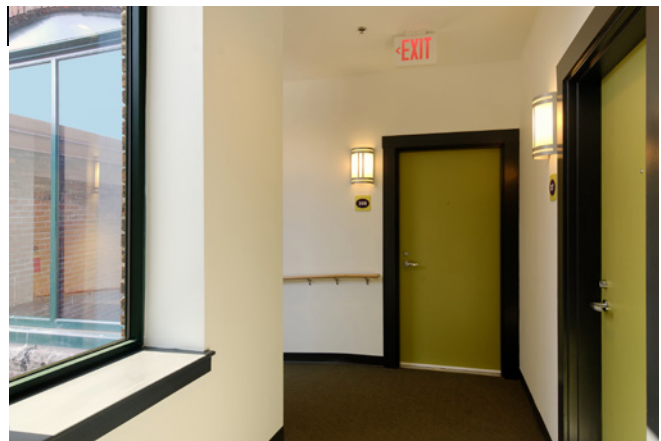
We are strong advocates of sustainability, aiming to create environmentally-responsible designs that enhance quality of life for both residents and owners. Building reinvestment and adaptive reuse are closely aligned with our belief of the importance of land conservation, as well as minimizing harmful environmental effects of demolition and new construction.

ENDLESS POSSIBILITIES

Our adaptive reuse projects range from the transformation of a former bank into a trendy neighborhood coffee shop, to the creation of over 40 affordable apartments at a former historic paper mill, to reconfiguring an historic church for multifamily housing. Some of our award-winning projects include:

Towards Independent Living and Learning (TILL): for a human services agency non-profit, we transformed three run-down structures in downtown Chelsea, Massachusetts into 23 affordable units of housing, plus 11,000 sf of ground-level commercial space including a café. The project has won several awards for both its innovative design and preservation.

Bright Horizons Family Solutions Corporate Headquarters: we helped turn a civil war munitions depot into the headquarters of an expanding childcare corporation. Our approach of using a lively and innovative combination of color, form, and unusual materials was recognized for setting new standards of creativity in commercial interior design. ■



ADAPTIVE REUSE OVERVIEW
davissquarearchitects.com

HISTORIC COMMISSIONS



**OVER 30 YEARS OF
EXPERIENCE WITH
HISTORIC COMMISSIONS**



DAVIS
SQUARE
ARCHITECTS



We understand the design and technical challenges of historical renovations. We also have extensive experience with historic buildings, districts and occupied rehabilitations, as well as working with communities, tenants and clients to achieve well-designed, cost-effective solutions. The reinvestment and restoration of historical buildings is closely aligned with our belief of minimizing the harmful environmental effects of demolition and new construction.

“Architecture should speak of its time and place, but yearn for timelessness. —Frank Gehry



SENSITIVITY TOWARDS THE ORIGINAL ARCHITECTURAL INTEGRITY

By working on numerous rehabilitations in historically rich areas, from Boston's South End, to the cities of Lexington and Springfield, Massachusetts, we understand the design and technical challenges of historical renovations. These projects usually begin with a capital needs assessment and a detailed survey of the surrounding fabric. Our design strategy combines respect for the architectural integrity of the original buildings and its context, with detailed attention to the residents' current and future needs. We work closely with developers, tenants, and the surrounding neighborhood associations to develop a program that integrates careful historic restoration with modern code-mandated and life safety system upgrades. This approach has helped us return many important historical places to their original grandeur.

EXPERIENCE WITH HISTORIC GUIDELINES

We carefully juggle working with residents through a design committee process and the need to meet the demands of local, state, and federal historical guidelines. We have prior knowledge of the Boston Landmark Board's preservation requirements, the Department of Interior's guidelines for building in historic districts, and Boston's South End Landmarks Committee's specifications. By meeting the historical requirements, our projects have received funding from the U.S. Department of Interior's historic tax credits and the

Massachusetts Historic Commission's funding. At Interfaith Housing, these credits allowed us to restore and recreate elements such as plaster crown molding, mahogany entrance doors, metal fencing, and brick and stone facades, which would typically be beyond the means of an affordable housing project.

AWARD-WINNING DESIGN

For the Bright Horizons Corporate office, we helped turn a civil war munitions depot into the headquarters of an expanding childcare corporation. The facility, which flouts conventional notions of corporate culture with its vibrant interplay of color, form, and unusual materials, was recognized for setting new standards of creativity in commercial interior design. At the Brunswick-Holborn & Columbia Wood Apartments, 11 historic buildings scattered throughout Boston were renovated into 94 units of housing. The project received an award from *Environmental Design + Construction Magazine* for its exemplary and creative application of environmentally, socially, and economically sustainable concepts. ■



HISTORIC COMMISSIONS OVERVIEW
davissquarearchitects.com

CORPORATE QUALIFICATIONS

The Public Archaeology Laboratory, Inc. (PAL) is a leading authority in cultural resource management and specializes in archaeology, architectural history, research and documentation, and preservation planning throughout New England and the Mid-Atlantic. An independent, non-profit corporation located in Pawtucket, Rhode Island, PAL has successfully completed more than 5,000 projects in the areas of cultural resource management, historic preservation planning, regulatory consultation, compliance with Section 106 of the National Historic Preservation Act, and state and federal historic tax credit projects. Established in 1982, PAL has steadily grown to become the largest private cultural resource management firm in New England with a staff of more than 50 people. The PAL team includes specialists in the disciplines of pre-contact and historic archaeology, industrial history and archaeology, architectural history, and preservation planning. The principal investigators for archaeology are Registered Professional Archaeologists. All staff meet the professional criteria for their respective disciplines established by the National Park Service (36 CFR Part 61).

The firm has a proven record of quality products that withstand rigorous technical reviews. The staff has developed innovative planning and project management strategies tailored to each client's needs. Our reputation is built upon facilitating large, complex projects efficiently and effectively. PAL's approach relies on integration, blending the skills of pre-contact, historic, and industrial archaeologists, architectural and industrial historians, historians, preservation planners, conservators, and technical support staff. PAL serves a broad client base who rely on PAL for our ability to rapidly mobilize staff and resources to conduct cultural resource surveys, preservation planning studies, eligibility determinations, environmental impact assessments, regulatory compliance, and consultation.

Consistency in our professional capabilities and responsive staff generates client confidence and long-term relationships, including numerous on-call services contracts. PAL's clients include federal and state agencies, municipalities, utility companies, engineering firms, private corporations, non-profit organizations, individual property owners, and Native American Tribes.

The PAL team understands that flexibility and responsiveness are key elements in supplying outstanding service to our clients. We have the management skills, staff, and support systems necessary to ensure that all projects, regardless of size, are completed on time and within budget.

Introduction to Klein Hornig LLP

Klein Hornig has a single mission – to provide uncompromising service and unparalleled legal expertise to the affordable housing community. The firm’s 45+ lawyers focus exclusively on structuring, managing, closing and advising affordable housing and community development projects across the nation. The attorneys at Klein Hornig work extensively with a wide variety of HUD programs and activities, including the Rental Assistance Demonstration (“RAD”) program, the Section 18 demolition/disposition program with PBV replacement units, Choice Neighborhoods Initiative (“CNI”) grant program, the public housing mixed-finance process, HOME and CDBG funding, HUD Section 202/811 developments (both traditional and mixed-finance, with RAD-for-PRAC), FHA-insured loans, Mark to Market restructurings, “porting” and other transfers of Section 8 subsidy, as well as the broader affordable housing spectrum of Low-Income Housing Tax Credits (“LIHTC”), financing provided by Government Sponsored Entities such as Fannie Mae or Freddie Mac, tax-exempt mortgage revenue bonds, state programs, and Federal Home Loan Bank AHP loans. In addition to affordable housing, we are active in other community development activities, including commercial and mixed-use development using creative financing vehicles such as the New Markets Tax Credit program, historic tax credits, and renewable energy credits. We supplement our housing and community development practice with expertise in partnership and business associations, condominiums and cooperatives, nonprofit organizations and real estate law. More information about Klein Hornig is available on our website, www.kleinhornig.com.

