



RFQ #52-24

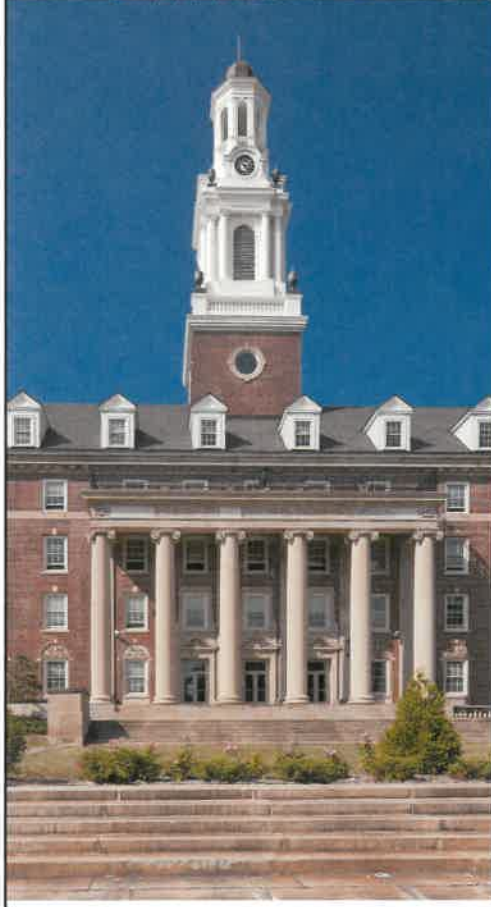
Permanent, Below Market Rate Housing On Municipal Property

SUBMITTED TO:
Finance/Purchasing Dept.
City Hall
1 Junkins Ave
Portsmouth, NH 03801

SUBMITTED BY:
Karmen Cheung
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PENNROSE
Bricks & Mortar | Heart & Soul

A. Cover Page



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B. Letter of Interest

June 4, 2024

Financing/Purchasing Department
City Hall
1 Junkins Avenue
Portsmouth, NH 03801

PENNROSE
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Re: Letter of Interest with Statements of Qualifications for 35 Sherburne Road

To Whom It May Concern,

Pennrose is a nationally recognized, award-winning developer of successful, high-quality affordable and mixed-income housing. We have extensive experience with the preservation and redevelopment of historic assets into housing and are excited by the City of Portsmouth's desire to revitalize the former Sherburne School into housing. We believe that the foundation of every successful project is a strong partnership with the local community and look forward to working side-by-side with the City to craft a vision for the former School.

Our vision is uniquely long-term; Pennrose typically builds, leases, and operates its buildings rather than selling them, making us heavily invested in a neighborhood's sustainability, quality of life, and economic opportunity not just now, but for decades to come. Our affiliated property management company, Pennrose Management Company (PMC), would be the management company for the Davis Thayer building and would help inform our design from day one. Their involvement early on helps ensure that we build a product that will be operationally sustainable in the long run. PMC has decades of experience managing affordable, mixed-income, and market rate housing across the country, and employs more than 400 individuals that serve residents in a way that aims to give them the highest possible quality of life.

Included in this submission are a few past project examples where Pennrose transformed historic old schools, office buildings, and even churches into affordable and attainable workforce housing. We understand the significance of these historic structures to their surrounding communities and worked with stakeholders to incorporate their needs and desires into our proposed plan. For example, the Pryde, a 74-unit mixed-income project in Boston, incorporates over 10,000 square feet of community space to provide accessible meeting space for the neighborhood. Often times key spaces within former schools, like the gymnasium or library, could continue to have a life as a residential amenity for residents as well as a community asset available for the surrounding neighborhood. As part of our redevelopment we would seek to make accessibility improvements also to the former school.

In order to make these projects feasible, we typically leverage Federal Low Income Housing Tax Credits (LIHTCs), Federal Historic Tax Credits (Federal HTC), State Historic Tax credits (State HTC), as well as other gap financing options such as funds from entities like New Hampshire Housing, Federal Home Loan Bank (FHLB), and others. We are familiar with the complexities of utilizing Federal Historic Tax Credits, which are critical resources to make a historic preservation project feasible, and can propose a realistic scheme that will get approval from National Park Service (NPS). Pennrose has had a good track record of securing these sources of funds and bringing our shared vision to reality in a relatively short period of time for developments such as this.

Pennrose can provide all project management services from initial conception through entitlements, due diligence, financing, construction, and lease-up. We have the personnel and financial capacity to execute the redevelopment, fund all predevelopment costs, and provide necessary financial guarantors.

Please do not hesitate to reach out should you have any questions.

Respectfully submitted,



Karmen Cheung
Senior Developer, Pennrose, LLC
kcheung@pennrose.com / 917-609-2687

PENNROSE 35 Sherburne Road
Bricks & Mortar | Heart & Soul

C. History of Other Projects

The following pages include select project examples for Pennrose, LLC

MARY D. STONE

Auburn, MA



Total Development Cost
\$21,384,046

Completion Date
November 2021

Units
55 units

DESCRIPTION

Mary D. Stone is a mixed-income and historic rehabilitation, 62+ senior development in Auburn, MA. Pennrose has worked closely with the Town of Auburn since 2017 to develop the program for Mary D. Stone, which will revitalize a former elementary school into a high-quality affordable housing community for seniors. The site was obtained through a competitive RFP process driven by the Town of Auburn requesting senior affordable housing proposals. While the Town received other responses, some of which proposed a higher acquisition price for the property, Pennrose was ultimately selected due to our experience and expertise with affordable housing developments.

The unique design of the project mimics, and is sensitive to, the existing architecture of the community and Town of Auburn. A portion of the existing 1920's historic school building was rehabilitated as housing units and the 1950's addition in the rear was demolished and replaced with a new four-story mid-rise building. The renovated historic school itself has 10 apartments, and a new, 4-story structure houses an additional 45 units. We intentionally located the community room and meeting room on the first floor so that these rooms can be easily utilized by the Town or social service providers to host events. To the rear of the building is a playground and ballfield that will continue to be owned by the Town and available for public and Mary D. Stone resident use. The buildings feature high performance design and materials and is designed to meet LEED Silver sustainability standards.

Of the 55 new rental units six (6) serve extremely low income (30% AMI), two (2) serve very low-income (50% AMI), thirty-seven (37) serve families earning up to 60% AMI, and ten (10) serve as market rate housing. Of the extremely low-income units, four (4) are set aside as Community Based Housing

units for seniors who are at nursing homes or at risk of institutionalization.

Since being selected, we have worked closely with the Town to progress the design and financing plan for Mary D. Stone. In September 2017, we hosted a very successful Aging-in-Place Charrette, co-sponsored by Enterprise Community and Pennrose, at the Auburn Town Hall. The charrette was very well-attended and allowed us to rely on the expertise of the individuals in the room to brainstorm and prioritize important elements of quality senior housing. The goal of everyone in the room is not to simply create units, but to make these safe, welcoming homes where seniors can continue to be as active members of the community.

Mary D. Stone has been highlighted in the Town's 2017 Housing Plan as a pivotal project to expand the supply of affordable housing options in the Town of Auburn.

Project Awards

Affordable Housing Tax Credit Coalition
Charles L. Edson Tax Credit Excellence Award Winner - Senior 2023

Affordable Housing Finance
Readers' Choice - Historic Rehab Winner 2022

Affordable Housing Finance
Readers' Choice - Overall Winner 2022

JULIA BANCROFT SCHOOL

Auburn, MA



Total Development Cost
\$24,569,257

Completion Date
November 2022

Units
60 units

DESCRIPTION

The Julia Bancroft School is a 60-unit, mixed-income senior (62+) development in Auburn, MA. Pennrose was designated by the Town as the developer in June 2017. The site is a 3.3 acre rectangular shaped parcel with an existing 37,000 square feet building, 2-story historic school building. The unique design of the project mimics, and is sensitive to, the existing architecture of the community and Town of Auburn. A portion of the existing 1920's historic school building will be rehabilitated as housing units and the 1950's addition in the rear will be demolished and replaced with a new four-story mid-rise building.

Of the 60-units, 45 units are designated affordable units for tenants with incomes at or below 60% of AMI and 15 units targeted to market rate tenants. Of the affordable units, four (4) units have also been set aside for Community Based Housing (CBH) units. There are seven (7) accessible units that are distributed throughout the building, of which one (1) is a studio, five (5) are one-bedrooms, and one (1) is a two-bedroom. The building will have three elevators, a resident lounge, a fitness center, and two outdoor patios. Pennrose will have a property manager and resident service coordinator on-site who will provide supportive services for the residents. To the rear of the building is a playground and ballfield that will continue to be owned by the Town and available for public and Julia Bancroft resident use. The buildings would feature high performance design and materials and is designed to meet LEED Silver sustainability standards.

There is regular 7-day bus service to the site (#27) that connects residents to the Auburn Mall and Worcester Union Station. Furthermore, the site will be served by Worcester Regional Transit Authority (WRTA)'s paratransit service which will provide door-to-door service when requested. Since being selected, we have worked closely with the Town to progress the design and financing plan for Julia Bancroft. In September 2017, we hosted a very successful Aging-in-Place Charrette, co-sponsored by Enterprise Community and Pennrose, at the Auburn Town Hall. The charrette was very well-attended and allowed us to rely on the expertise of the individuals in the room to brainstorm and prioritize important elements of quality senior housing. The goal of everyone in the room is not to simply create units, but to make these safe, welcoming homes where seniors can continue to be as active members of the community.

The Town's 2017 Housing Plan identified the redevelopment of two historic schools, Julia Bancroft and Mary D. Stone, as pivotal projects to expand the supply of affordable housing options in the Town of Auburn. The State and Town's commitment to repurposing historic structures for housing is evident in the resources and support that these two projects have received.

THE PRYDE (FORMER WILLIAM BARTON ROGERS SCHOOL)

Boston, MA



Total Development Cost

\$49M (Projected)

Completion Date

Summer 2024

Units

75 units

DESCRIPTION

William Barton Rogers Middle School, formerly Hyde Park High School, served and educated the Hyde Park community for over a century. Originally built in 1902 as a high school, the building has been adapted and reconfigured numerous times, with additions constructed in 1920 and again in 1934, to better serve the needs of the Hyde Park community. Today, while it is no longer able to serve as an educational institution, it remains an anchor that can continue as a monument to, and celebration of, the Hyde Park Community as well as serve as safe, mixed-income, LGBTQ+ affirming senior housing for Hyde Park and Boston residents. Pennrose will reactivate the former public school as a vibrant, welcoming, and inclusive space that will not only house the seniors of Hyde Park but also celebrate the history of the former school and the history of Hyde Park. The entirety of the building will be preserved and adapted for this new use, which includes preservation of the historic exterior facade as well as significant interior architectural elements such as the frieze and stage of the auditorium, mosaic tiles, gymnasium and more. Large spaces are retained in the interior of the building for general use by the community. Architect DiMella Shaffer's design includes preserving the auditorium, the gym, the cinema room, and the front entrance and retains 10,000 sq. ft. of space to be used by the public that will cater to residents and the community. Community organizations can use the space for meals, events, activities and can hold meetings, classes and workshops there.

The Pryde will be New England's first LGBTQ+ affirming senior housing development, with 74 units available at a range of incomes, from 30% of AMI to 100% AMI, so that everyone has an opportunity to live here. Residents can enjoy all of the public community spaces as well as additional amenities in the residential section of the building. The main residential entrance is on Harvard Avenue, recreating the historical portecochère that likely served as the primary entrance to the building in the early 1900s. The former administrative offices to the left of the residential entrance will be converted into a

lobby area where residents can check their mail, grab some coffee, or sit and chat with their neighbors. This common area will have seating and tables that will allow for informal mingling among residents. To the right of the residential entrance will be the development's management offices. Two main elevators have been strategically located in the courtyard, near the two knuckles of the building to reduce the distance that seniors will need to walk to enter and exit the building from their unit. The auditorium on the second floor will be preserved for resident gatherings, serving as the community room for residents. We have added bathrooms near the entrance of the auditorium to improve the functionality of the space for large events. Additionally, a small warming kitchen is planned for this space for food events. On the fourth floor of the residential wing, there currently exists a room with built-in tiered seating which will be converted into a resident cinema space capable of hosting movie nights.

The Courtyard will have controlled access but will be accessible to the community and residents through the building itself or via the side entrance on Everett Street on the side of the building. This space will be kept available and open to the public, while ensuring resident security and privacy.

The development will offer an array of residential services targeted at helping residents successfully age in place and being a positive contributor in the Hyde Park community. As an LGBTQ+ affirming senior development, tailored social gatherings and cultural events will be offered, and all staff will be trained to address the unique needs of the LGBTQ+ senior community.

Project Awards

Center for Active Design

Best in Building Health

2024

JEFFERIS SQUARE

Chester, PA



Total Development Cost

\$11,579,000

Completion Date

2014

Units

36 Units (Rental)

DESCRIPTION

When Jefferis Elementary School was built in 1932, the city of Chester, Pennsylvania was home to thriving naval shipyards and a burgeoning automobile industry. Sixty years later, these had all but disappeared, and Chester placed last in a series of criteria ranking of the State's 501 districts. Its population had dwindled by half and Jefferis no longer met the educational needs of its students. Abandoned by the school district, it sat vacant, attracting criminal elements and activities. When the Redevelopment Authority of Chester sought in the late 1990s to remove the blight that was overtaking its city, it turned for assistance to Pennrose with whom it had formed in a number of previous projects a solid working relationship. Striving to revitalize the neighborhood, Pennrose developed a plan to reinvigorate this property and to create quality affordable housing for families.

Whereas some school houses lend themselves easily to adaptation for other purposes, Jefferis Elementary did not. The development team, using multiple funding sources, worked creatively to overcome its inefficient floor plans and to simultaneously maintain the integrity of the building itself. The 1920s two-story brick structure was innovatively reconfigured into sixteen two-story town homes with individual entrances conducive to a healthy neighborhood. Continuous to this, a perpendicular row of 20 new town homes were constructed to create an L-shaped complex banked by on-site parking on one side and landscaped grounds on the other. With the new buildings stylistically complementing the old, the end result was a development

that was architecturally seamless. The older building was rehabilitated with new mechanical, electrical, and plumbing systems. The new buildings incorporated energy efficiencies. The two were united in purpose by the common open green space they share. In 1996, Jefferis Square received the William H. Bates Memorial Award for Outstanding Land Development.

In 2014, Pennrose recommitted to the community by reapplying for tax credits after the Year 15 Extended Use Period had expired.

The adaptive reuse project underscores Pennrose's commitment to working with communities over a period of years on multiple projects that provide quality housing. Utilizing the community's resources to reinvigorate its housing stock is a hallmark of the Pennrose practice.

BLESSED SACRAMENT

Boston, MA



Total Development Cost

\$56,821,382

Completion Date

Fall 2026

Units

55 units

DESCRIPTION

The Blessed Sacrament project is an adaptive reuse of the existing Blessed Sacrament Church building, a historic building in the Hyde Square neighborhood. Originally built in 1913, Blessed Sacrament was initially deconsecrated by the Archdiocese in 2004 and has remained vacant ever since. Pennrose, in partnership with Hyde Square Task Force (HSTF), a neighborhood non-profit community organization, will redevelop the former church into a vibrant, welcoming, mixed-use, mixed-income development. Most of the building's exterior will be preserved and adapted for this new use, which includes preservation of the historic façade. Architect DiMella Shaffer's design includes adapting the church's main nave into a 250+ capacity multipurpose community space, operated by the HSTF, and the building's cupola will be repurposed as the residents' community room.

Hyde Square is an incredibly transit-oriented, resource-rich neighborhood that is experiencing significant market pressures and displacement of low- and moderate-income households. Not only does the community urgently need affordable housing, but the historic building needs investment and comprehensive renovations to survive. Following Blessed Sacrament Church's deconsecration in 2004, several developers considered adaptive reuse of the building as housing/mixed use; no development was pursued, and JPNDNC sold the building to HSTF in 2014. In 2019, HSTF and the City of Boston completed a Latin Quarter District Plan that identified the local need for mixed-income housing and community space, and HSTF embarked on a community process to determine the redevelopment options for the Church to best meet local priorities. In mid-2021, HSTF released a Request for Proposals and selected Pennrose as the designated developer after a comprehensive community process. We are committed to ongoing stakeholder engagement throughout the design process.

Beyond the inherent complexity of building mixed-income housing in one of the country's highest-cost cities, Blessed Sacrament is an especially complicated project due to the challenges of rehabilitating and adapting a 100+ year-old structure that has been vacant for almost two decades. Repurposing the building will require a high level of structural and environmental work to address multiple issues including damage to the masonry, roof, and structure. The 71,000+ square foot building's existing design poses an immense challenge to redeveloping it as affordable units; especially since the building's historic design and potential landmark status requires creative and costly solutions. Beyond the already high costs of creating high-quality mixed-income housing, which have been exacerbated by COVID-19's supply chain challenges, building important and much-needed community spaces and preserving a significant historic landmark add extraordinary costs and complications. For these reasons, the development will rely upon a creative mix of financing sources that will include Low-Income Housing Tax Credits, Historic Tax Credits, funding from Boston's Mayor's Office of Housing, and numerous other sources.

HORACE H. STRONG SCHOOL

New Haven, CT



Total Development Cost
\$25,000,000

Completion Date
Fall 2026

Units
58 units

DESCRIPTION

Pennrose, with its partners The Cloud Company and the New Haven Pride Center, as well as the City of New Haven, is proposing to redevelop the historic Horace H. Strong School into an affordable, LGBTQ+ affirming development with an arts and cultural space for the greater Fair Haven community. We believe that our approach reflects the goals, desires, and needs of the community to revitalize Fair Haven through the catalytic redevelopment of the landmark Strong School building into a community asset that enhances the area's social and cultural life.

Our proposal is comprised of the adaptive reuse of the Strong School that maintains a community space and adds 58 new deed-restricted affordable housing units.

The proposed design is inspired by the rich architectural heritage of the Fair Haven neighborhood and the Strong School's anchor in the community. We have considered the City's prior efforts to redevelop the property and enrich Fair Haven's cultural life, including the Strong School Redevelopment and Market Feasibility Study, the City's Cultural Equity Plan, and the New Haven Vision 2025.

Our 58-unit, mixed-income residential proposal intends to serve a range of individuals and families that will support local businesses and take advantage of the benefits of living in the Fair Haven area. The proposed affordability mix includes 8 of units for households under 30% of the AMI, 25 units at 50% AMI, 15 units at 60% AMI, and 10 units at 80% AMI. The initial unit mix includes 4 studios, 44 one-bedrooms, and 10 two-bedrooms, to allow families and individuals of different sizes to live and enjoy the benefits of the project.

Pennrose will lead a community-centered engagement process throughout the development stages, with support and input from local neighborhood groups and organizations, City officials, and other key stakeholders and interested parties. Our development team has had initial conversations with local stakeholders to assess local needs and desires, including our local partners at the New Haven Pride Center, as well as the Fair Haven Public Library. We have also reached out to various cultural organizations, including the Long Wharf Theatre, Bregamos Community Theatre, Proyecto Cimarron, and the Neighborhood Music School.

PLANT 64

Winston-Salem, NC



Total Development Cost
\$56,821,382

Completion Date
October 2014

Units
242 units

DESCRIPTION

In October of 2014 Pennrose Properties, together with development partner C.A. Harrison Companies, LLC (CAH), leveraged its mixed-used and historic rehabilitation expertise to open its first ever development in the Winston-Salem market, Plant 64 Apartment Homes. Plant 64 is a robust mixed-use development project in downtown Winston-Salem, NC. The \$57 million, adaptive re-use development boasts 423,000 sf of total space across five buildings, and was constructed by historic renovation specialists, Capstone Building Corporation. Originally built in 1916, it is the site of one of the oldest R.J. Reynolds tobacco buildings. Plant 64 combines the timeless nostalgia of the early 20th century Winston-Salem Americana with the contemporary luxury of modern day living.

During the course of the focused 17 month construction period, the development team worked diligently with local, state and federal agencies to transform this aging and underutilized Winston-Salem asset to house 242 loft-style apartment residences complete with fully outfitted resident amenity areas, and 10,000 sf of commercial space. The development utilizes a combination of 198 structured and 54 surface spaces to maximize the site's programmable resident-focused spaces, while delivering ample parking area for its commercial tenants.

The spacious 1, 2, and 3 bedroom apartments are uniquely tailored to the complex's former industrial structure to create spacious, well-lit environments ideal for living, working and entertaining. The residences at Plant 64 are thoughtfully designed with comfort and convenience in mind, and are stylishly appointed with a number of premium materials

and finishes, including: 13 foot ceilings, designer kitchens featuring high-grade stainless steel appliances and granite countertops, floor-to-ceiling windows, spacious closets, washers and dryers, and access controlled entryways.

In addition to the fully outfitted apartment residences, the development boasts a combination of amenities unique to the Winston-Salem market, including: a seasonal salt water pool, outdoor theater and bistro, fire pits, immediate access to proposed Winston-Salem rails to trails walkway, roof terrace and grill, sundeck, outdoor kitchen and grill, 24-hour fitness center, indoor basketball court, community lounge with HDTV and games, pet wash station, resident lounge and business center, and covered parking.

Plant 64 was financed with Federal Historic Tax Credits, State Historic Tax Credits, developer equity, private equity, and private debt.

WARNER AND SWASEY

Cleveland, OH



Total Development Cost
\$60,000,000 (Projected)

Completion Date
Summer 2026 (Projected)

Units
140 units

DESCRIPTION

The Warner and Swasey redevelopment will be a dynamic mixed-used, mixed-income, mixed-population historic adaptive reuse of the former Warner & Swasey manufacturing plant into a vibrant community providing workforce housing and office space oriented to the technology and manufacturing fields with an emphasis on associated workforce development opportunities that connect residents to economic opportunity. Our vision is that Warner and Swasey will serve as a symbol of the revitalization of the MidTown neighborhood and Cleveland at large in context to the rich heritage this building communicates. A revitalized Warner and Swasey will serve as a gateway to the growing Innovation District to the east.

The Warner & Swasey Co. building, listed on the National Register of Historic Places, is representative of the immense impact of the Warner & Swasey Company as a world leader in the manufacturing of high-quality craftsmanship of machine tools, telescopes, and precision instruments. Their impact to the advancement of engineering through their overlapping of the craft of toolmaking and instrument-making, not only affected the success of their company, which continued more than fifty-years after their deaths but recognized both men as major actors in the advancements of the field of engineering.

Now owned by the City of Cleveland, this 200,000 GSF 5 story elegant shell is poised for a dramatic adaptation. W&S is strategically located on one of the major thoroughfares, Carnegie Ave, connecting the job centers of Downtown Cleveland and University Circle. The Warner & Swasey Co. Building redevelopment will bring new investment and life to this massive vacant and blighted brownfield building. The neighborhood has seen an influx of investment in transit options like the HealthLine, a bus rapid transit line that connects the major job centers of University

Circle and Downtown Cleveland, as well as other public and private investments in innovation, technology, and housing. It will have a positive impact on the community by offering affordable housing while removing blight through rehabilitation of a vacant historic building in a prominent location in the burgeoning neighborhood of MidTown. It will further create a gateway to the Innovation District neighborhood using a highly visible building to engage commuters, and the Cleveland community at large and encourage further redevelopment. The Warner and Swasey project has broad support from multiple local and state level agencies, the Mayor of Cleveland, the City of Cleveland Department of Development, the Ward City Council person, the Cuyahoga County district representative and more.

The project will create approximately 91,000 NSF in 140 units in a mix of 1-, 2- and 3-bedroom units on the upper floors. The residential units offer senior and workforce housing affordable to households earning between 30% and 60% of Area Median Income (AMI), as well as market rate workforce housing affordable to households earning 60% to 120% AMI. This mixed-tenure and mixed-income approach creates a dynamic mixed-income affordable housing solution that serves a spectrum of existing and new MidTown District residents.

The ground floor of the existing buildings will house approximately 20,000 SF of office space targeted towards organizations with a focus on technology and manufacturing with an emphasis on workforce development and supportive service programs which create opportunities for residents and the community at large. While we are still in negotiations with specific tenants, we anticipate a dynamic interaction between the activity happening in the commercial spaces and the residents living above.

D. Team and Organization

Penrose, LLC

Developer

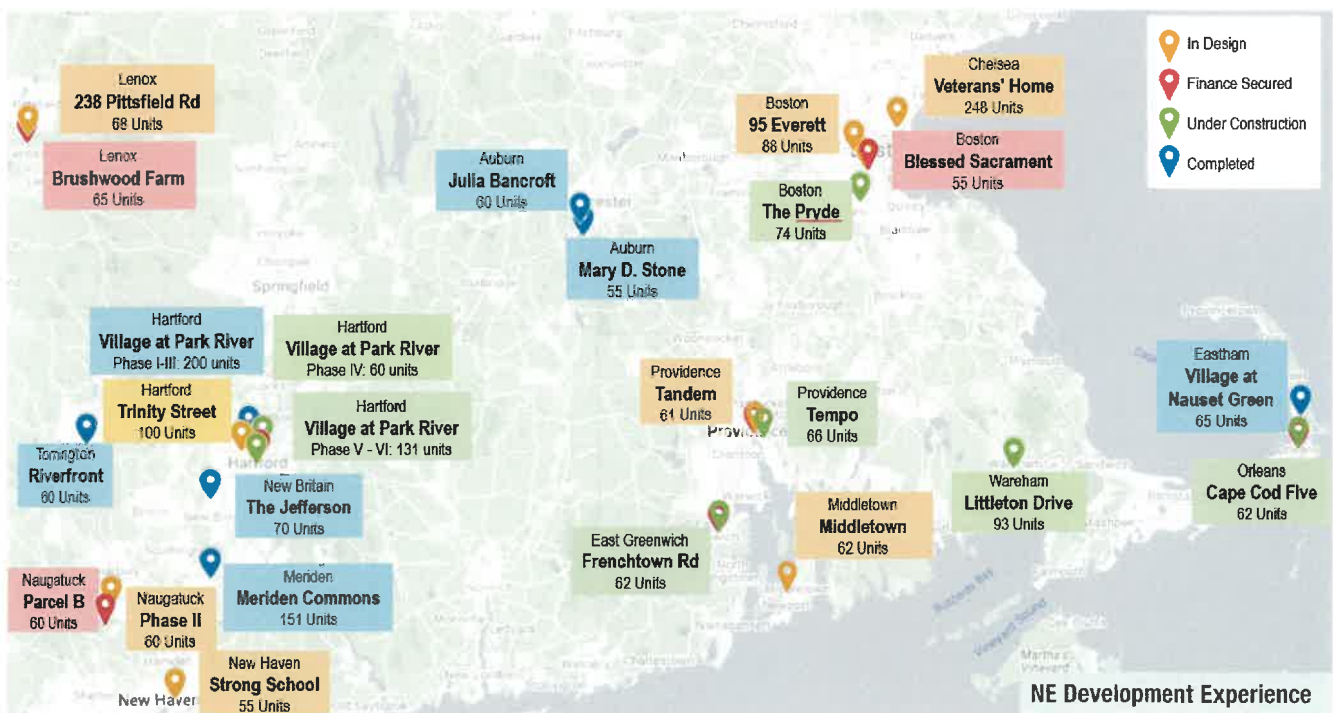
50 Milk Street, 16th Floor, Boston, MA 02109
Contact: Charlie Adams, Regional Vice President
Telephone: 857.415.4650

PENROSE
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Penrose, LLC is a premier multifamily development company with the necessary expertise to bring together all aspects of development in a way that exemplifies quality while creating value in both the short and long term. Penrose is a private full-service real estate development firm, which has been active in real estate development, through principals or affiliates, for 50 years. During this time Penrose has developed over 27,000 rental housing units. Penrose has developed more than 4,500 units in the last five years alone, representing over \$5 billion in total development costs. Penrose's portfolio includes more than 350+ distinct developments in seventeen states plus the District of Columbia and the U.S. Virgin Islands, the vast majority of which Penrose continues to own and manage. Penrose offers extensive expertise in complex urban developments, including mixed-use development for market-rate, workforce, and mixed-income communities. From new construction to historic preservation, Penrose maximizes value and provides outstanding quality.

Penrose's custom approach and commitment to its residents, investors, owners and personnel distinguishes the firm from its peers within the industry. Penrose has achieved an outstanding reputation for excellence, in the quality of the residential units produced and in the manner in which these are maintained. As an innovator in building design, Penrose delivers lasting value for its customers and for the multifamily housing market. No two developments in our portfolio are the same, each is unique to the communities in which we work and catered to the needs and desires of community stakeholders.

Penrose developments have won numerous awards for project design and community revitalization. These awards are a testament to not only what Penrose develops, but how the company approaches development. In all its projects, Penrose maintains a firm commitment to achieving financial, social and environmental sustainability. Penrose has incorporated Leadership in Energy and Environmental Design (LEED) into many projects, understanding that green & LEED developments produce fundamentally better buildings and communities that are more comfortable, more efficient, more appealing, and ultimately more affordable. Penrose recently completed construction on five Passive House residences including – the first



multi-family affordable Passive House development in Connecticut by the Boston office. Pennrose continues to be on the forefront of sustainable design for affordable and mixed-income housing, showing successful experiences in development and obtaining financing for these design standards as well as other sources to facilitate energy efficient project development.

Our qualifications and capability are exemplified in that triple-bottom-line commitment, as well as in our track record in partnering with cities/towns, and community groups to revitalize communities; our ability to coordinate the efforts of a diverse team of experienced professionals through all phases of development; our experience in shepherding developments through community processes; our experience with an array of financing methods, both public and private; and, the scores of projects we have developed through close collaborations with community groups. Pennrose's unrivaled combination of experience, reputation for quality, financial capacity, and commitment to developing successful, thriving communities position us to successfully lead the development.

Pennrose is an expert in the implementation of projects involving successful partnerships and public engagement processes. Pennrose has successfully collaborated with over 100 municipalities and even more local community organizations to develop projects. Pennrose understands that these partners act as a gateway to the community and Pennrose has established a successful record in partnering with cities and towns in the planning and implementation of its developments. The ultimate success of the design process for the development will depend on the ability of the development team to effectively communicate with and engage various community stakeholders, in an open and inclusive planning process. Pennrose is committed to facilitating that process and possesses the experience to do so.

Pennrose employs a staff of seasoned, credentialed developers made up of licensed realtors, engineers and professionals with advanced degrees in such areas as real estate, architecture, business administration, city planning and public policy. Its developers have expertise in all facets of real estate development, including acquisition, finance, construction, management, and maintenance. The experience, dedication, and stability of its employees, who focus specifically on real estate development have been the key to the continued success of Pennrose.

Historic Rehab Experience

Pennrose has completed 47 historic rehabilitation projects totaling close to 2,300 units at nearly \$500 million in development costs. In New England, Pennrose has recently rehabilitated and repurposed the Mary D. Stone School, which won the Affordable Housing Finance Deal of Year Award in 2022 and the Julia Bancroft School in Auburn, MA. The New England office is also completing the former William Barton Rogers School in Boston, MA into the first LGBTQ+ affirming development in Massachusetts. When complete, this senior housing complex, now called The Pryde, will house 74 seniors and will provide





10,000 square feet of community space to be used by the neighborhood as well as the residents. Pennrose is currently in predevelopment of the Horace Strong School in New Haven, CT, Blessed Sacrament in Boston, MA, and Veterans Home at Chelsea, in Chelsea, MA.

Mixed Income Housing Experience

Pennrose has successfully completed over 350+ affordable and mixed-income deals company-wide. The backbone of our work is affordable, workforce, and mixed-income rental housing. Over the last ten years alone, we have completed 90 multi-family deals. We have leveraged our breath of experience in raising private equity and public funds, to execute mixed-income projects in what are sometimes considered unproven markets for market rate developments. Pennrose's continued increase in business in the face of escalating competition for limited resources is a testament to the quality of the Pennrose product and the manner in which the team conducts its business. In fact, since 2010, Pennrose has raised over \$530,000,000 in private tax credit equity, accounting for almost half of total development costs for these developments. Historically, Pennrose has received the highest rates in the industry for the sale of Historic and Low Income Housing Tax Credits. Pennrose also has strong banking relationships as evidenced by its completion of over 27,000 affordable and market-rate residential rental units in seventeen states and the District of Columbia.

Pennrose is consistently ranked as one of the top affordable housing developers in the country and in 2022 was named the sixth largest affordable housing developer in the country. This record of performance has made Pennrose one of the larger, and in some cases the largest, producer of Low Income Housing Tax Credits sold to Wells Fargo, Bank of America, TD Bank, JP Morgan Chase, and a host of other National and Regional tax credit investors. The breath of this LIHTC experience has given Pennrose in-depth knowledge of the program and of the regulatory framework for affordable housing developments.

BRICKS & MORTAR

PENNROSE

HEART & SOUL

By the Numbers:

27,000+
UNITS DEVELOPED

350+
DEVELOPMENTS

200+
INDUSTRY AWARDS WON

\$5 billion
OF DEVELOPMENT COMPLETED

6th
LARGEST AFFORDABLE HOUSING DEVELOPER (2022)

470
EMPLOYEES

100+
PARTNERS

50
YEAR HISTORY

12,000+
UNITS MANAGED

15+
NEW DEVELOPMENTS EACH YEAR



Residences at Roosevelt Park, Edison, NJ



tat



SERVICES

Architecture
Interior Design
Master Planning
Moderate Rehabilitation

tat

PROJECT TYPES

Academic | Athletic + Community Centers
Assisted Living
Commercial
Healthcare | Science + Technology
Historic Preservation | Restoration + Adaptive Reuse
Hospitality + Mixed-Use
Multifamily
New Construction
Senior Living
Waterfront



The Architectural Team. Since 1971, the master planning, architecture, and interior design firm, The Architectural Team (TAT), has been recognized for its thought leadership and diverse portfolio of acclaimed design solutions. The 95+ person firm has earned more than 200 awards for design excellence across a broad range of building types and programs, including new construction of large-scale urban mixed-use developments, multifamily, commercial, waterfront and hospitality developments, assisted and senior living facilities, and community centers.

TAT holds a national reputation in the areas of historic preservation, rehabilitation, and adaptive reuse—transforming neighborhoods across the United States by artfully restoring and reimagining neglected buildings for new uses while simultaneously preserving history.

The firm's distinctive design solutions are a result of TAT's ability to understand and draw inspiration from the client's vision, while respecting the character and quality of the natural and built environment. Thoughtful solutions begin with client goals. These goals evolve through collaborative relationships and come to life through the insight and expertise of TAT's design teams.

As trusted advisors and active listeners, TAT is dedicated to creating positive and lasting transformation in the communities it serves.



200+ DESIGN EXCELLENCE AWARDS

85% BUSINESS THROUGH REPEAT CLIENTS

53 YEARS OF EXPERIENCE

29 STATES IN WHICH TAT IS LICENSED

46% WOMEN

95+ TAT TEAM MEMBERS

54% MEN

350+ HISTORIC ADAPTIVE REUSE DEVELOPMENTS

155,000+ UNITS

1,250+ MULTIFAMILY DEVELOPMENTS COMPLETED

project team



Michael D. Binette

AIA NCARB | Senior Partner + Managing Principal

As managing principal, Mike is responsible for establishing and implementing the long-term goals and objectives of the firm. With over 35 years of experience, he is adept at coordinating and managing teams for complex developments in the multifamily, mixed-use, senior, and commercial sectors. He has a value-based approach to design that seeks first to understand the client's goals and then identify strategic opportunities for greater return. His extensive understanding of the construction process and technical interdependence of all elements results in efficient project delivery with high levels of client satisfaction. Mike's award-winning work has earned recognition from the Boston Society of Architects and the National Housing and Rehabilitation Association, among others.

JOINED THE ARCHITECTURAL TEAM

1982

EDUCATION

Wentworth Institute of Technology
Bachelor of Science in Architectural Engineering

PROFESSIONAL AFFILIATIONS

American Institute of Architects
Boston Society of Architects
National Council of Architectural Registration Boards
National Fire Protection Association
National Housing & Rehabilitation Association
U.S. Green Building Council
Urban Land Institute

PUBLIC AND PROFESSIONAL SERVICE

CURRENT ROLES

Federal Home Loan Bank of Boston's Affordable
Housing Development Competition
Design Mentor
Boston Society of Architects
Housing Committee Member

FORMER ROLES

Chelsea Neighborhood Developers Committee
Committee Member
Masconomet Regional School Building Committee
Committee Member
Boston Society of Architects Housing Committee
Committee Chairman

AWARDS

Mike is honored to have his work recognized by notable professional and trade associations, including the Boston Society of Architects, Massachusetts Historical Commission, Boston Preservation Alliance, and Urban Land Institute

PUBLICATIONS

Tax Credit Advisor
"Multi-Credit Case Study: Evergreen Village"
McKnight's Senior Living
"Minding the 'Gap'"
Eco Structure; by R. Verrier + M. Binette
"Bridging the Gap"
Architects + Artisans
"In Boston, Re-knitting the Fabric"
EDC; by R. Verrier + M. Binette
"Old Mills New Lives"

REGISTRATIONS

Alabama, Arizona, Arkansas, Colorado, Connecticut, Delaware, District of Columbia, Florida, Georgia, Illinois, Indiana, Kansas, Kentucky, Maine, Maryland, Massachusetts, Michigan, Minnesota, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Texas, Virginia, West Virginia

★ BOWER, BOSTON, MA

A new LEED Gold and Fitwel Certified, \$240M mixed-use air-rights development which includes two buildings at eight and 14 stories consisting of 312 luxury units, 40,000 square feet of commercial space, and public and private parking for 189 vehicles.

★ HARBOR PLACE, HAVERHILL, MA

The design of a new mixed-use waterfront development featuring two new midrise buildings: a five-story, 58,000 square foot commercial building; and a six-story mixed-use building with ground floor riverfront restaurant space, commercial uses, and 80 residential units.

★ SIBLEY SQUARE, ROCHESTER, NY

The historic adaptive reuse of a former 1.1M square foot department store into a vibrant mixed-use urban center including multifamily, commercial, ground floor restaurants and retail, high-tech incubator space, and senior rental apartments.

★ ARLINGTON 360, ARLINGTON, MA

A new market-rate multifamily community located on the 18-acre former Symmes hospital campus offering 200 units in a mix of midrise buildings and for-sale and townhomes, with ample resident amenities, garage, and surface parking.

★ THE ARCHER RESIDENCES, BOSTON, MA

The integration of two former Suffolk University buildings into one 172,000 square foot structure and the addition of a penthouse, resulting in 62 luxury condominium units in the heart of Boston's renown Beacon Hill neighborhood. The new building is designed to achieve LEED Silver Certification.

★ THE ANNE M. LYNCH HOMES AT OLD COLONY, SOUTH BOSTON, MA

A new six-phased affordable housing development comprised of apartments and townhomes, offering residents a new LEED Gold Certified learning center and social services. Phase I consists of 116 LEED Platinum Certified units, Phase II of 169 units, and Phase III of 301 units, 55 of which are Passive House Certified. Phases IV, V, and VII will provide an additional 342 units.

Michael D. Binette

AIA NCARB | Senior Partner + Managing Principal

★ THE METROPOLITAN, BOSTON, MA

The new construction of a 23-story mixed-use development in Boston's Chinatown neighborhood. The community includes 118 condominiums, 133 rental apartments, retail, commercial, and community program space.

EVERGREEN VILLAGE AT BLOOMINGTON, BLOOMINGTON, IN

Located on a 6.2-acre site, this new 115 unit affordable assisted living community serves an emerging demographic of moderate-income, Medicaid-eligible seniors who earn less than 60% of the area's median income.

WHITE PLAINS INSTITUTE FOR HEALTHCARE & REHABILITATION, WESTCHESTER, NY

Located in a densely populated urban center, this new \$60M state-of-the-art five-story rehabilitation and skilled nursing facility serves a broad range of medically complex patients. The 110,000 square foot community consists of 42 long-term skilled nursing beds, 76 subacute care beds, and a 42-bed memory care neighborhood.