Klein Hornig works with nonprofit, for-profit and public agency developers to build and rehabilitate affordable housing across the country. Our clients range from public housing authorities to nationally recognized developers building entire neighborhoods to community-based organizations building a dozen scattered-site homes at a time. We structure and close transactions using a full range of funding sources, creating financing strategies that match programs, minimize conflicts between sources, and close expeditiously. Our projects use funding from housing tax credits, Section 8 rental assistance, tax-exempt bonds, state and local programs, local and national private lenders, and more.

Our lawyers assist with the entire development process – from site control to closing – as well as post-closing asset management, compliance and refinancing activities. We combine our immersive knowledge of funding programs with a strong foundation in real estate “dirt” law, assisting clients with construction contracts, title insurance, purchase and sale agreements, reciprocal easements, condominium and air-rights regimens, and the like.

ABOUT US




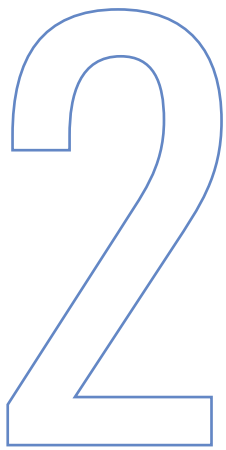

Maloney Properties, Inc. opened for business on May 1, 1981, to provide professional property management services to community-based housing owners who are committed to the interests and well-being of the resident population that the housing serves. Since then, Maloney Properties has emerged as a leading women-owned firm working in communities throughout New England.

Our executive staff works collaboratively with each client to achieve their goals while providing excellence in property and asset management. Our highly qualified team of professionals will work closely with you to understand your objectives and execute a plan to achieve them. In our long-term relationships with our clients these goals have grown, changed and shifted over time. What has remained constant is our commitment and our standard for excellence.

Our work in the multifamily housing business is well known and respected. We pride ourselves on the ability to think creatively, create lasting partnerships, and bring excitement to both new and existing projects.

We are proud of our diverse workforce and our work in the community. Our outreach in recruitment has ensured that our staff members represent the communities in which we work. With our workforce of over 400 employees, 52% of whom are Asian, African-American, and Latino we are able to provide management services that reduce or eliminate cultural and linguistic barriers. Maloney Properties is a certified Women Business Enterprise (WBE). In addition, 20% of the company is minority-owned.



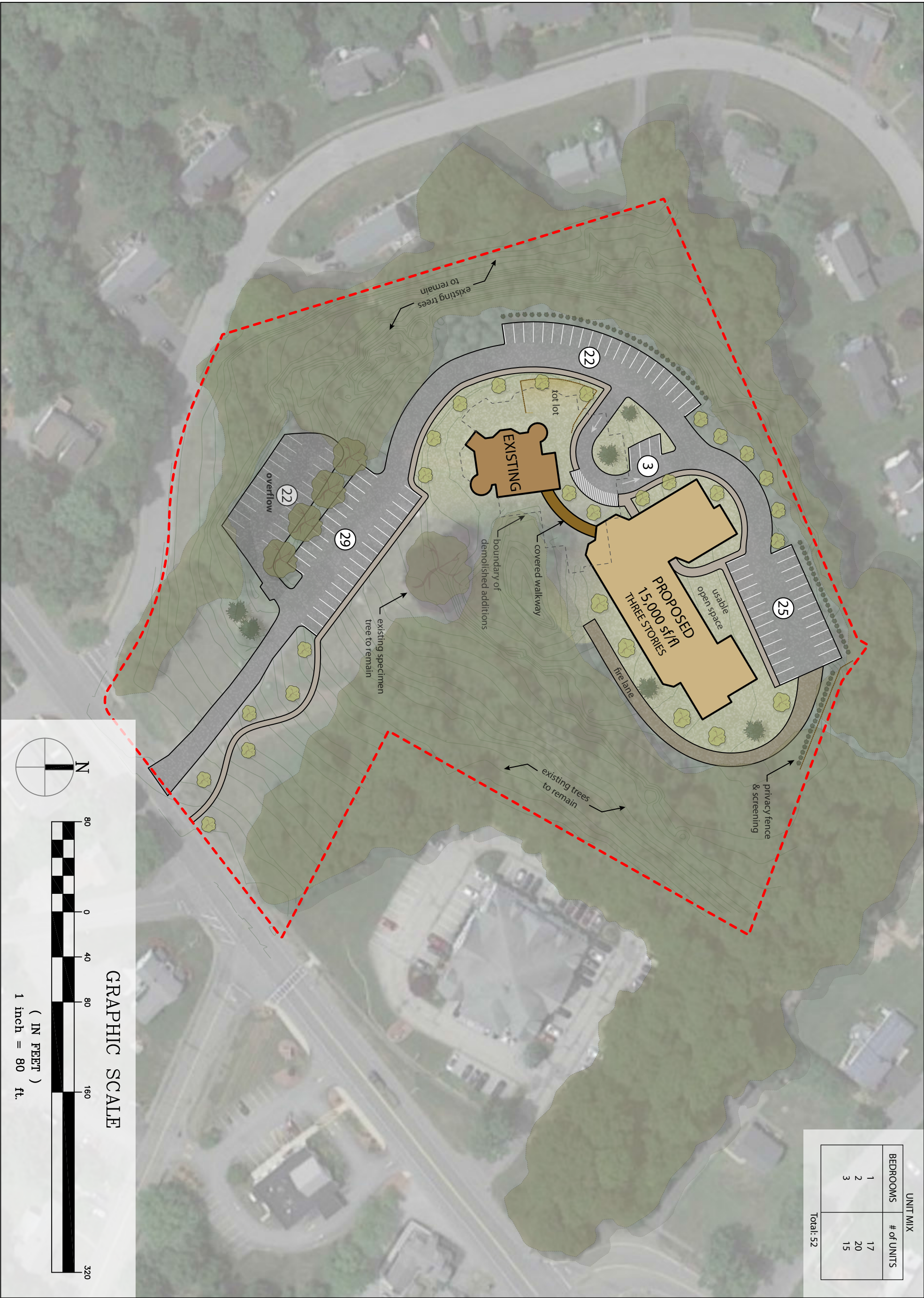


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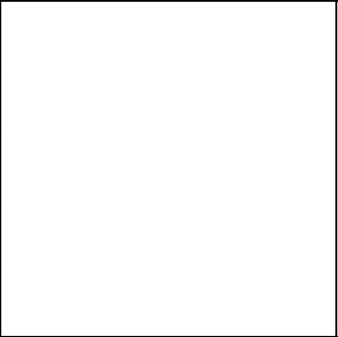


Design

- 
- Proposed Site Plan
 - Design Precedents



| | |
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| Drawing No. | Designed |
| | Checked |
| | Project No. 23Prop.11 |
| | Scale AS NOTED |
| | Date 12.06.22 |





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| | |
|---------|--|
| Project | WHITE CLIFFS 167 MAIN ST., NORTHBOROUGH, MA |
| Title | PROPOSAL SCHEME |



VILLAGE HILL AT NORTHAMPTON

Davis Square Architects is currently working on Village Hill at Northampton. Developed by The Community Builders and Valley Community Development Corporation, Village Hill consists of two buildings: North Commons, which will house 53 apartments and be Passive House-certified, and 35 Village Hill Road, which will contain 12 units and commercial space. Targeting low- to middle-income households, the community will be mixed-income, and continues the redevelopment of the former Northampton State Hospital site. ■

LOCATION

Northampton, MA

DEVELOPER

The Community Builders, Valley Community Development Corporation

SCOPE

New construction
2 buildings
65 rental units
Commercial space

SUSTAINABLE DESIGN

North Commons is Passive House-certified



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HOUSING & MIXED-USE
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HOUSE OF HOPE | BONENFANT PLACE

Davis Square Architects teamed up with House of Hope on Bonenfant Place, the transformation and addition to the former Horn Home in Lowell, MA, a beautiful Italianate building constructed in 1840 that served as a rest home for the aged since 1928. The scope includes renovations to the 1840 home, plus a new addition. The design challenge was to preserve and enhance the historic structure and details, while creating a new building that would be able to blend into the existing context. This exciting project houses 17 formerly-homeless families and a resident manager, and House of Hope now has the capacity to serve 58 families in shelter and 39 families in permanent housing. ■

LOCATION

Lowell, MA

DEVELOPERS

House of Hope

SCOPE

Adaptive reuse
Historic renovation
New construction



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VILLA AT MEADOW VIEW

Villa at Meadow View is the new construction of 33 units of senior housing located in Tewksbury, MA. Beginning with a master plan, Davis Square Architects worked with Elder Services of the Merrimack Valley in partnership with the Tewksbury Housing Authority to transform a vacant parcel of land located between existing multi-family housing into an exciting addition to the neighborhood.

The property amenities and highlights include a library equipped with a computer room as well as an arts and crafts room, dining room, patio, and an entryway with a fireplace. Villa at Meadow View has met all of the Enterprise Green Building Criteria, and is the first new senior housing complex to open in Tewksbury in over 30 years. ■

LOCATION

Tewksbury, MA

DEVELOPERS

Elder Services of the Merrimack Valley,
Tewksbury Housing Authority

SCOPE

New construction
Masterplanning
Age-restricted housing
HUD 202
33 units

SUSTAINABLE DESIGN

Project has met all Enterprise Green
Building Criteria



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HOUSING & MIXED-USE
davissquarearchitects.com



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Project Summary

- Overview
- Design & Unit Mix
- Affordable Housing
- Historic Preservation
- Sustainable Design
- Accessibility
- Impact on Schools
- Zoning
- Financing
- 2020 Master Plan
- Schedule
- Option to Purchase
- Impact & Mitigation
- Landscape and Buffering
- Parking
- Pro Forma
- Development Budget

PROPOSED RE-USE

Overview

Metro West CD proposes to preserve the landmark White Cliffs Mansion by developing 52-units of 100% affordable intergenerational rental housing for Northborough on the site.

This plan calls for the 20th-century additions to be removed from White Cliffs, returning the mansion to its original size, while restoring the exterior of the structure and adding improvements such as insulation and weatherization where permissible.

On the interior, the Gilded Age first floor will be preserved and revitalized as a space for community gatherings and events. This space will be available by reservation for Northborough residents and organizations to use and enjoy. When not otherwise occupied, residents of the development will have access to these rooms as a secondary common area. Upstairs, the second and third floor will be re-purposed into 3 or 4 residential units, bringing the structure back to its intended use as a home.

In order to preserve the view to White Cliffs and the existing open space along Main Street, we propose to construct a new multifamily building at the rear of the site, tucked behind the mansion.

With a 15,000 SF footprint and a height of three stories, the new structure will have similar massing to the neighboring building at 1 East Main Street.

Community benefits of this proposal include the resiliency of a well-diversified housing stock, significant state and federal funding to preserve White Cliffs, and the elimination of ongoing maintenance costs associated with the property from the town budget. The creation of 52 new households so close to downtown could also catalyze additional public funding in support of Northborough's downtown revitalization project, as occurred in Medway when our development there led to a \$300,000 MassWorks grant to expand the local pedestrian infrastructure.

Saving this landmark from demolition was the first step to revitalize the property. Metro West CD is prepared to finish the journey and put White Cliffs back on the path to self-sustaining preservation, for the long-term enjoyment of Northborough residents.

Design and Unit Mix

Our design balances new housing and open space with the preservation of historic views, centered on the White Cliffs mansion, and respect for the



Image: 62 Packard Street, Hudson



Image: Glen Brook Way, Medway

character of the neighborhood. Architectural elements such as dormers and a sloped shingle roof will help fit the building within its neighborhood context, while the steep natural grade and mature woodlands will serve to screen much of the new structure from view.

Roughly one-third of the development will be 1-bedroom units, ideal for most senior residents, while the remaining 2 and 3-bedroom units will cater to senior residents with live-in aids, larger households, and families.

Dwelling units are planned in the following configurations:

| Affordability | Configuration | Unit Count |
|---------------|---------------|------------|
| 30% AMI | 1-bedroom | 3 |
| | 2-bedroom | 7 |
| | 3-bedroom | 6 |
| 60% AMI | 1-bedroom | 14 |
| | 2-bedroom | 13 |
| | 3-bedroom | 9 |
| Total: | | 52 |

Affordable Housing

The proposed housing will be affordable to households with incomes up to 60% of the area median income (AMI), including sixteen units set

aside for households with incomes up to 30% AMI.

According to the Northborough 2020 Master Plan, the median annual household income in town rose from \$79,781 to \$110,147, an increase of 38%, over the period from 2000 to 2016. During that same period the Master Plan points out that median gross monthly rent increased by 70% and median monthly owner cost with a mortgage increased by 44%.

This indicates that while household income has increased, for some residents household costs have increased faster, which can lead to individuals becoming cost burdened. This is particularly true for those living on a fixed income, including many seniors.

For a household earning up to 60% of AMI, the savings from renting a deed-restricted affordable unit at White Cliffs, versus a similar market rate unit at Avalon Bay, are significant:

| Unit Type | Avalon Bay, advertised rent, Dec. 2022 | White Cliffs, forecast rent | Annual Savings |
|-----------|--|-----------------------------|----------------|
| 1bd | \$2,070 | \$1,361 | \$8,508 |
| 2bd | \$2,815 | \$1,633 | \$14,184 |
| 3bd | \$3,025 | \$1,885 | \$13,680 |

Historic Preservation

Metro West CD understands the Town of Northborough intends to establish a preservation restriction, preservation easement, or other mechanism to formalize future preservation of the White Cliffs Mansion, in accordance with CPA requirements. We look forward to working with the Town in cooperation with our historic consultant, Public Archaeology Laboratory, to develop the restriction and assure significant character-defining features of the building are preserved and protected.

White Cliffs is an excellent candidate for adaptive reuse using historic tax credits, and we project drawing over \$1 million from this source. It is anticipated that the project will be approved by the National Park Service and Massachusetts Historical Commission, as required to qualify for historic tax credits, and the renovation will be designed to be consistent with the Secretary of the Interior's Standards for Rehabilitation of Historic Properties.

The upper floors of White Cliffs, with their ample size and many windows, lend themselves to residential reuse. On the first floor, the reception rooms and foyer will be preserved, while back-of-house areas may be reconfigured to provide modern conveniences. The large parcel itself allows for new construction to the northeast, preserving the historically significant views of the mansion.

Sustainable Design

Both the historic renovation and the new construction will be designed to a high standard of sustainability. Improvements to HVAC systems and the exterior envelope of the mansion, such as adding high-efficiency heat pumps and modern insulation, will reduce the energy load of White Cliffs. For the new structure we are envisioning a 100% electric building, similar to our project in Hudson, and the first of its kind in Northborough, which will maximize the benefits of any future



Image: Carter School Apartments, Leominster

renewable energy sources connected to the grid. Finally, Metro West CD plans to pursue state and federal subsidies to finance a roof-top solar array at the new structure.