ONE CHESTNUT PLACE, QUINCY, MA

A \$75M new luxury 15-story transit-oriented building situated in the heart of Quincy with water views and 4,000 square feet of ground floor retail. Amenities include a fitness center, concierge services, an upscale lounge with elegant millwork, Amazon Hub lockers, dramatic stone walls, and a clubroom with work pods.

★ TREADMARK, DORCHESTER, MA

New construction of a 83 unit six-story sustainable TOD structure that maintains a strong visual connection to the former Ashmont Tire shop it replaced. The \$45M mixed-income building is enveloped in grey ironspot brickwork interspersed with clean, vertical aluminum panels that give it a modern feel.

★ LOFT FIVE50, LAWRENCE, MA

The first and second phases of the redevelopment of historic Malden Mills into a LEED for Homes Certified mixed-income, 75 unit community with a public riverwalk and a 130,000 square foot 62 unit affordable multifamily complex with a mix of one-, two-, three-, and four-bedroom layouts.

MARY ELLEN MCCORMACK, BOSTON, MA

The phased redevelopment of the first public housing complex in New England. Approximately 3,000 new units will replace the 1,061 existing 80-year-old units, creating a new mixed-income community including 18 new buildings and 2.3 acres of open space.

AVALONBAY COMMUNITIES, VARIOUS LOCATIONS, USA

With the successful completion of over 3,400 multifamily units, TAT proudly continues a long-standing relationship of providing insightful and pragmatic architectural and interior design solutions for Avalon properties nationwide.

related work





Cape Cod Five

Orleans, MA

SERVICE

Architecture
Moderate Rehabilitation

TYPE

Multifamily
New Construction

CLIENT

Pennrose Properties

SIZE

82,600 sf





Walker School Apartments

Taunton, MA

SERVICE

Architecture
Interior Design

TYPE

Historic Preservation | Restoration +
Adaptive Reuse
New Construction
Senior Living

CLIENTS

Affordable Housing & Services
Collaborative, Peabody Properties

SIZE

47,021 sf





Residences at Wells School

Southbridge, MA

SERVICE

Architecture
Interior Design

TYPE

Historic Preservation | Restoration +
Adaptive Reuse
Senior Living

CLIENT

Arch Street Development +
WinnDevelopment

SIZE

117,655 sf





The Machon

Swampscott, MA

SERVICE
Architecture

TYPE
Historic Preservation | Restoration +
Adaptive Reuse
New Construction
Senior Living

CLIENT
B'nai B'rith Housing
Peabody Properties

SIZE
40,199 sf





Voke Lofts

Worcester, MA

SERVICE

Architecture

TYPE

Historic Preservation | Restoration +
Adaptive Reuse
Multifamily

CLIENT

WinnDevelopment

SIZE

116,306 sf





Livingston School Apartments

Albany, NY

SERVICE

Architecture
Interior Design

TYPE

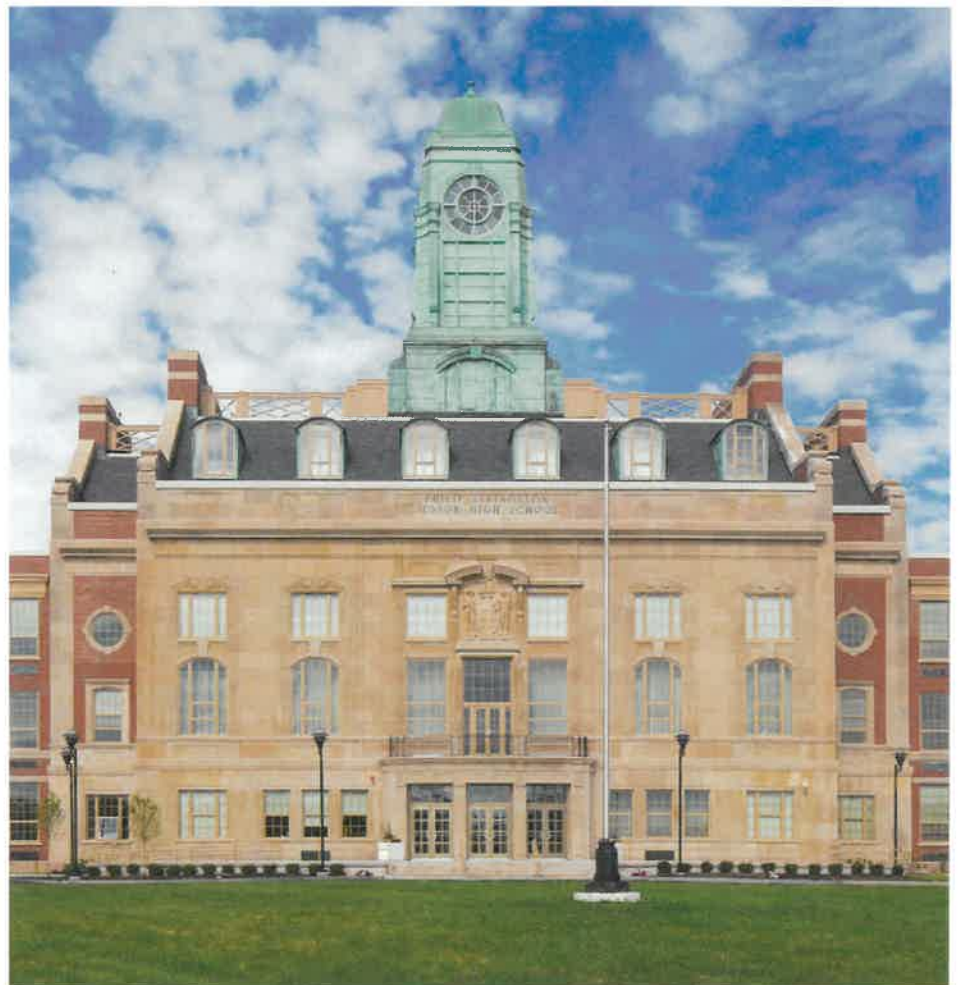
Historic Preservation | Restoration +
Adaptive Reuse
Senior Living

CLIENT

WinnDevelopment

SIZE

230,000 sf





The Tyler

East Haven, CT

SERVICE

Architecture
Interior Design

TYPE

Historic Preservation | Restoration +
Adaptive Reuse
Senior Living

CLIENT

WinnDevelopment

SIZE

104,871 sf





Bethany Apartments

Hanover, MA

SERVICE

Architecture
Interior Design

TYPE

Multifamily
Historic Preservation
Restoration + Adaptive Reuse

CLIENT

Planning Office for Urban Affairs

SIZE

58,375 sf



Pennrose Management Company

Property Manager

1301 North 31st Street, Philadelphia, PA 19121

Contact: Marsha Blunt, President

Telephone: 267.386.8730

PENNROSE

Bricks & Mortar | Heart & Soul

Since its inception in 1981, Pennrose Management Company (AMO®), has earned a reputation as a leader in the field of affordable and mixed-income housing management. Our singular approach to management, our commitment to our residents, investors and personnel, and our multi-faceted relationships with state and other regulatory agencies sets us apart from other housing management providers. As a provider of professional property management, consulting and auxiliary services to property owners including non-profit and public agencies as well as private sector entities; Pennrose administers over \$35 million in annual budgeted operations with a staff of approximately 400 employees.

Our management portfolio continues a trend of dramatic growth and great diversity, currently consisting of 160 properties, with approximately 13,000 units, in eleven states/districts. Our growth has averaged 1,000 to 1,500 units per year since inception, with even greater growth projected in the foreseeable future.

PMC continues to be recognized and has won numerous awards and accolades for excellence in service. Although too numerous to list, at the PennDel AHMA Fall 2016 Management Conference, Pennrose Management Company received an "Excellent Rating" and at last year's New Jersey Apartment Association Garden State Awards, PMC was selected as the Management Company of the Year (Affordable).

PMC participates in all Pennrose's developments, from concept to planning, through design and development, and into construction of the housing units, well before they might assume any management responsibility in the operation of the units. This type of participation better assures development of units that addresses effectively the needs of that population constituting the documented demand in the professional market studies. It also better assures adequate consideration of efficient functioning of common areas in the design of buildings, efficiencies in operating costs and proper design/careful selection of materials, fixtures and equipment to assure long-term durability and cost-effective maintenance.

An ACCREDITED MANAGEMENT ORGANIZATION® FIRM, Pennrose Management Company has earned a reputation for excellence in long-term management, maintenance, and the provision of social services. PMC also utilizes regional and portfolio-wide procurement, which incorporates in its bid process, in addition to pricing, the extent to which contractors and vendors commit to train/hire residents of properties that PMC manages in the operation of their businesses.

MARSHA BLUNT

President, Pennrose Management Company

Education: Bachelor of Science, Business Administration, Strayer University

Experience: 18 years with the firm | 25+ years in the industry



As President of Pennrose Management Company, Marsha Blunt is responsible for the financial and operational performance of the organization, overseeing the property operations, risk management, compliance, and maintenance departments and increasing the management company capacity to support development activities. She was promoted to this position in January 2024 after serving as Vice President of Operations. Marsha has been a valued member of the Pennrose team since joining the organization in 2006, serving as regional property manager and later regional vice president, where she oversaw 2,400 units in New Jersey and Pennsylvania. Most recently, she served on the executive team as vice president of operations, where she provided property management oversight for communities across Pennsylvania, Maryland, Washington, D.C., and the southeast. Prior to joining Pennrose she held other positions in multifamily management, including Property Manager with Vesta Camden Urban Renewal. Marsha has extensive experience leasing-up and managing affordable housing programs, including LIHTC, HUD 202, Section 8, HOME, Hope VI, ACC, and Housing Choice Voucher. Marsha holds her Certified Occupancy Specialist (COS) and Blended Occupancy Specialist (BOS) certifications.

RELEVANT EXPERIENCE



Mary D. Stone and Julia Bancroft Schools, Auburn, MA

±\$40M | 115 Units

The Mary D. Stone School is a 55-unit, senior, mixed-income, historic rehabilitation project in Auburn, MA. Similarly, the Julia Bancroft School will be a 60-unit, senior, mixed-income, historic rehabilitation project in Auburn, MA. Both projects were won through a competitive RFP process, one for each school, driven by the town of Auburn in 2015.



Residences at Roosevelt Park, Edison, NJ

±\$22M | 85 Units

The Residences at Roosevelt Park is a historic renovation and adaptive reuse of the Roosevelt Hospital building in Edison, NJ. Pennrose undertook this project along with Middlesex County, NJ who owns the land. Residences at Roosevelt Park provides 85 units of affordable housing for seniors, with 22 units set aside for veterans.



Saint Luke's Manor I & II, Cleveland, OH

±\$39M | 137 Units

The City of Cleveland as a whole experienced tremendous loss of population and investment in the last 40 years. Changing the trend of this loss is Saint Luke's Manor, the landmark building in the center of the neighborhood design transformation consisting of more than 20 acres being redeveloped into an intergenerational community consist of 137 affordable apartments for seniors.



Plant 64, Winston-Salem, NC

±\$56M | 242 units

Located in the Wake Forest Research and Innovation district, adjacent to the Wake Forest Medical School, Plant 64 is a class A loft-style apartment redevelopment. This project is the adaptive reuse of the former R.J. Reynolds Factory 64 buildings, an 1800's tobacco factory. The project site contains five separate buildings.

JENNIFER HAYWARD

Vice President of Transition Management, Pennrose

Education: Bachelor of Science in Communications, Ashland University

Experience: 14 years with the firm | 30+ years in the industry



Jennifer Hayward serves as the Vice President of Transition Management, playing a pivotal role in the responsibilities related to taking developments from the conceptual stages through timely occupancy stabilization. She is the primary liaison between Pennrose, LLC and Pennrose Management Company for the successful integration of newly constructed and/or renovated properties into PMC's property management operations. Ms. Hayward joined Pennrose Management Company in February 2011 as a Regional Vice President of Operations. Her portfolio consisted of more than 2,600 conventional, tax credit senior, student, and family rental units which total more than 42 communities in Pennsylvania, New Jersey, Connecticut and Ohio. She led a team that included four Regional Property Managers, and over 100 employees. Prior to joining Pennrose Management Company, Ms. Hayward worked for over five years as the Director of Multifamily Management with a private firm who owned and managed multifamily and commercial assets throughout the Midwest. Earlier, she worked with AIMCO as a Regional Property Manager overseeing up to 26 assets in Michigan and Ohio. Ms. Hayward's responsibilities included overseeing every facet of the portfolios, creating/building company structure, and supervising the employees at all levels within the portfolios.

RELEVANT EXPERIENCE



Plant 64, Winston-Salem, NC

➦ \$56M | 242 units

Located in the Wake Forest Research and Innovation district, adjacent to the Wake Forest Medical School, Plant 64 is a class A loft-style apartment redevelopment. This project is the adaptive reuse of the former R.J. Reynolds Factory 64 buildings, an 1800's tobacco factory. The project site contains five separate buildings.



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Village at Park River Phase I, II, and III, Hartford, CT

➦ 200 Units

Village at Park River will feature 420 new high-quality housing units when completed, including both rental and homeownership opportunities. In partnership with the Housing Authority of the City of Hartford and The Cloud Company, the project provides replacement of the City's stock of affordable housing units, as well as acts as a catalyst for reinvestment and commercialization in the Upper Albany Neighborhood.



Meriden Commons Phase I and II, Meriden, CT

➦ 151 Units

Pennrose completed the multi-phase redevelopment plan with the City of Meriden and the Meriden Housing Authority to redevelop the 140 unit Mills Memorial public housing site. The site was the subject of a Master Developer RFP, won by Pennrose and The Cloud Company in 2012. Meriden Commons is a mixed-used, mixed-income community, revitalizing the downtown core.

SHANNON MOWERY

Vice President of Community Impact, Pennrose

Education: Bachelor of Science, Biobehavioral Health, The Pennsylvania State University
Experience: 19 years with the firm | 20 years in the industry



Shannon Mowery, one of the company's longest tenured team members, serves as Vice President of Community Impact. In this role she oversees all aspects of Pennrose's outcomes-driven approach to providing on-site support and resources to help residents achieve their goals. In 2023, her responsibilities were expanded to include oversight of activities related to the Pennrose Foundation, DEI, and corporate citizenship. Shannon is also responsible for new program design and implementation and working with Pennrose Development team members. She is responsible for developing and managing community partnerships for all future developments, including those needed for low-income housing tax credit and Federal HOME Loan Bank applications, as well as ensuring that every site within the 170+ property portfolio meets the individual program obligations that were a part of each property's original plan.

RELEVANT EXPERIENCE



William Barton Rogers School (The Pryde), Boston, MA

+74 Units

Pennrose will reactivate the former school as a vibrant, welcoming, and inclusive space that will not only house the seniors of Hyde Park but also celebrate the history of the school and neighborhood. The historically redeveloped senior development will include 74 units available at a range of incomes, from 30% of AMI to 100% AMI. The Pryde will be the first LGBTQ-friendly development in New England.



Mary D. Stone and Julia Bancroft Schools, Auburn, MA

+115 Units

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Village at Nauset Green, Eastham, MA

+65 Units

Village at Nauset Green is a sixty-five (65) unit multifamily development located in Eastham, Massachusetts. The 11.2-acre development site was acquired by the Town of Eastham and designated for use as affordable housing. The development was financed using a variety of sources including LIHTC's and DHCD.

Innova Services Company & Innova Building Advisors

Construction Admin. & Sustainability Consultant

1548 S. 16th Street, Philadelphia, PA 19146

Contact: Benton Blackburn, Principal

Telephone: 215.336.0440



Innova's mission is to preserve and create energy-efficient and affordable housing while contributing to the sustainable redevelopment of transitional neighborhoods. Innova has overseen the design and construction of affordable housing and mixed-use developments valued at over \$2.3 billion, with new projects totaling more than \$200 million annually throughout the eastern United States. Innova represents owners in the design and construction phase of new construction, historic rehabilitation projects and large-scale capital improvements. Our construction professionals give special attention to moisture mitigation, energy efficiency, mechanical systems integration, component durability, and long-term maintainability. Drawing on its property maintenance expertise, Innova can inform the design and construction process in a way that uniquely focuses attention on building sustainability and maintainability as well as occupant safety and comfort.

Innova serves as the Owner's Representative in the design and construction of affordable housing and mixed-use developments. Its focus is to advance building practices that maximize resource efficiency, component durability, and systems maintainability. Innova's Project Management portfolio is comprised of more than 200 multifamily and mixed-use projects valued at more than \$2.2 billion - over 12,000 units in all - including large scale transit-oriented developments, new town centers and historic rehabilitations; from exurban green fields to New York City brown fields.

As Building Advisors, Innova is a certified Energy Star pattern, Passive Consultant, PHIUS+ Verifiers, and NGBS Green verifiers, focused on the multifamily industry. Innova performs whole building modeling, energy audits and capital needs assessments; enabling multifamily clients to devise smart approach to achieving very low energy buildings with improved durability and maintainability.

Innova's core expertise is in understanding the needs of existing buildings. They are PCNA specialists and multi-family energy auditors, providing comprehensive needs assessments, sleuthing elusive building failures, and devising cost-effective retrofit strategies for increasing building efficiency, enhancing resident comfort and safety, and preserving affordable housing for the long term.

Innova Services Company grew out of a division of Pennrose, and is the Construction Administrator of choice for Pennrose and has completed over 100 projects for Pennrose.

BENTON BLACKBURN

Principal, Innova Services Company



Education: Bachelor of Arts, Dartmouth College
Experience: 17 years with the firm | 28 years in the industry

Benton Blackburn is a Principal of Innova and serves as Vice President of Operations. Ben has been with Innova since 2004, and has led its efforts in owner's representative services, general contracting, capital project management, and building diagnostic services. He has personally overseen the successful completion of a wide variety of housing projects, including single family, townhomes, historic rehabilitation, urban infill, high rise and student housing developments. In Innova's capacity as General Contractor, Ben has successfully led large-scale renovation projects, specializing in affordable multifamily housing including single family, townhome, historic rehabilitation, urban infill, high rise, and student housing developments. Ben has also successfully led large-scale renovation projects, specializing in affordable multifamily housing preservation projects with tenant in place. Ben has been a construction professional since 1993. Prior to joining Innova, Ben served as Project Manager for Denver-based Shaw Construction where he was responsible for \$100 million in construction projects per year.

RELEVANT EXPERIENCE



Frenchtown Road, East Greenwich, RI \$27M | 63 Units

Frenchtown Road Apartments is a 63-unit new construction affordable housing development in East Greenwich, RI. Co-developed by Pennrose, LLC and Cove Homes, Inc, the development is structured as a twinning 9% / 4% LIHTC project. The development features programmed community spaces, a landscaped courtyard, bike storage, and incorporation of solar PV throughout the community.



Parcel 9, Providence, RI \$31M | 131 Units

Parcel 9 - West is the first phase of a proposed two phase development located in Providence. When complete, the development will feature 131 residential units in studios, 1-BR and 2-BR. Parcel 9 will feature public outdoor spaces, ground floor retail, and includes a proposed partnership with a childcare provider to create four classrooms, two outdoor play spaces and dedicated staff space.



Cape Cod Five, Orleans, MA \$33M | 74 Units

Orleans Cape Cod Five consists of the re-use of a former bank headquarters building, combined with a new construction addition and two separate townhouse buildings, as mixed-income housing. Together, the refurbishment and new construction will provide 62 family rental units, including 52 affordable units and 10 workforce apartments.



Littleton Drive, Wareham, MA \$34M | 93 Units

Pennrose was selected via a competitive RFP process in the town of Wareham, Massachusetts to introduce affordable housing on an undeveloped, forested, publicly owned site. Pennrose has proposed a 49-unit, mixed-income non-age-restricted development with market, workforce, and affordable rents, plus an additional 44 age-restricted units in a senior housing building.

ADAM BLACKBURN

Vice President, Innova Building Advisors

Education: Bachelor of Arts, Amherst College
Experience: 12 years with the firm | 12 years in the industry



Adam Blackburn heads Innova's Innova Building Advisors consulting group. His area of expertise is consulting and energy performance certification for developers, designers and builders of multi-family housing. Adam has provided Passive House Verification and ENERGY STAR certification services for over 2,500 homes under both low-rise and high-rise standards. He has leveraged nearly \$2MM in energy efficiency incentives and rebates on behalf of affordable housing projects, and has overseen energy efficiency upgrades and capital improvement projects totaling more than \$10 million. Prior to joining Innova in 2009, Adam specialized in integration project management, accruing more than ten years' experience in coordinating engineering design and hardware installation on large-scale technology infrastructure projects. Adam holds a B.A. from Amherst College, is a Certified Passive House Consultant, PHIUS+ Passive House Rater, RESNET Certified Home Energy Rater, ENERGY STAR® for Multifamily High Rise Consultant, and Enterprise Green Communities Consultant.

RELEVANT EXPERIENCE



Village at Nauset Green, Eastham, MA

➦ \$23M | 65 Units

Village at Nauset Green is a sixty-five (65) unit multifamily development located in Eastham, Massachusetts. The 11.2-acre development site was acquired by the Town of Eastham and designated for use as affordable housing. The development was financed using a variety of sources including LIHTC's and DHCD.



Village at Park River, Hartford, CT

➦ \$71M | 420 Units

Village at Park River will feature 420 new high-quality housing units when completed, including both rental and homeownership opportunities. In partnership with the Housing Authority of the City of Hartford and The Cloud Company, the project provides replacement of the City's stock of affordable housing units, as well as acts as a catalyst for reinvestment and commercialization in the Upper Albany Neighborhood.



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**REQUEST FOR QUALIFICATIONS # 52-24 For Entities Engaged in
Permanent, Below Market Rate Housing Development for Municipal
Property at 35 Sherburne Road, Portsmouth, NH**

Avesta Housing Development Corporation, 501(c)3
307 Cumberland Avenue
Portland, ME 04101
207-553-7777
<https://www.avestahousing.org/estahousing.org>

Contact:
Patrick Hess
Director of Real Estate Development
207-653-2368
phess@avestahousing.org



Letter of Interest

June 7, 2024

Attn: Portsmouth City Council
1 Junkins Avenue
Portsmouth, NH 03801

RE: Sherburne School Site Redevelopment

Dear Councilors:

Thank you for the opportunity to respond to the Request for Qualifications for the redevelopment of the Sherburne School building and associated site. We envision partnering with the City of Portsmouth to redevelop this important community asset into permanent, below market housing. We believe the close alignment of our goals and our extensive experience collaborating with municipalities on similar projects makes Avesta Housing the best match for this opportunity to transform the Sherburne School site into a diverse and affordable community.

Sincerely,

A handwritten signature in blue ink, appearing to read "Patrick Hess". The signature is fluid and cursive, with a large initial "P" and "H".

Patrick Hess
Director of Real Estate Development
Avesta Housing



Background & Experience

Avesta Housing, founded in 1972, is a Portland-based nonprofit organization whose mission is to improve lives and strengthen communities by promoting and providing quality affordable homes for people in need. The organization has more than 300 employees, over \$420 million in assets, and an annual budget of \$57 million.

The organization currently owns and manages 100 affordable housing developments with more than 3,000 apartments in Maine and New Hampshire. The portfolio consists of state and federally assisted family and elderly/disabled housing, affordable rent-restricted apartments, mixed-income (affordable and market rate) rental developments, supportive housing for long-term homeless and visually impaired, and unrestricted workforce housing. Additionally, Avesta owns and operates two assisted-living facilities. Both assisted-living facilities offer private pay and MaineCare supported housing for seniors, which uniquely positions Avesta to house and support seniors requiring a higher level of care regardless of their income.

Avesta Housing has an extensive track record of effectively managing budgets, schedules, and project partners in the execution of complex real estate developments ranging in size from 12 to 100 plus units and up to \$50 million in total cost. The organization has developed more than 130 properties, totaling over 3,500 apartments and homes across 40 municipalities. The Real Estate Development department, a team of ten, has completed new construction, rehabilitation and adaptive reuse projects of varying complexities, mixed-use developments, and redevelopments of older buildings using historic tax credits. The organization has developed three projects for chronically homeless people using the Housing First model. In addition to development, Avesta also acquires existing rent- and/or income-restricted properties to help preserve affordable housing and has completed the development of 16 affordable condominiums to provide affordable homeownership opportunities in Portland.



While Avesta has not had the opportunity to develop permanent, below market housing in Portsmouth, we have developed in nearby Seacoast communities. In Exeter we own and manage 140 permanent, below market housing units in a phased four building development, and in Hampton Falls we developed 72 permanent, below market housing units in a phased three building development. We have experience securing financing from New Hampshire Housing and other NH-based partners to guide complex multi-phased developments to fruition.

Avesta's experience leveraging various funding sources to successfully develop or rehabilitate properties is one of its strengths. In the past five years, Avesta has secured Low Income Housing Tax Credits, State Housing Tax Credits, Federal and State Historic Tax Credits, a Congressionally Directed Spending grant (aka "earmarks"), a Northern Borders Regional Council grant, Community Development Block Grant funding, NeighborWorks capital grants, tax increment financing, conventional bank financing, and more than \$7 million in philanthropic donations, among other sources.



An important component of Avesta Housing’s development success is the competency of Avesta Housing Management Corporation. The Avesta Housing property management team has significant experience administering a number of affordable rental assistance programs under HUD, Rural Development, Low Income Housing Tax Credits, and other local, state, and federal housing programs. The Avesta development team collaborates closely with the property management staff and is able leverage the knowledge of property management to make well informed decisions to ensure we are developing sustainable properties that best serve our residents.

Avesta Housing provides leadership and support to the Maine Affordable Housing Coalition (MAHC), the state’s leading housing policy advocacy organization. In 2008, Avesta joined the national NeighborWorks America network, which is comprised of 250 nonprofit housing organizations throughout the country. In 2013, the Housing Partnership Network invited Avesta to join 98 leading housing organizations in the country in a network of strong, sophisticated, and cutting-edge housing organizations.

Background & Experience

Avesta draws upon years of relationships with the financial industry, funders, community leaders, and housing advocates in order to develop, acquire, and preserve hundreds of affordable units each year. Our skilled development staff contributes extensive management, legal, financial, community planning, and construction experience. Avesta adheres to smart growth principles, sustainability guidelines, and design standards informed by Avesta’s development and property management experience.

In addition to developing new properties, we also invest in Maine and New Hampshire’s large stock of older, affordable, multi-family housing, including developments regulated by USDA Rural Development, HUD, MaineHousing, and New Hampshire Housing. Using a full spectrum of available financial resources, Avesta recognizes the opportunity to acquire and recapitalize these properties rather than see them lost from the pool of affordable housing.

Of paramount importance to Avesta is the recognition that affordable housing is an essential community asset. To that end, Avesta has restored 15 historic properties in Maine and New Hampshire Housing over 600 apartments, including former public and parochial schools, a convent, an early 19th century farmhouse, and the home of a Civil War-era industrialist. Most of the properties are on the National Register of Historic Places. Avesta has been recognized by Maine Preservation, the Maine Real Estate & Development Association (MEREDA), and the Affordable Housing Tax Credit Coalition, among others, for our historic preservation work.

Property Name	City/Town	State	Units
Brick Hill Cottages	South Portland	ME	43
Butler Payson	Portland	ME	56
Central Street	Farmington	NH	11
Cousens School	Kennebunk	ME	28
Emery School	Biddeford	ME	24
Fox School	Paris	ME	12
Hyacinth Place	Westbrook	ME	37
Ingraham House	Portland	ME	12
Iris Park Apartments	Portland	ME	30
Munjoy Commons	Portland	ME	39
Park Street School	Kennebunk	ME	30
Prescott Heights	N. Berwick	ME	20
Seventy-Five State Street	Portland	ME	154
Southgate House	Scarborough	ME	38
Steeple Square	Westbrook	ME	73



We achieve award-winning restorations through careful research and thoughtful, expert execution. Key architectural details have been maintained where possible to preserve historic features of the buildings. We work closely with local Planning and Historic Preservation boards as well as civic leaders and neighbors to ensure robust stakeholder engagement, significant expert input, and best-in-class design.

Avesta is committed to the stewardship of natural and historic resources, and the reuse of existing buildings limits demand for raw materials and impacts on undeveloped land. We have found that combining attention to historic detail with an emphasis on high-quality design and construction creates healthy, energy-efficient homes.

Project Experience

Deering Place, Portland, ME

Located in downtown Portland, Deering Place is one of Avesta's most diverse developments and is a prime example of the careful and thoughtful process of resident and stakeholder involvement employed by Avesta. It includes a variety of building types and architectural styles, which we sought to refine in order to meet the existing character and charm of the Parkside neighborhood. Deering Place is a mixed income community of 75 homes in three apartment buildings in Portland's historic Parkside neighborhood. 61 Deering is new construction, 63 Deering is a renovation, and 510 Cumberland Ave is an adaptive reuse of an existing building plus an addition and enclosed parking. Residents enjoy onsite amenities including a community room, laundry facilities, and a parking garage. The city's Parkside Community Policing office is also located onsite, providing residents with immediate access to community services and programming.

With Deering Place, Avesta Housing provides a mixture of affordable and market-rate homes in the heart of downtown Portland. The campus' close proximity to nearby schools, medical facilities, public transit, retail and dining, recreational areas, and more make it an ideal location for affordable housing.

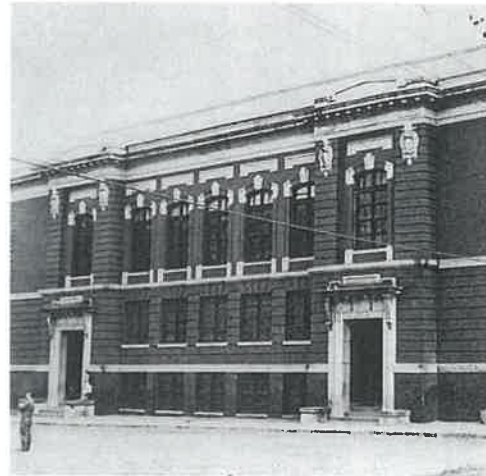
Total Development Cost (TDC): \$16,225,000



Emery School, Biddeford, ME

This Georgian Revival-style former school building was built in 1913 and the renovated building consists of 24 affordable apartments, completed in 2012.

Exterior renovations preserved the building's granite and cast stone trim, red brick façade, and large entrances. Avesta installed a new roof, which now features solar panels, and new windows. Inside, wide hallways showcase the restored original wood floors, tin ceilings, and wood trim. The apartments feature the original classroom chalkboards and glass-paned cabinetry that formerly held books. The auditorium and stage were converted into a community room for residents to socialize. A second community room on the first floor includes a shared kitchen and computers for resident use.



TDC: \$6,375,000



Park Street School, Kennebunk, ME

Avesta redeveloped the historic Park Street School into 30 affordable apartments for seniors in 2012. The project included the adaptive reuse of the former Kennebunk High School built in 1922 and construction of a new, two-story 15,000 square foot addition. The original wood and cast stone trim of the buildings' facades was replicated as part of the historic preservation. The renovation also retained many of the original historic details of the school, including classroom chalkboards and coat closets, slate floors, glass-paned doors and transom windows.



The reuse of an existing building, existing public space in particular, requires that any additions respect and honor the existing structure, while remaining distinct enough so as not to diminish its historic and community value. The marrying of structures, the old and the new, requires a good architect, a thoughtful team, and robust attention to detail. Avesta has a demonstrated track record in delicately combining the existing with the new and in so doing honoring a community's history and connection to place. Park Street school remains a vibrant part of Kennebunk community and has been reinvigorated with 30 affordable apartments and community gardens.

TDC: \$7,670,000





Development Team & Professional Qualifications

Rebecca Hatfield, President & CEO

Rebecca Hatfield joined Avesta Housing in 2015 and is the president & CEO, leading 300+ staff to provide safe, affordable homes and support services to 5,000 people every day. Prior to Avesta, Rebecca was a Senior Vice President at Citigroup, working in various roles within the commercial and corporate banks. She has over 15 years of experience in finance, with a focus on deal structuring, underwriting, risk analysis, and portfolio management, and has extensive experience completing real estate transactions.

Rebecca was named a Mainer of the Year in 2022 by Maine Magazine and a Woman to Watch in 2021 by MaineBiz magazine. She is the board vice chair and loan committee chair for Genesis Community Loan Fund and serves on the boards of the Gulf of Maine Research Institute, the John T. Gorman Foundation, and Camden National Corporation, the parent company of Camden National Bank. Previously, she served on the boards of the Maine Council on Aging and the Maine Real Estate and Development Association (MEREDA). Rebecca earned a B.S. in Computer and Information Science from University of Maryland and an M.B.A from University of California Los Angeles, Anderson School of Management.

Patrick Hess, Director of Real Estate Development

Patrick Hess started at Avesta Housing in 2017 and was promoted to his current role in 2022. Prior to Avesta, Patrick worked in a range of real estate, community, and economic development capacities for the City of New York, most recently as Chief of Staff for Development at the New York City Department of Housing Preservation and Development. He also worked on the construction of affordable housing with Habitat for Humanity – New York City as an AmeriCorps volunteer and site supervisor. Patrick earned a Bachelor of Arts in History from Boston College and a Masters of Urban Planning from New York University, Wagner Graduate School of Public Service. He was formerly certified with the American Institute of Certified Planners (AICP).

Amanda Gilliam, Vice President of Property Management & Resident Services

Amanda Gilliam joined Avesta Housing in 2014. Since that time, she has served in a number of roles on the property management team and has worked with our LIHTC, Rural Development and HUD properties across Maine and New Hampshire. In her current role, Amanda oversees Avesta's property management, maintenance, leasing, and resident services staff, as well as our reception and administrative support team. Amanda holds a Certified Occupancy Specialist, Certified Credit Compliance Professional and an RD 515 STAR, among a number of additional affordable housing certifications. She earned an MBA from the University of Southern Maine and a BS in International Business from Grove City College.

Todd Rothstein, Director of Construction Services

Todd Rothstein started at Avesta Housing in 2013 as the Director of Construction Services. He is responsible for overseeing design and construction of new developments and major-rehabilitation projects. Todd also works with our Property Management division staff to improve building efficiency to help ensure long-term sustainability of Avesta properties. Prior to joining Avesta, Todd worked for a construction management company as Project Manager and Business Development Manager. Todd earned a B.S. in Education from S.U.N.Y. Cortland and ROTC Certificate at Norwich University Military Academy in Northfield, VT. He is a certified Passive House consultant. Todd is a member of Efficiency Maine's Low-Income Advisory Group and Governor Mills' Maine Climate Council.



Nate Howes, Development Officer

Nate Howes joined Avesta in 2019 as a Development Officer. Prior to Avesta, Nate worked as a multifamily underwriter and low-income housing tax credit administrator for MaineHousing. At MaineHousing he oversaw projects from application to completion ensuring their financial solvency and regulatory compliance. Nate earned a Bachelor of Arts in History from George Washington University and a Master of Science degree in International Affairs: Conflict Studies from the London School of Economics and Political Science. He is also a certified tax credit underwriter under the National Development Council’s Rental Housing Development Financial Professional (RHDFP) program.

Current Work Schedule and Availability

Avesta Housing’s development team has a staff of ten highly qualified individuals. We diligently manage our pipeline to ensure that projects are adequately staffed and advance expeditiously. Based on our recently completed projects and current pipeline, we have availability to pursue the Sherburne School redevelopment project.

Project Name	Location	Units	Status	TDC
Porter Station	Portland, ME	60	Complete, 2023	\$21,310,000
River Turn I	Conway, NH	40	Complete, 2023	\$12,690,000
Snow School	Fryeburg, ME	28	Complete, 2024	\$9,665,000
Village Commons	Scarborough, ME	31	Complete, 2024	\$10,713,000
Meadowview II	Gray, ME	26	Est. Complete, 2025	\$9,819,000
Edgewater Village	Farmington, ME	25	Pre-construction, 2024 start	\$9,215,000
Seavey Street	Westbrook, ME	61	Pre-construction, 2024 start	\$22,978,000
River Turn II	Conway, NH	40	Pre-construction, 2025 start	\$15,000,000
Oxford Street	Portland, ME	48	Pre-construction, 2025 start	\$19,800,000
Williston-Immanuel	Portland, ME	33	Pre-construction, 2025 start	\$15,000,000

ABOUT JSA DESIGN

JSA Design | Architects Interiors Planners

273 Corporate Drive, Portsmouth, NH 03801
JSAinc.com

Founded in Portsmouth, NH, in 1980, JSA is a studio-based design firm focused on five market sectors: multi-family housing, senior living, higher education, healthcare, and commercial. We have developed our practice around building enduring client relations, rather than a specific project. The success of that strategy is evident in the fact that over 80% of our work is with repeat clients. We also have a non profit organization under the JSA umbrella, Access Navigators, an organization devoted to advocacy and information about accessibility for people impacted by disabilities. Visit accessnavigators.com



JSA principals are: Wm. North Sturtevant; Mark Moeller, AIA; Todd Hanson, FAIA; Sandra Hodge, IIDA, Caleb Sloan, AIA and Richard Martz, AIA. Staff includes architects registered in New Hampshire, Maine, Vermont, Massachusetts, Connecticut, New York, New Jersey, Pennsylvania, Kansas, South Carolina, Florida, Ohio and Utah.

Staff are affiliated with AIA, IIDA, SMPS and hold many professional accreditations including NCARB, LEED AP, EDAC, NCIDQ and CPSM.

In our forty-plus years we have worked with hundreds of clients. Recent notable clients include:

Addison Gilbert Hospital	Exeter Hospital	New Hampshire Hospital	State of New Hampshire
The American Skiing Company	Fidelity Investments	Northbridge Companies	SunBridge
Anna Jaques Hospital	Five Star Senior Living	Northeast Health Systems	Sunrise Assisted Living
AvalonBay Communities	Frisbie Memorial Hospital	Northeast Rehabilitation Hosp	Sunshine Retirement Living
Bates College	Genesis Health Ventures	North Hill	Taylor Communities
Beverly Hospital	Great Bay Community College	Oak Hill, Inc.	Timberland
Benchmark Assisted Living	Greystone Communities	Ocean Properties, Ltd.	Thomas College
Brattleboro Memorial Hospital	Hospital Corporation of America	Optima Health	Town of Lynnfield MA
Brighton Medical Center	John Hancock	Parkland Medical Center	US Military Academy
Brightview Senior Living	Maine Eye Care	Picerne Military Housing, LLC	University of Maine
Cancer Care Center of York Co	MaineGeneral Medical Center	Pigeon Cove Ledges	University of New England
Central Maine Orthopaedics	Maine Medical Center	Plymouth State University	University of New Hampshire
City of Lynn, Massachusetts	Marriott International	Portsmouth Regional Hospital	University of North Florida
City of Portsmouth NH	Massachusetts General Hospital	Prescott Park Arts Festival	University of Southern Maine
Concord Hospital	McNabb Properties	Prime Buchholz	University System of NH
Crotched Mountain Rehab	Michaels Organization	Quarry Hill	University of Virginia
Dartmouth College	Mid Coast Health	RiverMead Retirement Comm.	Wentworth Senior Living
Don Orione Home	Middlesex Community Hospital	Riverview Psychiatric Treatment Center	Wise Properties
EasterSeals NH	Miles Healthcare	RiverWoods at Exeter	York Hospital
Elliot Hospital	Millinocket Regional Hospital	Shands Jacksonville	
Embry Riddle Aeronautical University	Monadnock Community Hospital	The Shelter Group	
Endicott College	Nantucket Cottage Hospital	Southern Maine Medical Center	
Epoch Senior Living	National Dev of New England	Southern NH Medical Center	
Eversource	New England Baptist Counsel	Southern NH University	
	New Hampshire Central Facility		

JSA DESIGN | RELEVANT PROJECTS



AVESTA MEADOWVIEW | AVESTA HOUSING

Gray, ME

Project:

Below market rate housing for seniors and people with disabilities

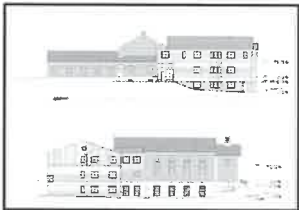


AVESTA KENNEBUNK | AVESTA HOUSING

Kennebunk, ME

Project:

A collaboration between Kennebunk Savings and Avesta Housing creating below market rate housing for seniors on the Kennebunk Savings corporate campus.