Accessibility

Metro West CD strives to maximize accessibility in all our projects. It is both a key part of our mission, as well as a DHCD funding requirement.

Since we envision White Cliffs to be an intergenerational community, welcoming a mix of families and individuals of various ages and abilities, all newly constructed common areas will be fully accessible. Additionally, units in the new building will be visitable, which means elevator access to each floor, power operators on common doors, and ADA compliant pathways inside and outside the building.

Moreover, several units will be designed to meet the strict Massachusetts Architectural Access Board (MAAB) and Community Based Housing (CBH) requirements for occupancy by disabled residents.

According to the 2020 Master Plan, there are currently 104 subsidized apartments for seniors and people with disabilities in Northborough, but only 2 of those units are handicap accessible. Our project will therefore bring desperately needed accessible and affordable units to the community.

Finally, though the 3 or 4 upper-level residences in the existing structure will not be accessible due to the historic preservation work, accessibility improvements made to the first floor will create a community space that is more inclusive and inviting for all Northborough residents.

Impact on Schools

According to a study published by the Metropolitan Area Planning Council (MAPC) in 2017, titled “The Waning Influence of Housing Production of Public-School Enrollment in Massachusetts”:

At the district level, we observe no meaningful correlation between housing production rates and enrollment growth over a six-year period. While it is true that schoolchildren occupying new housing units may cause a marginal change in enrollment, they are one small factor among many.

As part of our due diligence for this project, Metro West CD reviewed the number of school-age residents at three existing affordable housing developments, located in Maynard, Sudbury, and Medway. At those developments the number of new school-age children, those who moved to the development from another school district, ranged from 0.24 to 0.50 per 2-bedroom unit, and 0.65 to



Image: 62 Packard Street, Hudson



Image: Glen Brook Way, Medway

1.6 per 3-bedroom unit. We therefore forecast that the proposed White Cliffs development would bring between 12 and 28 new school-age residents to Northborough.

However, considering the MAPC research it is unclear whether these new residents would result in increased enrollment, since housing production does not appear to be the controlling variable.

Supporting this conclusion, data published by the MA Dept. of Elementary and Secondary Education (DESE) shows that total Northborough enrollment dropped from 1,896 students in 2009 to 1,587 students in 2019, despite the 385-unit Avalon Bay Northborough project having been completed during that period.

Zoning

Since the existing Business East and Residence C zoning does not allow the proposed development by-right, the permitting path for this project would typically be through a friendly Chapter 40B. This is a state law that empowers the Zoning Board of Appeals to issue a Comprehensive Permit covering the site, which subsumes all other local rules and regulations, including zoning, for a qualifying affordable housing development. At White Cliffs, Metro West CD would work collaboratively with

Town staff and resident stakeholders to build support of the proposal submitted to the ZBA.

The Town may also consider whether zoning updates required by the recent changes to Section 3A of the Zoning Act, otherwise known as MBTA Community Zoning, could include White Cliffs. As an Adjacent Community under the law, Northborough must make multifamily developments allowable by-right in a non-contiguous area of at least 50 acres before 12/31/2024. The 7-acre White Cliffs site would be a meaningful step towards compliance with the requirement.

Financing

The development of affordable housing in Massachusetts relies on a variety of federal, state, and local resources.

Proposed equity sources for the project are Federal and State Low Income Housing Tax Credits (LIHTC) and Historic Tax Credits (HTC). We anticipate raising nearly \$14 million from these sources. Projected soft debt sources, meaning deferred loans that do not require repayment so long as an affordable restriction is in place, include the following State programs:

Affordable Housing Trust Fund (AHTF), HOME, Housing Stabilization Fund (HSF), Housing Innovation Fund (HIF), and Community Based Housing (CBH). Each of the programs include unique requirements and allocations, which together account for approximately \$5.2 million of project funding. Additional funds will come from a roughly \$4.2 million permanent mortgage.

Metro West CD has close relationships with best-in-class financing partners from past successful projects, including CEDAC, Stratford Capital Group, Blue Hub Capital, Massachusetts Housing Investment Corporation, Massachusetts Housing Partnership, Eastern Bank, and others.

As Massachusetts requires a local match for all projects seeking state subsidy, we have included an allocation of \$800,000 from the Northborough Community Preservation Committee (CPC) as a source for the project. We understand that the Town has already invested significant funds to preserve White Cliffs from demolition and will communicate with the Commonwealth the overall value leveraged by the Town in our application to DHCD.

A pro forma development budget is included further down this response.

2020 Master Plan

Metro West CD believes this proposal is consistent with the goals of the 2020 Northborough Master Plan. It bolsters the Downtown Revitalization strategy by bringing more households within walking distance of downtown. These new residences will support Northborough businesses through their spending and by increasing the availability of employees in the local market.

Furthermore, the many affordable and accessible 1-bedroom units will meet the housing need identified in the Master Plan for aging residents that want to downsize and remain in town. The development will also boost tax revenue by increasing the value of the site.



Image: Carter School Apartments, Leominster

Schedule

Projects relying on government subsidy must participate in the Department of Housing and Community Development (DHCD) funding allocation process. This annual competition largely dictates the development timeline for affordable projects, since DHCD only reviews new funding applications during January, with an additional invite-only "mini-round" in September for project's that are highly ready to proceed.

Current industry best practice is to assume that a project will not be funded on its first January application, due to demand for Low Income Housing Tax Credits constantly outstripping supply, and that the project will need to apply again the following year. Recently, Metro West CD's 62 Packard Street project in Hudson was invited into the DHCD mini-round after just one application, which greatly accelerates the funding timeline, but we have not assumed that will be the case here.

Option to Purchase

One way in which affordable housing projects differ from market-rate developments is in the execution of a Purchase and Sale agreement for the acquisition of property.

Projects applying for federal funds (i.e. HOME, Section 8, etc.) may not make so-called "choice limiting" actions before the project secures environmental clearance under the National Environmental Policy Act (NEPA). The signing of a Purchase and Sale agreement is an example of a choice limiting action.

Therefore, affordable housing developments using federal funds will sign an Option to Purchase agreement instead. See applicable NEPA regulation 24 CFR 58.22(d) for reference.

Construction Impact & Mitigation

No permanent and substantial negative impacts are anticipated in connection with the proposed development. Temporary negative impacts due to construction will be mitigated to the maximum extent possible.

The highly qualified General Contractor selected for this project will create a construction management plan detailing items such as site security, material laydown areas, as well as the impact of the work on any site and/or building access points. We will work with our contractor to

| Milestone | Date |
|---|------------------|
| Developer selected by RFP | Feb. 2023 |
| Site due diligence | Mar. 2023 |
| Option to Purchase agreement executed | May 2023 |
| Architectural and engineering work commence | May 2023 |
| Submit funding request for Community Preservation Committee funds | July 2023 |
| Submitted comp. permit application to ZBA | Aug. 2023 |
| DHCD pre-application | Oct. 2023 |
| Receive comp. permit approval | Dec. 2023 |
| Submit DHCD OneStop application (most likely twice) | Jan. 2024 / 2025 |
| DHCD funding decision announced | May 2024 / 2025 |
| Final construction set of drawings and pricing | Aug. 2024 / 2025 |
| Property conveyed to sponsor & construction begins | Nov. 2024 / 2025 |
| Marketing for lease-up begins | June 2025 / 2026 |
| Buildings substantially complete | Dec. 2025 / 2026 |
| Fully occupancy | Mar. 2026 / 2027 |

reduce as much as possible the effect of such activities on surrounding neighbors. In the event a particular disruption is unavoidable during construction, advanced notice outlining the type and duration of the disruption will be provided to abutters through a regularly updated lookahead schedule. In addition, abutters will have the direct phone number of the General Contractor's on-site supervisor, as well as Metro West CD's project manager.