HAVEN

Portsmouth, NH

Project:

Transitional supportive housing for domestic abuse survivors on a collaborative campus of nonprofits.



GAFNEY HOME COMMUNITY ACTION PARTNERSHIP OF STRAFFORD COUNTY

Rochester, NH

Project:

Supportive senior housing



ROBERT J LISTER ACADEMY | CITY OF PORTSMOUTH

Portsmouth, NH

Project:

An innovative public high school program at Portsmouth's Community Campus.



CAREY COTTAGE

Portsmouth, NH

Project:

Restoration and adaptive re-use of a historic structure into nonprofit office space and housing for nonprofit employees.



Preservation of
Affordable Housing

Letter of Interest with Statement of Qualifications

In response to:
Request for Qualifications #52-24
For Entities Engaged in Permanent, Below Market Rate Housing
Development for Municipal Property at 35 Sherburne Road,
Portsmouth, NH

Respondent: Preservation of Affordable Housing, Inc.
Status: 501(c)(3) Non-Profit
Address: 2 Oliver Street
Suite 500
Boston, MA 02019
Phone: 617-261-9898
Website: www.poah.org

Contact: Alex Finigan
617-449-1013
afinigan@poah.org



Placework
ARCHITECTURE • PLANNING

Kaplan
Thompson
Architects

**DURBIN
LAW**

ALTUS
ENGINEERING

ALA

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APPENDIX

- POAH New Construction Pipeline and Recent Projects
- POAH Qualifications
- Placework Qualifications
- Kaplan Thompson Qualifications
- ALA Qualifications

LETTER OF INTEREST

Members of the Sherburne Road selection committee:

Preservation of Affordable Housing, Inc. (POAH) is pleased to submit this statement of qualifications for the development of permanently below-market-rate housing at 35 Sherburne Road. We are an experienced and innovative team that offers the following advantages:

- **National developer with local perspective.** POAH brings the best practices and development know-how that we've acquired by building and preserving more than 13,000 apartments in 11 states and the District of Columbia, and we combine it with the deep local knowledge we've built by creating and operating housing in tight-knit New England communities from Cape Cod to Seacoast New Hampshire and southern Maine for more than two decades.
- **Experience with New Hampshire Housing.** POAH has rehabilitated and owns 268 below-market-rate apartments financed through New Hampshire Housing, including 106 apartments in nearby Dover, and we maintain strong relationships with New Hampshire Housing staff.
- **Ability to move quickly.** The Sherburne Road opportunity faces an ambitious timeline that will require an experienced team that can move quickly. POAH has a deep bench of 35 development professionals and the staff capacity to begin working on Sherburne Road immediately. We fund our own predevelopment and we have no competing applications with New Hampshire Housing.
- **Local design team committed to sustainability and contextual scale.** We have an exceptional design team led by Placework and Kaplan Thompson Architects. They are leaders in sustainable design within traditional New England contexts, recognize the need for an appropriate scale and considered site planning, and have deep connections within the Portsmouth community.
- **Award-winning property management.** POAH Communities provides resident-focused property management and our award-winning Community Impact program connects residents with both local and national service providers to achieve outcomes around health, wellness, career development, and financial self-sufficiency. POAH Communities was recently recognized with a prestigious \$2.5 million Enterprise Foundation grant for its work on improving resident experience and outcomes.
- **Non-profit commitment.** We are a non-profit developer and owner. This means corporate profits will never take precedence over residents and our commitment to the City of Portsmouth's housing goals. Long after construction is complete, POAH continues to invest in residents and provide them with the tools they need to access opportunity.

We have reviewed the Request for Qualifications and all addenda and we applaud the City Council's commitment to expanding housing options for Portsmouth residents. We believe Portsmouth's economic diversity is one of the things that makes it a special place to live, and we would be honored to partner with the City to help create a new community at Sherburne Road that offers housing security for Portsmouth residents.

Sincerely,



Aaron Gornstein
President & CEO, POAH

Sherburne Road Opportunity

The site at 35 Sherburne Road presents a rare opportunity to address the real need for both below-market-rate and middle-income housing in Portsmouth. Based on what we've heard so far from the City and community discourse, this opportunity requires a development team that can move with efficiency and confidence but also with respect for the Pannaway community and a commitment to involve community members' voices in the project vision.

We see the potential for a new neighborhood at 35 Sherburne Road that is intergenerational, with options for Portsmouth's growing families, smaller households, and seniors who want to age within their community. The community would be economically diverse, with apartments for a range of incomes from households living on limited means to middle-income renters who still struggle to afford housing in a market that is increasingly designed for high-income earners. We envision highly sustainable buildings on a site that preserves existing trees, native species, and a sense of place. And we respect the desire for a community that is appropriate in scale to the Pannaway neighborhood and contextual in design to Portsmouth's rich architectural fabric.

We believe a community that meets these goals is possible, and we expect that a development of appropriate scale could be achieved using some combination of Low-Income Housing Tax Credits in a phased execution or a single-phase 9% & 4% "twin" structure; income-averaging; and alternative public and private capital. Our team has considerable experience using these tools to create successful developments on sites and within community contexts similar to 35 Sherburne Road, and the qualifications on the following pages attest to this. We have assembled an experienced, community-focused team that is ready to begin working with the City and community members on this important opportunity to expand middle-income housing in Portsmouth.

Introduction to POAH

POAH is a non-profit developer and owner whose mission is to create, preserve, and sustain affordable, healthy homes that support economic security, racial equity and access to opportunity for all. We leverage our strengths to address community needs and the goals of stakeholders and partners such as the City of Portsmouth.



Seasoned New England developer and owner. POAH has extensive experience developing, constructing and owning below-market-rate housing in tight-knit, historic communities like Portsmouth. We have built more than 220 affordable and middle-income apartments in small cities and towns in New England and are under construction on another 127 apartments in communities like Portsmouth where neighborhood participation and local architectural context are key to a successful development. POAH owns 268 affordable apartments among three communities in New Hampshire, including two in nearby Dover, all of which were renovated using Low-Income Housing Tax Credits (LIHTC) through New Hampshire Housing (NHH). POAH maintains excellent working relationships within New Hampshire Housing and has no competing projects in the financing queue at the state level.



Cochecho Park in Dover, NH

Strong balance sheet and ability to self-guarantee. POAH’s development capacity is built on a robust corporate balance sheet with \$1.6 billion in real estate owned and \$281 million in net assets at year-end 2022. In 2021 POAH earned an A+ credit rating from S&P and issued \$75 million of general obligation bonds. This new bond financing tool allows POAH to deploy flexible, low-cost financing quickly and for a variety of uses, and our excellent institutional credit rating underscores to lenders and investors POAH’s strong financial health.

S&P Global Ratings

Credit Profile

US\$75.0 mil GO bnds ser 2022 dtd 04/18/2022 due 12/01/2032

Long Term Rating

A+/Stable

Ability to secure funding and navigate multilayered subsidy requirements. POAH is a nationally-recognized innovator in affordable housing finance and has experience with the full breadth of private and public sources and programs for below-market-rate housing, including federal and state LIHTCs; FHA-insured financing; state housing finance agency tax-exempt bond financing and Risk Share; HUD project-based Section 8 rental subsidy; and HUD community development programs including CDBG and HOME. POAH was the first non-profit recipient of a HUD Choice Neighborhoods capital grant for our revitalization of the Woodlawn neighborhood of South Chicago and was among the first developers to pair 9% and 4% LIHTCs in a “twin” capital structure for our redevelopment of Whittier Street Apartments in Boston. We have experience working with many of New Hampshire Housing’s funding programs, including NHH tax-exempt bonds, 4% LIHTCs, and HOME capital subsidy loans.

Commitment to sustainable and innovative development. POAH is a leader in sustainable design and development in affordable housing. POAH targets the Passive House efficiency standard for all new construction projects, and our two most recent new construction completions are leaders in the field: Brewster Woods is the first multifamily Passive House-certified development on Cape Cod, and The Kenzi is the first all-electric mid-rise multifamily building in Boston. POAH has another eight Passive House projects under construction or in development in Massachusetts, Maine, Chicago, and Washington D.C. POAH is also a leader in using new and innovative building technologies for the construction of affordable housing; projects currently under development employ a range of innovative building strategies including prefabricated modular units, cross laminated timber (CLT), and panelized building systems.



Brewster Woods

In-house property management dedicated to building and improving communities. POAH is a mission-driven non-profit that not only develops and manages housing but works to strengthen communities by enabling resident access to greater opportunity. POAH and its affiliated property manager POAH Communities support residents through long-term partnerships, corporate sponsorship, and a focus on positive outcomes. In 2021, POAH received a competitive \$2.5 million grant from the Enterprise Foundation for our work adapting building designs and management practices to the stresses that many working-class renters encounter in their everyday lives. We operate our award-winning Community Impact programs across our portfolio and support residents to achieve positive outcomes in housing stability, mental and physical health, community connections, and financial stability. POAH Communities has three full-time management staff based in Dover, NH and an additional 15 full-time staff based on Massachusetts’ north shore within an hour of Portsmouth.

Advancing local and diverse participation in development. POAH is a leader in diversity and inclusion in our real estate development projects - we consider this to be a key component of our organizational purpose. We are committed to hiring local workers, people of color, and minority- and women-owned businesses and make this commitment a key priority of our development plans, from general contractor selection to hiring property management staff. POAH itself is an example of how a diverse and representative workforce produces outcomes of success and inclusivity. POAH's corporate staff is composed of 36% people of color and 65% women, POAH's Board is composed of 60% people of color and 50% women, and POAH Communities' staff is composed of 67% people of color and 57% women. Our development vision and management are rooted in a diverse organization where issues of racial equity and housing justice are taken very seriously.

Qualifications and Experience Developing Permanent, Below-Market-Rate Housing

POAH has substantial experience developing housing communities of a size and complexity consistent with what would be appropriate for the site at Sherburne Road. Since 2020, POAH has completed seven new construction projects totaling 440 permanently below-market-rate apartments. These projects range in setting and typology, from mid-rise buildings with structured parking on dense urban sites in Boston to undeveloped sites in small towns on Cape Cod. Six of the seven projects used LIHTC financing, and all involved complex, multi-layered sources of public capital subsidy and private financing. Notably, four of the seven projects were awarded to POAH through competitive RFPs, all were built on municipally-owned or quasi-municipally-owned land, and all were developed in close working relationships with the respective municipalities that were both land owners and project funding partners. The table below provides summary information on these recently completed new construction projects, and the "POAH Pipeline and Recent Projects" table in the appendix provides additional detail.



The Kenzi in Boston, MA

Name	Location	Units	Income Range	TDC	Tax Credit Type	Municipal Partner	Land Owner	Completion Date
Flat 9 at Whittier Ph 1	Boston, MA	92	30% - 120% AMI & market rate	\$61.7M	Fed 9% & 4% LIHTC	City of Boston	Boston Housing Authority	Jun 2020
Flat 9 at Whittier Ph 2	Boston, MA	56	30% - 120% AMI & market rate	\$34.7M	Fed 4% & MA State LIHTC	City of Boston	Boston Housing Authority	Nov 2021
Terrapin Ridge	Sandwich, MA	30	30% - 60% AMI	\$15.7M	Fed 9% LIHTC	Town of Sandwich	Town of Sandwich	Jul, 2022
The Freelon	Detroit, MI	68	50% - 80% AMI & market rate	\$37.3M	New Markets Tax Credit	City of Detroit	City of Detroit	Aug 2022
The Loop at Mattapan	Boston, MA	114	30% - 80% AMI	\$73.2M	Fed 9%, 4% & MA State LIHTC	City of Boston	MBTA	Aug 2022
Brewster Woods	Brewster, MA	30	30% - 60% AMI & market rate	\$13.7M	Fed 9% LIHTC	Town of Brewster	Town of Brewster	Dec 2022
The Kenzi	Boston, MA	50	30% - 80% AMI & market rate	\$28.2M	Fed 4% & MA State LIHTC	City of Boston	POAH	Mar 2024

POAH has six new construction projects underway totaling 642 permanently below-market-rate apartments, all of which will be complete by early 2025. These projects range from the 12-story high-rise third phase of Flat 9 at Whittier in Boston to the traditional New England vernacular of LeClair Village in Bourne. Five of the six projects were awarded to POAH through a municipal RFP and all involve close collaboration with municipal funding partners and land owners. The table below provides summary information on POAH’s new construction projects currently under construction, with additional detail in the appendix.



LeClair Village in Bourne, MA

Name	Location	Units	Income Range	TDC	Tax Credit Type	Municipal Partner	Land Owner	Completion Date
Flat 9 at Whittier Ph 3	Boston, MA	172	30% - 120% AMI & market rate	\$152.9M	Fed 9%, 4% & MA State LIHTC	City of Boston	Boston Housing Authority	Apr 2025
The Asberry	Washington, D.C.	108	30% - 80% AMI	\$65.2M	Fed 4% & DC LIHTC	District of Columbia	D.C. Housing Authority	Jun 2024
LeClair Village	Mashpee, MA	39	30% - 60% AMI	\$23.8M	Fed 9% & MA State LIHTC	Town of Mashpee	Town of Mashpee	Jul 2024
Clarendon Hill	Somerville, MA	168	30% - 80% AMI	\$115.9M	Fed 4% LIHTC	City of Somerville	Somerville Housing Authority	Dec 2024
Meridian at Goulds Point	Miami, FL	113	30% - 80% AMI	\$53.4M	Fed 4% LIHTC	Miami-Dade County	POAH	Aug 2024
Cape View Way	Bourne, MA	42	30% - 60% AMI	\$25.6M	Fed 9% & MA State LIHTC	Town of Bourne	Town of Bourne	Feb 2025

Finally, POAH has six additional new construction projects and one adaptive re-use project in pre-development. Project financing for each development has been fully secured or is nearly complete and construction for each project is expected to begin within one year. The projects will create 447 new below-market-rate apartments in towns and cities such as Wellfleet, MA and Portland, ME. Four of the six projects were awarded through a municipal RFP. The table below provides summary information on POAH’s new construction projects in pre-development, with additional detail in the appendix.



Rendering of the Residences at Lawrence Hill in Wellfleet, MA

Name	Location	Units	Income Range	TDC	Tax Credit Type	Municipal Partner	Land Owner	Projected Start Date
The Edmonson	Washington, D.C.	139	30% - 80% AMI	\$135.6M	Fed 4% & DC LIHTC	District of Columbia	D.C. Housing Authority	June 2024
Residences at Lawrence Hill	Wellfleet, MA	46	30% - 120% AMI	\$35.0M	Fed 9% & MA State LIHTC	Town of Wellfleet	Town of Wellfleet	October 2024
Columbia Crossing	Boston, MA	48	30% - 80% AMI	\$47.6M	Fed 4% & MA State LIHTC	City of Boston	Community Land Trust	October 2024
Lambert Woods	Portland, ME	72	60% AMI	\$32.6M	Fed 4% LIHTC	City of Portland	MCDP/POAH	November 2024
Spring Rock Village	Brewster, MA	45	30% - 80% AMI	\$31.2M	Fed 9% & MA State LIHTC	Town of Brewster	Town of Brewster	January 2025
49 6 th Street	Cambridge, MA	46	30% - 80% AMI	\$44.6M	Fed 9%, 4% & MA State LIHTC	City of Cambridge	POAH	February 2025
3i Scarborough	Scarborough, ME	51	30% - 60% AMI	\$22.4M	Fed 9% LIHTC	Town of Scarborough	POAH	June 2025

In-House Construction Management and Building Design

In addition to our large and experienced development staff, POAH has separate in-house Building Design & Performance and Construction Management teams that work closely with development staff throughout project planning, design and construction to ensure that design issues are identified and resolved early-on and construction moves forward efficiently with disciplined controls on cost. POAH’s Construction Management team is led by Deanna Savage, a long-time general contractor, and our Building Design & Performance team is led by Julie Klump, a licensed architect and expert in sustainable design and systems. By integrating specialized in-house design and construction expertise from the beginning of development, POAH is able to better manage project timelines and budgets and resolve issues quickly when they arise.



Deanna Savage, POAH’s in-house construction project manager, brings more than two decades of experience with a large multifamily contractor to the development team. Deanna’s technical knowledge and oversight is a significant benefit to the communication between the development and general contractor teams. Deanna’s responsibilities focus on maintaining project timelines, cost controls, and working with general contractors to reduce impact on abutters and neighbors.

Municipal Collaboration

A substantial number of POAH’s new construction projects are developed in collaboration with cities and towns. Most commonly, this collaboration begins when a municipality awards developer rights to POAH through a competitive RFQ or RFP. POAH’s development staff and our project architects and planners then work closely alongside municipal stakeholders (e.g. town planners, affordable housing trust boards, select board members), abutters and other community members to develop site and building designs that are most responsive to local goals and preferences. We also often work in partnership with municipalities to secure project funding, such as local HOME funding or state level financing. For example, we worked closely with the Town of Brewster on Cape Cod to secure a \$2 million MassWorks infrastructure grant to fund the sitework, roadways and utilities at Brewster Woods. The grant was awarded to the Town and loaned to the project.

Below are references for some of our collaborations with municipalities:

Reference	Reference Project
Jill Scalise Housing Coordinator Town of Brewster 508-896-3701 ext. 1169 jwertz-scalise@brewster-ma.gov	Brewster Woods
Tom Galligani Executive Director, OSPCD City of Somerville 781-808-8191 tgalligani@somervillema.gov	Clarendon Hill
Elaine McIlroy Board Chair Wellfleet Housing Authority 617-947-1269 emcilroy@comcast.net	Residences at Lawrence Hill

Site Development and Historic Structures

The majority of POAH’s new construction projects were developed on vacant or mostly vacant sites similar to 35 Sherburne Road. However, POAH has completed several projects that involve the adaptive re-use of historic structures, pairing LIHTCs with federal and state historic tax credits to fund the preservation and adaptation of the historic buildings. POAH’s Old Middletown High School Apartments in Middletown Connecticut consists of 65 affordable apartments housed in a historic high school built in 1893. Similarly, Central Annex and Union Court in Pittsfield Massachusetts consist of 101 apartments in a historic high school and hotel from the late 19th century, incorporating spacious community rooms and amenities in some of the buildings’ larger rooms.



Central Annex

POAH is currently developing two new projects that feature the adaptive re-use of historic buildings. 49 6th Street will create 46 new below-market apartments in a former high school and convent in East Cambridge. Built in increments between the late 19th century and early 20th centuries, this complex project will adapt three distinct structures into one housing community, restoring extensive interior and exterior period details and updating the structures with enclosure improvements, insulation, and historically appropriate, high-efficiency insulated windows. Columbia Crossing will create 48 new below-market apartments and artist residences in the Dudley Square neighborhood of Boston and will incorporate a new construction mid-rise residential building with the historic Dorchester Savings Bank. The 100-year-old bank building will be refurbished to house new community space, offices for resident services, and an exhibition space for local artists.

Middle-Income Housing

The need for housing for middle-income households in Portsmouth has become particularly acute, as it has in many of the other New England communities in which POAH works. The market dynamics are consistent: new development is almost exclusively targeted to high-income renters and buyers, but many middle-income households are not eligible for traditional affordable housing communities. POAH has been innovative and responsive to this need, creating housing options for “workforce” and “missing middle” renters in our developments using LIHTC income-averaging, the early adoption of public programs such as MassHousing’s Workforce Housing Program in Massachusetts, and the investment of targeted state and local funds for apartments outside the LIHTC program. The resident income ranges of our developments are included in the tables above (and in greater detail in the appendix) and attest to our success in developing communities with broad economic diversity, which we believe will be an important component of a successful development at Sherburne Road.



Residents with a POAH Community Impact Coordinator

Financial Capacity

POAH would bring deep financial resources to Sherburne Road project, backed by POAH’s corporate balance sheet with \$1.6 billion in real estate assets and \$281 million in net assets at year-end 2022 and an A+ credit rating from S&P. POAH has built an exceptionally strong financial position through twenty years of successful development and operations and long-term partnerships. This financial strength translates to real benefits for our projects. For example, because we self-fund predevelopment and do not need external financing to begin projects, we can get started on design and community engagement immediately and stay on course for New Hampshire Housing’s 2025 funding round. Our team’s financial strength and ability to back guarantees also makes us more attractive as a project sponsor for lenders and LIHTC equity partners, which results in lower-cost loan financing and better LIHTC equity terms. POAH will be providing the full array of development, completion, and operating guarantees for the project, offering comfort to lenders, investors, and the City that the development will successfully deliver the public benefits we commit to.

A distinguishing strength of our team is our access to several innovative financing sources that would allow us to bring additional flexible, low-cost capital to the Sherburne Road project. These discretionary funds, drawn from sources such as the Capital Magnet Fund and POAH’s 2022 Sustainability Bond offering, total more than \$50 million of available capital and will enable us to manage funding gaps and expedite timelines.

Examples of how POAH has used its internal discretionary capital to help projects succeed include:

- **Construction bridge financing.** POAH has funded more than \$14 million of short-term construction bridge loans using CMF and Sustainability Bond funds. These interest-free short term bridge loans allow us to both reduce construction loan interest costs and secure better LIHTC equity pricing by deferring LIHTC equity installments until project completion.

- **Pre-closing purchase of building components with delayed lead times.** POAH recently used \$4 million of internal capital to advance purchase windows and steel prior to construction loan closing for its redevelopment of the Clarendon public housing community in Somerville, MA. These pre-closing purchases help facilitate on-time construction in the current environment of supply chain shortages.
- **Funding financing gaps.** Unable to find a lender willing to provide an unsecured, subordinated loan that was needed to finance the creation of 10,000 SF of community retail space in Roxbury, POAH structured a \$3.4 million low-cost mezzanine loan using internal capital to finance the commercial funding gap.
- **Construction requisition bridge financing.** Many smaller local and minority-owned subcontractors lack sufficient cash reserves to manage the lengthy time from requisition to funding on LIHTC projects. POAH has used its Sustainability Bond funds to bridge finance more than \$5 million (and counting) of requisitions to small and minority-owned subcontractors so that these businesses can remain solvent and pay employees.

POAH has raised more than \$450 million in LIHTC equity for our communities and more than \$360 million of external gap financing. At the corporate level, in direct support of its affordable housing development, POAH has also received five separate competitive Capital Magnet Fund awards totaling \$40 million - more than any other recipient in the country - and various philanthropic awards for our Community Impact work. The "POAH Pipeline and Recent Projects" table in the appendix shows POAH's recent new construction development history and pipeline, displaying POAH's track record of securing layered project financing with an array of state and local funders to create below-market-rate housing.



Brewster Woods, the first certified Passive House multifamily property on Cape Cod

HISTORY OF OTHER PROJECTS

POAH has developed and preserved more than 13,000 apartments serving working families, seniors, and disabled citizens. This includes 17 new construction projects totaling 864 below-market-rate apartments and extensive community spaces. Twelve of these new construction projects have been awarded through competitive RFPs to build new affordable housing on city and town-owned land. Six of these projects are located in historic, coastal New England towns like Portsmouth with a strong sense of place and identity.

While every project is different in its specifics, we always take care that our mission-focused team develops and implements a financing structure, construction scope, and long-term operations plan that ensures the long-term affordability and success of the property, that meets the needs of its residents and partners, and that places community engagement and communication at the center of the development process. The comparable projects described below are indicative of the breadth and depth of development experience that will be relevant to the construction of a contextual and balanced community of permanently below-market-rate housing at Sherburne Road.



LeClair Village in Mashpee on Cape Cod. Construction is expected to complete later this summer.

Lambert Woods North (Construction beginning in Q4 2024) Portland, ME

Project Narrative

In 2022, Maine Cooperative Development Partners (MCDP) asked POAH to become the lead developer on the “north” phase of MCDP’s Lambert Woods project in Portland’s residential neighborhood of North Deering. Lambert Woods North was to be the below-market-rate rental complement to the below-market-rate homeownership created at Lambert Woods South. MCDP needed a partner with LIHTC expertise, a strong balance sheet, and the staff capacity to advance the project quickly before



MaineHousing’s tax-exempt bond and deferred loan program became oversubscribed.

Community Engagement and City Collaboration

The Lambert Woods North design team is led by the same team from Kaplan Thompson Architects (KTA) that is part of our team for Sherburne Road. KTA’s commitment to neighborhood engagement and collaboration with city officials was essential for securing the project’s site plan approval - which was shaped by door-to-door conversations with abutters and two workshops with the Planning Board - to enable the team to submit a competitive application to MaineHousing.

Design and Program

The community consists of 72 below-market-rate apartments with a substantial number of family-sized apartments for growing families looking for attainable housing near North Deering’s public schools. KTA’s site design creates a small neighborhood on the undeveloped site within a 5-acre footprint that preserves a maximum number of existing old-growth trees. KTA incorporated an innovative landscape space called the “Mews” where vehicles and people share the same space to help reduce impervious surfaces and promote a pedestrian-friendly core to the neighborhood.

Green Design

The community will be built to Passive House specifications and should be certifiable when complete.

Financing

The POAH team had to move quickly to prepare a complete and competitive application to MaineHousing for the agency’s 4% LIHTC and subordinate deferred loan program, which was being offered as a limited-time product and was receiving an unprecedented level of demand. Working closely with city officials to finalize the project’s city-level tax-increment financing and the MaineHousing underwriting team, POAH was able to secure the financing shortly before the program became oversubscribed and ceased taking applications. This financing is a critical piece of the project’s capital structure and has set the project up to begin construction later this year and achieve the team’s ambitious timeline goals.

Features Relevant to Sherburne Road:

- ❖ POAH + Kaplan Thompson Architects + ALA project
- ❖ Contextual design at neighborhood scale
- ❖ Passive House
- ❖ Close collaboration with city and housing finance agency for expedited funding

Project Information

Location.....Portland, ME

Project Type.....Below-market-rate family rental housing

Residential Units.....72 units

Affordability.....100% at 60% AMI

Mortgage Lender.....MaineHousing

Other Funders.....City of Portland (Tax Increment Financing)

LIHTC Investor.....CREA

Total Development Cost.....\$32.3 million

Construction Timeline.....Construction is expected to start in the fourth quarter of 2024

Management Agent.....POAH Communities



Brewster Woods (Completed in 2023)

Brewster, MA

Project Narrative

In 2023, POAH completed the construction of Brewster Woods, a community consisting of 30 below-market-rate apartment homes in two buildings on a 5.8-acre parcel of undeveloped land owned by the Brewster Housing Authority (BHA) in Brewster, Massachusetts. The project will allow families to put down roots in a desirable community close to amenities including high-quality open space and beautiful beaches.



Community Engagement and Town Collaboration

Brewster Woods is structured around a long-term ground lease with the Brewster Housing Authority, which owns surplus land that the Town prioritized for affordable housing development. Close coordination with the Town and abutters was critical to successful permitting, with discussions focused primarily on dimensional constraints and landscaping - including large setbacks and buffer zones, additional landscaping and planting 100% native species, utilizing existing topography to minimize building height, and construction-period strategies to minimize impact. These meetings took place over many months and the resulting proposal received overwhelming community support. The Town also supported a MassWorks infrastructure grant application that POAH and the Town submitted together, coordinated by POAH. This strong working relationship with the Town and successful completion at Brewster Woods led to the Town's selection of POAH to develop a second project in Brewster (Spring Rock Village) that is currently in pre-development.

Design and Program

The apartments are affordable to households earning 60% of area median income or less. POAH brought its significant experience designing and building housing on environmentally sensitive sites to this project, working closely with the design and general contractor team to extend infrastructure from the nearby thoroughfare, including roads, sidewalks, utilities, and new pedestrian and transit infrastructure.

Green Design - Passive House Certified

The buildings at the Passive House-certified community are fossil fuel-free and include a large photovoltaic solar array expected to produce upwards of 175,000 kWh, high-efficiency all-electric heating, cooling, and hot-water systems, and air-tight wall assemblies with triple-pane windows and three inches of rigid insulation. The project's energy efficient approach enables residents to pay no utility bills and ensures comfort and well-being with excellent fresh air distribution and consistent temperature control. Brewster Woods is the first certified multi-family Passive House on Cape Cod and is among the first 10 in Massachusetts.

Financing

Brewster Woods was financed with 9% LIHTCs. The project received soft funding from a variety of Massachusetts EOHLC and MassHousing programs, including the Affordable Housing Trust Fund and HOME. The project also received funding from the Town of Brewster and a MassWorks infrastructure grant.

Features Relevant to Sherburne Road:

- ❖ Awarded through a town-issued competitive RFP
- ❖ Town collaboration on infrastructure funding
- ❖ Contextual design at neighborhood scale
- ❖ Passive House



Project Information

Location.....Brewster, MA

Project Type.....Below-market family rental housing

Residential Units.....30 units

Affordability.....100% at 60% AMI

Mortgage Lender.....Massachusetts Housing Partnership

Other Funders.....Massachusetts EOHLC, MassHousing, CEDAC, MassWorks, Barnstable County HOME Consortium, Town of Brewster

LIHTC Investor.....Bank of America

Total Development Cost.....\$15 million (delivered on budget)

Construction Timeline.....Construction started in June 2021 and completed in December 2022. The project was completed several months behind schedule due to unforeseen COVID-related supply chain issues that delayed Certificates of Occupancy. However, with a fast lease-up, tax credits were delivered with only minimal timing adjuster that did not require any request for additional subsidy.

Management Agent.....POAH Communities



Canal Bluffs (3 phases, completed in 2018) Bourne, MA

Project Narrative

In 2008, POAH, acting as lead developer in partnership with local non-profit Housing Assistance Corporation (HAC), began the development of a three-phased mixed-income intergenerational community on an undeveloped and environmentally sensitive site on Cape Cod. The community, collectively known as Canal Bluffs, comprises the 28-unit family building Canal Bluffs, the 45-unit senior building Clay Pond Cove, and the 44-unit family townhome community High Meadow Townhomes, and was completed in 2018.



Community Engagement and Town Collaboration

Because the 17-acre hilltop site overlooking Buzzards Bay was deemed an environmentally sensitive area due to its proximity to the Phinney Harbor watershed, our development plan required the construction of a new wastewater treatment plant located on site to ensure that zero net nitrogen was released into the watershed. The viability of this plan relied on the participation of the abutting properties since it required the construction of shared infrastructure and access roads for the new wastewater treatment plant. POAH worked closely with the neighbors to shape the development plan that was best for the community, and after many months of meetings with abutters and the Massachusetts DEP, a plan was created that received overwhelming support from the community.

Design

Organized around elliptical common landscapes, the multi-unit buildings are designed to give individuality to each building form, from duplex townhouses to larger, double-loaded corridor elevator buildings. A range of siding types and colors complement the scaled massings, offering a residential rhythm of porches, bays and canopies. Private front doors for the townhouses sit conveniently beyond parking courts that array around the central green, which offers play structures and a landscape of preserved natural landscape, trees, and rain gardens.

Affordability

The resident population is intergenerational and economically diverse, with apartments reserved for senior residents, residents with disabilities, and households at a range of incomes from less than 30% of AMI to 110% of AMI and unrestricted apartments targeted to middle-income households.

Financing

Each of the three phases of Canal Bluffs was financed with 9% LIHTCs. The projects also received soft funding from a variety of Massachusetts EOHLC programs, including the Affordable Housing Trust Fund, HOME, and the Community Based Housing Fund. The projects also received funding from the Town of Bourne and the Barnstable HOME Consortium. High Meadow Townhomes was the first project on Cape Cod to use MassHousing Workforce Housing Funds to subsidize its workforce units that are restricted to renters earning up to 80% of AMI.

Features Relevant to Sherburne Road:

- ❖ Mixed-income community with workforce and middle-income housing
- ❖ New construction in densely settled New England community
- ❖ Site plan that prioritized outdoor space and preservation of mature trees

Project Information

Location.....Bourne, MA

Project Type.....Mixed-income family and senior rental housing

Residential Units.....Total: 117 units

	<u>Phase I</u>	<u>Phase II</u>	<u>Phase III</u>
	28 family units	45 senior units	44 family units
Affordability.....	10% at 30% AMI 90% at 60% AMI	15% at 30% AMI 5% at 50% AMI 80% at 60% AMI	20% at 30% AMI 60% at 60% AMI 15% at 110% AMI 5% unrestricted

Mortgage Lender (Ph III).....MassHousing

Other Lenders (Ph III).....Massachusetts EOHLC, Barnstable HOME Consortium, Town of Bourne

LIHTC Investor.....Boston Capital

Total Development Cost.....Phase III: \$14.1 million
Total Campus (3 phases): \$37.4 million (on budget)

Construction Timeline (III).....June 2017 - December 2018 (on time)

Management Agent.....POAH Communities



Flat 9 at Whittier (Phase 2 completed 2022, Phase 3 to complete in 2025) Boston, MA

Project Narrative

In 2012, POAH, along with its non-profit development partner Madison Park Development Corporation, was selected through a competitive RFP to lead the redevelopment of the 200-unit Whittier Street apartments in the Roxbury neighborhood of Boston. Working closely with the City of Boston and the Boston Housing Authority, we developed a three-phase plan creating 316 units and including 9,000 SF of commercial space, expanded community space, a new playground, bike and pedestrian infrastructure, and



opportunities for passive and active recreation. The first phase received the 2020 Edson Tax Credit Excellence Award, the second phase has fully leased up, and the third phase is under construction.

Community Engagement and Town Collaboration

Working collaboratively with the City and the Boston Housing Authority, the POAH-led team engaged residents and local stakeholders to lay the foundation of the Whittier neighborhood revitalization vision. Since 2012, the POAH team has organized more than 150 community meetings, surveys, focus groups, workshops, and design charrettes to solicit guidance for the development and to maximize community participation in the planning and design process. These engagement strategies helped shape solutions for residents' concerns about displacement, affordability, and local jobs and the City's goals for increased density and income diversity, all on an infrastructure-intensive site that involved modifying existing and creating new roads, building a new bus lane and bike lanes, and working around a major sewer line that bisected the site. Ultimately, we were able to craft a phased master plan that won the full support from existing residents and neighbors within Roxbury as well as the Boston Housing Authority and City elected officials.

Design and Program

Flat 9 at Whittier is an economically diverse community, with apartments affordable to public housing residents alongside middle-income housing and unrestricted, market-rate apartments. The diversity of its resident population is mirrored in the community's architectural design, which creates a contextual mix of building scale, from townhouses to mid-rise and high-rise elevator buildings, that responds to the neighboring uses at each end of the dense, urban site.

Financing

Each of the three phases of Flat 9 at Whittier were financed separately and feature complex, multilayered capital structures that leverage an array of City, State, HUD and private funding sources. Each of the three phases are mixed-income and consist of project-based rental subsidy, LIHTC units, workforce housing, and market-rate units. Phases 1 and 3 were financed with 4%/9% "twin" LIHTC structures, with Phase 2 using only 4% LIHTCs. LIHTC equity and first mortgage debt were leveraged with Massachusetts State LIHTCs, soft funds from the City of Boston, MassHousing Workforce funding, and project-based Section 8 vouchers from the Boston Housing Authority.

Features Relevant to Sherburne Road:

- ❖ Awarded through a competitive RFP
- ❖ Multi-phase development with complex financing structure
- ❖ City priority project with significant community involvement
- ❖ Mixed-income community with workforce and middle-income housing

Project Information

Location.....Boston, MA

Project Type.....Mixed-income family rental housing built in three phases

Residential UnitsPhase 1: 92; Phase 2: 52; Phase 3: 172

Affordability.....38% at 50% AMI or less
 19% at 60% AMI
 18% at 80% AMI
 7% at 120% AMI
 18% market-rate

Mortgage Lender.....MassHousing

Other Lenders.....Massachusetts Executive Office of Housing and Livable Communities (EOHLC), City of Boston Mayor’s Office of Housing, HUD

LIHTC Investor.....Phase 1: NAHT; Phase 2: Boston Private / Eastern Bank; Phase 3: BofA

Total Development Cost.....\$250 million (Phases 1 and 2 delivered on budget)

Construction Timeline.....Phase 1 was completed on time. Phase 2 was completed several months behind schedule due to unforeseen COVID-related supply chain issues. However, with a fast lease-up, tax credits were delivered with only minimal timing adjuster that did not require any request for additional subsidy. Phase 3 is expected to be complete in May 2025.

Management Agent.....POAH Communities



TEAM AND ORGANIZATION

We have assembled a team for the Sherburne Road site that brings together a high-capacity non-profit developer with extensive New England experience and an exceptional team of designers and planners with local roots and a deep commitment to sustainability and contextual design.



Cory Fellows will serve as lead project manager from POAH and will oversee all aspects of the project's financing and construction, with specific focus on the LIHTC financing through NHH. Based in Scarborough, Maine, Cory is a Vice President in POAH's Real Estate Development group and has overseen several new construction projects in New England settings similar to Sherburne Road. Cory is currently leading POAH's developments on Cape Cod and Lambert Woods North in Portland, Maine.



Alyssa Manypenny Murphy will lead Placework's involvement in the project including conceptual design, public process, permitting, and collaboration with the city. Alyssa is a founding principal of Placework, a Portsmouth-based architecture studio specializing in community-focused projects in the Seacoast region. Placework has worked with the City of Portsmouth on a range of projects and is currently working with the Strawberry Banke Museum on long term campus and neighborhood stormwater management.



Jesse Thompson will lead KTA's involvement in the project including schematic design, consultant team oversight, and permitting. Jesse is a founding principal of KTA, a Portland-based architecture studio with extensive experience designing sustainable mixed-income multifamily housing in New Hampshire, Connecticut, and Maine. KTA is currently working with POAH on the Lambert Woods North project.



Seth Kimball will work closely with Placework and KTA on site and landscape design. Seth is a principal of ALA, a Portland-based landscape architecture studio with a focus on native New England habitats. ALA is currently working with POAH and KTA on Lambert Woods North and is also leading landscape design for a proposed multifamily development on Durgin Lane in Portsmouth.



Eric Weinrieb will lead Altus's involvement in the project, working closely with the design team on site planning and interfacing with the City on site permits and utility design. Eric is president of Altus Engineering, a longstanding Portsmouth-based civil engineering firm with extensive multifamily experience in Portsmouth and the greater Seacoast region.



Derek Durbin will represent the team through the City's land use, site planning and zoning process. Derek is the founding partner of Durbin Law, a Portsmouth-based legal practice focusing on land use and real estate law. Derek has extensive experience securing land use approvals for projects in Portsmouth.



Jennifer Cavaco will serve as the regional property manager for Sherburne Road and will work closely with the development team to coordinate the property's marketing, leasing and ongoing operations. Jennifer is a Senior Vice President of Regional Operations for POAH Communities and oversees POAH's New England portfolio.

Developer	
POAH	Cory Fellows Vice President, Real Estate Development cfellows@poah.org
Design and Engineering	
Architect Concept and Permitting	Placework Alyssa Manypenny Murphy Principal alyssa@placework.studio
Architect Architect of Record	Kaplan Thompson Architects Jesse Thompson Principal jesse@kaplanthompson.com
Landscape Architect	ALA Seth Kimball Principal sk@acetola.com
Civil Engineer	Altus Engineering Eric Weinrieb President eric@altus-eng.com
Legal	
Attorney - Zoning	Durbin Law Derek Durbin Partner derek@durbinlawoffices.com
Attorney - Transactional/LIHTC	Klein Hornig Daniel Rosen Partner drosen@kleinhornig.com
Property Management	
Property Manager	POAH Communities Jennifer Cavaco Senior Vice President jcavaco@poahcommunities.com

POAH is a 501(c)(3) non-profit based in Boston, Massachusetts. POAH has 84 employees. POAH Communities is POAH's affiliated property management company and is wholly owned by POAH. POAH Communities has 514 employees.

Based on our experience with recent projects in the context of the volatile and inflationary construction materials market, POAH has adopted a strategy of working with a reputable general contractor during pre-construction and soliciting bids before construction closing to ensure we are securing the best possible price and team. POAH has relationships with several experienced general contractors that have successfully completed similar projects throughout New Hampshire and greater New England. Contact information for these general contractors is presented below.

Company	Contact	Contact Information	POAH Projects
Dellbrook JKS	Michael Fish President	781-380-1675 mfish@dellbrook.com	Clarendon Hill (Somerville, MA)
Penobscot	Clay Maker Co-President	207-838-8021 cmaker@penobscotgc.com	Lambert Woods North (Portland, ME)
North Branch	Joseph Campbell President	603-345-2416 jcampbell@northbranch.net	Sugar River Mills (Claremont, NH)

Please see the appendix for firm qualifications and resumes for POAH, Placework, KTA, and ALA. Firm qualifications for Altus and Durbin Law can be provided on request.

**Preservation of Affordable Housing
New Construction: 2020 - Present**



Project Name	Status	City	State	Total Apartments	Apartments by Income Range				Market Rate	Tax Credit Type	Total Dev Cost	Soft Debt / Public Funders	LIHTC Investor	Closing Date	Completion Date
					60% AMI and Less	60% - 80% AMI	80% - 120% AMI	120%+ AMI							
Flat 9 at Whittier - Phase I	Completed	Boston	MA	92	65	0	15	12	Federal 9% & 4% MA State LIHTC	\$61,667,493	MassHousing, City of Boston, EOHLC, HUD	NAHT	3/18/2019	6/30/2020	
Terrapin Ridge	Completed	Sandwich	MA	30	30	0	0	0	Federal 9%	\$15,668,646	EOHLC, Town of Sandwich, Cape Cod HOME Consortium	RBC	11/20/2021	7/28/2022	
Flat 9 at Whittier - Phase II	Completed	Boston	MA	52	31	10	7	4	Federal 4% MA State LIHTC	\$34,704,357	City of Boston, EOHLC, MassHousing	MHIC	6/30/2020	11/24/2021	
The Freelon at Sugar Hill	Completed	Detroit	MI	68	15	4	0	49	New Markets	\$37,289,950	City of Detroit, POAH	PNC	8/26/2020	8/15/2022	
The Loop at Mattapan Station	Completed	Boston	MA	135	93	42	0	0	Federal 9% & 4% MA State LIHTC	\$73,234,314	MassHousing, City of Boston, EOHLC	Bank of America	11/6/2020	8/15/2022	
Brewster Woods	Completed	Brewster	MA	30	29	0	0	1	Federal 9%	\$13,650,266	EOHLC, Town of Brewster, Cape Cod HOME Consortium	Bank of America	7/11/2021	12/16/2022	
The Kenzi	Completed	Boston	MA	50	35	9	0	6	Federal 4% MA State LIHTC	\$28,220,044	MassHousing, City of Boston	Bank of America	10/1/2021	3/31/2024	
Flat 9 at Whittier - Phase III	Construction	Boston	MA	172	84	46	0	42	Federal 9% & 4% MA State LIHTC	\$152,912,813	MassHousing, City of Boston, EOHLC	Bank of America	6/30/2022	4/1/2025	
The Asberry	Construction	Washington	DC	108	98	10	0	0	Federal 4% DC LIHTC	\$65,204,190	DC Housing Finance Agency, DC Housing Authority, DMPEP	NAHT	8/17/2022	6/30/2024	
LeClair Village	Construction	Mashpee	MA	39	39	0	0	0	Federal 9% MA State LIHTC	\$23,834,500	Mashpee AHTF, BCHC, EOHLC HOME/AHTF/ARPA, POAH CMF	MHIC	1/17/2023	7/1/2024	
Clarendon Hill	Construction	Somerville	MA	168	130	38	0	0	Federal 4%	\$115,874,614	MH Workforce, City of Somerville ARPA/AHTF/CPA/DIF, POAH, EOHLC	BofA	2/17/2023	12/31/2024	
Meridian at Goulds Point	Construction	Miami	FL	113	68	45	0	0	Federal 4%	\$53,358,174	Florida Housing Finance Corporation, Miami-Dade County, POAH	Hudson	3/24/2023	8/31/2024	
Cape View Way	Construction	Bourne	MA	42	42	0	0	0	Federal 9% MA State LIHTC	\$25,633,596	Bourne CPC, BCHC HOME, EOHLC HOME/HSF/AHTF	NEF	11/1/2023	2/1/2025	
The Edmonson	Construction	Washington	DC	139	109	30	0	0	Federal 4% DC LIHTC	\$135,582,302	DC Housing Finance Agency, DC Housing Authority, DMPEP	NAHT	5/30/2024	3/1/2026	
Residences at Lawrence Hill	Pre-Development Funding Secured	Wellesley	MA	46	35	0	11	0	Federal 9% MA State LIHTC	\$35,034,314	Wellesley CPC/AHTF, BCHC HOME, EOHLC HOME/HSF/AHTF, BC ARPA	Bank of America	10/1/2024	3/1/2026	
Lambert Woods	Pre-Development Funding Secured	Portland	ME	72	72	0	0	0	Federal 4%	\$32,581,523	MaineHousing, Federal Investment Tax Credits, City of Portland TIF	CREA	11/1/2024	7/1/2026	
Spring Rock Village	Pre-Development Funding Applications	Brewster	MA	45	35	10	0	0	Federal 9% MA State LIHTC	\$31,186,416	Brewster CPC/AHTF, BCHC HOME, EOHLC HOME/HSF/AHTF, CLC Energy Grant	TBD	1/1/2025	6/1/2026	
Columbia Crossing	Pre-Development Funding Applications	Boston	MA	48	38	10	0	0	Federal 4% MA State LIHTC	\$47,590,787	EOHLC, City of Boston	Boston Financial	3/31/2025	12/31/2026	
3i Scarborough	Pre-Development Funding Applications	Scarborough	ME	51	51	0	0	0	Federal 9%	\$22,404,001	MaineHousing, Town of Scarborough, FHLB, Cumberland County HOME	TBD	6/1/2025	2/1/2027	
Total - Completed (2020 - 2024)				457	298	65	22	72		\$264,435,070					
Total - In Construction				781	570	169	0	42		\$572,400,189					
Total - Pre-Development				262	231	20	11	0		\$168,797,040					



PRESERVATION
OF AFFORDABLE
HOUSING

AFFORDABILITY | SUSTAINABILITY | COMMUNITY





PRESERVATION
OF AFFORDABLE
HOUSING

Preservation of Affordable Housing (POAH) is a national nonprofit organization whose mission is to preserve, create and sustain affordable, healthy homes that support economic security, racial equity and access to opportunity for all.





13,000
AFFORDABLE
RENTAL
APARTMENTS
PRESERVED
OR CREATED

BUILDING FOR
LONG-TERM
SUSTAINABILITY

PARTNERING
FOR RESIDENT
SUCCESS

WHAT WE DO

POAH revitalizes at-risk affordable housing communities as vibrant, healthy homes for low- and moderate -income residents. Since 2001, the POAH team has advanced its mission with a blend of expertise and creativity, solving complex problems that others have seen as insurmountable. We have secured long-term affordability for residents while addressing the interests of owners, funders, public agencies, and other stakeholders. The result is the preservation of more than 13,000 affordable rental apartments through transactions that guarantee that rents will remain affordable for the long-term (30+ years).

POAH has also successfully influenced a range of public policies that address the vulnerability of our nation's subsidized rental housing. POAH's policy interests include regulatory and preservation efforts nationwide, incentives to empower nonprofit owners seeking to preserve long term affordability, energy efficiency, and the promotion of housing as a platform for resident success.

WE PRESERVE AFFORDABILITY.

HOW WE DO IT

Creative Development

The Development Team develops creative and responsive strategies for preserving and building affordable homes, carrying projects from acquisition through financing, renovation/construction and stabilization under new permanent financing. The team works closely with partners – including current residents, public housing authorities, investors and lenders – to deliver buildings that are financially and physically sustainable for the long run, on-schedule and on-budget. The team primarily works on three types of projects:

1 NEW CONSTRUCTION

Building homes that are appropriate for the surrounding neighborhood and community, and built to high standards that integrate conservation and sustainability for the long term.



2 COMMUNITY REVITALIZATION

Undertaking major neighborhood-scale revitalization projects in Chicago, Boston, Somerville, (MA) and Washington, D.C.



3 ACQUISITION REHAB

Rehabilitating properties threatened with conversion to market rental or luxury housing with new systems and structures.

“I am so proud to have family and friends come and see this whole transformation. It’s a beautiful community inside and out and I’m so blessed.”

Donna Hodson (front left)
Resident, Brandy Hill Apartments, Wareham, MA

WE BUILD FOR THE FUTURE.

FEATURED PROPERTY

Canal Bluffs/Clay Pond Cove, Bourne (Cape Cod)

Canal Bluffs and Clay Pond Cove is a multi-phased, mixed income new construction residential development located less than a mile from the Bourne Bridge at the gateway of Cape Cod on the 17 acre parcel of land that had been slated for a high tech startup company. The Residences at Canal Bluffs were built in 2009 followed by the second phase, Clay Pond Cove which included the completion of the wastewater treatment plant that serves the whole Canal Bluffs residential community and the abutting retail shopping center.

High Meadow Townhomes were the last phase of these affordable, workforce and market rate apartment homes for families and seniors in this very desirable Cape Cod location with easy access to commercial areas, shopping, employment centers and transportation.

Hawthorne Apartments

Independence, MO is the site of a LISC Financial Opportunity Center and the largest project-based Family Self Sufficiency (FSS) program in the country. FSS is a five-year, voluntary, asset-building tool that enables HUD-assisted families to increase their earnings, build savings, and make progress towards their goals and aspirations. In 2020, POAH was awarded a Trauma Resiliency Grant from Enterprise Community Partners and Wells Fargo to explore trauma-informed innovations in resident services, property management and physical design. The result will be a more equitable model for affordable housing that reduced evictions; improves resident and staff retention; promotes healthy design and contributes to individual and community resiliency.



Hawthorne families participate in the Family Self-Sufficiency program

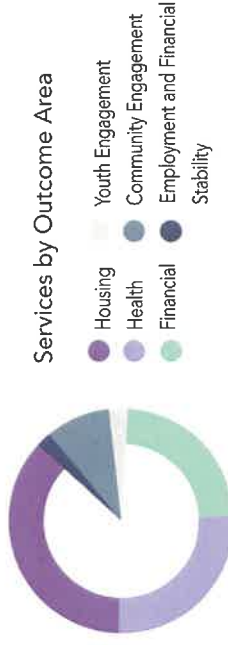
SUPPORTING RESIDENT SUCCESS

POAH knows our work is only one front in the broader fight against poverty and inequality in this country. Our Community Impact initiatives, rooted in principles of trauma resiliency, build on a platform of stable housing to create opportunity for residents so they can achieve financial independence and enrich their lives.

POAH Communities delivers these services through a team of community impact coordinators in properties across the country. We also established regional Resource Centers where we work with local partners to advance our mission of supporting economic mobility. The Woodlawn Resource Center in Chicago offers skill-building, workforce certifications and education programs including financial, employment and income-support services, behavioral health, GED, college preparedness and digital literacy. WRC has helped more than 1,048 community members secure employment since it opened in 2015.

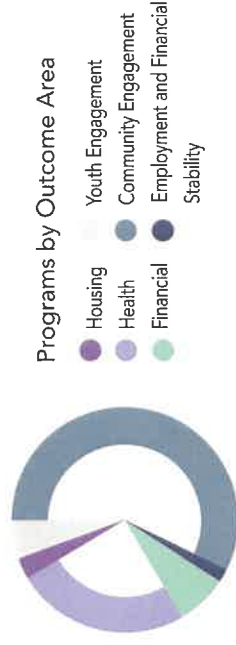
5,000

INDIVIDUAL SERVICES PROVIDED TO RESIDENTS EVERY YEAR



1,117

COMMUNITY PROPERTIES DELIVERED IN POAH PROPERTIES EVERY YEAR



REDUCTION IN EVICTIONS at properties that have been under POAH Communities management for just 3 years



600

Organizations that partnered with POAH Communities to offer a program, service or referral resource for residents

FAMILY SELF SUFFICIENCY PROGRAM

COMMUNITY ENGAGEMENT



RESIDENTS HAVE THE ABILITY TO ACHIEVE FINANCIAL FREEDOM.

RESIDENTS HAVE THE OPPORTUNITY TO ENRICH THEIR LIVES.

RESIDENTS ARE STABLY HOUSED.

Part of the Community Impact Program, the Family Self-Sufficiency (FSS) program combines three key components in order to incentivize work and help participants build savings: stable affordable housing, one-on-one coaching to help participants achieve their employment and financial goals, and an escrow savings account tied to rental payments.



Percent of FSS participants with escrow savings

\$9,382
/ per household



Average escrow savings account balance

\$1 million



2016

Escrow savings accumulated by POAH households since the program launched in 2016

ARMARTINE COOK Woodlawn Park, Chicago

Armartine Cook has been a resident of The Burnham at Woodlawn Park, POAH's senior building on the South Side of Chicago since 2018. In 2019, Armartine was looking for a part-time job and worked with the career navigator at the Woodlawn Resources Center to identify opportunities and found a community hiring event for the grand opening of the Jewel Osco supermarket just a block away. Amartine was hired to work in the bakery — exactly what she was looking for — an opportunity to work close to home and earn extra income for herself. As a senior, this job opportunity was a good match for her, and her participation in the Catholic Charities Commodities monthly food program run by the WRC in partnership with the City of Chicago, has allowed her to keep working part-time, knowing she is supported in meeting her daily needs.



"I wouldn't have had this opportunity without you guys. Thank you again from the bottom of my heart."

Armartine Cook



FEATURED PROPERTY

The Residences at Melpet Farm Dennis, MA

Melpet Farm is a nine-building, 27-unit development on Cape Cod for households earning 60% of AMI or less, with 25% of the units set aside for those on the brink of homelessness.

The goal was to build housing that is both affordable and sustainable. The buildings were designed and constructed with the goal of net zero, meaning the total amount of energy used is equal to the amount of renewable energy generated on-site.

SOLAR ENERGY

60% of the energy needed to power Melpet Farm is produced using solar arrays on the roofs.

ENCLOSURE

Well-insulated, above-grade walls, slab and windows increase energy efficiency. Melpet Farm is 70% more air tight than code requires.



WATER

Low-flow fixtures reduce water consumption.

LIGHTING & APPLIANCES

LED lighting and Energy Star Rated appliances save energy.

Visionary Design and Building Performance

POAH is known as a leader in multifamily housing sustainability and efficiency. The Design + Building Performance department holistically integrates energy and water efficiency into development projects and the owned portfolio, working closely with property management staff to maintain each building's green upgrades and monitor the effectiveness of our conservation initiatives. D&BP oversees a passive house design in at least one major revitalization. The team works in these areas:

Better Buildings Challenge Goal Achiever for 20% reduction in energy use



1 DESIGN AND BUILDING PERFORMANCE

Design reviews during every phase ensure renovations and new construction will provide durable, healthy, high quality housing;



2 FINANCIAL SAVINGS

Reducing energy consumption saves money for both POAH and the residents in our communities;

3 HEALTH

POAH is committed to improving resident health. Enhancing indoor air quality and removing volatile organic compounds is crucial;

5 DESIGN STANDARDS

In-house design standards ensure the buildings we construct and renovate will be durable, long lasting, and serve the needs of our residents.

4 DATA ANALYSIS

Continuous monitoring of utility consumption informs our conservation investments;

Professional Property Management

Part of the POAH family since 2001, POAH Communities oversees the leasing and operations of properties in 11 states and the District of Columbia. POAH Communities provides high-quality property management and customer service to our residents, connecting them with the opportunities and partnerships that improve their quality of life. POAH Communities manages 134 apartment communities which vary in size, age, geography, and program type, 131 of which are owned by POAH.



POAH
COMMUNITIES



WE FOSTER COMMUNITY.

WHERE WE ARE

11 STATES
AND THE
DISTRICT OF
COLUMBIA



PRESERVATION
OF AFFORDABLE
HOUSING

NORTHEAST

CONNECTICUT
Billings Forge Apartments
Old Middletown High School Apartments
Torrington West Apartments

MASSACHUSETTS
Attleboro Properties:
Gardner Terrace I and II
Hebronville Mill
Bay Meadow Apartments
Bedford Village & 447 Concord Rd
Brandy Hill Apartments
Brewster Woods
Bridle Path Apartments
Briston Arms Apartments
Canal Bluffs
Central Annex & Union Court Apartments
Chestnut Gardens
Clay Pond Cove
Cromwell Court Apartments
Dom Narodowy Polski
Fairweather Apartments
(Beverly, Danvers, Peabody, Salem)
Flat 9 at Whittier
Founders Court
Franklin Square Apartments
High Meadow Townhomes
Kenmore Abbey
King's Landing Apartments
Machado House at Peter's Grove
Meadowbrook Apartments
Rock Harbor Village
Salem Heights Apartments
Temple Landing
Terrapin Ridge Apartments
The Blackstone Apartments
The Loop at Mattapan Station
The Residences at Melpet Farm
Torrey Woods
Tribune Apartments

NEW HAMPSHIRE

Cocheco Park Apartments
Riverview Apartments
Sugar River Mills

RHODE ISLAND
Aaron Briggs & Cherry Hill
Beachwinds Apartments
Fieldstone Apartments
Grace Apartments
Heritage Village Apartments
Hillcrest Village Apartments
Hillside Village Apartments
Oxford Place/Oxford Gardens
Pocasset Manor
Water's Edge Apartments

MID-ATLANTIC

DISTRICT OF COLUMBIA
Garfield Hills

MARYLAND

Washington Gardens

SOUTHEAST

FLORIDA
Campbell Arms Apartments
Cutler Manor Apartments
Cutler Meadows Glen Apartments
Middletowne Apartments
New Horizons Apartments
Southpoint Crossing
Trinity Towers East, West, South

MIDWEST
ILLINOIS
Kankakee:
Crestview Village Apartments

Elgin:

Elgin Schoolhouse
Elgin Manor

Chicago Properties:

Archer Avenue Senior Residences
Corcoran Place Apartments
Emil Jones Jr. Senior Housing
Fred C. Matthews III Senior Housing
Greenwood Park Apartments
Island Terrace Apartments
Jackson Park Terrace
Lafayette Terrace Apartments
Levy House
Martin Farrell House
Mattie Butler Apartments
Newberry Park Apartments
South Chicago Salud Center and Senior Housing

Historic Uptown Apartments:

Hazel Winthrop
Uptown Preservation Associates
Clifton Magnolia
Sunnyside Kenmore

Woodlawn Park:

The Jackson at Woodlawn Park
The Grant at Woodlawn Park
The Burnham at Woodlawn Park
Renaissance Apartments
The Washington at Woodlawn Park
Trianon Lofts
Woodlawn Station

Harvey:

Jesse Jackson Jr. East and West Senior Housing
South Suburban Senior Housing

KENTUCKY

Covington:

WH MainStrasse Apartments

MICHIGAN

8330 On the River
920 On the Park
The Freelon Sugar Hill

MISSOURI

Colony Plaza Apartments
Country Club Village I & II Apartments
Crestview Village Apartments
Deerfield Village Apartments
Glenwood Manor
Hawthorne Place Apartments
Highland Acres Apartments
Highland Meadows Apartments
Houston Plaza Apartments
Maplewood Manor Apartments
Monroe Estates
Prairie Plains Apartments
Woodlen Place Apartments

OHIO

Blacklick:

Walnut Grove Apartments

Cincinnati:

Abigail Apartments
Abington Race and Pleasant Apartments
Baymiller Apartments
Burnet Place Apartments
Community Manor
Fairview Estates
Kerper Apartments
Losantiville Building and Evanston
Magnolia Heights
Navarre Garrone
North Rhine Heights
OTR Revitalization
Pendleton Estates
Terri Manor Apartments
Washington Park
Wesley Estates

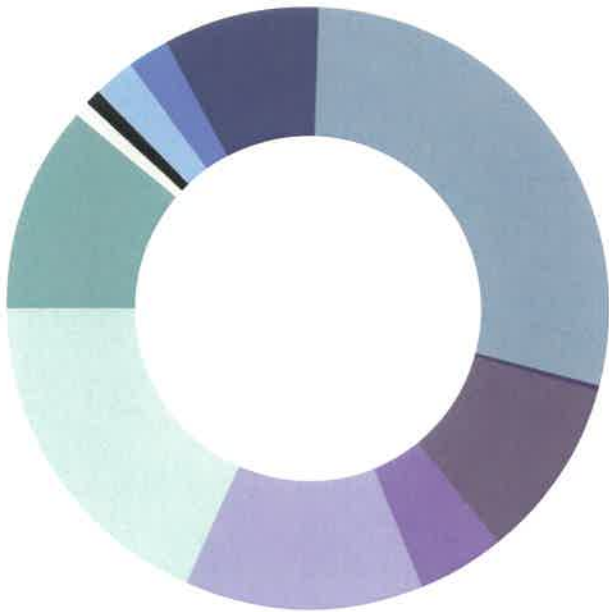
Lincoln Heights:

Villas of the Valley I
Villas of the Valley II

PROPERTY STATS



PORTFOLIO GROWTH BY STATE



- WASHINGTON, D.C.
- KENTUCKY
- MARYLAND
- OHIO
- NEW HAMPSHIRE
- MICHIGAN
- CONNECTICUT
- MISSOURI
- RHODE ISLAND
- ILLINOIS
- MASSACHUSETTS
- FLORIDA

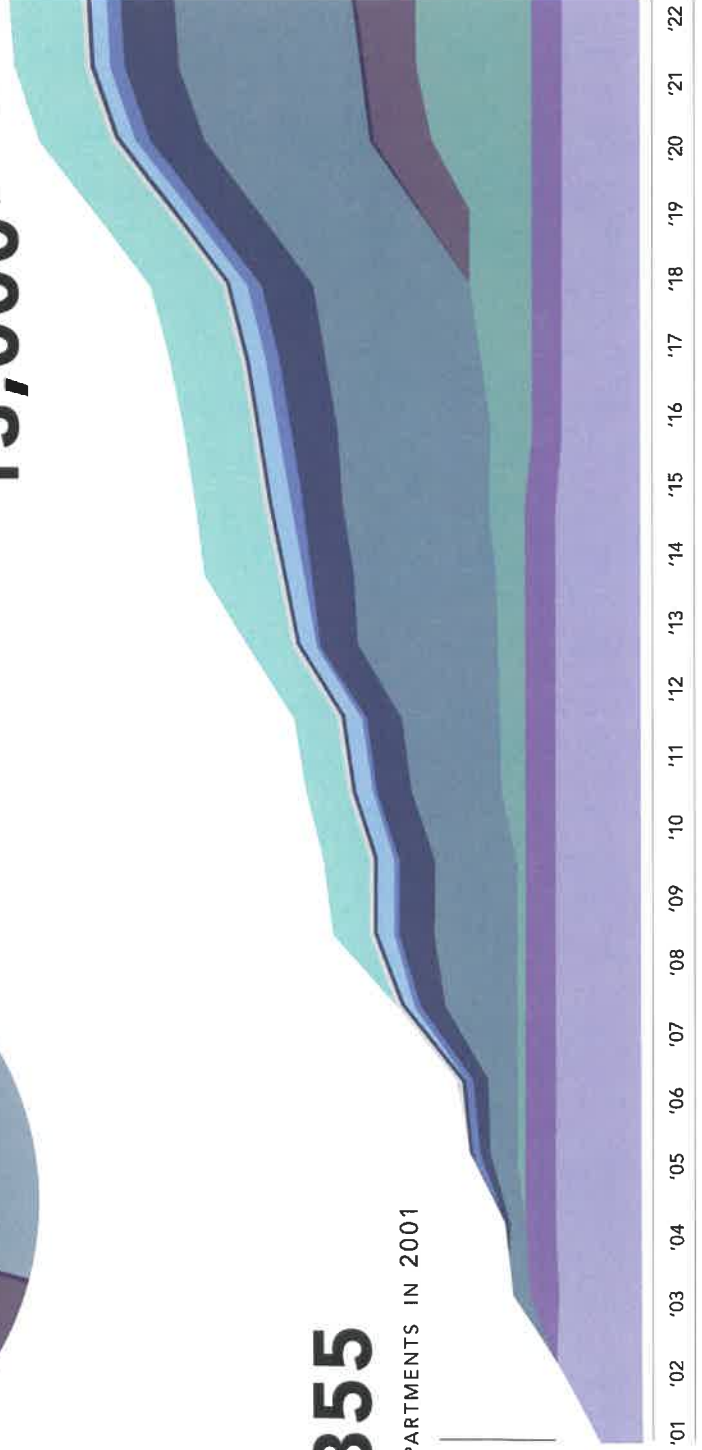


PORTFOLIO GROWTH BY UNITS

13,000

855

APARTMENTS IN 2001



- FLORIDA
- WASHINGTON, D.C.
- MARYLAND
- NEW HAMPSHIRE
- CONNECTICUT
- RHODE ISLAND
- MASSACHUSETTS
- KENTUCKY
- OHIO
- ILLINOIS
- MICHIGAN
- MISSOURI

FINANCIAL PARTNERS 2021

AFL-CIO Housing Investment Trust	Chicago Community Trust	District of Columbia Housing Authority (DCHA)	Kentucky Housing Corporation
Alliant Capital	Citi Foundation	District of Columbia Housing Finance Agency	KeyBank
Asbury Managers	Citibank	Eastern Bank	KeyBank National Association
Avidia Bank	Citibank Community Development	Enterprise Community Partners	Lancaster Pollard (ONIX)
Bank of America	Citizens Bank	Enterprise Mortgage Investments	Life Insurance Community Investment Initiative
Barnstable County	Citizens Charitable Foundation	Eversource	Local Initiatives Support Corporation
Barnstable County Home Consortium	City of Boston	Federal Home Loan Bank of Boston	LISC Chicago
BB&T Bank	City of Cambridge	Federal Home Loan Bank of Chicago	Low Income Investment Fund
BlueHub Loan Fund, Inc.	City of Chicago	Federal Home Loan Bank of San Francisco	MacArthur Foundation
BMO Harris Bank	City of Cincinnati	First Financial	Maryland Appalachian Housing Fund
Boston Community Loan Fund	City of Miami	First Housing	Maryland Department of Housing and Community Development
Boston Department of Neighborhood Development	City of New Bedford	Florida Housing Finance Corporation	Massachusetts Department of Housing and Community Development
Boston Housing Authority	City of Providence Department of Planning & Development	Hamilton County, OH	Mass Housing Finance Agency
Boston Financial Investment Management	City Real Estate Advisors	HOME Funders	Massachusetts Housing Investment Corporation
Brookline Bank	Clean Energy Group Clocktower	Hope of Kentucky, LLC	Massachusetts Housing Partnership
Calvert Impact Capital	Community Economic Development Assistance Corporation	Housing Assistance Corporation	MassDevelopment
Cambridge Affordable Housing Trust	Community Investment Corporation	Hudson Housing Capital	MassHousing
Cambridge Savings Bank	Connecticut Department of Housing	IFF	Melville Charitable Trust
Cape Cod Commission	Connecticut Department of Economic and Community Development	Illinois Clean Energy Community Foundation	Mercy Loan Fund
Capital One Foundation	Connecticut Housing Finance Authority	Illinois Housing Development Authority	Miami-Dade County
CBRE	Cornerstone for Shared Equity	JP Morgan Capital Corporation	Miami Purchase Preservation Fund
Community Economic Development Assistance Corporation	CREA	JP Morgan Chase	Michigan State Housing Development Authority
Chicago Community Loan Fund	D.C. Office of the Deputy Mayor for Planning & Economic Development		

Midland Loan Services, Inc.
 Missouri Housing Development Commission
 Morgan Stanley
 National Affordable Housing Trust
 National Equity Fund
 New Hampshire Housing Finance Authority
 Northern New England Housing Investment Fund
 Ohio Capital Corporation for Housing
 Ohio Housing Finance Agency
 Over-the-Rhine Community Housing
 People's United Bank
 PNC Multifamily Capital
 Polk Brothers Foundation
 Prudential Social Investments
 Red Mortgage Capital
 R4
 Rhode Island Housing
 RiverHills Bank
 Rockland Trust Bank
 Santander
 Santander Charitable Foundation
 Silicon Valley Bank
 Somerville Housing Authority

Southeast Chicago Commission
 Stewards of Affordable Housing for the Future
 Stratford Capital Group
 TD Bank
 TD Charitable Foundation
 The Barr Foundation
 The Kresge Foundation
 The Richman Group
 Town of Bedford, MA
 Town of Framingham, MA
 Town of Weymouth, MA
 United Way
 U.S. Bancorp Community Development Corporation
 U.S. Bank National Association
 U.S. Department of Energy
 U.S. Department of Housing and Urban Development
 U.S. Treasury Community Development Financial Institutions Fund
 Voice of the People in Uptown
 Walker and Dunlop LLC
 Wells Fargo



OUR LEADERSHIP



AARON GORNSTEIN, *President and Chief Executive Officer*, has been President/CEO of POAH since 2015 and is the former undersecretary for the Massachusetts Department of Housing and Community Development and Executive Director of Citizens' Housing and Planning Association.

Board of Directors



GEORGIA MURRAY, *Chair*, Georgia Murray is widely experienced in property ownership and management, and served as director at Boston Financial, a real estate investment company and in senior positions in property management, asset management and investment and acquisitions.



LIZ BLUME, *Director*, is the Director of the Community Building Institute (CBI) at Xavier University and a planning professional with more than 30 years of experience.



PRINTICE GARY, *Director*, is the founding partner and CEO of Carleton Residential Properties, a real estate company engaged in investing, developing, general contracting, and asset management throughout the Southwest.



JOE FLATLEY, *Director*, served as President and CEO of the non-profit Massachusetts Housing Investment Corporation from 1990 through 2022.



DORIANE MILLER, *Director*, is the Director of the Center for Community Health and Vitality at UChicago Medical and professor of medicine at UChicago Pritzker School of Medicine.



JENNY NETZER, *Director*, was the CEO of TCAM, an asset management and consulting firm serving clients in the housing and tax credit industries.



RAMON JACOBSON, *Director*, is Executive Director of the Local Initiatives Support Corporation Washington, D.C. office where manages LIISC's portfolio in the District of Columbia.



ANA GELABERT-SANCHEZ, *Director*, is Principal of Gelabert-Sanchez LLC, a Planning and Design consulting firm that serves clients in the public and private sectors. She was planning director for the City of Miami from 1998 to 2010.



MARK SNYDERMAN, *Director*, was a portfolio manager and the Head of High Income Real Estate Group at Fidelity Management and Research Company.



WILLIAM TOWNS, *Director*, is the National Market President for Community Revitalization and Public Housing for Gorman & Co., working with public housing authorities on revitalizations and development strategies.



PRESERVATION
OF AFFORDABLE
HOUSING

2 Oliver Street, Suite 500
Boston MA 02109
(617) 261-9898
www.poah.org



Placework

To achieve a lasting positive impact, we need to envision it.

Placework's mission is to make good places that inspire people to take care of one another and planet. Our core values guide how we work within our team, with our clients, and in our communities:

EMPATHY

We build trust by listening and communicating with kindness.

CO-CREATION

We engage clients and project teams in a collaborative process to identify and achieve shared goals.

STEWARDSHIP

We design healthy places for people and the living ecosystems that support them.

CURIOSITY

We constantly expand our knowledge and skills to do better for those we serve.

POSITIVITY

We appreciate on our potential to create positive change.



Designing with Purpose.

As a Certified B Corporation, Placework has demonstrated the highest verified standards of social and environmental performance, transparency, and accountability. We are leading the shift from a “do less harm” paradigm to one that creates a just and healthy future for all.

Placework was founded in 2010 and established as a PLLC in 2013. Formerly Manypenny Murphy Architecture, we changed our name in 2019 to better reflect the skills, vision, and values of our team. We became a Certified B Corporation in 2022.





Strawbery Banke Stormwater Plan

A plan for historic preservation in a changing climate

Strawbery Banke Museum tells the story of a Portsmouth neighborhood on its 10-acre campus with over 40 buildings and thousands of historic artifacts. Placework led a planning effort to create a strategy for managing the Museum's ever-increasing vulnerability to stormwater inundation. Already strained by its low elevation and location along the Piscataqua River, a tidal estuary, the campus bears the overflow of ineffective municipal drainage systems. The climate change induced conditions call for highly specific strategies to manage surface water flow and retention.

The plan identifies seven areas of intervention to reduce inundation, divert surface water from historic building foundations, and mitigate erosion. Strategies for the interior campus are designed to be curatorial and interpretive to support the very work of the museum – bringing history to life – holistically improving the overall visitor experience.

SCOPE

Stormwater Plan

CLIENT

Strawbery Banke Museum

YEARS

2021-2023

REFERENCE

Rodney Rowland
Director of Facilities and
Environmental Sustainability
603.422.7525
rrowland@sbmuseum.org





FITNESS • ENRICHMENT • ARTS • ATHLETICS

PORTSMOUTH

Portsmouth Recreation Study

Assessing and Planning of Recreational Needs

Placework led a team that provided needs assessment, community engagement, and a planning report for Portsmouth, a regional hub and city of 25,000 people. The initial analysis compiled existing facility data and demographics and compared them with national trends, analyzing resource types, equity of access and physical distribution throughout the city. A prioritized set of guidelines for Portsmouth’s recreational future was created out of combined analysis and public input.

Community engagement included a public on-line survey and a series of in-person and virtual workshops. Forums captured the voice of the community as well as current City of Portsmouth volunteers and staff. Input was compiled and draft priorities reviewed by stakeholders. The final report outlined three primary goals, with seven categories of implementation strategies. Specific project examples were provided to guide future decision-making in keeping with the community’s goals.

SCOPE

Planning Study

CLIENT

City of Portsmouth, NH

YEARS

2021-2022

REFERENCE

Todd Henley
 Recreation Director
 City of Portsmouth
 (603) 610-8897
 takenley@cityofportsmouth.com



PRESERVATION, GROWTH AND STEWARDSHIP	
GOAL 2 MAINTAIN/ENHANCE EXISTING FACILITIES, EXPAND PROGRAM OFFERINGS AND DEVELOP NEW INDOOR AND OUTDOOR FACILITIES	
STRATEGIES	ACTIONS
A FACILITIES (Indoor) Provide adequate indoor facilities to support active living programs, services and lifestyles	1 Seek creative solutions to meet the community's identified need for the following facilities: <ul style="list-style-type: none"> Indoor ice rink/arena Multi-purpose sports complex Teen center Indoor courts (basketball/pickleball) Performance theater/Ambitheater
B FACILITIES (Outdoor) Provide adequate outdoor facilities to support active living programs, services and lifestyles.	2 Conduct economic feasibility and marketing studies to explore the development of new specialty facilities including: <ul style="list-style-type: none"> Indoor ice rink/arena Multi-purpose sports complex
	3 Utilize the Level of Service, Climate Change and FEMA Flood Zone Analyses as planning tools to inform future improvement investments.



Strawbery Banke Museum

Integrating a historic neighborhood into the urban fabric

Throughout a decade-long relationship with this revered Portsmouth, NH based non-profit organization, Placework has served Strawbery Banke Museum with architectural design work, space needs analysis, campus planning, and research and report writing. In collaboration with Horsley Witten Group, we have recently completed a feasibility study, cost estimate, and conceptual design for a new building on the historic campus which will become the center of the Museum's preservation, education, and curation efforts. Placework and Horsley Witten Group are currently creating a comprehensive storm water management plan for the entire campus as part of Strawbery Banke Museum's Sea Level Rise Initiative.

Other projects with the Museum include a historic assessment report and planning study for the Penhallow House; space planning, design, and restoration documentation for the Thales Yeaton House; design of a new boat-building workshop; planning and design for the Puddle Dock Pond Skating Rink; and design for the re-creation of historic garden structures.

SCOPE

Feasibility studies, historic preservation, site planning, new construction

CLIENT

Strawbery Banke Museum

YEARS

2015-Present

AWARDS

Plan NH Merit Award 2020, Puddle Dock Pond





Portsmouth Senior Activity Center

Adaptive reuse for an engaged community

Partially funded by a community block grant, Placework collaborated with the City of Portsmouth to transform a mid-century utilitarian structure into a welcoming 21st-century multi-use space. The project reimagines a former 1950s Army Reserve Center as a vibrant hub to support programming for the local senior community. The municipal facility will not only meet the current need for flexible spaces of various sizes, but also anticipates future growth of multi-generational community resources on the site.

A new entrance vestibule and canopy defines the new entry while providing a covered arrival and seating area. The lounge, a comfortable and inviting gathering space, is the focal point of the new interior; activity rooms of various sizes allow for flexible use, from lectures to yoga and dancing. Finishes throughout the building were chosen to soften the existing masonry construction and provide warm, tactile material elements.

SCOPE

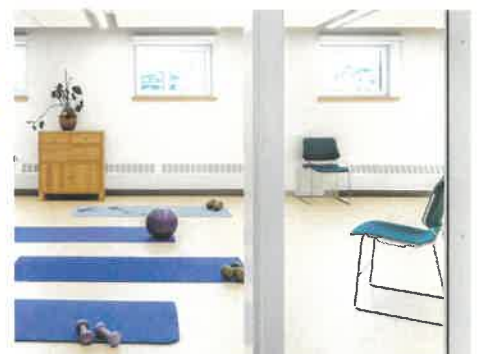
Adaptive Reuse

CLIENT

City of Portsmouth, NH

YEARS

2017-2020



Qualifications for Architectural Services



**Kaplan
Thompson
Architects**

Firm Profile

Philosophy

Beautiful. Sustainable. Attainable. These are the defining characteristics of Kaplan Thompson Architects' work. We combine the practicality of sustainable design with the artistry of architecture to deliver high-quality, low-impact, and on-budget buildings.

Since 2006, we have designed hundreds of deeply sustainable buildings at every scale, developing a portfolio of completed projects that spans single-family new construction and renovations, market rate and affordable multifamily housing, education facilities, and restaurant and retail spaces across New England and beyond. Our process embraces empathy, creativity, and technical rigor to deliver buildings that serve both people and planet.

We observe a teamwork model in which the architect leads a dynamic and innovative group of experts, working towards a common goal in alignment with client and contractor.

Sustainability

We design spaces that consider the environment into which they are built as much as the environment they are creating. Using Net-Zero, Passive House, and Living Building principles, we embrace the synergistic connection between human and ecological health to build resilient, adaptable, and future-proof communities.

Our firm has been a signatory in the American Institute of Architects' 2030 Commitment Program since 2011, a voluntary initiative in which members pledge to annually reduce the Predicted Energy Use Intensity of their projects and progress towards producing net-zero emission buildings by the year 2030. We have successfully met the Commitment goals every year since 2018 and achieved greater than an 80% carbon reduction portfolio-wide since 2019.

Our JUST label shows our commitment to improving social equity in the firm and the community, and enhancing employee engagement around these values.

Firm Details

Kaplan Thompson Architects was established by Phil Kaplan and Jesse Thompson in Portland, Maine in 2006. The company has eighteen employees. Our work has been featured in the New York Times, Wall Street Journal, Boston Globe, USA Today, NPR, and numerous national, New England, and Maine-based publications.



AIA 2030 Commitment

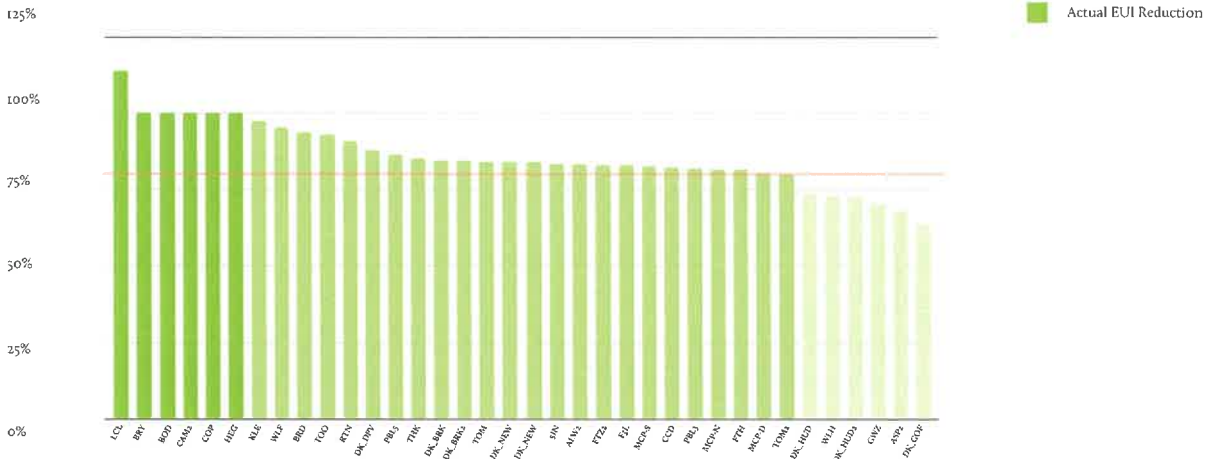
The urban built environment is responsible for 75% of the world's green house gas emissions, with buildings alone accounting for 40%. The AIA 2030 Commitment provides an actionable climate strategy with a series of incremental goals for achieving carbon neutrality in all new construction and renovation projects by the year 2030. To-date, more than 1,300 firms nationwide have made the pledge to design fossil fuel-free buildings and reduce the greenhouse gas emissions and energy consumption of their projects.