Landscape and Buffering

The mature plantings at White Cliffs, such as an immense beech tree near the mansion's southeast corner, are a wonderful feature of this site. Metro West CD would start with a survey of this existing inventory to assess its overall health and prioritize areas for pruning. The grounds would then be supplemented as needed with new plantings that both benefit the property aesthetic and ensure year-round screening from neighbors.

One key landscape improvement we plan to make is removing the large, paved expanse behind what is now the function hall at White Cliffs. While a portion of this area would ultimately form the footprint of the new building, much of it could be replanted. This new greenspace will ultimately help mitigate stormwater runoff from the site as well.

Our landscape plan strives to be responsive to the

different conditions along the various sides of the property. While the South, West, and North sides benefit from steep grade changes that effectively separate the development from its neighbors, the area by Warren Street is mostly flat, and would benefit from privacy fencing and tall plants for screening. In this area, as in the others, all plantings brought to the site would be drought tolerant non-invasive species.

Parking

The 7-acre site provides sufficient parking for the proposed development. A ratio of 1.5 spaces per unit is achieved in this design, which is sufficient given the intergenerational resident profile. The parking layout makes efficient use of space to minimize new impervious surfaces, retaining the existing lots by Main Street while eliminating the paved area at the back of the site.

New parking is located between the mansion and the multifamily structure, and is largely out of view from the street while still convenient to residents. The retained existing parking will be primarily for use during events, or as resident, visitor, and staff overflow. The drive aisle includes a convenient turnaround and drop-off area at the main entrance to the new building, which continues behind the building to allow emergency vehicle access to all areas of the site.

Electric vehicle charging stations for residents are planned at the new lots.



Image: 62 Packard Street, Hudson

PRO FORMA

| SOURCES & USES | | | | | |
|----------------------------------|----------------------|-------------------|-------------------------------|-------------------|-------------------|
| Sources of Funds | Total | Per Unit | Uses of Funds | Total | Per Unit |
| Equity | | | Acquisition | \$ 100 | \$ 2 |
| Federal LIHTC Equity | \$ 10,179,590 | \$ 195,761 | Construction | \$ 17,163,086 | \$ 330,059 |
| State LIHTC Equity | \$ 2,558,400 | \$ 49,200 | Soft Costs | \$ 4,360,573 | \$ 83,857 |
| Federal Historic Equity | \$ 673,422 | \$ 12,950 | Reserves | | |
| State Historic Equity | \$ 478,484 | \$ 9,202 | Operating Reserve | \$ 449,023 | \$ 8,635 |
| Debt | | | Initial Rent-Up Reserves | \$ 60,000 | \$ 1,154 |
| First Mortgage | \$ 4,247,583 | \$ 81,684 | Developer OH & Fee | \$ 2,097,410 | \$ 40,335 |
| Soft Debt | | | Total Development Cost | 24,130,193 | \$ 464,042 |
| AHTF | \$ 1,000,000 | \$ 19,231 | | | |
| CBH | \$ 750,000 | \$ 14,423 | | | |
| HIF | \$ 500,000 | \$ 9,615 | | | |
| HOME | \$ 990,000 | \$ 19,038 | | | |
| HSF | \$ 1,000,000 | \$ 19,231 | | | |
| DHCD Other | \$ 952,713 | \$ 18,269 | | | |
| Local Community Preservation Act | \$ 800,000 | \$ 15,385 | | | |
| TOTAL | \$ 24,130,193 | \$ 464,042 | | | |
| | | | Surplus/(Gap) | \$ 0 | \$ 0 |

| RESIDENTIAL INCOME | | | |
|---------------------------------|--------------------|------------|------------------------|
| Unit Size | Target Population | # of Units | Forecast Contract Rent |
| 1 Bedroom | | | |
| | 30% AMI - Sec. 8 | 3 | \$1,369 |
| | 60% AMI | 14 | \$1,361 |
| Subtotal 1 Bedroom Units | | 17 | |
| 2 Bedroom | | | |
| | 30% AMI - Sec. 8 | 3 | \$1,768 |
| | 30% AMI - MRVP | 4 | \$1,617 |
| | 60% AMI | 13 | \$1,633 |
| Subtotal 2 Bedroom Units | | 20 | |
| 3 Bedroom | | | |
| | 30% AMI - Sec. 8 | 2 | \$2,157 |
| | 30% AMI - MRVP | 4 | \$1,971 |
| | 60% AMI | 9 | \$1,885 |
| Subtotal 3 Bedroom Units | | 15 | |
| | | | |
| | Total Units | 52 | |

Acquisition Price

A \$100 acquisition price reflects DHCD best practice that for public parcels the state and federal subsidy invested in developing the project, in this case \$19 million, compensates municipalities for the value of the land.

About 30% AMI Rents

The rent for 30% AMI units, those shown receiving project based vouchers from the Section 8 and MRVP programs, is based on Fair Market Rent figures produced by the US Dept. of Housing & Urban Development. This contract rent amount is the total rent the development will receive from both the tenant and the subsidy provider. The share to be paid by the tenant is capped at 30% of their income, with the balance paid by the state or federal subsidy. The FMRs are updated by HUD annually.

DEVELOPMENT BUDGET

| ITEM | | TOTAL PROJECT COST |
|--|-------------------------------------|---------------------------|
| ACQUISITION | | |
| <i>Acquisition</i> | | \$100 |
| | Total Acquisition Cost | \$100 |
| CONSTRUCTION / REHABILITATION | | |
| <i>Direct Construction Budget</i> | | \$16,191,591 |
| <i>Construction Contingency</i> | | \$971,495 |
| | Total Const. / Rehab. Costs | \$17,163,086 |
| ARCHITECTURE AND ENGINEERING | | |
| <i>Architecture</i> | | \$825,771 |
| <i>Engineering</i> | | \$150,744 |
| | Total Arch. & Eng. Costs | \$976,515 |
| SURVEY & PERMITS | | |
| <i>Survey</i> | | \$20,240 |
| <i>Permit Fees</i> | | \$178,416 |
| <i>Utility Hook Up Fees</i> | | \$356,676 |
| | Total Survey & Permits | \$555,332 |
| GENERAL DEVELOPMENT COSTS | | |
| <i>Owners Rep/Clerk of the Works</i> | | \$155,608 |
| <i>Environmental</i> | | \$25,920 |
| <i>Furniture, Fixtures & Equipment</i> | | \$81,964 |
| <i>Legal</i> | | \$267,621 |
| <i>Title and Recording</i> | | \$52,686 |
| <i>Accounting & Cost Certification</i> | | \$47,632 |
| <i>Marketing</i> | | \$65,430 |
| <i>Real Estate Taxes</i> | | \$59,506 |
| <i>Insurance</i> | | \$246,036 |
| <i>Appraisal and Market Study Costs</i> | | \$15,330 |
| | Total General Development | \$1,017,733 |

| | | |
|--|--|---------------------|
| FINANCING COSTS | | |
| <i>Const. Loan Interest</i> | | \$800,825 |
| <i>Predevelopment Loan Interest & Fees</i> | | \$118,019 |
| <i>Inspecting Engineer/Lender's Inspector</i> | | \$36,900 |
| <i>Loan Fees (Construction and Perm)</i> | | \$92,363 |
| <i>DHCD Fees (LIHTC FEES)</i> | | \$62,734 |
| <i>MassDevelopment Fees</i> | | \$162,455 |
| <i>Syndication Fees</i> | | \$43,264 |
| | <i>Total Financing Costs</i> | \$1,316,560 |
| | | |
| OTHER | | |
| <i>Construction Testing</i> | | \$40,000 |
| <i>Development Consultant</i> | | \$80,000 |
| <i>Historic Consultant</i> | | \$35,000 |
| <i>Commissioning</i> | | \$35,000 |
| <i>Green Consultant</i> | | \$96,788 |
| <i>Soft Cost Contingency</i> | | \$207,646 |
| | <i>Total Other Costs</i> | \$494,434 |
| | <i>Total Soft Costs</i> | \$4,360,573 |
| | <i>Subtotal: Acq, Constr and Soft</i> | \$21,523,759 |
| | | |
| RESERVES | | |
| <i>Operating Reserves</i> | | \$449,023 |
| <i>Lease-up Reserve</i> | | \$60,000 |
| | <i>Total Reserve Costs</i> | \$509,023 |
| | | |
| DEVELOPER COSTS | | |
| <i>Developer Overhead</i> | | \$1,048,705 |
| <i>Developer Fee</i> | | \$1,048,705 |
| | <i>Total Developer Costs</i> | \$2,097,410 |
| | | |
| TOTAL DEVELOPMENT COST | | \$24,130,193 |