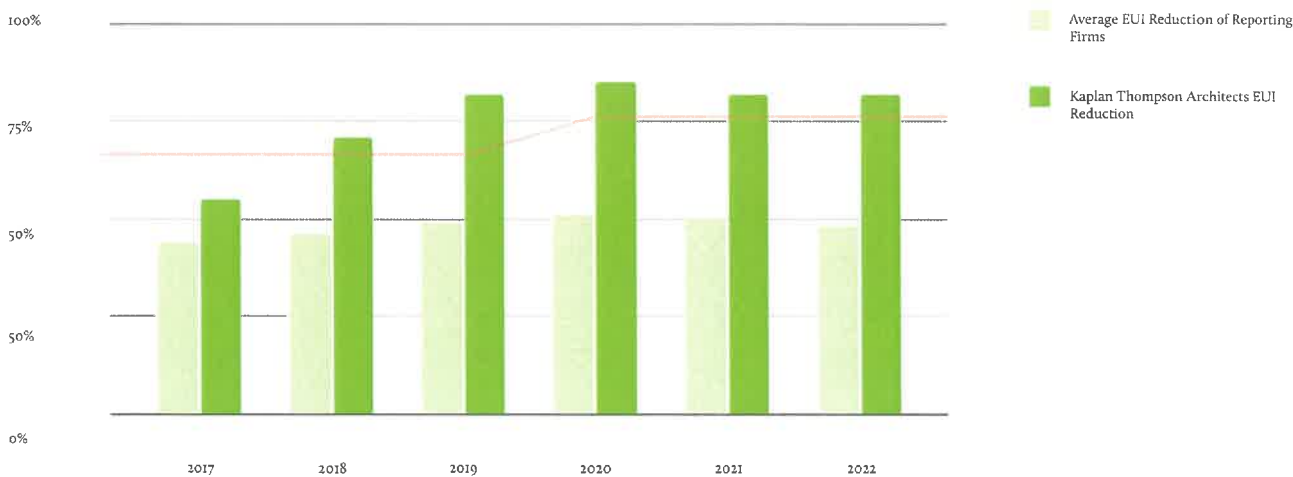
Kaplan Thompson Architects was among just 19 firms in the country to meet the goal of 80% pEUI reduction across our entire portfolio of submitted work in 2022; our submission for work performed in 2023 has also been accepted, marking our sixth consecutive year of successfully hitting this target. We create energy models for every active project - over 50 projects per year! - at each phase of design, allowing us to measure a building's anticipated consumption and adapt the design to meet desired performance metrics.

As the AIA 2030 Commitment gradually lowers energy use targets until net zero energy is achieved, our firm has tackled the increasing challenge with persistent innovation, including testing building forms that allow for increased solar energy production.

KTA's 2022 AIA 2030 Commitment Data



AIA 2030 Commitment Firm Comparison



Project Manager

Jesse Thompson

Kaplan Thompson Architects
Principal, FAIA, LEED AP, CPHC

jesse@kaplanthompson.com
207-842-2888
102 Exchange St Portland, ME 04101
<https://www.kaplanthompson.com/>

SIGNIFICANT PROJECTS

West End Apartments
116 affordable housing apartments, South Portland, ME
Completed 2023

5 India
24 market-rate apartments, Portland, ME
Completed 2022

Friars Court
81 affordable housing apartments, Hudson, NH
Completed 2022

Oak Tree Village
72 affordable housing apartments, Griswold, CT
Completed 2021

Parris Terraces
23 unsubsidized Workforce Housing condos, Portland, ME
Completed 2019

EDUCATION

University of Oregon
Bachelor of Architecture, 1996

LICENSURE

Maine
Connecticut
Massachusetts
New Hampshire



Jesse Thompson is co-founder and Principal of Kaplan Thompson Architects and BrightBuilt Home, and has become a national leader in green design, building science, and affordable housing. He is a Maine, Massachusetts, New Hampshire, and Connecticut Licensed Architect that was awarded Fellowship, the AIA's highest membership honor, in 2024. He was the first architect in northern New England to become a Certified Passive House Consultant.

His portfolio straddles the residential and commercial worlds with a proven record of bringing even the most complex projects to fruition. He expertly balances client needs, design directives, and regulatory requirements to deliver beautiful buildings on time and on budget.

In his twenty-seven years of practice, Jesse has advanced the industry's fluency in high-performance design with his enthusiastic mentorship, collaborative spirit, and the presentation of nearly one hundred workshops and lectures with professionals across the country. He has served as past President of the Maine Chapter of the AIA, a Board member of the Portland Society for Architecture, and a founding member of Passivhaus Maine.

Significant Awards, Honors & Recognition

Design Awards

AIA New England Awards

- 2020 Honor Award for Parris Terraces
- 2017 Citation Award for Bayside Anchor
- 2013 Merit Award for Harborview Townhomes

AIA Maine Awards

- 2023 Detail Award for 5 India
- 2022 Honor Award for The Ecology School
- 2020 Honor Award for Parris Terraces
- 2020 Merit Award for Blackwood House
- 2015 AIA COTE Merit Award for Harborview Townhomes
- 2015 AIA COTE Merit Award for Maiden Cove DER
- 2013 AIA COTE Honor Award for Ranch Revival
- 2012 Merit Award for Ranch Revival
- 2012 Merit Award for Miyake
- 2012 Merit Award for White Mountain View

Phius Passive House Awards

- 2022 Passive Projects Design Competition Honorable Mention for Oak Tree Village
- 2018 Best Affordable Housing Award for Bayside Anchor
- 2018 Best Single Family Award for Joslin Hill Passive House

LEED Awards & Certifications

- 2013 Outstanding Single Family LEED for Homes Award for Passive House Farmstead
- 2011 LEED Platinum Certification for Flying Point
- 2009 LEED for Homes Innovation Award for BrightBuilt Barn

Other Awards and Recognitions

- 2023 New Hampshire Home | Best Energy-Efficient Design for Beaver Lodge Lookout
- 2023 WoodWorks | Sustainable Wood Design Award for The Ecology School
- 2022 Rethinking the Future | Sustainable Project of the Year | The Ecology School
- 2022 Rethinking the Future | Second Award - Institutional | The Ecology School
- 2022 Multifamily Executive Awards | Mixed Income Merit Winner | Oak Tree Village
- 2021 MEREDA Magnificent Seven | Honorable Mention | The Ecology School
- 2019 Maine Homes Design Awards | Best Professional Bath | Long Reach Retreat
- 2019 Maine Smart Growth Awards | Outstanding Project | Parris Terraces
- 2018 Efficiency Vermont | Merit Award | Joslin Hill Passive House
- 2018 Maine Environmental Education Association | The Ecology School
- 2017 Vermont's Greenest Building Awards | Vermont's Greener Award | Joslin Hill Passive House
- 2013 Lowering the Cost of Housing Competition Winner | Bayside Anchor
- 2013 Fine Homebuilding Magazine | Best Energy-Smart Home | Flying Point

Notable Achievements

LEED AP Certified, 2004

LEED AP BC+C Certified, 2011

Certified Passive House Consultant:

Passivhaus Institut (PHI), 2011

Passive House Institute US (PHIUS), 2011

First architect in northern New England to become a Certified Passive House Consultant

Founding member of PassivhausMAINE

The AIA 2030 Commitment signatory since 2011

40 under 40 in Portland, Maine, 2011

First company in Maine to get a JUST label, 2018

AIA Involvement

President AIA Maine 2018-2020

AIA Maine Board of Directors 2009-2022

AIA Grassroots annual leadership conference attendee 2017

AIA 2030 Firm Representative 2019 – Present

Named AIA Fellow 2024

Jury Service

NH Home Awards

Maine AIA partners

Civic / Volunteer

Governor of Maine's Climate Council: Buildings and Infrastructure, 2019-2020

Portland Society for Architecture, Board Member 2009 - 2016

Maine Affordable Housing Commission member 2020 – present

PassivhausME co-founder



Lambert Woods and Dougherty Commons

Client: POAH, Maine Cooperative Development Partners

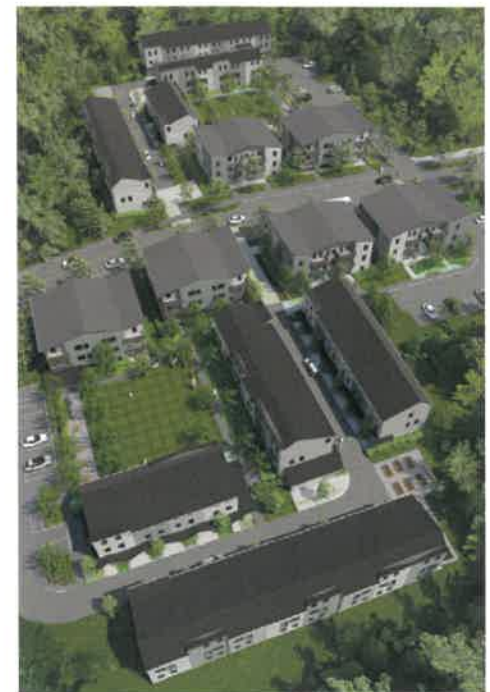
Completion Date: 2025

Location: Portland, ME

Designed in partnership with Maine Cooperative Development Partners and Preservation of Affordable Housing (POAH), the Dougherty Commons and Lambert Woods developments will create rentable and cooperatively-owned housing in Portland's Libbytown neighborhood.

The family-oriented developments feature three distinct building typologies - townhomes, rowhomes, and community flats, designed as standardized base models and deployed as repeats of one another - that differ in unit densities and sizes to accommodate a diversity of demographics. Though the buildings vary in scale, a shared architectural language creates rhythm and cohesion among them. Similar rooflines, repetition of colors and materials, and common elements such as column details, entry canopies, and proportions of fenestration will define a clear and consistent neighborhood aesthetic. Design of the greater site prioritizes a balance of green space, transit-orientation, walkability, community, and privacy.

More than 200 new units will provide affordable, high-performance rentals and home ownership to households earning 100% or less of the area median income. For buildings offered via a limited equity co-op model, residences will be owned and managed by the occupants, rather than landlords, and offered at lower buy-ins than market-rate co-ops. Profits will be capped on the future resale of units to maintain affordability over time. The cooperative model creates greater accessibility to home-ownership in the Portland area, which has become increasingly unobtainable for low- and moderate- income residents.



renderings by Aceto Landscape Architects

The neighborhoods surrounding Dougherty Commons and Lambert Woods are dominated by single family residences, inspiring a similar architectural scale and occupant experience in the new developments. Residences are configured so that both interior layouts and the positioning of buildings onsite provide occupants with a sense of individual identity while supporting connectivity to other homeowners within the community.

All new buildings will be solar-ready and achieve the performance standards outlined in the Department of Energy Zero Energy Ready Home Program.

4-unit rowhome:

- 2 one-bedroom units at ground level
- 2 two-story, three-bedroom units on upper level



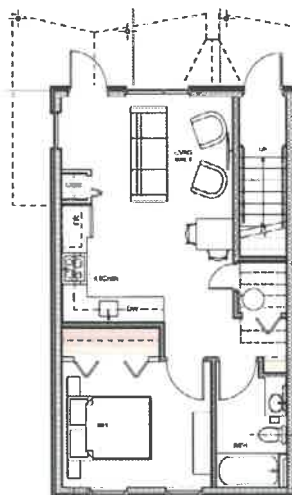
3-unit townhome:

- 3 two-story, three-bedroom units



Typical 3-bedroom unit

Typical 1-bedroom unit



Lower Level



Upper Level



Oak Tree Village

Client: Dakota Partners

Size: 96,976 sq. ft.

Completion Date: 2021

Location: Griswold, CT

In partnership with an active New England developer of high-performance affordable housing, we designed a prototype for a Passive House multi-family building that could be deployed at multiple sites and achieve certification at different orientations and locations. This efficient and economic approach delivers Passive House at scale and with consistent high quality, benefiting from continuous improvement cycles in drawing sets and construction methodology with every repetition of the design.

Oak Tree Village features the first two built iterations of the Passive House prototype, introducing 72 units of sustainable, mixed-income housing to Griswold, Connecticut. Each three-story building contains 36 open-concept, one- and two-bedroom apartments with a first-floor lobby. A centralized clubhouse provides a community room, fitness facility, leasing office, and other shared spaces for residents to enjoy. The development is 80% deeply affordable to families and individuals earning 50-80% of Area Median Income and includes 15 supportive housing units and 15 market-rate rentals.

A large-scale project with small environmental impact, both residential buildings at Oak Tree Village have achieved PHIUS+ 2018 Core Certification and are currently passing PHIUS Core 2021 standards. Every residential unit is outfitted with its own fresh air ventilation supply and exhaust system, with Energy Recovery Units in the ceilings of the building's main corridors to reclaim interior heat. Though not certified, the clubhouse was also built to Passive House standards.

To date, we have built four of seven planned prototype buildings across two developments. Ultimately, 252 Passive Home apartments will be generated through this effort.



Blackstone Senior Living

Client: Avesta Housing

Size: 15,681 sq. ft.

Completion Date: 2018

Location: Falmouth, ME

Avesta Housing owned a set of 20 rental apartments originally built in the 1970s designed for low-income elderly persons or individuals with disability. The existing apartments were worn and needed a complicated matrix of renovations, including new cabinetry, flooring, sinks, trim, toilets, and a fresh air ventilation system. In addition, we had the opportunity to build 19 new apartments.

The new building was designed as a stealth “Passive House”— meeting the highest energy efficiency goals on the planet without going through a complex Certification process on a project that had to be completed within 10 months for \$165 per square foot.

Knowing that the residents were an aging population, care was taken to install features that would support them: handrails throughout the hallways with orienting windows and calming colors on the walls. The apartments themselves are ADA accessible, with bright and open floor plans.

To situate the building in the context of the surrounding neighborhood, we designed a classic New England shape with white clapboard sides and a high-pitched gable roof. A large, sheltering front porch provides a place for residents to sit outside. High quality, durable, and affordable construction materials were used in both the renovations and the new construction.



Parris Terraces

Client: Jack Soley

Size: 13,711 sq. ft.

Completion Date: 2019

Location: Portland, ME

Parris Terraces apartments are both attractive and affordable, seeking to create housing for an income bracket overlooked in the current market. Units can be purchased at Workforce Housing prices with no government subsidy and meet the desperate need for Missing Middle Housing. Upon opening, the building was fully occupied with 18 of the 23 homes going to first-time homebuyers at prices as low as \$195k, a figure unheard of for downtown home ownership.

In order to fit 23 homes in a small footprint, the apartments are designed to be as efficient as possible. An open kitchen/living space allows for airiness in the common area, while a compact bedroom and bathroom leave extra room for closets and in-unit laundry. Tall ceilings – ranging from 9 to 14 feet – create the illusion of a larger space while elongated windows welcome abundant daylight. Six of the seven upper apartments also have a small balcony, providing a connection to the outdoors invaluable to urban living. Residents enjoy 24-hour fresh air ventilation with heat recovery, as well as individual thermostats. As a final consideration, a first-floor guest apartment is available for use by all owners to accommodate visits from traveling loved ones.

The building is situated just a few blocks from the center of downtown Portland and within walking distance of multiple grocers, restaurants, recreational areas, and other municipal services. It is close to a variety of forms of public transportation, with bike racks and parking included onsite.

Sustainable design and Passive House techniques were applied to the structure as well. The project has a predicted overall energy use of 58% of a typical multi-family building (EUI of 22), even without renewable energy systems installed.





ALA is a process-driven, landscape architecture and urban design firm committed to thoughtful, creative intervention at the intersection of environment, economics, art, and culture. ALA was founded on the notion that great design is a product of careful listening, inclusive decision-making, and unrelenting passion for enduring built spaces. We believe in the core tenets of placemaking and the power of design to shape our everyday experience and sense of well-being.

ALA's team offers a unique set of skills and perspective, well-equipped to harmonize and reconcile the roles and value systems of varied design disciplines. We integrate expertise and intuition to craft powerful places, built upon a commitment to resiliency and sustainability. Our studio's passion for craft and technical savvy affords us the opportunity to collaborate across a broad range of scales and geographic locales.



CAITLIN ACETO, PLA, ASLA
PRINCIPAL+PARTNER



SETH KIMBALL, PLA, ASLA
PRINCIPAL+PARTNER



TRILBEY NELSEN



PAIGE LYONS



NICK ACETO, PLA, ASLA
PRINCIPAL+PARTNER



GRACE MCNEILL
DESIGNER



COLLEEN SLOAN









THE DOWNS | 510-ACRE MASTER PLAN & TOWN CENTER SCARBOROUGH ME

ALA has played a key visionary and design role since the project's inception in late 2017. Specifically, ALA has been the sole consultant responsible for developing the overall project master plan as well as working collaboratively with a diverse range of consultants to deliver fully permitted and implemented site plans ranging from entire mixed-density neighborhoods to large office users, and innovative commercial and light-industrial developments.

KEY STAFF
SERVICES
REFERENCE
STATUS

Nick Aceto, Caitlin Aceto, Seth Kimball
Master Planning, Urban Design, Landscape Architecture, Visualization
Dan Bacon, Development Director | dbacon@mr.holdings
Under Way



FRONTRUNNER PARK SCARBOROUGH ME

This third phase of The Downs master plan includes over 200 homes across a broad range of affordability including compact, lane-loaded single family and pocket homes as well as more than 75 apartment units and ground floor office space. The plan is organized around a series of small parks and a highly-walkable street grid.

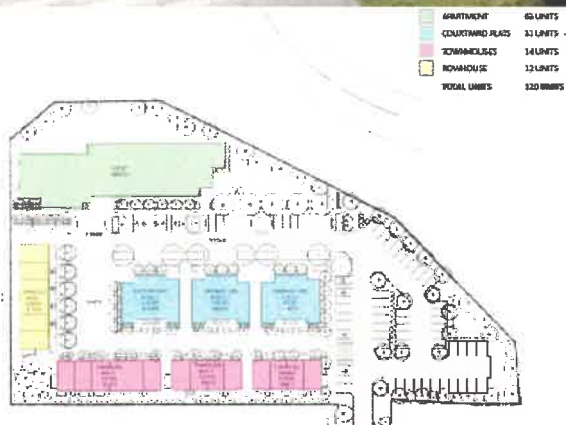
KEY STAFF	Nick Aceto, Seth Kimball
SERVICES	Master Planning, Urban Design, Landscape Architecture, Visualization
STATUS	Permitted, Expected Construction Fall 2020
REFERENCE	Jay Chace, Planning Director, Town of Scarborough Jchace@Scarboroughmaine.org



LAMBERT WOODS PORTLAND ME

ALA has worked closely with a multi-disciplinary team of architects, engineers, foresters, and planners to develop a master plan and site permitting documents for the second major co-op housing development in Portland. The visionary developers charged the design team with developing a compact, affordable program that respects the sites natural character while introducing new public space and bike/ped facilities.

KEY STAFF	Nick Aceto, Caitlin Aceto, Seth Kimball
SERVICES	Landscape Architecture, Master Planning, Visualization
STATUS	Permitting
REFERENCE	Preservation of Affordable Housing



DOUGHERTY COMMON PORTLAND ME

In 2018, Aceto pitched the City of Portland with the idea of building infill housing at the former site of the West School in Libbytown. ALA joined a team of developers in 2021 to plan and build two of Portland's first co-op housing communities. One of which would deliver more than 160 units to the former West School site.

KEY STAFF	Nick Aceto, Caitlin Aceto, Seth Kimball
SERVICES	Landscape Architecture, Master Planning, Visualization
STATUS	Permitting
REFERENCE	Maine Cooperative Development Partners

REFERENCES

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DKELLER@BATHHOUSING.ORG

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207.756.8362



ALA LIST OF SELECT PROJECTS

ALA has been fortunate to have made meaningful contributions to a vast array of projects across a wide gamut of scales over the last 5-6 years. Below is an abbreviated list of select project examples intended to provide a sense of our professional skill set, experience, and range as a design studio. We would be happy to provide more information about any of the below projects upon request.

COMMERCIAL/CAMPUS

HOMELESS SERVICES CENTER	PORTLAND, ME
100 FORE STREET OFFICE BUILDING	PORTLAND, ME
66 STATE STREET	PORTLAND, ME
LAAM 525 LIVE-WORK	BASALT, CO
HOTEL ASPEN	ASPEN, CO
MEMORIAL PLAZA	QUANTICO, VA
CUMBERLAND CLUB SITE PLAN	PORTLAND, ME
RIVERSIDE LIVE-WORK	PORTLAND, ME
WILLITS BEND LIVE-WORK	BASALT, CO
RED HAWK ELEMENTARY SCHOOL	ERIE, CO
ANDERSON RANCH ARTS CAMPUS	SNOWMASS VILLAGE, CO

HOUSING DEVELOPMENT

MERCY HOSPITAL REDEVELOPMENT	PORTLAND, ME
LAMBERT WOODS CO-OP	PORTLAND, ME
DOUGHERTY COMMON CO-OP	PORTLAND, ME
200 FEDERAL STREET	PORTLAND, ME
SCARBOROUGH DOWNS MASTER PLAN	SCARBOROUGH, ME
JOCELYN PLACE	SCARBOROUGH, ME
PUBLIC WORKS REDEVELOPMENT	BELFAST, ME
BATH HOUSING MASTER PLAN	BATH, ME
HEAD OF FALLS VILLAGE	WATERVILLE, ME
RAISE-OP BLAKE STREET	LEWISTON, ME
RAISE-OP WALNUT STREET	LEWISTON, ME
STEVENS SQUARE	PORTLAND, ME
KENNEBUNKPORT HOUSING TRUST	KENNEBUNKPORT, ME
THE TREE FARM	BASALT CO
66 STATE STREET	PORTLAND, ME
BLOCK 11 MASTER PLAN	BRECKENRIDGE, CO
BROKEN COMPASS BREWERY	BRECKENRIDGE, CO
RIVERBEND COMMERCIAL CENTER	TIMNATH, CO
CUMBERLAND MULTI-GEN	CUMBERLAND, ME

PUBLIC/MUNICIPAL PLANNING

VILLAGES MASTER PLAN	WINDHAM/GORHAM, ME
COMMERCIAL STREET TRANS. STUDY	PORTLAND, ME
LIBBYTOWN PLAYScape	PORTLAND, ME
BASALT POST SIGNAGE	BASALT, CO
TOWN WAYFINDING SIGNAGE	BASALT, CO
BAYSIDE ADAPTS MASTER PLAN	PORTLAND, ME
ARBANEY PARK MASTER PLAN	BASALT, CO
BASALT OUR TOWN	BASALT, CO
TIMNATH COMMUNITY PARK	TIMNATH, CO
PACTS SMART CORRIDOR STUDY	PORTLAND, ME
LIBBYTOWN VISIONING	PORTLAND, ME



REQUEST FOR QUALIFICATIONS # 52-24

<p>Response prepared by:</p> <p style="text-align: center;"> Avanru Development Group, Ltd. P.O. Box 1015, Walpole, NH 03608 Website: www.avanrudevelopment.com Contact: George Hansel Email: george@avanrudevelopment.com Phone: 603-903-3677 </p>	<p>In response to the request from:</p> <p style="text-align: center;"> The City of Portsmouth, NH 1 Junkins Avenue Portsmouth, NH 03801 </p>
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PROJECT LOCATION(S):

- 35 Sherburne Road, Portsmouth, NH



Avanru Development Group, Ltd
"Building for a better future..."

TABLE OF CONTENTS

1. Letter of Interest
2. Team and Organization
3. History of Other Projects

SUBMISSION DATE:

June 4, 2024

LETTER OF INTEREST

5/4/2024

Finance/Purchasing Department, Portsmouth City Hall
1 Junkins Avenue
Portsmouth, NH 03801

Re: Avanru Development Group's interest in developing the property at 35 Sherburne Road, Portsmouth, NH

Dear Selection Committee:

Avanru Development Group, Ltd. (ADG) is an experienced developer of affordable, workforce, senior, and market rate housing utilizing volumetric modular construction methods. Headquartered in Walpole, New Hampshire, ADG has developed hundreds of units of housing throughout New Hampshire. A typical project is between 42-84 units, with development costs ranging from \$14-25M. ADG has \$150M of projects in the pipeline that are currently being permitted or under construction.

ADG is formally expressing interest in developing the city-owned parcel located at 35 Sherburne Road in Portsmouth, NH. We are excited about the prospect of utilizing our experience to help transform this parcel into affordable and sustainable apartments that will meet the needs of future residents and the Portsmouth community at-large.

ADG specializes in creating innovative affordable housing that exceeds 2030 energy efficiency standards by utilizing the latest modular technologies we've developed. Our proven design and methods provide a superior product in less time, with a multitude of benefits over traditional stick-built construction.

Key advantages of ADG's offsite construction methods include:

- Cost Savings and Certainty
- Schedule Savings and Certainty
- Energy Efficiency
- Quality Control
- Reduced Environmental Impact
- Reduced Construction Waste
- Reduced Neighborhood Impact During Construction
- Improved Worker Safety

ADG's modular design allows for unparalleled energy-efficiency and a significantly lower cost of ownership as compared with traditional construction methods. Each box is manufactured in a controlled environment where precision and quality standards can be controlled. One of ADG's recent projects reduced energy consumption for heating and cooling by 70% compared with similar multifamily housing developments as reported by the Fannie Mae Industry Survey. These

fuel savings allow residents to afford a comfortable home year-round, positively impacting both their health and the environment.

Funding for the project will come from a combination of sources including, but not limited to: ADG's own pre-development funds, investor equity funds, the Low-Income Housing Tax Credits (LIHTC), and any grants or public funding that can be raised before construction begins. ADG has successfully used each of these tools to deliver projects on time and on budget.

ADG is excited to work in partnership with Portsmouth's city leadership, and community, to transform the 35 Sherburne Road property into a development that will illicit pride from both the future residents and the broader community. Please feel free to reach out with any questions or concerns. We look forward to the next steps and hearing from you soon.

Best regards,

A handwritten signature in cursive script that reads "George Hansel".

George Hansel

Avanru Development Group Ltd.

TEAM AND ORGANIZATION

ADG will oversee the project, acting as the project developer and owner. Throughout the development process, several specialized firms and individuals, listed as “Development Partners” below, will be brought in to perform specific job functions.

Project Team:

Jack Franks – Principal, Avanru Development Group, Ltd.

Responsibilities: Overall project execution, community engagement, permitting, and project financing

George Hansel – Project Manager, Avanru Development Group, Ltd.

Responsibilities: Overall project execution, community engagement, permitting, and project financing

Tim Sampson – Architect, Principal, Sampson Architects

Responsibilities: Building design, site plan, and code compliance

Selected Development Partners:

RC2 Commercial, a subsidiary of Ritz-Craft – 15 Industrial Park Road, Mifflinburg, PA

Responsibilities: Manufacturing, transportation, and box setting

WV Engineering – 11 King Court, Keene, NH

Responsibilities: Mechanical Engineering, LEED compliance analysis, Energy modeling

Fieldstone Land Consultants, PLLC – 778 Elm Street, Suite C, Milford, NH

Responsibilities: Civil Engineering, land surveying and environmental services

Baker Tilly LLP – 1 Highwood Drive, Tewksbury, MA 01876

Responsibilities: Advisory, tax, insurance

Five Points (BIPOC-led) – 8911 N. Capital of TX Hwy, Ste 4200-111, Austin, TX 78759

Responsibilities: Project funding partner

HISTORY OF OTHER PROJECTS

ADG strives to improve the quality of life of our families, friends and neighbors through community-minded planning, great design and high-quality construction & property management. In recent years, ADG has built affordable housing projects throughout New Hampshire totaling more than \$80,000,000. ADG has \$150,000,000 of projects in the pipeline and scheduled for construction over the next two years.



The Residences at Abenaki Springs - 17 Avery Lane, Walpole, NH 03608

Project Type: Workforce Housing

Number of units: 43

Developer: Avanru Development Group, Ltd.

Owner: Avanru Development Group, Ltd.

Architect: Sampson Architecture

Property Manager: Avanru Development Group, Ltd.

Description:

Built in 2015, Abenaki Springs was the state's first affordable modular housing development. Taking its name from the nearby "healing" springs that were historically frequented by visitors coming to Walpole by train in the late 1800's, The Residences at Abenaki Springs is a residential multi-family development that provides quality, energy-efficient, low-maintenance apartments for the local and regional community.

Designed to meet the needs of local residents and fit with the historic, rural and agricultural aesthetic of the town, The Residences at Abenaki Springs feature:

- 784 sf one-bedroom units and 1,176 sf two-bedroom, two-bath units
- Energy Star appliances and lighting
- ADA accessible units
- Common rooms and porches for use by all residents
- Individually-controlled digital heating & cooling systems



Swanzey West Apartments – 10 & 12 Perry Lane, Swanzey, NH 03446

Project Type: Workforce Housing

Number of units: 84

Developer: Avanru Development Group, Ltd.

Owner: Avanru Development Group, Ltd.

Architect: Sampson Architecture

Property Manager: Avanru Development Group, Ltd.

Description:

Phase I (42 units) of this new facility came online November 1, 2023. Phase II (42 units) is completed and leasing as of January 2024. The Swanzey West Apartments feature:

- (36) Spacious, 605 sf one-bedroom/one-bathroom units
- (36) Spacious, 905 sf two-bedroom/two-bathroom units
- (12) Spacious, 915 sf three-bedroom/two-bathroom units
- Energy Star Appliances and Lighting
- ADA Accessible Units
- Common Rooms and Porches for use by All Residents
- Individually-Controlled Digital Heating & Cooling Systems



Spring Street Apartments – Spring St., Newport, NH 03773

Project Type: Workforce Housing

Number of units: 42

Developer: Avanru Development Group, Ltd.

Owner: Avanru Development Group, Ltd.

Architect: Sampson Architecture

Property Manager: Avanru Development Group, Ltd.

Description:

This project was completed in February 2024. The Spring Street Apartments feature:

- (24) Spacious, 605 sf one-bedroom/one-bathroom units
- (18) Spacious, 905 sf two-bedroom/two-bathroom units
- Energy Star Appliances and Lighting
- ADA Accessible Units
- Common Rooms and Porches for use by All Residents
- Individually-Controlled Digital Heating & Cooling Systems



Hillsborough Heights – 219 West Main St., Hillsborough, NH 03244

Project Type: Workforce Housing

Number of units: 42

Developer: Avanru Development Group, Ltd.

Owner: Avanru Development Group, Ltd.

Architect: Sampson Architecture

Property Manager: Avanru Development Group, Ltd.

Description:

Currently under construction. This project is scheduled for completion in October 2024. The Hillsborough Heights will feature:

- (24) Spacious, 605 sf one-bedroom/one-bathroom units
- (18) Spacious, 905 sf two-bedroom/two-bathroom units
- Energy Star Appliances and Lighting
- ADA Accessible Units
- Common Rooms and Porches for use by All Residents
- Individually-Controlled Digital Heating & Cooling Systems



Plane View Housing – Swanzey, NH 03446

Project Type: Senior Housing

Number of units: 74

Developer: Avanru Development Group, Ltd.

Owner: Avanru Development Group, Ltd.

Architect: Sampson Architecture

Property Manager: Avanru Development Group, Ltd.

Description:

Currently waiting for tax credit allocation. This project is scheduled for completion in June 2026.

The Plane View Housing will feature:

- (63) Spacious, 605 sf one-bedroom/one-bathroom units
- (11) Spacious, 905 sf two-bedroom/two-bathroom units
- Energy Star Appliances and Lighting
- ADA Accessible Units
- Common Rooms and Porches for use by All Residents
- Individually-Controlled Digital Heating & Cooling Systems

2024 Request for Qualifications – 35 Sherburne Road



Tamposi Brothers Holdings, LLC
PO Box 847, Hollis, NH 03049

Contact Person:
Joe Tamposi, Manager
603-305-8998
Joetamposi@gmail.com

Tamposi Brothers Holdings, LLC
PO Box 847
Hollis, NH 03049

June 7, 2024

City of Portsmouth
Finance/Purchasing Department
1 Junkins Avenue
Portsmouth, NH 03801

RE: Request for Qualifications #52-24 For Entities Engaged in Permanent, Below Market Rate Housing Development for Municipal Property at 35 Sherburne Road, Portsmouth, NH

Dear Deputy Manager Lunney:

On behalf of Tamposi Brothers Holdings, LLC, I am pleased to submit the following Letter of Interest for the City of Portsmouth's disposition of the Municipal Property at 35 Sherburne Road for the development of below market rate housing. We acknowledge receipt of the proposal and all Addenda.

By way of background, Tamposi Brothers Holdings, LLC is a fully-integrated real estate development company founded by Joe and Jake Tamposi. Based in Hollis, NH, our company has become one of the leading developers of affordable and workforce housing in the State of New Hampshire. Since 2020, we have been directly responsible for the permitting, development, and/or construction of approximately 600 units of affordable and mixed-income housing in New England, including two twinned LIHTC projects funded by NH Housing, five 40B projects in Massachusetts, and numerous restorations of historical properties.

At the Sherburne School site, we would seek to work with the City to develop a first-class affordable housing community that respects the historic façade of the school building. Our expectation is that all of units developed on the site would have an average affordability at or below 60% of the Area Median Income for Portsmouth. We would anticipate financing the project principally through Low Income Housing Tax Credits competitively awarded by NH Housing together with other state and federal funding sources. In NH Housing's previous two funding rounds for competitive tax credits, applications from Tamposi Brothers Holdings have been the highest scoring projects in each round.

Tamposi Brothers Holdings and its principals have significant New Hampshire-specific expertise in the permitting, financing, and construction of complex affordable housing projects as well as extensive experience in restoring historic New England structures and integrating them into high quality new developments. A sample of these projects is outlined below. Pembroke Road Apartments Phase I and II, which consist of 123 affordable units in three buildings currently under construction in Concord, NH, are both ahead of schedule and under budget.

Thank you for your consideration,

Joe Tamposi
Tamposi Brothers Holdings, LLC
603-305-8998

Affordable Housing Developments in New Hampshire

Project Name:	Avery Lane Phase I and Phase II
Location:	Nashua, NH
Developer Entity:	Tamposi Brothers Holdings, LLC
Total Development Costs:	\$33 Million
Public Funding Sources:	Federal Low Income Housing Tax Credits, Tax-Exempt Bonds, HOME Funds, NH Affordable Housing Funds, HOME-ARP Funds, Project Based Vouchers
Energy Standards:	NH Saves Energy Charette
Status:	Funding Allocated, Pre-Construction with anticipated start Summer 2024
Project Reference:	Sam Durfee Planning Manager City of Nashua, NH 603-589-3112

Narrative Summary:

The riverfront area of Nashua’s East Hollis Street is a neighborhood at a crossroads. Old, heavy industrial uses share space with smaller scale residential uses. However, the City of Nashua’s Master Plan, East Hollis Street Area Plan, and Transit Overlay Development District envision the area being revitalized with new transportation options supporting higher density residential and mixed-use development in close proximity to the river and downtown. The Avery Lane project supports this vision by redeveloping an environmentally-compromised, industrial and contractor yard into a vibrant, 100% affordable workforce housing community.

Avery Lane Phase I will create 32 new, high-quality, affordable housing units for general occupancy in a four-story garden-style elevator building. Hillsborough County in New Hampshire has one of the lowest vacancy rates in the state of NH for apartments (0.4%) and the highest median gross monthly rental costs (\$1,858). The project secured competitive Low Income Housing Tax Credits in NH Housing’s most recent funding round and will feature rents affordable to households at 60% AMI, 50% AMI, as well as a set-aside for the HUD 811 program at 30% AMI for individuals experiencing severe mental health issues.

Sharing a campus with Avery Lane Apartments Phase I, Phase II will feature interconnected sidewalks and a playground, as well as easy access to shopping, retail, employment, and transit opportunities. The project will create 63 new, high-quality, affordable housing units for general occupancy in the City of Nashua in a four-story garden-style elevator building. The project is being financed in part with 4% Low Income Housing Tax Credits and Tax-Exempt Bond funding, and will feature rents affordable to households at 60% AMI.



EAST HOLLIS STREET APARTMENTS

Project Name:	Pembroke Road Apartment Phase I and Phase II
Location:	Concord, NH
Developer Entity:	Four Percent Pembroke Road Manager, LLC and Nine Percent Pembroke Road Manager, LLC (Joe and Jake Tamposi)
Total Development Costs:	\$39 Million
Public Funding Sources:	Federal Low Income Housing Tax Credits, Tax-Exempt Bonds, InvestNH Funds, NH Affordable Housing Funds
Energy Standards:	NH Saves Energy Charette
Status:	Construction with anticipated completion in late 2024/ early 2025
Project Reference:	Jim Menihane Director of Multifamily Originations & Business Development New Hampshire Housing (603) 310-9273

Narrative Summary:

The area between Louden Road, Sheep Davis Road, and Pembroke Road in Concord has historically lacked a clear identity. The construction of Steeplegate Mall in 1990 spurred commercial development along Louden Road, but the rise of online retail and a lack of higher density housing (despite appropriate zoning) has led to a decline in foot traffic.

Located directly adjacent the Steeplegate Mall, Pembroke Road Apartments is one of several projects that will increase foot traffic, provide housing for the workforce, and support plans to renovate Steeplegate Mall into a mixed-use destination. The project consists of a total of 123 affordable apartments in three, 3-story buildings in a New England style campus. Featuring all 2-bedroom units, interconnected sidewalks, a playground, and dog park, the community will help meet the need for affordable housing for families with children in Merrimack County.

Phase I consists of 39 units with rents affordable to households at 60% AMI and 50% AMI as well as a set-aside for the HUD 811 program for individuals experiencing severe mental health issues. Phase II consists of 84 units with rents affordable to household at 60% AMI. Financing for the phases is through a combination of state, federal, and private funding sources.



Project Name:	Courtyard Apartments
Location:	Manchester, NH
Developer Entity:	245 Main Street Manchester, LLC (Joe and Jake Tamposi)
Total Development Costs:	\$2 Million
Public Funding Sources:	Project Based Vouchers
Energy Standards:	NH Saves Low Income Housing Energy Audit and Assistance
Status:	Occupied
Project Reference:	Ned Olney President and CEO Crotched Mountain Foundation 603-792-0133

Narrative Summary:

Originally constructed in the 1980’s by Crotched Mountain Foundation, Courtyard Apartments has provided safe, clean, affordable housing for households with disabilities in Manchester for decades. When Crotched Mountain’s programmatic goals changed, they sought a purchaser who would be committed to preserving the property as affordable housing for households with a disabilities.

245 Main Street Manchester, LLC purchased Courtyard Apartments from Crotched Mountain in 2022, navigating a complex regulatory process associated with paying off the original HUD Section 202 program loan used to build the project and assigning the project’s Housing Assistance Payment contract.

After closing, 245 Main Street Manchester, LLC undertook significant energy improvements to the project through the NH Saves Low Income Housing Energy Audit and Assistance Program. Improvements included the purchase and installation of new, high-efficiency mini-split units for each apartment, insulation improvements, and smart thermostat technologies.