4

Certificates

- 
- 
- Certificate of Non-Collusion and Tax Compliance

Non-Collusion Form and Tax Compliance Form

Applicants submitting a bid or proposal to provide supplies or services to the Town, or to purchase supplies from the Town, must complete and submit the following certification of non-collusion and tax compliance with the bid.

CERTIFICATE OF NON-COLLUSION

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



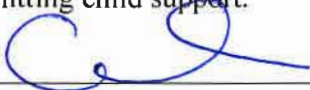
Signature of individual submitting bid or proposal

Metro West Collaborative Development, Inc.

Name of business

TAX COMPLIANCE CERTIFICATION


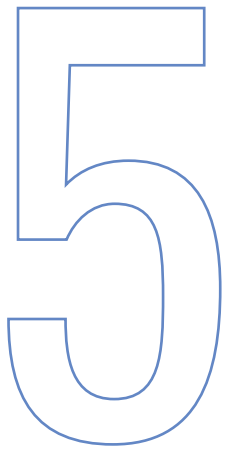

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, the proposer entity named below is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.



Signature of person submitting bid or proposal

Metro West Collaborative Development, Inc.

Name of business



5



Appendix

- 
- Northborough Affordable Housing Corporation - Letter of Support
 - Selected Resumes



Northborough Affordable Housing Corporation
30 Wiles Farm Road
Northborough, MA 01532

To: White Cliffs Committee

From: Northborough Affordable Housing Corporation

Re: Metro West Collaborative Development Proposal for the White Cliffs

Laurie Connors, Town Planning Director, asked Rick Leif from the Northborough Affordable Housing Corporation (NAHC) to have a discussion with representatives from the Metro West Collaborative Development organization (MCD) concerning a proposal they plan to submit which would involve the creation of affordable housing at the White Cliffs property. During this conversation MCD outlined a plan to create a new building containing approximately 50 units of affordable housing on the White Cliffs property and to preserve the existing building for some sort of community access. Although Mr. Leif came away from the discussion with a favorable view of the proposed project and of MCD, NAHC has not reviewed this plan in any level of detail nor has done any significant background investigation of MCD.

NAHC supports the creation of affordable housing in Northborough and believes it is imperative for the vibrancy and resiliency of our community that Northborough continue to develop a diverse mix of housing options affordable to all incomes. The proposal by MCD has the potential to meet this objective. Based on our knowledge of housing needs in Northborough, the MCD proposal should be evaluated on its ability to provide some units of housing for senior residents looking for lower cost housing, its ability to provide handicapped accessible units, and, to the maximum extent allowable by DHCD, to provide for local preference for Northborough residents.

NAHC would be pleased to work with the White Cliffs Committee on the evaluation of the MCD proposal to whatever extent the Committee deems appropriate. Please feel free to contact me to discuss how we might be of service to the Committee.

Sincerely,

A handwritten signature in cursive script that reads 'Rae Carlsen'.

Rae Carlsen, President

rp.carlsen@verizon.net

508 208 4380



Caitlin Madden

caitlin@metrowestcd.org | 617.923.3505 x4
Metro West Collaborative Development

Current

Executive Director | Metro West Collaborative Development

June 2021 – Current | Newton, MA | Served as Deputy Director through 11/2021

- Create and implement strategic vision of organization, oversee staff, develop and manage corporate budget
- Forge relationships with community, civic, and religious leaders; community advisory board members; other CDCs; and municipal officials
- Initiate real estate development projects and manage related project managers, consultants, and interns
- Work with lenders, investors, and government agencies to secure complex debt and equity project financing including state and federal LIHTCs, state subsidy funds, and state and federal historic tax credits

Education

University of Michigan | Stephen M. Ross School of Business | MBA | 2015

University of Denver | Bachelor of Arts, Sociology | Magna cum Laude | 2008

Project Experience

Senior Project Manager | Urban Edge

November 2018 – May 2021 | Boston, MA

- 1599 Columbus Avenue | 65-unit 100% affordable new construction building w/ 3,100 SF of commercial space pursuing Passive House
- Bancroft Dixwell | 78-unit scattered site occupied rehab, including 5 historic buildings

Project Manager | Planning Office for Urban Affairs (POUA)

November 2015 – October 2018 | Boston, MA

- 48 Boylston (Historic Rehabilitation) | 46 units of affordable housing + 10K SF of commercial space. Successfully completed permitting, zoning, DHCD financing application, and construction closing for the adaptive reuse of an individually listed historic building
- 48 Boylston (New Construction) | Managed early schematic, permitting, and financial feasibility for a mixed-income 19-story new construction tower
- Safe Haven | Worked with the Boston Mayor's office, Attorney General's office, and a service provider to acquire and rehabilitate a building as emergency transitional housing for victims of human trafficking

Development & Acquisitions Intern | Beacon Communities

Summer 2014 | Boston, MA

- Performed due diligence for purchase of 204 unit mixed-income multi-family community in Amherst, Massachusetts & worked with management to facilitate acquisition
- Attended new construction + substantial rehab development meetings and site visits for potential acquisitions
- Performed analysis of development costs for 15 most recent development projects to identify trends and more accurately estimate future costs

Executive Assistant to the President | Telesis Corporation

June 2011 – August 2013 | Washington, DC

- Assisted with real estate development acquisition, zoning and permitting, and financing efforts for a private, for-profit affordable housing developer
- Former youth counselor at co-ed group home for at-risk teenagers
- Lover of running, the outdoors, and historic buildings

Etcetera



Derek Hansen

derek@metrowestcd.org | 617.923.3505 x7

Metro West Collaborative Development

Current

Senior Real Estate Manager | Metro West Collaborative Development

January 2022 – Current | Newton, MA | Planning & Development Committee Member since 2019

- Deliver new affordable housing developments with direct responsibility for construction and design decisions and the management of associated consultants.
- Secure project approval from public partners, including zoning boards, local commissions, and elected officials, and project funding from public/private lenders, tax-credit investors, and State funding agencies.
- Source real estate development opportunities through a mix of open market acquisitions and requests for proposals.
- Underwrite potential and current deals to maximize the affordability impact of each project.
- Support property managers in the on-going asset management of existing portfolio properties.

Education

Massachusetts Institute of Technology | M.S., Real Estate Development | 2022

Babson College | B.S., Business Administration | 2012

Past Experience

Acquisitions Intern | K2 Developers

2021 – 2021 | Remote

- Prepared local market research and conducted initial outreach for 68 target properties in Colorado resort towns.
- Assisted underwriting of \$4.5 million adaptive reuse project in Glenwood Springs.