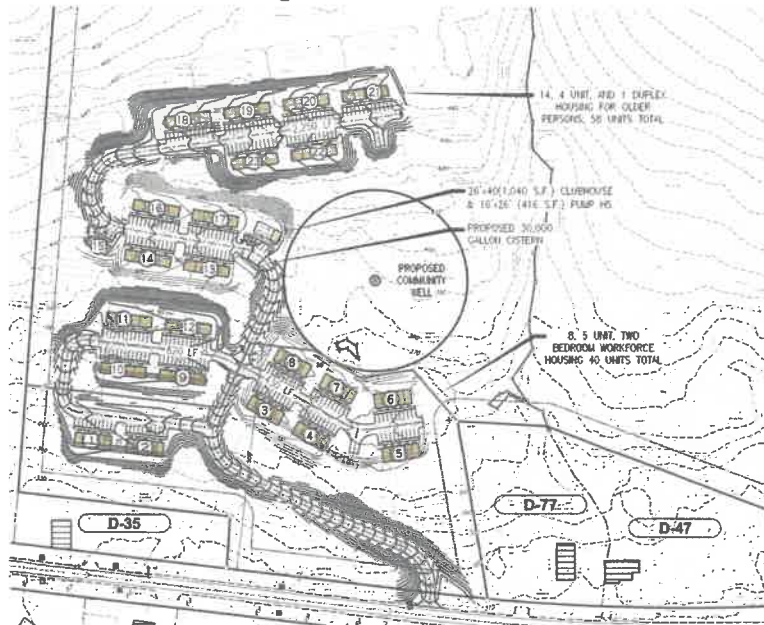


Project Name:	Brookline Opportunities
Location:	Brookline, NH
Developer Entity:	Brookline Opportunities, LLC (Joe and Jake Tamposi)
Total Development Costs:	\$32 Million
Public Funding Sources:	Federal Low Income Housing Tax Credits, Tax-Exempt Bonds, Other Capital Subsidy (Anticipated)
Energy Standards:	Passive House (Anticipated)
Status:	Permitting
Project Reference:	Jim Menihane Director of Multifamily Originations & Business Development New Hampshire Housing (603) 310-9273

Narrative Summary:

The Brookline Opportunities project reflects our commitment to creating affordable housing in New Hampshire. After Brookline Opportunities, LLC proposed a workforce housing rental project for families with children—the first ever in the Town of Brookline—the town imposed a moratorium, enacted a growth management ordinance, and changed its Workforce Housing Ordinance to make it functionally impossible to develop affordable rental housing. Whereas most developers would abandon a project after these actions, our passion for affordable housing and recognition of a likely violation of the Fair Housing Act inspired us to find a way for the project to proceed.

In late 2023, through several sessions of creative and concerted mediation, the Town of Brookline agreed to support the town’s first ever affordable rental community of 98 townhomes and seek training to better understand the need for fair and diverse housing. The project is currently before the Planning Board based on the framework agreed to in the settlement.



Historic Restoration and Development

Project Name:	582 Blue Hill Ave
Location:	Milton, MA
Developer Entity:	Comprehensive Land Holdings, LLC (Joe and Jake Tamposi)
Total Development Costs:	\$33 Million
Funding Sources:	Private Equity
Energy Standards:	Massachusetts STRETCH Energy Code
Status:	Pre-construction, Construction Design Development

Narrative Summary:

Through careful site design and a collaborative 40B process with the local ZBA, Comprehensive Land Holdings overcame significant NIMBYism within the Town of Milton to permit a mixed-income multifamily housing community that would preserve a historic mansion building and gardens designed by the pioneering female landscape architect, Ellen Biddle Shipman. The development will restore the 1925 mansion house to its former splendor and convert it into amenity space for the community; the gardens will become a focal point for relaxation and community events.

The Blue Hill Avenue project will add 84 units to the Town of Milton’s subsidized housing inventory, with 21 units affordable to rental households earning at or below 80% AMI. It is one of the first non-age restricted mixed income housing projects permitted in the Town of Milton since the establishment of MGL Chapter 40B in the 1960’s.



Project Name:	Emmeline Path
Location:	Wayland, MA
Developer Entity:	Tamposi Brothers Holdings, LLC
Total Development Costs:	\$8 Million
Funding Sources:	Private Equity
Energy Standards:	Massachusetts STRETCH Energy Code
Status:	Completed

Narrative Summary:

The Queen-Anne style, Dr. Frank Draper House has been a landmark in the Town of Wayland since its original construction circa 1889. Tamposi Brothers Holdings purchased and restored the historic property, then designed and built a series of cottage-style condominiums to respect the charm and prominence of the main house. Working closely with the Wayland Planning Board, Historical Commission, and Conservation Commission, the Emmeline Path project was able to provide a niche, “middle-market” housing type in an affluent town, conserve several acres of conservation land, and bring the Draper House to its former glory. The property was made restored pursuant to a historic preservation restriction guided by the Secretary of the Interior’s Standards for the Treatment of Historic Properties.



Other Completed Historic Restoration and Development

Moore Road Conservation Cluster, Wayland, MA: The renovation of the historic 1820 Luther Gleason House and construction of 3 new luxury homes. Total Development Costs of \$5.8 Million.

Benjamin Dowse House, Sherborn, MA: The complete restoration of the 1817 Benjamin Dowse House and ANR subdivision. Total Development Costs of \$2.0 Million.

Weetamoo House, Medfield, MA: The complete restoration of the 1860 Weetamoo House and ANR Subdivision. Total Development Costs of \$3.1 Million.

Development Team and Organization

Developer:

Tamposi Brothers Holdings, LLC
Joe and Jake Tamposi
Managers

Legal*

Sheehan Phinney
Greg Chakmakas, esq.
Shareholder

Tax Credit Equity*

Stratford Capital
Josh Gould
Vice President

Civil Engineering and Survey*

TF Moran
Nick Golon, P.E.
Principal

Property Manager*

Hodges Property Management
Diane Benoit
Vice President

*Note: Members of the development team are only anticipated with final selection based on competitive bidding, programmatic requirements, and other factors.



PORTSMOUTH HOUSING AUTHORITY

SHERBURNE SCHOOL BELOW MARKET RATE HOUSING DEVELOPMENT QUALIFICATIONS



PORTSMOUTH HOUSING AUTHORITY | PHA HOUSING DEVELOPMENT LTD.

📄 Corporate Status: Municipal Public Corporation Created by RSA 203:4 | NH Nonprofit Corporation

🏠 245 Middle Street, Portsmouth, NH 03801

☎ 603-436-4310

🌐 www.porthousing.org

Craig Welch
craigwelch@nh-pha.com
603-436-4310 ext. 118



PORTSMOUTH HOUSING AUTHORITY

SHERBURNE SCHOOL BELOW MARKET RATE HOUSING DEVELOPMENT QUALIFICATIONS

To the Mayor and Council of the City of Portsmouth:

Without a doubt, PHA's qualifications for building high-quality, affordable housing in Portsmouth stand alone among all other housing developers in the nation. PHA is uniquely suited to create new housing on privately or publicly owned land in Portsmouth, including at the Sherburne School at 35 Sherburne Road.

The City of Portsmouth created the Portsmouth Housing Authority in 1953 to provide safe, healthy affordable housing for Portsmouth residents. Since then, we have been the most prolific developer and owner of affordable rental housing in the City. PHA is a special purpose government entity and non-profit organization, locally controlled and governed by volunteer Commissioners who are all Portsmouth residents and appointed by the Mayor and Council. These Commissioners and Directors have considerable depth and skill and are all passionate about making Portsmouth a great place to live and work.

All PHA's properties and operations are locally managed by 39 specialized staff, ensuring a personalized approach to wait list management, admissions, occupancy, compliance, maintenance, and capital projects.

PHA currently provides housing for over 1,000 Portsmouth citizens, living in 682 rental apartments spread across 13 different properties throughout the City. Recognized as a High-Performing agency by the Department of Housing and Urban Development, PHA spends more than \$450,000 annually on resident services programs for Portsmouth seniors, youth, families, and people with disabilities. Over the years, PHA has pumped more than \$100,000,000 in to the local economy, and has earned awards for high environmental standards, planning, visionary leadership, community partnerships, community building and high performance financial management, occupancy, and physical standards.

With our long-standing record of success, PHA confidently presents this Request For Qualifications. We are committed to leveraging our expertise and capacity to deliver high-quality, financially viable housing worthy of one of the best small cities in America.

Craig Welch
Executive Director

Note: PHA has read Addendum I and Addendum II related to this Request for Qualifications.

PHA DEVELOPMENT AND PRESERVATION EXPERIENCE

- Over 65 years, PHA has invested more than \$100,000,000 in the housing infrastructure in Portsmouth.
- PHA completed the historic preservation and adaptive reuse of three City-owned properties at the Atlantic Heights School, the Cottage Hospital, and the Lafayette School in 1996, 2003, and 2010.
- PHA developed 421 affordable rental units throughout the City with the federal public housing program between 1959 and 1973.
- PHA acquired and completed a \$14 million rehabilitation of the 100-unit family development at Wamesit Place in 2011.
- PHA developed the award-winning Ruth Lewin Griffin Place Workforce Housing in downtown Portsmouth, placed in service in June 2022 with a total project cost of \$16,000,000.



HISTORIC PRESERVATION

ATLANTIC HEIGHTS 1996

PHA used Low Income Housing Tax Credits for the first time and turned this City-owned former neighborhood school into 30 rental apartments for people aged 62 and older.



CONNORS COTTAGE 2003

PHA partnered with the City of Portsmouth to permanently preserve the historic Cottage Hospital, converting it into 20 units of housing for people aged 62 and older, with the project costing \$3.7 million.



LAFAYETTE SCHOOL 2010

PHA saved this former neighborhood school from demolition by redeveloping the school into ten affordable rental units for people aged 62 and older. The project cost \$2.8 million.



RECENT SUCCESS

RUTH LEWIN GRIFFIN PLACE



PHA recently developed Ruth Lewin Griffin Place at 160 Court Street, adding 64 units of permanently affordable workforce housing in the heart of Portsmouth's historic downtown. This complex project included permitting requirements of the City's Historic District, sophisticated civil engineering, and a meticulous construction management program that accommodated the urban setting with 110 people living on-site during construction.

The total project cost of Ruth's Place was \$16,000,000, coming from a variety of funding sources, including the federal Low-Income Housing Tax Credit Program, NH Housing loans, bank loans, the Federal Home Loan Bank of Boston Affordable Housing programs, the City of Portsmouth Capital Improvement Program, the NH Community Development Finance Authority, and the 34 local businesses that invested in state tax credits for the project.

PHA completed Ruth's Place on time and on budget, opening in 2022.

AWARD WINNING DESIGN AND CONSTRUCTION

PHA collaborates with a variety of local designers, engineers, and contractors for new construction and capital projects in our portfolio. Notable local firms that have played a role in PHA's achievements include CJ Architects, Placework Studios, Lassel Architects, Market Square Architects, Woodburn & Company, Eckman Construction, Haley Ward Engineers, TF Moran, Tighe & Bond Engineers, and others.

The recently completed Ruth Lewin Griffin Place, located in the heart of Portsmouth's downtown historic district, required meticulous attention to design to blend seamlessly with the urban landscape. Designed by CJ Architects and constructed by Eckman Construction, it has achieved LEED Gold Certification and received the Building of the Year award from the US Green Building Council NH Chapter, and the Merit Award for Excellence from Plan NH.

Ruth Lewin Griffin Place's highly energy efficient design and mechanical systems assure a healthy environment and significant cost savings for residents.





MIXED-FINANCE DEVELOPMENT EXPERTISE

PHA works with diverse financing partners on both new development and ongoing compliance measures for the life of our properties, including New Hampshire Housing's Multi-Family Division's **Low-Income Housing Tax Credit Program (LIHTC)**.

PHA partners with **tax credit investors**, including **Evernorth**, a regional non-profit **tax credit syndicator**, and the **Federal Home Loan Bank of Boston Affordable Housing Program**. PHA manages **Annual Contributions Contracts with the U.S. Department of Housing and Urban Development**, which provides operating and capital grant funding, administrative funds, and Housing Assistance Payments through PHA's Housing Choice Voucher Program.

PHA uses funding from the **N.H. Community Development Finance Authority Tax Credit Program (CDFA)**. When developing Ruth Lewin Griffin Place, PHA worked with the CDFAs to receive an allocation of credits, which were subsequently purchased by 34 **local businesses** to support our project.

The **City of Portsmouth CDBG program**, which provides loans and grants for specific initiatives, and the City Planning Department, with their **Capital Improvement Program**, have both financially partnered on projects with PHA.

PHA is consistently seeking additional sources of development financing and recently applied to the federal **Community Projects Program**, specifically for Sherburne School.

PHA also controls an important allocation of **project-based vouchers**, which provide additional income to support more debt financing for new development programs. Only Housing Authorities like the PHA have direct access to these project-based vouchers.

PHA is also pursuing funding from the **N.H. Department of Energy Community Solar Program**, the **InvestNH Program**, **LCHIP**, and various other sources.

Housing projects funded by the LIHTC and other programs must meet various requirements after a new project is placed in service. This is why PHA employs our own tax credit compliance staff so we can manage audits, inspections, and tenant files locally to provide the best service to our residents and our regulators.



DEVELOPMENT TEAM

PHA COMMISSIONERS AND DIRECTORS

PHA's volunteer Commissioners and Directors are all residents of Portsmouth, with a breadth of experience in architecture, finance, construction, municipal governance, community development, and resident services. PHA Commissioners are appointed by the Mayor of Portsmouth for five-year terms, and appoint PHA Housing Development Ltd. Directors.

CRAIG WELCH, EXECUTIVE DIRECTOR

Craig is an 18-year resident of Portsmouth and has 25 years of private and public sector experience in affordable housing finance, development, and management, including the last 11 years as the Executive Director of PHA. In the private sector, Craig specialized in property acquisition and development of over \$100 million in senior housing projects throughout New England. Prior to joining PHA, Craig was Vice-President of Housing for the NH Community Loan Fund. He has served on the Federal Home Loan Bank of Boston Community Advisory Council, the Board of the Northern New England Real Estate Investment Trust, as Chair of the NH Land and Community Heritage Investment Program, and as the President of the New Hampshire Housing Authorities Corporation.

PETER ROCHE, DEVELOPMENT SYNERGIES

Peter provides real estate and business development advisory services to firms and institutions engaged in housing and community development nationwide. Peter specializes in complex development initiatives, including mixed-income and mixed-use developments, large-scale redevelopment projects, and community development strategies. Peter has more than 35 years of experience in housing and community development and has previously served as Director of Development at Maine Housing, Founding CEO of Maine and NH Housing Investment Funds, Founding Executive Director of NeighborWorks Southern NH, and Director of Commercial and Economic Development for the Neighborhood Reinvestment Corporation. In these capacities, Peter has served as a lender, investor, developer, and consultant to community development initiatives, representing more than \$1.5 billion in capital investments in more than fifty communities nationwide.

VALERIE LABRIE, CHIEF FINANCIAL OFFICER

Valerie has over 15 years of experience in affordable housing finance and development. She manages a \$19 million budget for PHA, comprising complex and highly regulated federal, state, local, and private sector grants and contracts across eleven different business divisions, with \$104 million in real estate assets. As part of the housing development team, Valerie provides all of the financial and asset management functions of new and existing mixed-financed affordable housing. Valerie was responsible for the financial management of the development, construction, and operations of the award-winning Ruth Lewin Griffin Place Workforce Housing project in Portsmouth. Valerie is tax credit certified and holds a Bachelor of Science in Accounting from Southern New Hampshire University.



MARK LENTZ, FACILITIES DIRECTOR

Holding the role of Facilities Director for Portsmouth Housing Authority and managing 13 facilities, Mark has been with PHA for four years and comes to us with 30 years of construction and project management experience. Mark also serves as the owner’s representative for all new development, redevelopment, and capital projects. Mark has a degree in Drafting and Design as well as Machine and Tool Design.

ANDREA PICKET, DIRECTOR OF OUTREACH AND ENGAGEMENT

Andrea leverages her firsthand experience as a former resident of public housing to connect with the community and facilitate activities such as outreach, community engagement, education, and advocacy. These efforts are aimed at involving community members in helping the City achieve its affordable housing goals. Andrea’s outreach efforts extend to securing new federal, state, and local sources of funding for new housing development and resident services, including to the local business community. Andrea has a Bachelor of Science Degree in Sociology with a focus on Public Policy, from SNHU.

MARKET SQUARE ARCHITECTS

Market Square brings a diverse housing sector background, including Market Rate Multi-Family, Affordable, Workforce, Senior Living, Student Housing, and adaptive reuse of historic properties. Market Square has forty professional staff and is headquartered in Portsmouth, NH.

TF MORAN ENGINEERS

TFMoran, Inc. is a regionally recognized multidisciplinary engineering, land surveying, and landscape architecture firm with over 50 years of continuous service to private and public clients. They have been responsible for many of the most prominent and most visible projects inside and outside of New Hampshire. Many of these projects involve hundreds of acres in size and hundreds of millions of dollars in value. Their staff of over 65 professionals are located in Bedford and Portsmouth, New Hampshire.

ECKMAN CONSTRUCTION

Eckman Construction has delivered construction management, design, build, and general contracting services to project partners across New Hampshire and beyond since 1974. Eckman has partnered on 60 multifamily housing projects, 43 of which are affordable housing, totaling 2,013 affordable units.

PHA TEAM

PHA locally employs 36 full-time and 3 part-time staff, and performs its own Property Management, Asset Management, Tax Credit Compliance, Maintenance, and Capital Projects Management in-house. PHA’s Tax Credit Management Division has highly skilled professionals with all of the credentials and certifications that assure compliance with IRS, HUD, NH Housing, and investor requirements.

INVESTMENTS IN PORTSMOUTH'S RESIDENTS

A strong local partnership with PHA is not only the best way to invest in Portsmouth's housing infrastructure; it's also the best way to bring services and supports to improve the lives of people living in Portsmouth.



Unlike out-of-town developers, all of PHA's human and financial resources are invested back into the City.

In 2024, PHA will invest more than \$450,000 in Resident Services programs for PHA residents and other residents of the City. PHA budgets for Resident Services in all of its ten business divisions, and any excess cash earned as a result of our outstanding property management is invested back into our property portfolio and the Resident Services programs designed to improve outcomes for PHA residents and other residents in the City that benefit from our program.

Resident Service Coordinators play a crucial role in helping residents achieve their goals by connecting them to valuable services, bringing enrichment into the community, assisting with application processes, and providing referrals to community partners. Whether it's financial independence, higher education, or making lifestyle changes, they become an integral part of the community they serve, offering support to residents in many aspects of their lives. This program differentiates us from other property management and development organizations. By employing Resident Service Coordinators at each of our properties, we can better serve residents by providing prompt support when needed.

PROGRESS ON SHERBURNE SCHOOL TO DATE

In recent years, PHA has been a steadfast and reliable proponent of affordable housing development in Portsmouth, offering advocacy, policy reinforcement, and assessments of housing requirements in Portsmouth. These sustained endeavors have significantly influenced public perception regarding the importance of affordable housing within the City, prompting City leadership to prioritize the development of affordable housing.

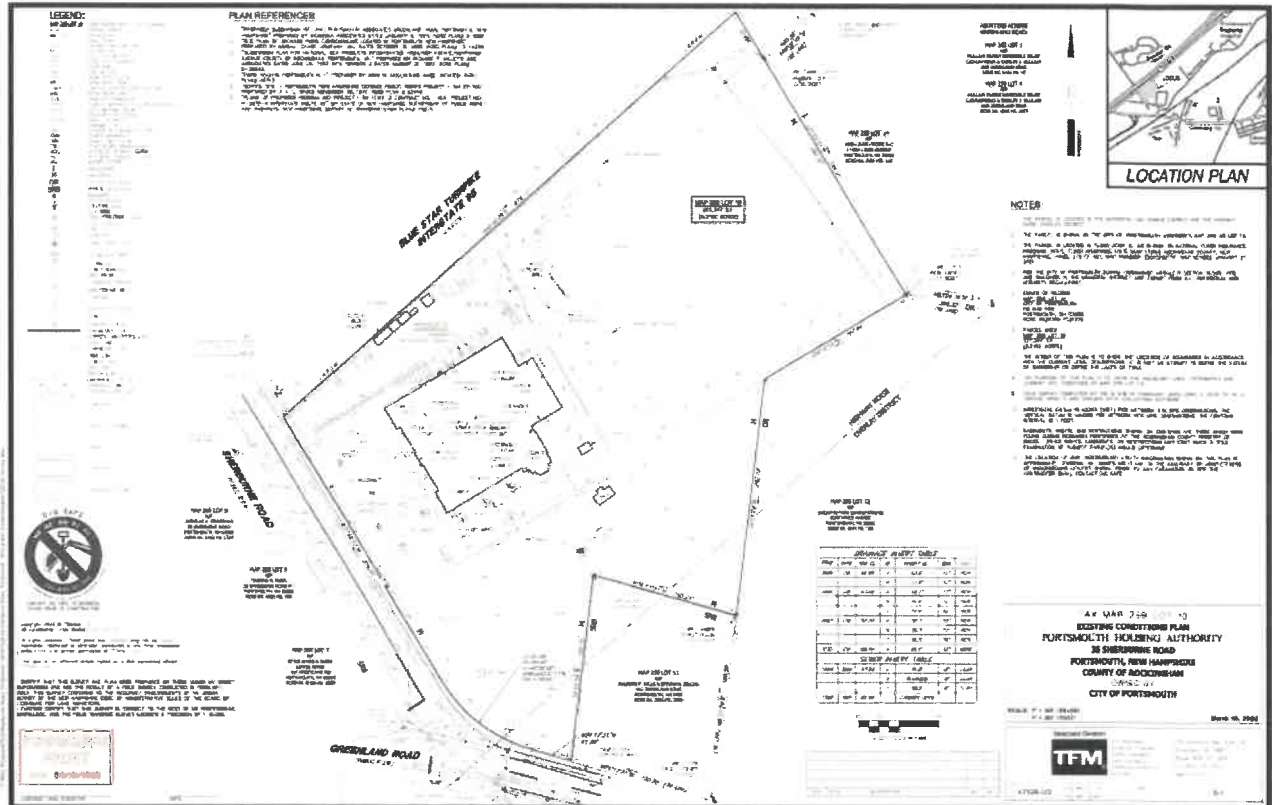
PHA's involvement in pivotal initiatives such as the 2016 City Housing Policy, the 2017 Portsmouth Study Circle on Housing, the 2024 Portsmouth Listens Study Circles, the 2025 Master Plan, the Portsmouth Housing Endowment Advisory Committee, the Land-Use Committee, as well as numerous public engagements, presentations, and collaborations with civic organizations, underscores PHA's unique role in the community as a reputable source of information, and as trusted collaborator in advancing the City's objective of augmenting the supply of affordable housing for Portsmouth residents.

In 2022, on behalf of the City, PHA initiated a thorough Housing Market Study, outlining specific policies and actions deserving attention. This study provided essential data that informed the housing objectives recently established by the Land Use Committee and City Council.



Moreover, beyond these enduring commitments, PHA dedicated two years and nearly \$100,000 to assessing the technical challenges and feasibility of constructing below market rate housing on the Sherburne School property. This thorough examination, conducted by PHA on behalf of the City without burdening Portsmouth taxpayers, will guide any future development on the property.

The research encompassed property surveys, environmental evaluations, traffic analyses, conceptual designs, engineering assessments, financial analyses and the publication of a Sherburne School Preliminary Report that was presented to the City Council in June 2023.



The time spent by PHA Commissioners, staff, and consultants, along with the money spent on due diligence activities and fundraising for the project, is clear evidence of PHA's capability and commitment to ensuring a successful project that the City and the local neighborhoods can embrace and be proud of.



**PORTSMOUTH
HOUSING**



Response to Request for Qualifications

Development of Below Market Rate Housing

35 Sherburne Road, Portsmouth, NH

The Housing Partnership

A New Hampshire Non-Profit Corporation

222 International Drive Unit 165

PO Box 127

Portsmouth, NH 03801

(603) 766-3125

housingpartnership.org

Contact:

Marty Chapman, Executive Director

p: (603) 766-3125

c: (978) 761-3152

marty@housingpartnership.org



PO Box 127
222 International Drive Unit 165
Portsmouth, NH 03801
P (603)766-3125
F (603)431-3627
housingpartnership.org

The Housing Partnership (“THP”)

is a New Hampshire Non-Profit Corporation with federal tax-exempt status under section 501(c)(3) of the Internal Revenue Code. The organization was formed as an affiliate of the United Way in 1988 for the purpose of providing housing and housing services to meet the growing demand for decent, affordable housing the Seacoast region of New Hampshire and southern Maine. Our offices have been located in Portsmouth since our founding.

This letter is our formal request to be considered for the list of respondents to an anticipated RFP for 35 Sherburne Road in Portsmouth, a site that aligns in many ways with the vision and scale of many of THP’s affordable housing projects. We hope with this submission to present examples of our work that demonstrate our success at converting under-utilized sites like 35 Sherburne Roads into permanent affordable housing for deserving local households.

In over 35 years of existence, THP has developed more than 500 units in 14 communities from Rye, NH to Kennebunk, ME. Much of our development has been focused on adding high-quality rental apartments to the regional inventory of affordable housing for family and senior households who struggle to pay the market rent, and who qualify, by HUD-established income standards, for subsidized housing. Our projects comprise both new construction and rehabilitation of existing buildings, including historically sensitive restoration, and are located in communities large and small, in rural and urban settings, in cul-de-sacs and downtowns, and in communities that had gone many years without approving new affordable housing units. We currently have two projects in progress: 40 units of mixed-income for sale housing under construction in Rye, NH, and 60 units of fully-approved family workforce housing Epping, currently in predevelopment.

The Housing Partnership operates with a core staff of four professionals – an Executive Director, a Deputy Director of Operations, a Project Manager (currently vacant) and a Certified Public Account/CFO. Our housing projects, like most subsidized housing developments, involve a complex process of municipal and state permitting, and application for multi-layered, competitive financing that can involve a risk of many thousands of dollars and many months before the

developer has certainty of the ability - or not - to construct the project. THP has a successful history of assembling and managing development teams to navigate the process of identifying and securing real estate, creating conceptual site and building plans, presenting to planning and zoning boards and neighbors, and constructing on-time and on-budget affordable rental developments.

Once a project is completed, THP turns the property over to Alliance Asset Management, a third-party property manager with expertise in operation of subsidized housing, including compliance with the many restrictions imposed by public financing. THP works closely with Alliance, meeting on a regular basis to review operational and financial performance and to ensure that relationships with funding partners and regulatory agencies are maintained in good standing for the benefit of the residents, and also for THP in its continuing pursuit of future funding opportunities.

The inclusion of below-market rental housing at 35 Sherburne Road will likely have as its core financing component, the Low Income Housing Tax Credit (LIHTC), the highly competitive federal program that is used to create much of the new affordable rental housing around the country. THP currently operates 10 rental properties in 6 communities that were developed using allocations of LIHTC. Just as important, because LIHTC typically funds about 70% of the cost of a project, most of our projects involve a “capital stack” of additional sources, often as many as four or five financial partners. In addition to active funding relationships with several regional for-profit and non-profit lenders, including Eastern Bank, TD Bank, Newburyport Savings Bank, Bangor Savings Bank, Genesis Community Loan Fund and New Hampshire Community Loan Fund, THP has been awarded some of the most competitive housing financing sources available for its projects. Those sources include:

Federal Home Loan Bank of Boston Affordable Housing Program “AHP”

Federal “HOME” Funds

Community Development Block Grant “CDBG”

Federal Historic Tax Credits

New Hampshire Community Development Finance Authority “NHCDFA” State Tax Credits

We have applied these resources in various combinations to achieve a feasible financial package specific to the requirements of each project. The following pages describe in detail the development teams and funding structure of some of THP’s affordable housing developments.

Bradley Commons

Dover NH



Mixed Use Development

Family Workforce Housing - 49 Units in Two Phases
Commercial Storefront Uses
Social Service Offices and Programs
Head Start Facility

Development Team

Developer/Sponsor: The Housing Partnership
Architect: Lassel Architects
Civil Engineer: Ambit Engineering
Construction Manager: Pine Brook Corporation

Financing Partners

New Hampshire Housing Finance Authority: Construction and Permanent Loans, LIHTC
RBC Capital: Equity Partner
New Hampshire Community Development Finance Authority: State Tax Credits
New Hampshire Community Loan Fund: Bridge Financing
Community Action Program of Strafford County

First large project approved under Dover's expanded Central Business District. Involved the demolition of the former St. Charles Parish campus in a very tight commercial and residential setting. Project houses CAPSC and a Head Start facility on the first floor, as well as commercial storefront tenant to honor the intent of the expanded district.





**Historic Rehabilitation of 19th Century Shoe Mill
Family Workforce Housing - 42 Units**

Development Team

Developer/Sponsor: The Housing Partnership
Architect: Lassel Architects
Civil Engineer: Ambit Engineering
Construction Manager: Pine Brook Corporation
Historic Consultant: Christine Beard

Financing Partners

New Hampshire Housing Finance Authority: LIHTC
Evernorth: Equity Partner
Eastern Bank: Construction and Permanent Financing

Historically sensitive conversion of abandoned 19th century shoe mill in residential neighborhood using federal Historic Tax Credits in combination with LIHTC. Involved identification and restoration of historic elements.





Retirement Community Development
Senior Workforce Housing - 22 Units

Development Team

Developer/Sponsor: The Housing Partnership

Architect: Khalsa Design

Civil Engineer: Ambit Engineering

Construction Manager: Pine Brook Corporation

Financing Partners

New Hampshire Housing Finance Authority: 1602 Program

Eastern Bank: Construction and Permanent Financing

New Hampshire Community Development Finance Corporation:

Community Development Block Grant "CDBG"

First project developed under Rye's Retirement Community Development ordinance. Negotiated with planning board for 11 months.



Bethesda House
Kennebunk, ME



Affordable Family Housing

41 Units Townhouse and Garden Style
Workforce Housing

Development Team

Developer/Sponsor: The Housing Partnership
Architect: Lassel Architects
Civil Engineer: Sebago Technics
Construction Manager: Pine Brook Corporation

Financing Partners

Maine State Housing Authority - LIHTC
Bangor Savings Bank - Construction and Permanent Financing
Federal Home Loan Bank of Boston - Affordable Housing Program





Village at Rye Place
Rye, NH

Mixed Income For-Sale Townhouses - Under Construction
40 Units - 20% Affordable

Development Team

Developer/Sponsor: The Housing Partnership
Architect: Lassel Architects
Civil Engineer: Ambit Engineering
Construction Manager: Chinburg Builders

Financing Partners

Newburyport Savings Bank
Genesis Community Loan Fund
New Hampshire Housing Finance Authority

First workforce housing project approved under Rye's multi-family ordinance. Worked with planning board and town counsel for several months to develop site plan and workforce housing covenants which are now in regular use for similar projects in town.





STATEMENT OF QUALIFICATIONS # 52-24

From: **GSD Communities**

For: **Permanent, Below Market Rate Housing Development
for Municipal Property
at 35 Sherburne Road, Portsmouth, NH**

June 7, 2024



Finance/Purchasing Department
City Hall
1 Junkins Avenue
Portsmouth, NH 03801

Re: Qualified Developers for Creation of Permanent, Below Market Rate Housing on Municipal Property

Dear members of the Sherburne Housing developer selection committee,

We are responding to the City of Portsmouth, New Hampshire's solicitation of Letters of Interest and Statement of Qualifications from real estate developers regarding their capacity to design and construct permanent, below market rate housing at the Sherburne School and Property located at 35 Sherburne Road.

On behalf of our entire project team, GSD Communities LLC is pleased to be considered for this incredibly significant project whose aim is to use the city's asset of the Sherburne school and property to host a new neighborhood of housing designed and priced to offer affordability for Portsmouth residents past, present, and future. It would be our goal to work collaboratively with the city to achieve the social, economic, and community integration benefits that this property and its neighborhood development promises.

This letter of interest addresses: Narratives to these considerations are subsequent pages.

- Qualifications and experience developing permanent, below market rate housing.
- Experience with incorporating existing, historic structures through renovation and adaptive reuse.
- Our experience developing land into new neighborhoods.
- Our experience working with municipalities to obtain state and federal funding, Low Income Tax credits, and assembling funding packages through various entities to implement housing projects.

We recognize that these pre - requisites may be shared with many of your project team submissions.

However, as you will see – We are different, and these are the reasons why:

1. We know the project location; we know the city and the residents and the combined concern and enthusiasm to move a housing project for a new neighborhood ahead for the Sherburne School and property. This local perspective makes us uniquely sensitive and responsive to community concerns and heightens our desire to make it a successful project.
2. As the developer, GSD Communities' recent work in the seacoast area of New Hampshire has taken innovative and non - traditional methods for project design, construction, and delivery and management. This has been highly successful particularly in its partnership with the City of Dover and has been carried out with an eye to replication.
3. GSD Communities retains the ownership of its housing portfolio to ensure initial project affordability, guarantee local ownership and responsibility and access, and cooperates with other partners for resident management to ensure the right people have access to the housing that is



developed.

4. We are dedicated to a transparent and open process for consideration and consultation with residents and neighbors of the project. Recent tensions may remain, but we will have the fresh perspective to offer both our patient listening skills as well as creative approaches.
5. We are resolved to listen to the public, but also bring back information that could be strategic in the project's successful execution and the rationale behind it. We know the background to this consideration has considerable anxiety and some animosity on the part of the neighborhood around the project. We would work as closely with the neighbors and the city to bring people back together for the benefit of the project and the city as a whole.
6. Neighborhood design is different than "a project." Making the Sherburne School and its property into a neighborhood is our highest priority.
7. We do not see this as a "housing project" as in an institutional design for big industrial scale housing buildings.
8. As a team, we know Portsmouth, we have studied Portsmouth neighborhoods, and there are direct lessons that can be applied. With this in mind, we also recognize that the M - Municipal zoning for the parcel could allow considerable latitude and opportunity to do an interpretation of Portsmouth legacy in the making of a neighborhood for Sherburne.
9. Our project team is the sum of more than its parts:
 - Our project developer has a unique philosophy that is long - term in its financial, social and management sustainability.
 - The entire project team embraces the principles with the expertise in all manner of sustainability and environmental responsibility.
 - We are neighborhood builders and community facilitators to make a city and developer relationship the best experience for everyone; to provide dignity in our communities.
 - We are very cost conscious, but we also know that it is our responsibility to design a wonderful place for people to live. We want this to be an example of the best of neighborhood housing for Portsmouth's future.
 - Our developer and contractor team also has staff fully capable of working to access the variety of state federal and other funding sources in assembly to package an entire project proposal for funding to implementation.
 - Our local civil engineer has extensive knowledge of the area and a foundation of understanding of the city's permitting requirements and procedures.
 - We have award-winning design quality with innovation, creativity, and execution.
 - We are people that our clients, municipal officials, and the public like to work with. We are transparent, engaging, compassionate, creative, and rational.

All of these skills will be necessary to bring a vibrant affordable new neighborhood for the City of Portsmouth. In the following pages we will provide an overview of our team for your consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "John and Maggie Randolph", written in a cursive style.

John and Maggie Randolph



GSD Communities

Our understanding and approach to the project:



The project site, building and opportunities: Based upon the RFQ and our site visit, we see the 35 Sherburne Road property of approximately five (5)-acres of land, the existing (but presently vacant) Sherburne School, at 18,000 square foot area. Constructed in 1930 with an addition added in 1985, the school has classrooms and larger spaces such as the gymnasium. The buildings condition is long overdue for a significant renovation if it wants to see it's next century – if that is its destiny. Gut and complete rehab. will probably be needed from the basement to the roof. In order to have adequate resources to renovate the building, however, a process of determining the future building programs and uses with adequate economic value to cover the cost of the building's renovation will be necessary.

We have heard the calls to retain the school building and offer our commitment to prioritize that. But without economic uses – the hard questions may be asked: If the site's primary social and economic value is housing – we could use the entire site to create a new Portsmouth legacy neighborhood in the best of Portsmouth's tradition of equity diversity and opportunity.

What are the initial housing opportunities:

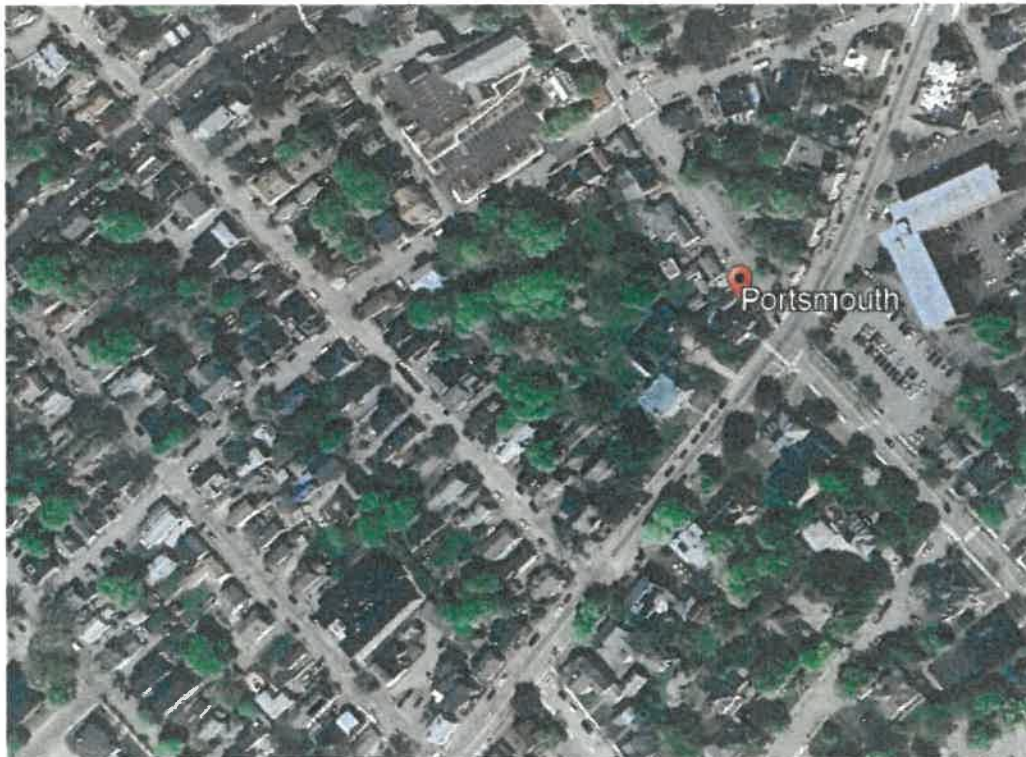
Two basic scenarios: Designs for the Sherburne neighborhood can proceed with either retention of removal of the Sherburne school building.

Retention of the school could be predicated upon reaching viable programmatic and cost solution for a high cost and somewhat challenging building footprint, condition and programmatic uses that could pay the cost of the renovations. Retention of the school building also divides the site into smaller less efficient spaces for



neighborhood development. Design of the neighborhood would look to place new housing units behind the school, consider some units in the school itself combined with some community uses such as a “Gather” headquarters or facility, a child’s and /or adult day care center, a job resource center, and consider ways to place units in front of the school but yet still respects the historic buildings architectural prominence.

Removal of the school would free up essentially all of the five acres of property and provide greater flexibility in neighborhood layout, building/home placements, and more modest size community facilities that could be built incrementally as funds were raised by non-profits. With greater land space, there could be greater flexibility to consider such things as retaining the neighborhood softball field and other open spaces while a compact efficient layout of neighborhood streets. In either case, the neighborhood design should use Portsmouth’s traditional historic street pattern and building placements as a pattern language and inspiration. With these in mind there are multiple neighborhood design opportunities that the design process can consider on a more site-specific basis.



Aerial map of traditional Portsmouth neighborhoods with streets and diverse housing.

Neighborhood context and objective:

The neighborhood around the Sherburne School are post-war single-family home subdivisions on lots roughly ¼ acre in size. Simply replicating this pattern cannot achieve the benefits of more affordable housing for Portsmouth as the development costs for moderate density cannot equate to affordable units. The M zone for municipal has no housing density uses and therefore as process of determining development standards may be necessary. But it may also be a chance to use the lack of definition to free form the confines of traditional Portsmouth zoning to



consider more progressive best neighborhood development practices that current zoning if applied could constrain the site. Mixed uses may not be allowed when they may in fact be positive.

Housing scale, uniformity, and diversity:

The residents have expressed concerns about the buildings and their height scale and character. These should be listened to and translated into some design operating assumptions. If we look for the different chapters of Portsmouth's neighborhoods for precedents, we may find other inspirations. Our general feeling as a team looking at the site and its opportunities is that we do not necessarily have to have massive buildings in order to achieve excellent housing opportunities for residents in the Sherburne neighborhood. The same scale of very large urban blocks of housing such as one finds in other places of the city, or such as was built by urban renewal for older affordable housing projects is not necessarily the kind of housing that we would build in the 21st century.

At the same time, we recognize there are significant costs benefits to be achieved with multifamily housing. In the end we have the opportunity over 5 acres of property with or without the school building in place to have a spectrum of neighbor housing opportunities to make up the composition of a whole neighborhood. One finds that in Portsmouth neighborhoods even going back 100 or 150 years. We just have to look at Portsmouth for the guidance of what the future neighborhood should be and then translate it into 21st century construction approaches and the needs of the affordable and workforce housing needs of residents who may become a part of this neighborhood community.

Sustainable integration:

Just meeting current energy stormwater and other state and federal permitting requirements will allow a new project to meet sustainability thresholds of Energy Star even LEED or LEED silver certifications. Greater vigilance and funding could elevate sustainable design achievements even further. High performance building shells and energy and insulation systems could result in Net-Zero structures that have no life cycle energy costs – and those savings can stabilize rent costs and tenant exposures to rent variability. But sustainability is more than just the mechanics of Energy calculations it is also the opportunity to bring in natural features for storm water treatment and also the integration of sustainable features for the neighborhood such as community gardens, native plants for pollinator wildlife and other value for Landscape spaces and the opportunity for the residents of the new neighborhood to participate to the quality of their life and even have a place to grow their own tomatoes.



An example of a mixed housing neighborhood design concept

Cost and design:

The project teams experience under the leadership of our lead developer has at least two significant methods to reduce project cost design and engineering harmony homes has served as its own designer and general contractor for their cottage neighborhood in Dover. This unique form of development is contrary to much of Portsmouth's build - it and sell - it mode. Harmony holds their properties for a long period of time and the financial return on the initial investment is what makes them economically viable. Our project team also has several layers of management in construction the coordination from one of the finest larger scale construction companies in New Hampshire with a deep decades old experience in a wide range of housing all compliant with the expectation that the Sherburne neighborhood would be a perpetually below market rate affordable housing neighborhood for City residents.

The choreography of how to put together big design and construction strategy for the project will take considerable work on the part of the design and development team working in partnership with the city. There will be many decisions to be made but we have both the capacity to have creative design pragmatic strategies based upon excellent pricing accuracy, and Project team facilitators to ensure that everyone comes together with decisions in the complete interests of all parties.



Construction

The same strength of The Team present in cost and design also translate directly to construction strategies. In the larger scheme of things, our developer and operator of a proposed Sherburne neighborhood will preside over a well-integrated plan where design, operational programming the name of this function as a management entity, the building out of the neighborhood in phases of construction, and the eventual welcoming of new residents to their new homes is all enabled by a well-designed construction plan. It is also important to understand that cost management for construction happens to directly translate to resident costs of rent or purchase of the units. We have set up this team to be organized and would make a commitment to transparency and engagement with the city so the public private partnership can fully contribute to the projects efficient and cost managed construction process.

Management:

There will be choices about how to manage the neighborhood on the long term, because once it is built and the residents move in there will be operational management. There will be services utilities, property, and site maintenance, rent payments and the creation of management both for the physical and social environment. If the city has community facilities that they want to have included in the development program those will also need to be facilitated with multiple partners both in design, participating in construction costs, and as complementary long-term tenants of the neighborhood community facilities.

There are also opportunities on the long term for management strategies as part of the city and neighborhood development partnership. In the case of Dover, the Dover Housing Authority is actually administering the rental process for the cottages, and the access to an affordable housing waiting list placement of residents works to reach to a broader Dover community to maximize the neighborhoods' ability to really participate in a regional housing solution. If the Harmony Homes development team is selected to carry out a project, it still would have the possibility of a shared relationship with the Portsmouth Housing Authority as the central administrator of affordable housing for the entire city. PHA is an excellent administrator of housing and there could be opportunities there.

All the above are points of philosophy and translation to strategy for the development have a new neighborhood for the Sherburne property. We hope that you will find that the interests of community and neighborhood affordability compassion in the management in long term opportunities within our team in the long-term management of harmony homes would work well in the services of the cities important ambitions to promote new affordable housing for its residents.



Project team:

Organization Name: **GSD Communities**
Corporate Status: LLC
Contact Name: John and Margaret Randolph
Business Address: 55 Briggs Way, Unit O, Durham, NH 03824
Business Phone: 1-603-815-8355
Website: <https://www.harmonyhomesnh.com/gsd-communities/>

Project examples:

Each team member firm has provided company overviews, staff resumes of key positions, and project examples that illustrate both the process and final completion of outstanding housing projects for all demographics and socio-economic status. These are included in the supporting documents.

Provide specific examples detailing your experience with design and construction of permanent, below market rate housing projects of similar size and complexity including total project cost.

These are provided in the supporting documents.

State the number of employees in your organization, key members of your team, management company, architect, planners, engineers, contractors, and financial partners.

See project team description.

GSD Communities: Developer and architect

GSD Communities is an interconnected network of senior living accommodations and workforce support services. What started in 2011 with the first Harmony Homes Assisted Living facility in Durham, NH and a second memory care facility in 2017, has grown into an innovative and proactive company with over 90 employees that seeks to support its own staff and the workforce of the community at large through innovative solutions that include attainable housing and childcare. Additionally, GSD Communities owns and operates a \$20 million real estate portfolio in support of its business and housing operations.

Role: Developer entity and project principal. Overall architectural leadership and Lead architect for community housing.

Studio Nexus: Architects of Record multi family

Studio Nexus Architects + Planners has extensive experience with housing, renovations and historic buildings, feasibility studies, and community review processes making it well-suited to be a creative, efficient, yet distinctive project partner. The firm of 5 architects has partnered extensively with non-profit developers and public finance agencies including Twin Pines Housing, the Upper Valley Haven for the homeless, Visions for Creative Housing, New Hampshire Housing, and Rural Development and have a substantial portfolio of affordable

housing and supported living projects.

Role: Architects for multifamily buildings, possible Sherburne School renovation and assistance on community architecture.

RWLA Landscape Architect, Site Planner, Public facilitator

Robert White is a landscape architect based in Portsmouth NH. His career of over 40 years has integrated all aspects of housing, economic revitalization, smart growth and sustainable development for cities, towns, villages, and neighborhoods across New England. He has completed numerous projects addressing workforce housing, traditional neighborhood housing and integration of high-performance energy and sustainability standards with affordable housing projects. Robert's capstone project for his certificate of training in Creative Placemaking researched creative forms of neighborhood housing for Portsmouth NH, discovering a spectrum of housing opportunities. Robert has received more than 40 national, regional, and state design awards and has either facilitated or participated as designer/illustrator – over 100 community design charrettes and workshops.

Role: Public Participation facilitation, Site design and landscape design

North Branch Construction: Construction pricing and management

Since its founding in 1958, North Branch Construction has developed into a full-service Construction Manager, Design-Builder, and General Contractor serving New Hampshire and Northern New England. NBC operates from our LEED Silver and Energy Star certified headquarters located in Concord, New Hampshire. With a wide range of construction expertise including institutional, municipal, industrial, commercial, multi-family affordable and market rate housing and single family residential, historic renovation. All NBC projects follow strategic sustainable design principles and innovative affordable housing strategies to meet New Hampshire's economic and community needs for housing.

Role: Cost estimation and phasing budget prioritization, Tax credit and other funding source facilitation and overall construction funding and constructability. NBC will provide supplemental financial strategy as a part of construction budgeting.

Bruss Project Management

Michael Bruss was the founder, president of Bruss Construction and Integrated Building Energy Associates, LLC. Michael's passion and drive focuses on building with green technologies, reuse of historic structures, energy efficiency and preparing today's buildings for future generations. With over 30 years of experience in Project development and management with a diverse group of building projects, Michael brings unmatched collaboration, innovation, and craftsmanship to every project in which he is involved.

Role: Project Management and city – developer facilitation

Altus Engineers: Civil engineering and permitting.

Eric Weinrieb has over 35 years of civil, survey, and construction engineering experience as President of Altus Engineers. A significant portion of Eric's experience is with municipal and institutional projects. He understands the challenges facing municipal departments and their constituents, especially in the area of public relations. He is an accomplished public speaker, communicating complex engineering concepts at public hearings, often to non-technical stakeholders. Eric and his staff's design and construction administration expertise with municipal facilities has made Altus highly respected.

Role: Project Management and civil engineering and infrastructure, state, and local permitting

Robin H. LeBlanc was the Executive Director of Plan NH for well over a decade. In that role, she sat on several state-wide boards and roundtables, and developed an interest in community planning and design, especially for older adults, as well as the role of choices in places to live for everyone.

RHL Strategies LLC provides facilitation services for thoughtful, client-driven discussions on a variety of topics, as well as organization, project and program planning. Our philosophy is simple: the client holds the key to the solutions they seek. RHL Strategies is the guide to get there with expertise in Strategic planning to create strong foundations and clarity for the plan's development, and working with leaders, managers and organizations who are "stuck, " or are face resistance to new ideas and/or change.

Role: facilitation coordinator.



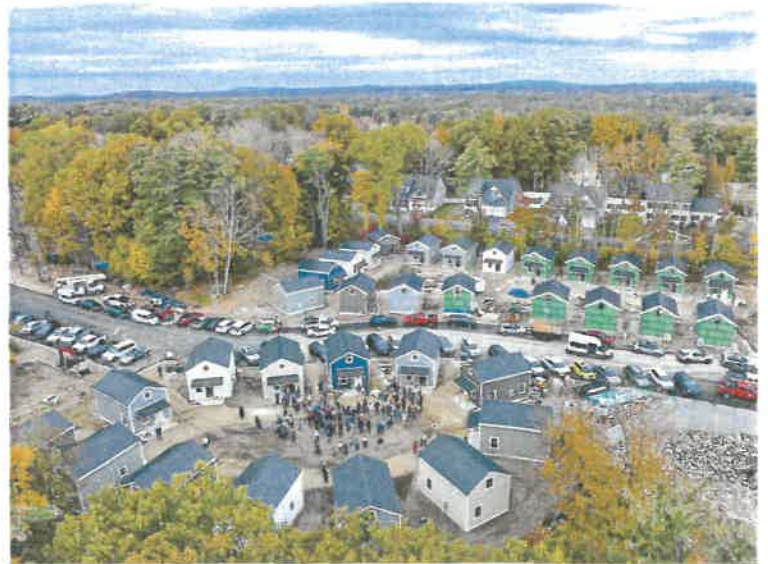
Supporting documents for team qualifications and example projects:



We Build Stronger Communities

GSD Communities is an interconnected network of senior living accommodations and workforce support services. What started in 2011 with the first Harmony Homes Assisted Living facility in Durham, NH and a second memory care facility in 2017, has grown into an innovative and proactive company that seeks to support its own staff and the workforce of the community at large through innovative solutions that include attainable housing and childcare. Additionally, GSD Communities owns and operates a \$20 million real estate portfolio in support of its business and housing operations.

At GSD Communities, we believe that no matter your stage or place in life, everyone deserves to be treated with dignity.



Harmony Homes

By GSD Communities





In 2021, GSD Communities opened Harmony Place, a multi-use building on the campus of its Harmony Homes By the Bay memory care facility in Durham, NH. The building includes seven one-bedroom apartments for employees of Harmony Homes, a childcare that includes an outdoor interactive playground, and administrative offices on the third floor. The childcare is a franchise of A Place to Grow, based in Brentwood, NH, and has the ability to double in capacity if necessary.

To combat rising material prices, the owner of GSD Communities, John Randolph, started his own construction company, GSD Construction, and built Harmony Place for over 30% less than other bids. This allowed the apartments to be rented at below-market rates. Currently there is an active wait list for apartments at the building, which are rented to staff of Harmony Homes at 30% of their pay; actual rents range from \$650 to \$900/month. Together with the childcare and affordable housing option, Harmony Place is a model of creative employee support in the Seacoast.

Harmony Place received a Merit Award of Excellence from PlanNH in 2023.





With the success of Harmony Place and after receiving approval from the Dover Planning Board in March 2021, GSD Communities broke ground on The Cottages at Back River Road at the end of 2021. Currently wrapping up construction, and also built by GSD Construction, the Cottages project has 44 free standing units, all with a footprint of 384sf. True tiny homes with a total square footage of 544sf, each cottage offers one bedroom and a loft, combination kitchen/living space, bathroom, and utility space with laundry hookups. The rents for all 44 units are capped in perpetuity at the HUD Fair Market Rental Rate for one-bedroom units as released by New Hampshire Housing Finance Authority. Unlike Harmony Place, the Cottages at Back River Road are available to anyone, and currently houses a variety of people who work in the area, including fire fighters, teachers, postal workers, and first responders, in addition to employees of Harmony Homes Assisted Livings. Arranged in a 'cluster court' arrangement, the Cottages project seeks to foster community and dignity for its residents, and has offered inspiration to municipalities across the state and region.

The Cottages at Back River Road is the 2023 Project of the Year by the NH Planners Association and the 2023 Project of the Year by the Workforce Housing Coalition of the Greater Seacoast.



John Randolph

Owner, GSD Communities



OBJECTIVE

Continue to create safe and affordable housing for families and the elderly of NH.

EXECUTIVE PROFILE

Business Owner, United States Air Force Officer Retired, Harvard Educated, excels in positions of Leadership focused on Strategic Planning, Training and Education, Human Resources, Logistics, Operations, Budgeting, Policy Development, and Facility Management. An inspired team builder and leader with natural enthusiasm and tenacity, as well as persuasive communication skills. Held and utilized Top-Secret SCI security clearance.

EDUCATION

AIR COMMAND AND STAFF COLLEGE, AIR UNIVERSITY Masters of Arts in Military Leadership	2007
HARVARD UNIVERSITY - Masters of Arts in Government	2001
UNIVERSITY OF COLORADO - Masters of Arts in Educational Leadership	1999
State University of New York at Potsdam - Bachelor of Arts in Psychology	1994

PROFESSIONAL EXPERIENCE

Owner, GSD Construction LLC 2015 - Present
Designs, builds, manages and renovates homes and apartments to create affordable and safe homes for NH families.

2011 - Lead renovations to turn bed and breakfast into Harmony Homes Assisted living
2012-2023 - Was on continuous contract with State of NH to make homes across NH lead safe
2015-2017 - Oversaw construction and budget for \$6M build of Harmony By the Bay Assisted Living
2019-2020 - Designed, built and manage Harmony Place - \$1.2M affordable housing and childcare for staff
2020-Present - Designed, building \$6M 44 Tiny Homes at 54 Back River Rd, Dover, The Cottages at Back River Rd
2023-Present - Build Joshua House Shelter Addition, Greenland NH; Seacoast Family Promise

Owner, Harmony Homes By the Bay LLC 2015 - Present
Built and manages 60-bed memory care facility with primary mission of providing outstanding memory care to the seniors of NH at an affordable price. Oversees operations as CEO of Harmony Homes By the Bay.

Owner, Harmony Homes LLC 2011 - Present
Turned foreclosed Inn with more than 2 years of neglect into a State of NH approved Assisted Living Facility. Harmony Homes is focused on providing much needed affordable housing and outstanding care to NH seniors. Currently, over 90% of residents use Medicaid or military benefits as their form of payment. Served as caregiver and Director for nearly 18-months

TAACCCT Grant Manager, Community College System of NH 2011-2015
Managed \$19.9M Department of Labor grant for the seven community colleges of New Hampshire. Provided leadership to 45 member team focused on purchasing more than \$10M in equipment and starting 28 additional degrees and certificates programs for the seven colleges. Worked with more than 100 advanced manufacturing partners to train and gain employment for nearly 9000 New Hampshire residents.

Maggie Randolph
RA, NCARB, AIA, LEED AP ND
Owner, GSD Studios



EXECUTIVE PROFILE

Registered Architect with experience in residential, commercial, and government architectural design and urban planning, with a passion for understanding how the built environment affects the human psyche. Committed to sustainable practice for healthy environments, and a focus on community and the concept of home.

Registered Architect, New Hampshire
NCARB Certificate
LEED Accredited Professional in Neighborhood Development
Affordable Housing Advocate

EDUCATION

UNIVERSITY OF MIAMI, Coral Gables, FL 2007
Bachelor of Architecture - B.Arch.
Background in Urban Planning; New Urbanism and Smart Growth

PROFESSIONAL EXPERIENCE

Owner, GSD Studios, PLLC 2020 - Present
Owner / Architect of design studio with current focus on affordable housing, projects with a 'cause' and small residential. Projects include:

The Cottages at Back River Road, Dover, NH (on-going)

- A community of 'tiny home' cottages built to provide affordable housing opportunities.
- Work includes site concept, architectural design, code compliance, & construction administration.
- 2023 Project of the Year from NH Planners Association
- 2023 Project of the Year from the Workforce Housing Coalition of the Greater Seacoast

Harmony Place, Durham, NH

- A multi-use building with affordable apartments, childcare, and administrative space.
- Work includes architectural design, code compliance, & construction administration.
- 2023 Merit Award of Excellence from PlanNH

Soup Kitchen Renovation, Salvation Army, Portsmouth, NH (on-going)

Cathedral Concept, Tri-City Covenant Church, Somersworth NH

Various Residential Projects

Previous experience includes adaptive reuse and historical renovation projects at the Portsmouth Naval Shipyard as a Project Architect with Oak Point Associates, Portsmouth, NH; and the lead planner for the 2040 Master Plan for the Portsmouth Naval Shipyard as an architect with McHenry Architecture, Portsmouth, NH.

Robert White, R.L.A.

Senior Landscape Architect



Robert White is a Landscape Architect with wide project experience across New England and beyond. With over 40 years in private practice as ORW Landscape Architects and as Senior Landscape Architect with GPI, he has guided over 400 projects to completion. Through creative and artistic design, facilitated implementation with built projects for private and institutional clients, policy acceptances with local, state, federal agencies and regional planning authorities, he has been a practice leader.

Bob's work has been diverse over his career, spanning environmental conservation and greenway planning for natural areas, design for sustainable trails, historic and natural site interpretation, planning, policy development and built projects in green/complete streets and bike/pedestrian transportation, urban/neighborhood design for vibrant neighborhoods and housing diversity, public spaces and private and public sector collaborative master planning. Under his leadership his firm's projects have received more than forty state, and regional design awards and has won or honorable mentioned three national design competitions. He is a licensed Landscape Architect in New Hampshire.

EDUCATION:

- | | |
|------|---|
| 2019 | Certificate of Training : National Coalition of Creative Placemaking
New Hampshire Institute on the Arts |
| 1984 | Master of Landscape Architecture
Harvard Graduate School of Design,
Cambridge, MA
Janet Darling Webel Prize |
| 1981 | Bachelors of Science in Environmental Design with Honors
University of Mass, Amherst, MA |

REGISTRATION:

2010/Registered Landscape Architect/NH #083

A regular contributor as a designer and illustrator in community charrettes, Bob's experience in complete streets, green infrastructure, workforce housing and smart growth have given direction for designs for walkable communities across a spectrum of rural, village and urban settings across New England.

Bob has a Master's degree in Landscape Architecture from the Harvard Graduate School of Design and a **Certificate of Training from the National Coalition of Creative Placemaking**. He is a founder of the Portsmouth Alliance of Design Professionals pioneering a major Covid - 19 effort to claim outdoor spaces for the downtown business community and restaurants, co- founded the Upper Valley Trails Alliance bringing together 28 towns in trail planning and coordination, serves on the Board of Directors of PLAN NH, in 2022 completed his role as the Camp Dodge Projects Director for the Appalachian Mountain Club Trail Crew Alumni Association, and in 2022-2023 has served as research fellow of the World Trail Network for the planning and redesign for the famous Franconia Ridge Trail.

PROFESSIONAL EXPERIENCE:

2015-Present	Senior Landscape Architect, GPI Greenman Pedersen, Portsmouth, NH
2008-2015	Partner, ORW LLC, White River Junction, VT
1990-2008	Principal, ORW Landscape Architects/Planners, White River Junction, VT
1986-1990	Senior Landscape Architect, Ertel Associates, Woodstock, VT
1984-1986	Landscape Architect, The Cavendish Partnership, Ludlow, VT
1981-1984	Teaching Assistant/Career Discovery Instructor, Harvard Graduate School of Design, Cambridge, MA
1982-1984	Landscape Designer, Cambridge Community Development Department, Cambridge, MA
1980-1981	Self employed logger, Amherst, MA
1979-1981	Trails Foreman, Mount Monadnock State Park, Jaffrey, NH
1978	Trails Foreman, Randolph Mountain Club, Randolph, NH
1974-1978	White Mountain Trail Crew, Appalachian Mountain Club, Gorham, NH

ORGANIZATIONS

Board Member, PLAN NH

Research Fellow, World Trails Network - Hub for Americas

Founder, Upper Valley Trails Alliance

Camp Dodge Projects Manager, Appalachian Mountain Club Trail Crew Association

Founder, Portsmouth Alliance of Design Professionals

Member, Portsmouth, NH Public Arts Commission

Robert White, R.L.A.

Senior Landscape Architect



Perry Hall at Champlain College, Burlington, VT



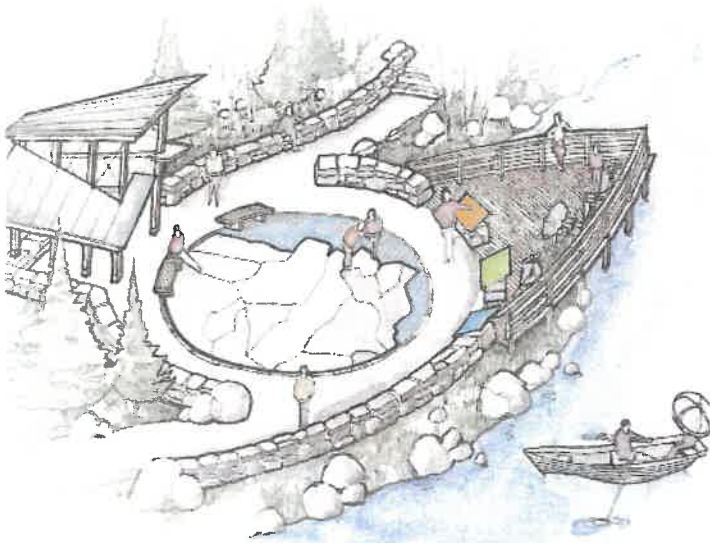
King Arthur Flour, Norwich, VT



Washington Monument Grounds Competition, Washington, DC

Awards

- 2021 Vermont Public Space Awards, Merit Award
"Northfield, VT Water Street Park"
- 2019 Montpelier 2050 Net Zero Design Competition
- 2014 Peoples Choice Award, Winning Design
Washington Monument Grounds Competition
- 2013 Vermont Chapter AIA, Merit Award
"Perry Hall at Champlain College"
- Plan New Hampshire, Merit Award
"Hampton Beach State Park"
- 2012 AIA New Hampshire, Honor Award
People's Choice Award
"Hampton Beach State Park"
- Vermont Chapter AIA, Merit Award
"King Arthur Flour"
- Northern New England Chapter of the APA
Plan of the Year Award
"Riverfront Island Master Plan"
- 2011 Vermont Public Space Awards, Merit Award
"Perry Hall at Champlain College"
- Vermont Planners Association, Plan of the Year
"Merchants Row Master Plan"
- Plan New Hampshire Project Award
"Hanover Co-op Community Market"
- 2009 AIA New Hampshire, Honor Award
"Hanover Co-op Community Market"
- 2008 American Association for State and Local History, Merit Award
"Mount Independence Baldwin Interpretive Trail"
- 2007 Vermont Chapter ASLA, Merit Award
"Champlain College Landscape Master Plan"
- Smart Growth Vermont, Merit Award
"Middlebury South Village"
- Plan New Hampshire, Merit Award
"Tilton Riverfront Park"
- 2006 Smart Growth Vermont, Merit Award
"Groton Village Revitalization Plan"
- Smart Growth Vermont, Merit Award
"Visualizing Density in Putney Village"
- Congress of the New Urbanism, New England Chapter Award
"Vermont Neighborhoods Project"
- Vermont Public Space Awards, Honorable Mention
"St. Johnsbury Academy Campus Green"
- Vermont Planners Association, Project of the Year
"Vermont Neighborhoods Project"
- Vermont Chapter ASLA, Merit Award
"Old Man of the Mountain Memorial"



Old Man of the Mountain Museum and Artists Pathway,
Franconia Notch, NH

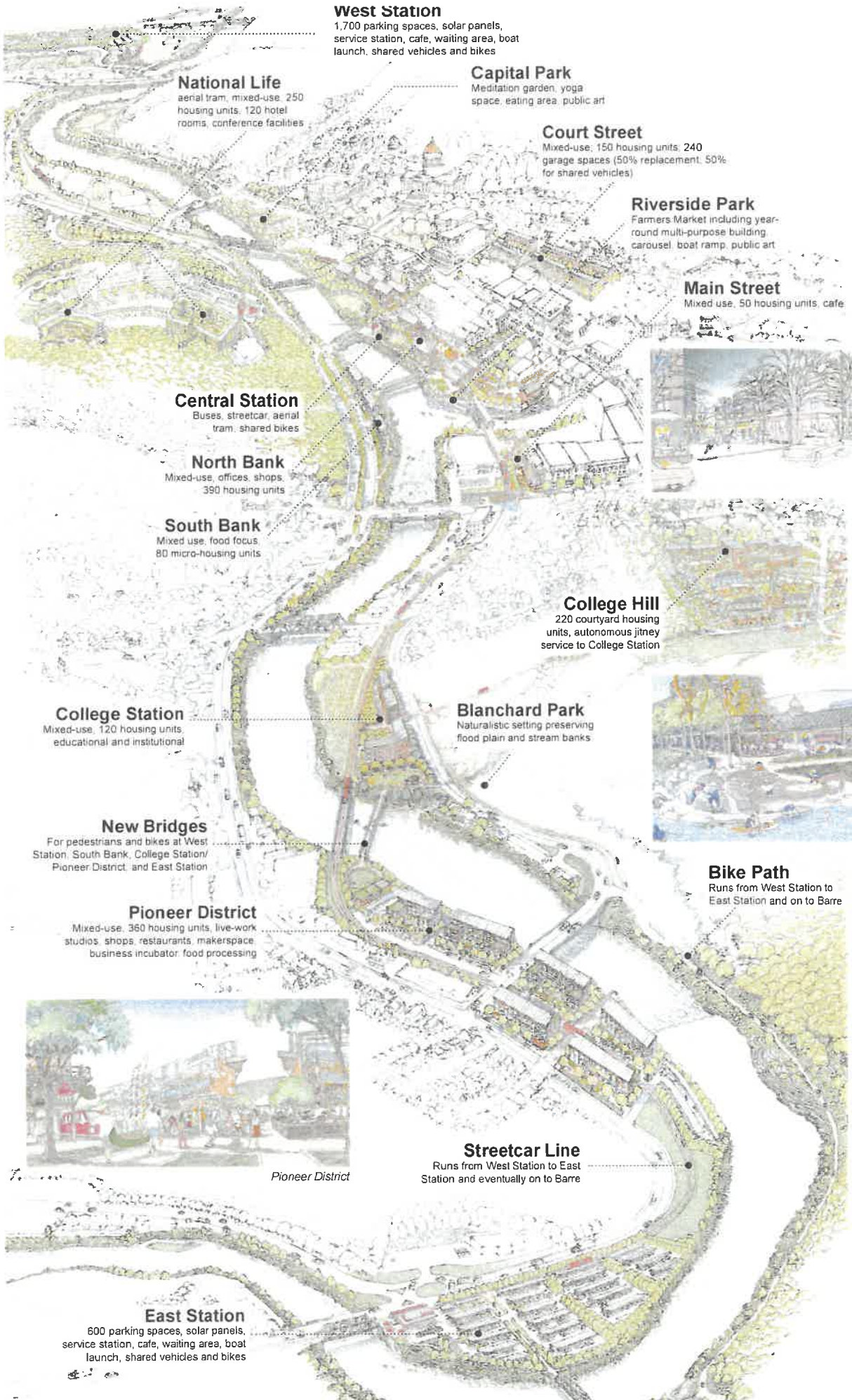


Hampton Beach State Park, Hampton Beach, NH



Mt. Independence State Historic Site Trails Master Plan,
Orwell, VT

- 2006 Vermont Chapter ASLA, Merit Award
"Vermont Neighborhoods Project"
- 2005 Vermont Chapter ASLA, Merit Award
"Irasville Growth Area Study"
- 2003 Vermont Chapter ASLA, Merit Award
"Wells River North Bank Study"
- Vermont Public Space Awards, Honor Award
"Burlington North/South Bicycle & Pedestrian
Plan"
- 2002 Vermont Chapter ASLA, Honor Award
"Mount Independence Trails Master Plan"
- 2001 Vermont Chapter ASLA, Merit Award
"The Vermont State Standards"
- Vermont Chapter ASLA, Presidents Award of
Excellence "Capital District Master Plan"
- 2001 Vermont Chapter ASLA, Merit Award
"Route 2 Corridor Village Planning"
- 2000 Northern New England Chapter APA, Award
"Montpelier Capital District Master Plan"
- New England Regional Council AIA, Design
Award. "Montpelier Capital District Master
Plan"
- VT Chapter of the ACEC, Grand Award
"Manchester Parking and Pedestrian Plan"
- 1998 Boston Society of Landscape Architects Award
"The Smuggler's Notch Scenic Highway Plan"
- Northern New England Chapter APA, Award
"The Barre City Economic Action Plan"
- 1995 Vermont Chapter AIA, Design Award
"Dorset Street Park Pavilion"
- 1994 AIA, Award for Excellence in Health Care Design
"Kendal at Hanover"
- 1993 Vermont Chapter AIA, Award
"Dorset Street Park Pavilion"
- Vermont Chapter ASLA, Design Award
"Dorset Street Park"
- 1992 New England Regional Council AIA, Design
Award "The Essex Center Master Plan"
- Northern New England Chapter APA, Award
"The Essex Center Master Plan"
- 1991 Vermont Chapter AIA, Design Award
"71 Central Street"
- Vermont Chapter AIA, Design Award
"The Woodstock Inn"
- 1989 The National Peace Garden Design Competition
Honorable Mention, Washington, DC.



West Station
1,700 parking spaces, solar panels, service station, cafe, waiting area, boat launch, shared vehicles and bikes

National Life
aerial tram, mixed-use, 250 housing units, 120 hotel rooms, conference facilities

Capital Park
Meditation garden, yoga space, eating area, public art

Court Street
Mixed-use, 150 housing units, 240 garage spaces (50% replacement, 50% for shared vehicles)

Riverside Park
Farmers Market including year-round multi-purpose building, carousel, boat ramp, public art

Main Street
Mixed use, 50 housing units, cafe

Central Station
Buses, streetcar, aerial tram, shared bikes

North Bank
Mixed-use, offices, shops, 390 housing units

South Bank
Mixed use, food focus, 80 micro-housing units

College Hill
220 courtyard housing units, autonomous jitney service to College Station

College Station
Mixed-use, 120 housing units, educational and institutional

Blanchard Park
Naturalistic setting preserving flood plain and stream banks

New Bridges
For pedestrians and bikes at West Station, South Bank, College Station, Pioneer District, and East Station

Pioneer District
Mixed-use, 360 housing units, live-work studios, shops, restaurants, makerspace, business incubator, food processing

Streetcar Line
Runs from West Station to East Station and eventually on to Barre

East Station
600 parking spaces, solar panels, service station, cafe, waiting area, boat launch, shared vehicles and bikes



Central Station



Riverside Park



Bike Path
Runs from West Station to East Station and on to Barre



Pioneer District

Team Bridges

- Roger Allbee
Food and agriculture
- Jay Ancel
Architecture
- Vince Appel
Architecture
- Doug Cooper
Architecture
- Stefani Danes
Urban design
- Ethan Lay-Sleeper
Planning
- Ken Millman
Public-media outreach
- Archie Kasnet
Energy
- Michael Rushman
Planning+development
- Janet Van Fleet
Public art



Bird's Eye view of the Vergennes neighborhood.

ORW was engaged by the Vermont Forum on Sprawl to prepare model 'smart growth' site plans for residential development on sites in Shoreham, Middlebury and Vergennes. Each site is located 'in-town,' served by municipal services and zoned for residential development. The objective of the project was to work with each community and the landowners to develop innovative site plans that are financially feasible to implement and supported by property owners and the community.

For each site, regulatory constraints posed by existing zoning were identified, a set of housing development precedents appropriate in scale and design to each community were identified in preparation for a series of community design workshops. Through the community design meetings site plans were developed for each site and 'pro-formas' were developed to test each plan for financial feasibility.

This project earned recognition in Vermont and beyond, winning awards from the New England Chapter of the CNU, Vermont Planners Association, and Vermont ASLA.



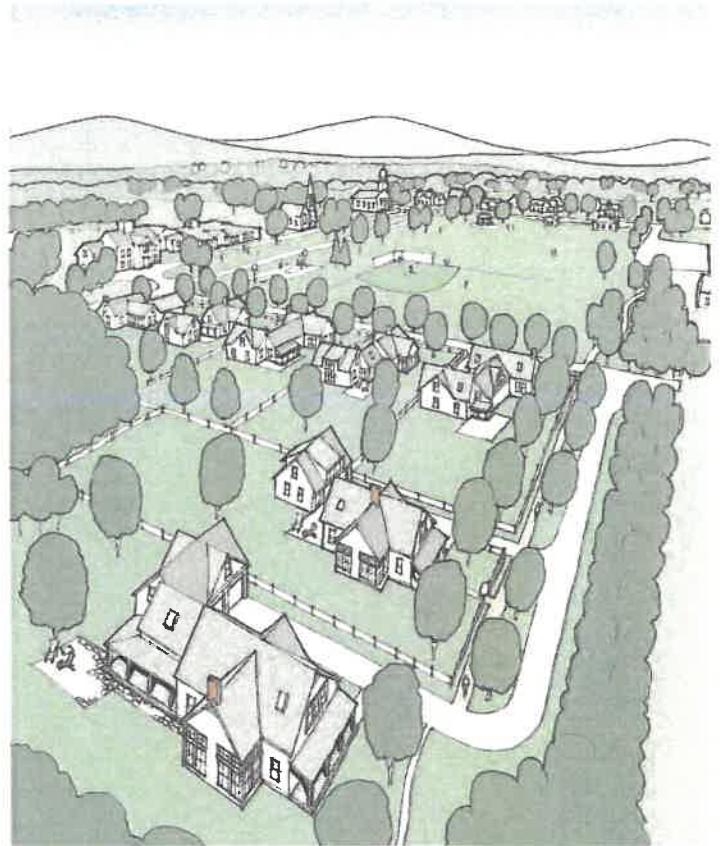
Landscape Architects & Planners

Shoreham



Above, Shoreham Commons adjacent to the site.

In Shoreham, the 8-acre site is set on the south edge of the town commons, presenting an opportunity to use new housing to enclose and define the green space and strengthen the overall image and character of this picturesque village center. Proposed development references the house and lot patterns of the village to provide a good fit between old and new elements of the Town.



Above, bird's eye view and site plan of the Shoreham neighborhood.



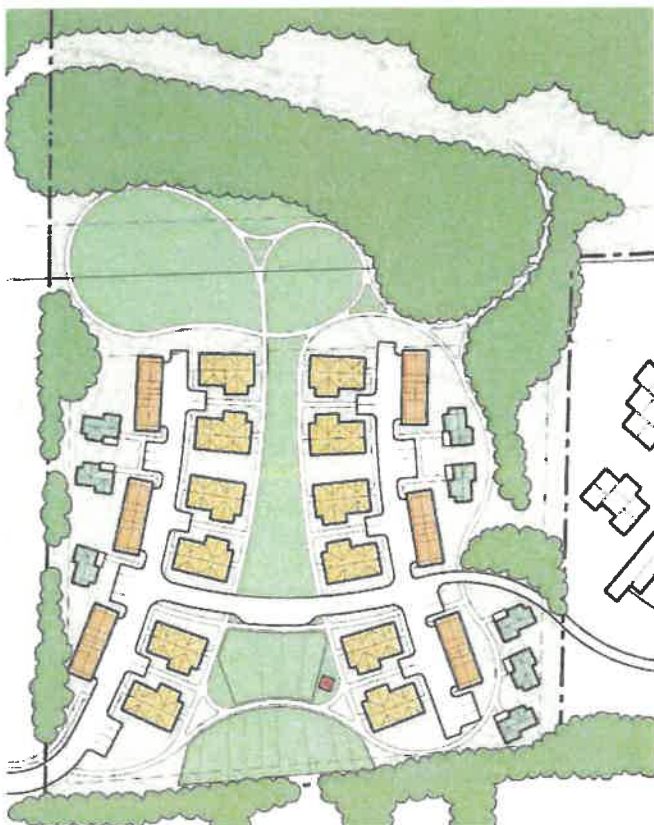


Landscape Architects & Planners

Middlebury



Left, Bird's eye rendering of new neighborhood housing in Middlebury with community gardens, a small green and ample natural open space. Below left, housing site plan.



Above, traditional neighborhood in Middlebury.

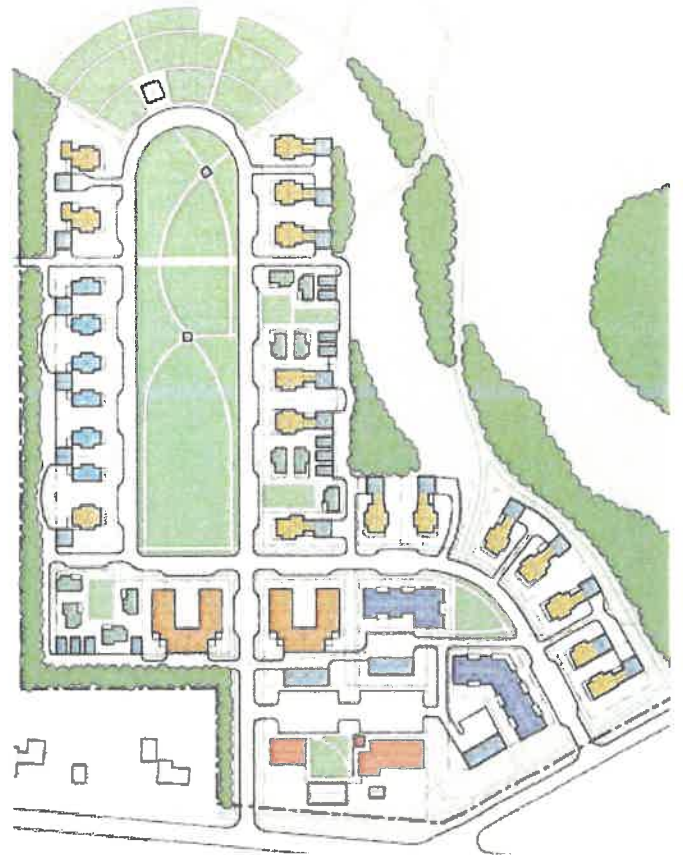
The 12.5-acre Middlebury site is located along Otter Creek and is within an easy walk or bicycle ride of downtown. New housing on this site is organized around a central open space and community gardens that buffer adjoining neighbors and provide neighborhood access to Otter Creek open space. A range of housing types including duplex, carriage and cottage units are planned to provide diverse housing choice for future residents.