Asset Manager | Yanamtemple, LLC

2018 – 2021 | Boston, MA

- Managed all day-to-day activity for the firm. Responsible for capital improvements, sourcing tenants, lease negotiation, and legal review. Developed close relationships with brokerage and legal partners. Executed \$5.7 million worth of leases.
- Built complex pro forma model in Excel to forecast impact of lease negotiation strategies on underlying value of the building.

Assistant Project Manager | Chapman Construction

2017 – 2020 | Newton, MA

- Delivered multimillion-dollar construction projects with focus on tenant improvements. Created construction budgets and schedules, led subcontractor buyout, submittal process, and design team coordination.
- Supported up to 6 projects simultaneously, ranging in size from \$500k to \$8 million.

Marketing Manager | Yzhny Dvor

2013 – 2017 | Moscow, RU

- Recruited and led team of field merchandisers that accelerated frequency of category resets from annual to semi-annual and quarterly.
- Launched company's first customer loyalty program, Yzhny+. Grew membership to 20,000 active users.

Professional Certifications

ARGUS Enterprise Certified | Altus Group | Certificate #8003

Building Information Modeling (BIM) Certified | Wentworth Institute of Technology



Sharone Small

sharone@metrowestcd.org | 617.923.3505 x3

Metro West Collaborative Development

Current

Senior Project Manager | Metro West Collaborative Development

August 2022 – Current | Newton, MA

- Manage the overall development process and schedule for real estate projects, including developing and maintaining project budgets and completing funding applications and requisitions.
- Deliver new affordable housing developments with direct responsibility for construction and design decisions and the management of associated consultants.
- Secure project approval from public partners, including zoning boards, local commissions, and elected officials, and project funding from public/private lenders, tax-credit investors, and State funding agencies.
- Lead real estate construction loan and permanent loan closings.
- Collaborate with property management on marketing and initial lease-up efforts.
- Manage investigation of potential development projects, including feasibility analysis, due diligence, and RFP responses.

Education

Rutgers University | Bloustein School of Planning and Public Policy | MCRP | 2017

Massachusetts Institute of Technology | Bachelor of Science, Civil Engineering | 2014

Project Experience

Senior Project Manager | Urban Edge Housing Corporation

July 2021 – August 2022 | Boston, MA

Project Manager | July 2018 – July 2021

Associate Project Manager | July 2017 – July 2018

- 1599 Columbus Avenue | 65-unit 100% affordable new construction building w/ 3,200 SF of commercial space. Managed contractor, investor, and lender selection and part of the construction closing.
- Holtzer Park | 62-unit 100% affordable new construction building. Managed design, permitting, funding applications, construction closing, construction, and rent-up. Site assembly included a BHA ground lease, master plan cost sharing and licensing, MBTA easement, and license for a temporary Boston Fire Department station on the site.
- Walker Park | 49-unit 100% affordable new construction building. Completed construction, marketing and rent-up, stabilization, and permanent conversion.
- Urban Edge 2021 Employee of the Year.

Intern | New Jersey Housing and Mortgage Finance Agency

September 2016 – December 2016 | Trenton, NJ

- Trained as a credit officer in multifamily loan underwriting, including pro formas, appraisals, A500 studies, cost audits, and board motions.

Intern | Jamaica Plain Neighborhood Development Corporation

Summer 2016 | Boston, MA

- Helped prepare \$3.4 million state funding application for MassWorks grant.
- Updated asset management plans and capital needs tracking for JPNDC's portfolio of 15+ properties.

Intern | Partnership for Strong Communities

January 2015 – July 2015 | Hartford, CT

Etcetera

HUD Innovation in Affordable Housing Competition 2017 Winning Team

CLIFFORD BOEHMER AIA

PRINCIPAL



PROFESSIONAL EXPERIENCE

Clifford Boehmer is a co-founder and Principal at Davis Square Architects. In 1989, he was a founder of Dirigo Design, a small Fort Point firm specializing in single-family homes.

Cliff's current responsibilities focus on site and project feasibility analysis, conceptual and schematic design, master planning and programming, project advocacy with government and funding agencies, neighborhood engagement, permitting, and renovation/adaptive reuse of historic buildings. He reviews state-funded housing proposals for the Massachusetts Department of Housing & Community Development (DHCD) and consults with many communities and developers in Massachusetts and Rhode Island.

Before pursuing a full-time architectural career, Cliff was known throughout the Early Music world as a maker of historically informed keyboard instruments. He has taught studios at the Graduate School of Design (Harvard), Massachusetts Institute of Technology, the Museum of Fine Arts (Boston), and the National Conservatory in San Sebastian, Spain. His housing designs, musical instruments, and architectural photographs have been published in magazines, journals, and city guides. He sits on boards of the Cambridge Society for Early Music and the Boston Clavichord Society.

EDUCATION

Harvard Graduate School of Design
Master in Architecture, 1987

Massachusetts Institute of Technology
Bachelor of Science in Art and Design, 1974

REGISTRATION

Architect Licensure: Massachusetts

AFFILIATIONS

American Institute of Architects
Boston Society of Architects



DAVIS
SQUARE
ARCHITECTS

MICAELA GOODRICH

JOB CAPTAIN



PROFESSIONAL EXPERIENCE

Micaela Goodrich joined Davis Square Architects in 2022 as a job captain. She brings over three years of experience to DSA, with a focus on interior renovation, graphic design and drawing documentation through all project phases. Micaela is currently working on the West Newton Armory project, which includes the renovation of an existing historic armory building into office space as well as the addition of 43 units of affordable housing.

Micaela is a graduate of UMass Amherst with both her Master and Bachelor of Science degrees. She also achieved minors in African American Studies and Sociology, which have largely influenced her passion for equitable and social justice design. Micaela's thesis, *Architectural Activism Through Hip-Hop*, reflects on the racial history of housing in the United States and its influence on the formation of Hip-Hop as a culture that reclaims the built environment.

EDUCATION

University of Massachusetts, Amherst
Master of Architecture, 2022

University of Massachusetts, Amherst
Bachelor of Science in Architecture and Design;
Minor in African American Studies and Sociology;
Certificate of Civic Engagement and Public Service,
2018



DAVIS
SQUARE
ARCHITECTS

MAUREEN A. CAVANAUGH

SENIOR PLANNER

EDUCATION

MA, Urban Affairs – 1987
 Boston University
 BFA, Art History – 1981
 BS, Nursing – 1981
 University of Rochester

EXPERIENCE

Years with PAL: 11
 Years of Experience: 37

AFFILIATIONS/ MEMBERSHIPS

National Park Service Boston
 Harbor Islands Advisory Council,
 2006-Present, Chair/Vice Chair
 2009-2015

National Park Service Boston
 Harbor Islands Partnership 2006-
 Present

Preservation Massachusetts
 Board of Directors 2017-Present

Wayland Community
 Preservation Committee, 2010-
 Present

Women's Transportation
 Seminar, Public Art Committee

Ms. Cavanaugh is a leading authority on best practices for successfully navigating the complex historic preservation landscape and well-respected throughout the regulatory and development communities. She has a wealth of professional experience in developing environmental planning documents for an array of public and private real estate projects. She has special expertise in cultural resource management, historic preservation planning, state and federal rehabilitation investment tax credits, and preparation of environmental analysis and regulatory compliance documents for review by the National Park Service, Advisory Council on Historic Preservation, state historical commissions, and local planning boards and historical commissions.

Ms. Cavanaugh has served as Project Manager for numerous multi-disciplinary projects involving environmental review, planning, and cultural resources. She has extensive experience in implementing Section 106 of the National Historic Preservation Act, Chapter 254 of the Massachusetts General Laws, and related state and federal environmental laws, regulations, and guidelines affecting historic resources, including National Environmental Protection Act (NEPA) and the Massachusetts Environmental Policy Act (MEPA). Ms. Cavanaugh assists clients in meeting regulatory requirements through consultation with state and federal agencies and the preparation of environmental impact assessments and documentation, Section 106 and Section 4(f) evaluations, and memoranda of agreement. She has established working relationships with numerous municipal, state, and federal agencies, the development community, architectural and planning firms, and private organizations involved in cultural resource management.

Ms. Cavanaugh has teamed with developers and architects to complete numerous historic rehabilitation projects utilizing federal and state historic tax credits. Her familiarity with interpreting the Secretary of the Interior's Rehabilitation Standards and depth of experience working with State Historic Preservation Offices ensures the successful outcome of these and other types of historic building rehabilitation projects.

Ms. Cavanaugh has worked on projects throughout the Northeast and in New York, Pennsylvania, Kansas, Colorado, and Puerto Rico.

Ms. Cavanaugh is a recipient of the Paul E. Tsongas Award from Preservation Massachusetts for contributions to historic rehabilitation projects (2014) and the Niki & Paul Tsongas Award from Preservation Massachusetts honoring women in historic preservation (2016). She serves on several boards, including the National Park Service Boston Harbor Islands Partnership, appointed by the Secretary of the Interior. Ms. Cavanaugh meets the Secretary of the Interior's Qualifications as a Historic Preservation Professional (36 CFR 61).



Wendy Cohen Biography

Wendy Cohen is the President and Managing Member of New Seasons Development LLC (NSD). She is a graduate of Oberlin College with a B.A. in Economics and Women's Studies and a Master of Public Policy degree from Harvard University's Kennedy School of Government.

Wendy started out in her career as a permanent lender at Massachusetts Housing Partnership Fund ("MHP"), a quasi-public state agency that funds affordable and mixed income housing projects, including Chapter 40B projects. MHP is an issuer of project eligibility letters. She was a member of MHP's lending team for over 11 years, in a progression of roles from lending assistant, to loan officer, to senior lender, and finally to Deputy Director of Lending. She is knowledgeable and experienced in all aspects of multi-family housing finance and lending.

Wendy was a developer in two periods, as a project manager at CASCAP, Inc. in Cambridge in the late 1990's after graduating from the John F. Kennedy School, and as Director of

Housing Development for the Allston Brighton CDC after leaving MHP as the Deputy Director of Lending in 2007.

In 2008, Wendy took the position of Director of the Low Income Housing Tax Credit (LIHTC) for the Commonwealth of Massachusetts' Department of Housing and Community Development (DHCD), where she was responsible for the allocation of 9% and 4% LIHTCs. She oversaw program compliance for over 40,000 tax credit units in the MA portfolio. Wendy also managed the allocation and disbursement of funds under the Tax Credit Assistance Program and the Section 1602/"Tax Credit Exchange" Program and oversaw the asset management of the 32 projects that were assisted under these American Recovery and Reinvestment Act programs. She remained in this position and underwrote and assisted hundreds of affordable housing projects in this capacity, until 2014 when she launched New Seasons.

While at DHCD, Wendy also participated as a representative of DHCD on the interagency committee in which many Chapter 40B policy matters faced by one or all of the state subsidizing agencies are discussed. She is familiar with the Chapter 40B rental housing cost certification guidelines (LIHTC and non-LIHTC) as well as the Chapter 40B Comprehensive Permit Guidelines and standards for economic feasibility. In addition to site eligibility application review, she has reviewed final approval requests and 40B cost certifications in her capacity as LIHTC Director.

Since starting New Seasons Development LLC in 2014, Wendy has focused her development consulting work on helping both non-profit and for-profit developer clients in the preservation and production of both family and elderly housing projects located in several neighborhoods of Boston, and in Arlington, Brockton, Chicopee, Lawrence, Lowell, Merrimac, Peabody, Salem, Salisbury, and Taunton, among other communities.

New Seasons Development LLC is a woman-owned business enterprise certified by the Commonwealth of Massachusetts' Supplier Diversity Office.

WATARU MATSUYASU

✉ wmatsuyasu@kleinhornig.com

☎ 617.224.0622



PRACTICE AREAS

- Real Estate
- Housing Development
- LIHTC Investments
- Co-Ops and Condos
- Lending
- Nonprofit Organizations
- Housing Preservation
- Mixed-Use Development
- MGL 40T Preservation Transactions
- Tenant Purchases / Cooperatives
- General Corporate

EDUCATION

Georgetown University Law Center, JD, 2000

Yale University, BA, 1993

EXPERIENCE

Wataru (Wat) Matsuyasu's practice focuses on real estate, affordable housing, and community development transactions. He has worked with nonprofit and for-profit developers in the acquisition, development and (re)financing of a number of affordable housing and community development projects in Massachusetts. He has also represented a national syndicator in a series of Low-Income Housing Tax Credit transactions around the country. His real estate experience includes real property purchase and sale transactions, zoning and permitting matters, conveyancing, title insurance, leasing, condominiums, and contracting for design and construction services.

Prior to joining Klein Hornig, Wat worked as an associate at DLA Piper and Goulston & Storrs, P.C. in Boston, MA, Baker & Daniels LLP in Indianapolis, IN, and as a project manager with Preservation of Affordable Housing, Inc. (POAH) in Boston, MA.

BAR ADMISSIONS

- Massachusetts
- Indiana (inactive)

TRANSACTIONS

- Represents a national syndicator in numerous Low-Income Housing Tax Credit transactions
- Represents a national tax credit investor in numerous asset management transactions

- Represented a national nonprofit developer in the acquisition, selective demolition, new construction and redevelopment of 173 affordable rental units, along with associated infrastructure development by the City of New Bedford
- Represented a Massachusetts community development corporation in the acquisition of a former mill building complex, subdivision and establishment of a master condominium, and financing of 60 units of affordable rental housing with Low-Income Housing Tax Credits and Historic Rehabilitation Tax Credits
- Represented a community health center in the financing and redevelopment of a former mill building complex, involving formation of a condominium, master lease and sublease, and New Markets Tax Credit and Historic Tax Credit financing
- Represented a Massachusetts community development corporation in the acquisition and preservation (facilitated pursuant to MCL Chapter 40T) of a 32-unit affordable rental housing development
- Represented a local YWCA agency in the financing and rehabilitation of a 103-unit SRO project, involving ground lease and sublease, restructuring of existing debt, and new debt and Historic Tax Credit equity financing
- Represented a Massachusetts community development corporation in the acquisition, development and financing of a three-phase affordable rental housing project, involving the establishment of multiple condominiums and cross-easements
- Represented a local settlement house in the acquisition, redevelopment and Historic Tax Credit financing of a building expanding the agency's services and programming
- Represented a Massachusetts nonprofit developer and operator of affordable SRO units in a series of financing transactions
- Represented a national nonprofit developer in a 140-unit project in Massachusetts involving a ground lease and sublease, refinancing and restructuring of the existing debt, and new debt and equity financing
- Represented a Massachusetts community development corporation in the acquisition, development and financing of 20 affordable homeownership units
- Represented a Massachusetts community development corporation in the acquisition of a former church building and the redevelopment and financing of 34 affordable rental units
- Represented a joint venture of a local nonprofit and national nonprofit developer in the acquisition and refinancing of an 80-unit senior project in Massachusetts

ACTIVITIES

- American Bar Association, *Member*
- Boston Bar Association, *Member*
- The Haley House, Boston, MA, *Board of Trustees* (2007-present)

- Lawyers Clearinghouse on Affordable Housing and Homelessness, *Pro Bono Participant* (2011-present)
- United Way of Massachusetts Bay and Merrimack Valley, Affordable Housing Review Panel (2014)

EVENTS

- Presentation on legal structuring issues to competition participants, Federal Home Loan Bank of Boston (FHLBB), 2012 Affordable Housing Competition – 2012