Landscape Architects & Planners

Vergennes

The 114-acre site in Vergennes is beautifully situated on a gentle east-facing slope overlooking the Otter Creek with distant views of the Green Mountains. The plan provides for a new neighborhood of 59 homes on approximately 15 acres (including the park) of the site, leaving almost 100 acres in open space. The new neighborhood is clustered around a central green and a creekside open space on a small portion of the site, leaving the majority of the site open for agriculture and open space uses. New housing on the site also includes a range of housing types, including cottage clusters, two-family and single-family units, carriage units and apartments, as well as a small amount of retail.



Site plan of the Vergennes neighborhood.

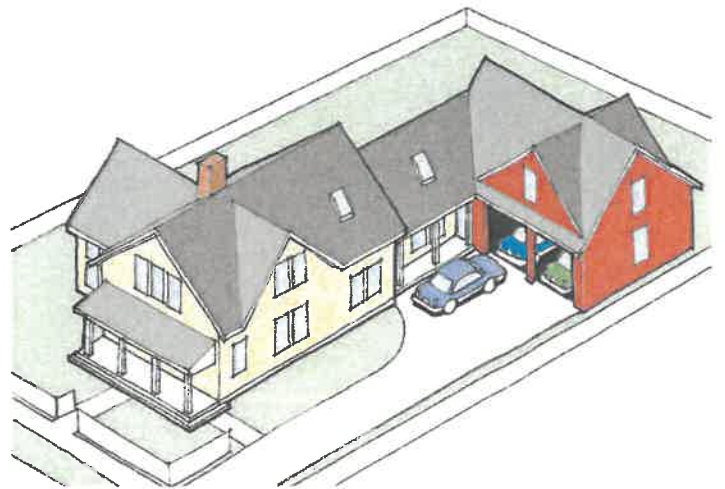
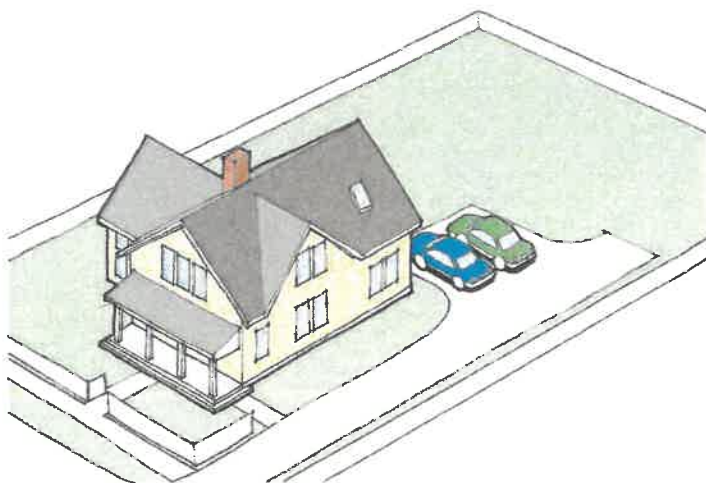


Diagram of housing that is adaptable over time to changing household needs. Below, elevation of housing fronting the Commons.





PATTERN BOOK OF IRENE COTTAGES



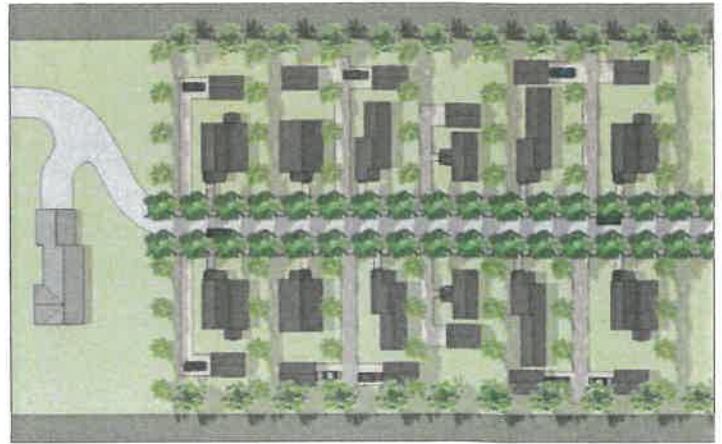
In the wake of Tropical Storm Irene, more than 1,000 homes in Vermont were left in need of major repairs and others were completely destroyed. For many in the path of Irene, the cost of replacing a destroyed home is simply cost prohibitive. However, even before Tropical Storm Irene, Vermonters have watched the gap between their income and the cost of housing as it grew wider. With energy prices on the rise, the ability of individuals and families to find appropriate, comfortable shelter for an affordable price became more challenging by the year. Vermonters reaching retirement age want homes that allow them to live independently for as long as possible.

Can we design a smarter house, a house that is small but efficient to minimize cost but maximize the utility of space? Can that house emphasize energy efficiency for comfort and livability at a lower cost? Can that house be attractive and adaptable to the changing needs of a household? Can such a house be at equally at home in a rural setting, village or in-town neighborhood?

The IRENE COTTAGE HOMES meet these challenges incorporating Vermont values of simplicity, efficiency, practicality, and flexibility to produce a smarter affordable home to meet the changing needs of a household.



The cottages can be arranged as a common courtyard with parking at the edges and a pedestrian center.



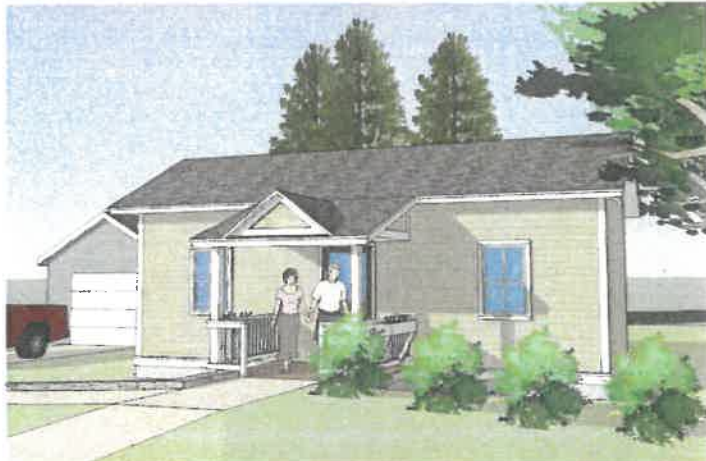
The cottages can also be arranged as a traditional village pedestrian oriented street with parking and driveways in side yards and behind homes to emphasize neighborhood space.

Leading a multidisciplinary project team, ORW developed a series of cottage housing types based upon a higher energy performance specification, and designed to be flexible small houses for Vermont families addressing a broad cross-section of needs including: aging in place, replacement units for village neighborhoods or rural settings, and mobile home parks.

The project is being implemented through a variety of means where the units are manufactured as high performance modular houses and delivered to each site for installation. Land and Affordable Housing Trusts, Community Development Agencies, and private developers are interested in using these innovative and cost-effective new house models.



The Ascutney is a compact 405 SF living unit that comfortably accommodates the necessities of life in a low cost, small footprint home for a single person or couple. This unit can also be developed inexpensively as first phase cottage -- expanded over time for an additional bedroom or other spaces. \$52,443 plus site development and soft costs.



The Sterling is a 567 SF, one-bedroom bungalow - like house with an attractive wrap-around porch for outdoor dining or sitting. The narrow profile of the house makes it adaptable to a mobile home park or as a primary house in a rural, village or neighborhood setting. The one bedroom configuration makes this a good 'starter home' that could be expanded over time. \$69,612 plus site development and soft costs

A 702 SF expanded two-bedroom option for the Sterling is created by extending the footprint of the house 10 feet back. \$78,163 plus site development and soft costs.



The Glastenbury is a 832 SF, two-bedroom home that works well for a small family or seniors desiring one-floor living arrangements. This design has its roots in the classic Cape style home, which is a traditional New England favorite. \$75,090 plus site development and soft costs.



The Mansfield is a 1320 SF two-story, three-bedroom home that could work well for a range of family options. This larger home includes a central open space for living, kitchen and dining, a bedroom on the ground floor, and two bedrooms upstairs for maximum flexibility. \$108,398 plus site development and soft costs.



The Design Book of IRENE COTTAGE HOMES has been developed with grant funding from the Vermont Community Foundation, the High Meadows Fund and COVER Home Repair. The Project Team and Partners include: COVER Home Repair, ORW Landscape Architects and Planners, Studio Nexus Architects, The Upper Valley Housing Coalition, Efficiency Vermont, The University of Vermont, Chet Pasho Building Sciences, and Preferred Building Systems.



Landscape Architects & Planners



Above, the campus promenade leading to Perry Hall.

PERRY HALL AND LAWN

Perry Hall, a stately brick Italianate home in Burlington's Hill neighborhood, was renovated and expanded to become Champlain College's Admissions Office, the public face of the College. The site design by ORW includes a generous lawn area that has become a major open space for the College and neighborhood.

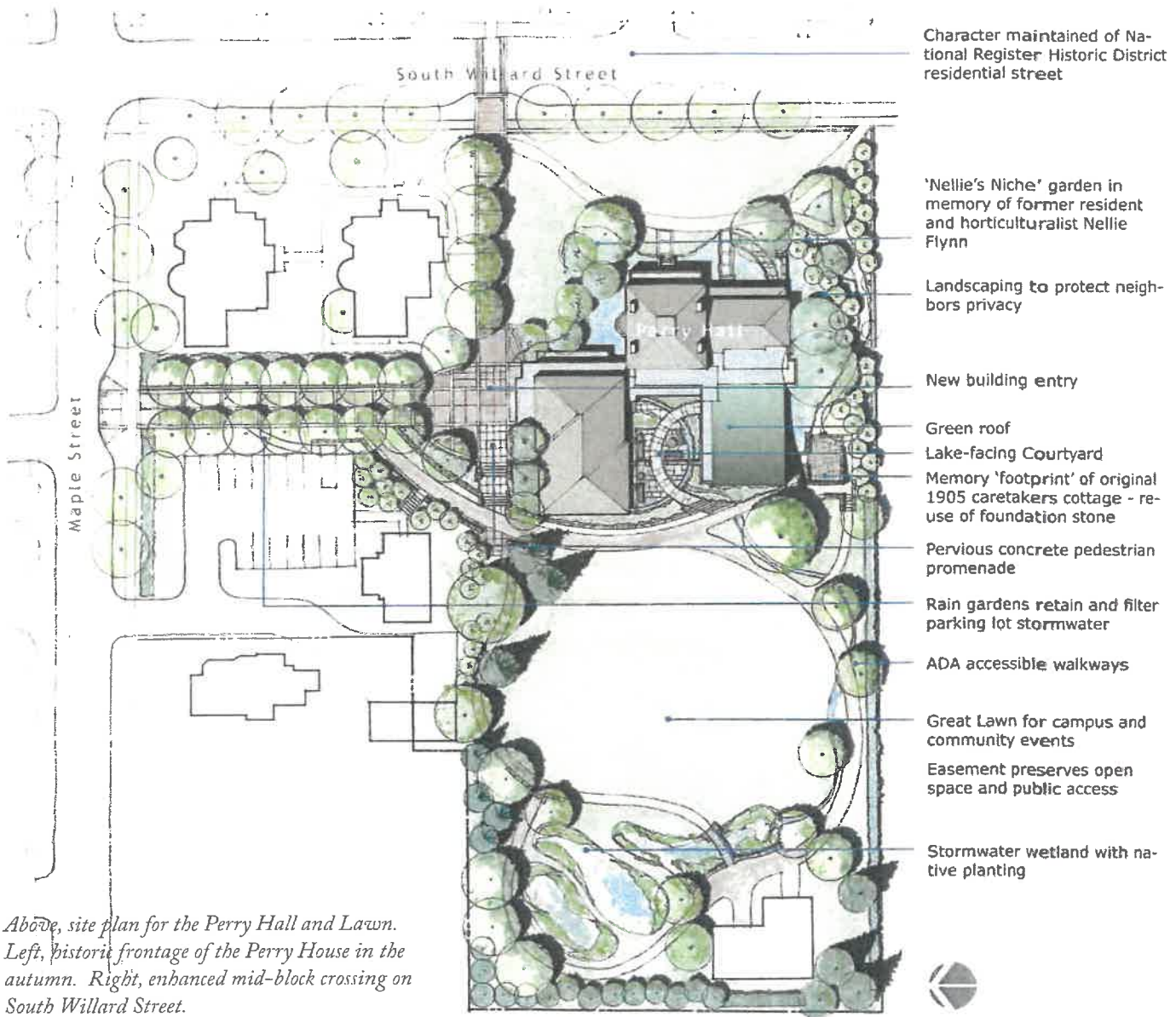
As an urban campus that has grown incrementally, Champlain College had no green space prior to the purchase of the two-acre Perry House property. With this addition to the campus, the college has significantly improved campus livability and provided much-needed green space for activities ranging from quiet enjoyment of the outdoors to formal gatherings such as alumni reunions and graduations.

The site is a showcase of 'green' site design features including a gravel wetland that captures storm surges before they enter the City system; pervious walkways; native plant materials; rain garden swales for parking areas; a green roof; and energy efficient LED lighting. The landscape references the cultural heritage of the site through garden design and repurposed stone from demolition. The project received LEED (Leadership in Energy and Environmental Design) Platinum certification in March 2012.



Above, the historic frontage of Perry Hall and the addition facing South Willard Street.

Photos: Jim Westphalen



Abode, site plan for the Perry Hall and Lawn. Left, historic frontage of the Perry House in the autumn. Right, enhanced mid-block crossing on South Willard Street.



Firm Introduction + Experience

Studio is a creative environment where design is approached with thoughtfulness and innovation considering human scale, aesthetics, context, light, efficiency, and comfort. Our goal is to bring joy and excitement to the people who inhabit the environments we create. **Nexus** is the collaborative link between individuals within a group. The essence and strength of our firm is the connection between our clients, our studio and our consultants. **Studio Nexus** is the creative link between conceptual ideas, people, and the built environment.

In an ever more technically advanced world, successful design relies on seamlessly integrating knowledge from specialized fields into one. Our process integrates key consulting disciplines into the conceptual design phase of a project, allowing troubleshooting to take place early on to avoid complications and cost overruns. We provide our clients with thoughtful, innovative and sustainable architectural design solutions using strategic partnerships, specialized expertise, active and honest communication, and timely project delivery. Our goal is to achieve long-term collaborative relationships based on mutual trust and respect. Our principals are LEED-certified; however, we go beyond LEED requirements in our approach to every project. Our goals are to reduce waste, improve interior environments, lower life-cycle costs and provide the most sustainable and economical use of the earth's resources and energy. We apply the highest quality standards acceptable to our clients to achieve the proper balance between quality and cost.



Spark!: The Spark! Community Center's grand opening at 75 Bank Street in Lebanon, NH. Their mission is to provide a safe, welcoming, and vibrant place where adults with special needs, their families and caregivers, and caring members of the Upper Valley community take part in fun and educational activities. Participants are enriched through a sense of diverse, integrated community activities and inspired to realize their fullest personal potential.

CONNECT

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STUDIO NEXUS
ARCHITECTS + PLANNERS



James R. Wasser AIA, LEED AP

Professional Registrations

New Hampshire
Vermont
Massachusetts
Oregon
Washington

Leadership in Energy and
Environmental Design Accredited
Professional (LEED AP)

Education and Training

Bachelor of Arts:
Oberlin College

Masters of Architecture:
Harvard University
Graduate School of Design

Related Experience

Managing Partner
Studio Nexus Architects + Planners
White River Junction, VT

Senior Architect
UK Architects PC
Hanover, NH

Partner
Richard Brown Architects & Planners
Portland, OR

Jim is a founding and managing partner of SNAP with particular skills in planning, design, home assessment and analysis, and all aspects of renovation work. This expertise is complemented by his ability to develop a close working relationship with his clients, consultants, contractors and local town/city officials to facilitate award-winning design, comprehensive construction documents and a smooth permitting and construction process. With over 35 years of design experience, including 15 years in the Pacific Northwest, Jim's work includes a wide variety of multi-family residential projects, both new, ground-up luxury developments to renovations that range from small, targeted improvements in affordable housing complexes to the repurposing and rehabilitation of worn-out industrial buildings.

Outside the office, Jim is an avid reader and music listener, enjoys hiking, walking and exploring New England and beyond, endless home projects and spending time with his family and friends.

Selected Projects

75 Bank St Apartments
Lebanon Middle School
Lebanon, NH

An early 20th Century Middle School repurposed and sensitively remodeled into 43 loft apartments, fitness gym and community center for adults with special needs

South Main Street
Industrial Lofts
White River Junction, VT

36 contemporary loft apartments designed with an industrial modern aesthetic within the renovated, energy efficient shell of a former dry cleaning warehouse

South Block
Apartments and Retail
White River Junction, VT

A 44,000 SF, five-story development in a tight urban vacant lot in the historic downtown, it has 69 small, high quality, studio apartments and 2,700 SF of retail

Village Market
Apartments
Lebanon, NH

Design and successful site permitting for two multi-story buildings with 152 loft-style apartments on a tight, reclaimed site in the heart of Lebanon's downtown



75 Bank St. Apartments



South Main Industrial Lofts



Village Market Apartments

CONNECT

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STUDIO NEXUS
ARCHITECTS + PLANNERS



Douglas J. Sonsalla AIA, NCARB, LEED AP

Professional Registrations

Vermont
New Hampshire
Maryland

Leadership in Energy and Environmental Design Accredited Professional (LEED AP)

Certified by the National Council of Architectural Registration Boards (NCARB)

Education and Training

BS in Construction Management:
University of Wisconsin-Stout

Masters of Architecture:
University of Minnesota

Related Experience

Founding Partner
Studio Nexus Architects + Planners
White River Junction, VT

Project Architect
UK Architects PC
Hanover, NH

Project Architect
Frank Anzalone Associates
New London, NH

Doug is a founding partner of SNAP and treats each project with an opportunity for a new, creative expression balanced with simplicity to clearly express the client's vision. Trained in both Architecture and Construction Management, Doug has over 25 years of experience constructing, designing and managing commercial and residential projects throughout New England and the Midwest.

A former Peace Corps Volunteer, Doug lent his construction knowhow to a variety of civic projects in Gabon, Africa. He continues to donate his time and expertise to numerous local community organizations including: the Selectboard, Historical Society, and the Congregational Church Building Committee in his home town of West Fairlee and the Two Rivers-Ottawquechee Regional Planning Commission.

Outside the office, Doug spends his time with his family enjoying outdoor activities such as rock climbing, swimming, fishing, kayaking, hiking, and mountain biking. He also enjoys traveling, painting, playing guitar and drums.

Selected Projects

Hartford Scattered Sites
Twin Pines Housing
Hartford, VT

A multi-building, multiphase project rehabilitating or replacing seven buildings totaling 34 units of badly deteriorated, energy inefficient, affordable housing

South Block
Apartments and Retail
White River Junction, VT

A 44,000 SF, five-story development in a tight urban vacant lot in the historic downtown, it has 69 small, but high quality, studio apartments and 2,700 SF of retail

One Mechanic Street
Apartments and Retail
Lebanon, NH

Renovation of a former mill, which serves as a gateway building to Lebanon's historic downtown and town green, with 11 studio apartments and 2,000 SF of retail

Crafts Hill Apartments
Twin Pines Housing
West Lebanon, NH

Structural, envelope, heating, electrical and interior finish improvements, along with a new Community building for this 100 unit, 1970's era affordable housing complex



Crafts Hill Apartments



Hartford Scattered Sites



One Mechanic Street Apartments

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STUDIO NEXUS
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MULTI-FAMILY RESIDENTIAL DESIGN

75 Bank Street

Adaptive Reuse
Lebanon, NH

Project Size. 42,600 sf • \$3.25 Million • 2014 Visualizing Density Award from NH HFA & Plan NH

Overview: An early 20th century Junior High School was re-purposed and sensitively remodeled into 40 studio lofts and three one-bedroom apartments, a fitness center (KDR) and a community center for adults with special needs (Spark!). The brick exterior was virtually untouched by the renovation, while many of its interior features were retained, such as wide halls, high ceilings, hardwood floors, wood and plaster moldings, chalk boards, and lockers. The renovation has resulted in new life for a building that had been, and continues to be, a cornerstone of the community.



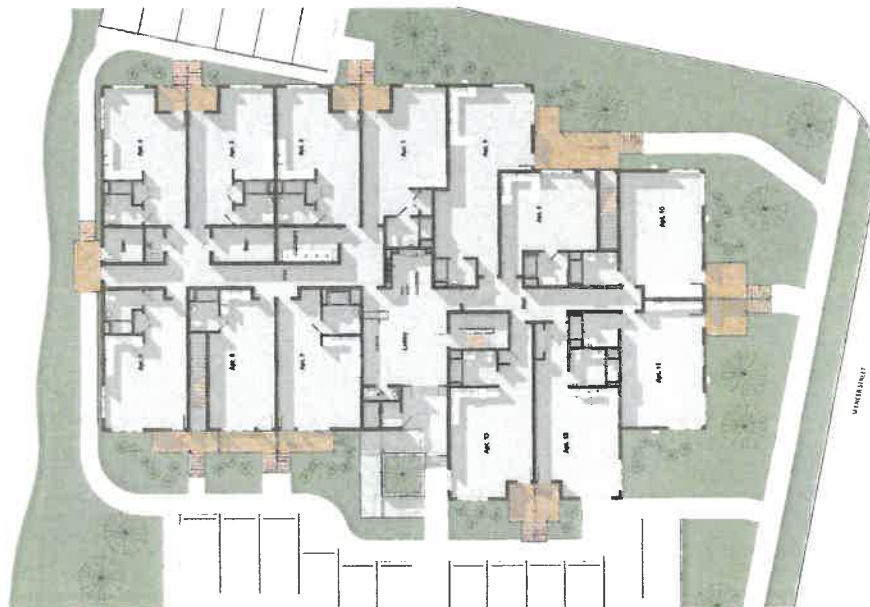
MULTI-FAMILY RESIDENTIAL DESIGN

37 Spencer Street

Adaptive Reuse and Renovation
Lebanon, NH

Project Size: 26 units

Overview: A collaboration between owner and architect that transformed a dilapidated, early 1960's industrial warehouse into 25 solar-powered, high-efficiency, luxury loft apartments. Each unit is unique, many with independent entries, and all with their own dedicated balcony, porch or terrace.



MULTI-FAMILY RESIDENTIAL DESIGN

241 South Main Street

Adaptive Reuse & Renovation
White River Junction, VT

Project Size: 20,000 sf • \$3.4 Million

Overview: 36 contemporary apartments were designed with an industrial modern aesthetic within a renovated shell of a former dry cleaning warehouse. The units feature high ceilings with exposed structural elements and consist of a mix of both market-rate studio apartments and dormitory suites to accommodate visiting actors for the nearby Norther Stage Theater.



MULTI-FAMILY RESIDENTIAL DESIGN

132 South Block

White River Junction, VT

Project Size: 69 Residential Units and 5,000 SF of Restaurant, totaling 43,600 GSF

Overview: The building sits in one of the last undeveloped parcels in downtown White River, providing a street level restaurant, loft apartments and continuing the revitalization of the thriving town core. The design expresses the rebirth of WRJ through its creative economy of artists using colorful patterning and staggered vertical metal panels reminiscent of the pattern on railway warehouse fire doors. Proportion, materials and colors are reminiscent of the historic district's brick buildings expressed contemporarily with veneer brick, metal panels and a tower signifying entry into the heart of downtown while echoing the Hotel Coolidge clock towers.



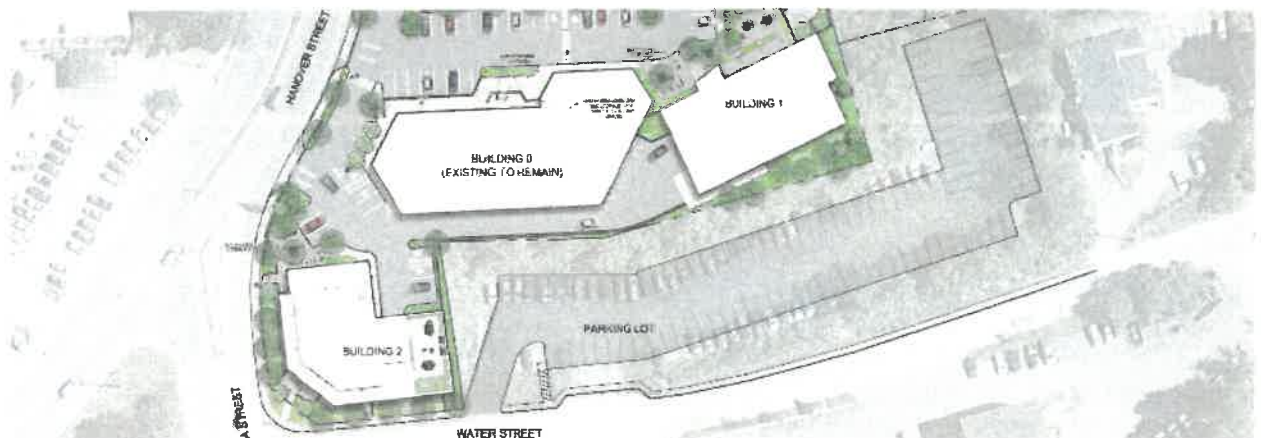
MULTI-FAMILY RESIDENTIAL DESIGN

2 Mascoma Street, Building 1

New Construction
Lebanon, NH

Project Size: 56,000 sf 69 Studios and 3 One-Bedrooms

Overview: Utilizing a vacant, derelict property of Lebanon's downtown instead of a large tract of undeveloped land outside the urban core, this project helps reduce sprawl and environmental degradation and builds a sustainable, livable, and walkable community. The 6-story apartment building plus a 17-car parking garage is clad with durable, low maintenance, high quality materials, predominantly, brick, fiber cement, metal and glass, reflecting Lebanon's rich architectural history, while reinterpreting it in a contemporary style for modern loft living.



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MULTI-FAMILY RESIDENTIAL DESIGN

The Village at Crafts Hill

Renovation & Energy Retrofit
Lebanon, NH

Project Size 34,000 sf • \$6 Million • \$176/sf • 100 units, 6 buildings • Expected Completion 2020

Overview: The mid 1970's era building complex secured funding through the USDA Rural Development's Multi-Family Housing Preservation and Revitalization Restructuring Program. The property was acquired by Twin Pines Housing in 2015, when the federal rental subsidies were at risk of being lost. A Capital Needs Assessment was developed for replacing the heating and electrical systems, replacing interior finishes, providing accessible units and improving the building envelope with new windows, insulation and air sealing.



MULTI-FAMILY RESIDENTIAL DESIGN

Hartford Scattered Sites

New Construction & Renovation
Hartford, VT

Project Size: 34,000 sf • \$5.7 Million • \$168/sf • 34 units, 5 sites • Completed 2017

Overview: A comprehensive assessment of seven existing buildings was undertaken, resulting in the complete removal and replacement of two buildings, the conversion of a barn, the renovation of three buildings, and the historic preservation of a former hotel. Professional architectural services for Twin Pines Housing, who partnered with Housing Vermont, included assistance with local, state, and federal funding applications and providing guidance and consultant coordination from design through construction.



SITE LOCATION PLAN



Hartford Scattered Site Project

Building Site Location

Photography: Mike P. Construction
September 26, 2016
BY: JACOB HENNING



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STUDIO NEXUS
ARCHITECTS + PLANNERS

EDUCATIONAL + INSTITUTIONAL DESIGN

NNCC (Northwest Neighborhood Cultural Center)

Feasibility
Portland, Oregon

Project Size: 36,691 sf .69 acres

Overview: Northwest Neighborhood Cultural Center—facility assessment and master planning for the renovation and repurposing of this turn-of-the-century former Church of Christ, Scientist, listed on the National Registry. Jim had to navigate a variety of needs: those of the building itself—including a seismic retrofit, accessibility and outdated building systems—and those of the users, including the owners, the Northwest Portland Neighborhood Association, the chief tenant, the NW Children’s Theater, and several smaller non-profits.

This project was undertaken with Jim as partner-in-charge with Richard Brown Architects, AIA, LLP.



MULTI-FAMILY RESIDENTIAL DESIGN

Visions for Creative Housing Solutions

New Construction
Hanover, NH

Project Size: 8,400 sf to accommodate 12 adult residents with developmental disabilities

Overview: This future home for 12 developmentally disabled adults sits prominently on a main thoroughfare in Hanover. The three-story wood framed structure is clad primarily with clapboards, along with a board and batten “base” to visually reduce the height. The upper two floors have wood accented bays, further breaking down the mass and scale of the building, while emphasizing the comfortable living spaces within. The roof is designed to minimize the building’s height, while maximizing access for solar panels.



Firm Overview

Since its founding in 1958, North Branch Construction has developed into a full service Construction Manager, Design-Builder, and General Contractor serving New Hampshire and Northern New England. We operate from our LEED Silver and Energy Star certified headquarters located in Concord, New Hampshire. We have a wide range of construction expertise including institutional, municipal, industrial, commercial, multi-unit and high-end single family residential, historic renovation, and medical projects. We have remained on the forefront of sustainable construction for over half of a century.



Despite being one of the largest construction firms in the state of New Hampshire, we are not your typical 'big business' corporation. In fact, we strive to maintain a limit of twenty to twenty-five exclusive projects each year. This quality over quantity approach allows us to provide the superior level of service to our clients that keeps them coming back. By limiting the amount of projects we take on each year, we are able to assign at least one principal of the firm to every project. Though we may never have a list of 100 schools, or libraries, or hospitals, we do have a list of highly satisfied clients and 80% of our work is repeat business.

We employ eight office-based Project Manager/Estimators, eleven field-based Project Superintendents, a full-time Quality Control and Service Foreman, a full-time Safety Director and part-time Safety Specialist, and a part-time Service Coordinator with full project management capabilities. We have three LEED Accredited Professionals and six American Hospital Association ASHE Certified Project Managers and Superintendents on staff.

We measure our success by how well we fulfill our mission:

To build a better future through unwavering **Integrity**, collaborative **Teamwork**, uncompromising **Quality**, and genuine **Respect** for our clients, employees, and community.



Company Snapshot

Who We Are

- Incorporated in 1958
- Located in Concord, NH in our "LEED" Silver and Energy Star Certified building
- Projects completed throughout NH, northern MA, and VT
- In sixty-five years, we have grown from a single & multi-family home and barn builder into one of the largest construction managers in the State of NH.
- Project size range of \$.5 to over \$65 million
- Honored for over a decade with Multiple ABC NH/VT "Excellence in Construction" Awards
- Winner of ABC NH/VT Top Award "Best of Best" four times
- 100+ Employees
 - 4 Principals, all active in daily operations
 - 8 Project Managers/Estimators
 - 3 LEED Accredited Professionals
 - 6 ASHE Healthcare Construction Certified Employees
 - 15 Administrative Staff
 - 11 Project Superintendents
 - 60+ Carpenters/Laborers
 - Full-Time Warranty/Service/Quality Control Foreman
 - Full-Time Safety Director and Part-Time Safety Specialist

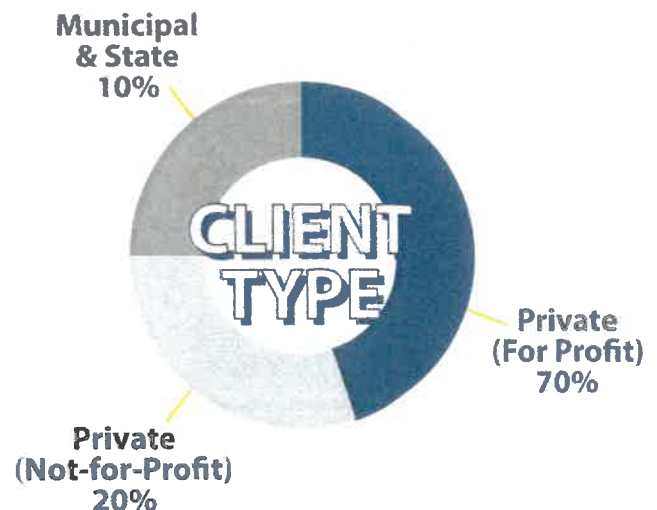
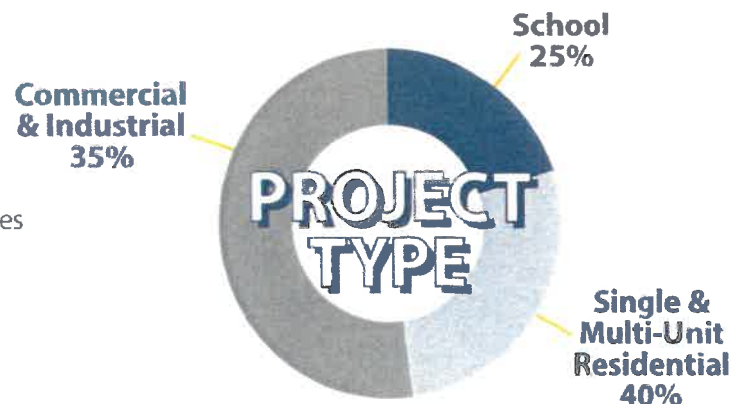
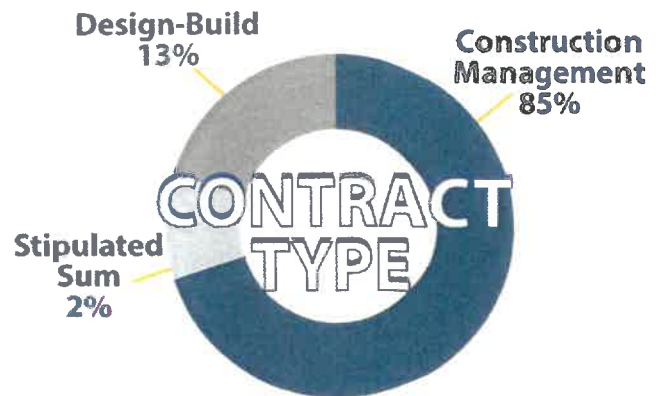
What We Build

- Schools, Public & Private, K-12
- Sustainable Construction
- Manufacturing Facilities
- Office Buildings
- **Multi-Unit Housing**
- Historical Restorations
- Medical Facilities
- Retail Space
- Commercial Kitchens
- Assisted Living Facilities
- Recreational Facilities & Venues
- Police/Fire/EMS Facilities
- LEED Certified Projects
- Municipal Buildings
- Dining Halls
- Warehouses
- Post & Beam Structures
- Pre-engineered Steel Buildings

What Puts Us Ahead of the Competition

- Bondable to \$250 million
- Over 65 years in business
- Project Managers and Estimators are one and the same - maintaining client expectations and improving customer service from planning through construction
- All four stockholders active in day-to-day operations
- Award-winning Safety Program
- Written Quality Control Program
- Proven track record of completing projects on or ahead of schedule
- Never failed to meet a contractual deadline
- Proven track record of completing at or below cost
- Award Winning Firm
- Real-Time Project Cost Accounting System

Construction Revenue





Joseph H. Campbell

LEED AP

President
Director of Business Development
Principal of the Firm

PRESIDENT

Project Experience

Concord Housing Authority | Parmenter Place Workforce Housing

Concord, NH • 27,600 sf • CM with GMP

New construction of 25 affordable family housing units in 6 wood-framed buildings totaling 27,600 sf featuring two and three bedroom apartment and townhouse units. A community laundry room was also included. Construction included vinyl siding, asphalt roof shingles and were built using energy efficient green building techniques.

Preservation of Affordable Housing | Sugar River Mills

Claremont, NH • 10 bldgs./162 units • CM w/GMP

Renovation and systems upgrades of mix of occupied workforce housing townhouses and occupied historic mill building elderly housing units. Renovations included total window replacement, a new roof, replacement of skylights in two 6-story atria, thermal envelope and heating control upgrades, and the installation of new forced hot water heating and air distribution systems. All townhouses received new windows and energy-efficient light fixtures, upgraded thermal envelopes, new attic insulation, new cement siding, and new standing seam roofing. This project was completed at a cost of approximately \$150,000 below the Guaranteed Maximum Price.

Red Oak Apartment Homes, Inc. | Red Oak at 409 Elm Street

Manchester, NH • 96,250 sf

Mixed-use, 6-story podium construction with structural steel, concrete and metal stud from basement to 2nd floor, wood-framed upper 5 floors. Site work, sheet piling, foundation waterproofing and insulation, metal siding, membrane roofing, steel fireproofing, deck & railing systems, two elevators, loading dock with equipment including lift, sprinkler, plumbing, HVAC, electrical/fire alarm.



Background

Joe joined North Branch Construction in 1998 as a part-time summer laborer while continuing his college education in Business Management. Joe joined the firm full-time in 2003, quickly becoming a Project Manager for commercial and multi-unit housing projects with contract values up to \$16.5 million. In 2014, Joe became a Principal of the Firm, and in 2018 he was named President of North Branch Construction.

Education and Qualifications

- New England College—Bachelor's Degree Business Management (Henniker, NH)
- USGBC LEED Professional Accreditation
- American Hospital Association and American Society for Healthcare Engineering Certified Healthcare Constructor
- OSHA 30-Hour Certified
- Associated Builders and Contractors of NH/VT (ABC NH/VT) Future Leaders in Construction Graduate
- ABC NH/VT Board of Directors 2014-2019, Chair of Board 2019
- Associated Builders and Contractors (ABC) National Board of Directors, 2020-2021
- ABC National Chapter Development Committee, 2022-Present
- AIANH Board of Directors Affiliate Director

Personal

Joe enjoys playing hockey and golf, and spending time with his family.



James J. Schwartzkopf

LEED AP BD+C

Executive Vice President
Director of Project Management/Estimating
Principal of the Firm

PROJECT EXECUTIVE

Project Experience

Michaels Student Living | Summit on Juniper

Lebanon, NH • 297,627 sf

Award-winning, new construction of four apartment buildings totaling 297,627 sf featuring unit configurations of 1-bedroom, 2-bedroom, 3-bedroom, and 4-bedroom floor plans with a total of 309 units supplying 628 beds. Student study, gathering, and fitness spaces within each building. Central Clubhouse provides community gathering spaces, fitness facilities, mail and package delivery service areas, work and office space for resident use, and onsite management company offices. Won 2023 ABC NH/VT Chairmans and Excellence awards and achieved U.S. Green Building Council LEED Gold certification.

Background

Jim has over 38 years of commercial and residential construction experience including multi-unit residential, luxury townhouses, commercial, medical, office, and retail facilities. Jim joined North Branch in 2001 and became a Principal and Vice President in 2004.

Education and Qualifications

- Norwalk Community College (Norwalk, CT)
- LEED Accredited Professional
- American Hospital Association and American Society for Healthcare Engineering Certified Healthcare Constructor
- OSHA 30 Hour Certified

Personal

Jim enjoys fishing, boating, golf, skiing, hiking, mountain biking and photography.

Wallace Farms, Phase II | New Construction

Londonderry, NH • 84,629 sf • 72 units • CM w/GMP

New construction of three 24-unit apartment buildings of 28, 213 sf per building and related site and infrastructure work.

Twin Pines Housing Trust | Rivermere Family Housing

Lebanon, NH • 25,246 sf • 21 units • CM w/GMP

New construction of 21 affordable family housing units in 2 two-story, wood-framed buildings. Work included sitework, underground utilities and improvements, demo, concrete, wood framing, roofing, siding, windows, doors/flooring/hardware, insulation, painting, case-work, HVAC, plumbing, sprinkler & electrical.



Summit on Juniper, Lebanon, NH

Relevant Project Experience



Michaels Student Living Summit on Juniper 401 Mt. Support Road, Lebanon, NH New Construction 297,627 square feet/600 beds

Award-winning, new construction of four apartment buildings totaling 297,627 sf featuring unit configurations of 1-bedroom, 2-bedroom, 3-bedroom, and 4-bedroom floor plans with a total of 309 units supplying 628 beds. Student study, gathering, and fitness spaces within each building. Central Clubhouse provides community gathering spaces, fitness facilities, mail and package delivery service areas, work and office space for resident use, and onsite management company offices. Won 2023 ABC NH/VT Merit Award and achieved U.S. Green Building Council LEED Gold certification.



Relevant Project Experience



Red Oak Apartment Homes

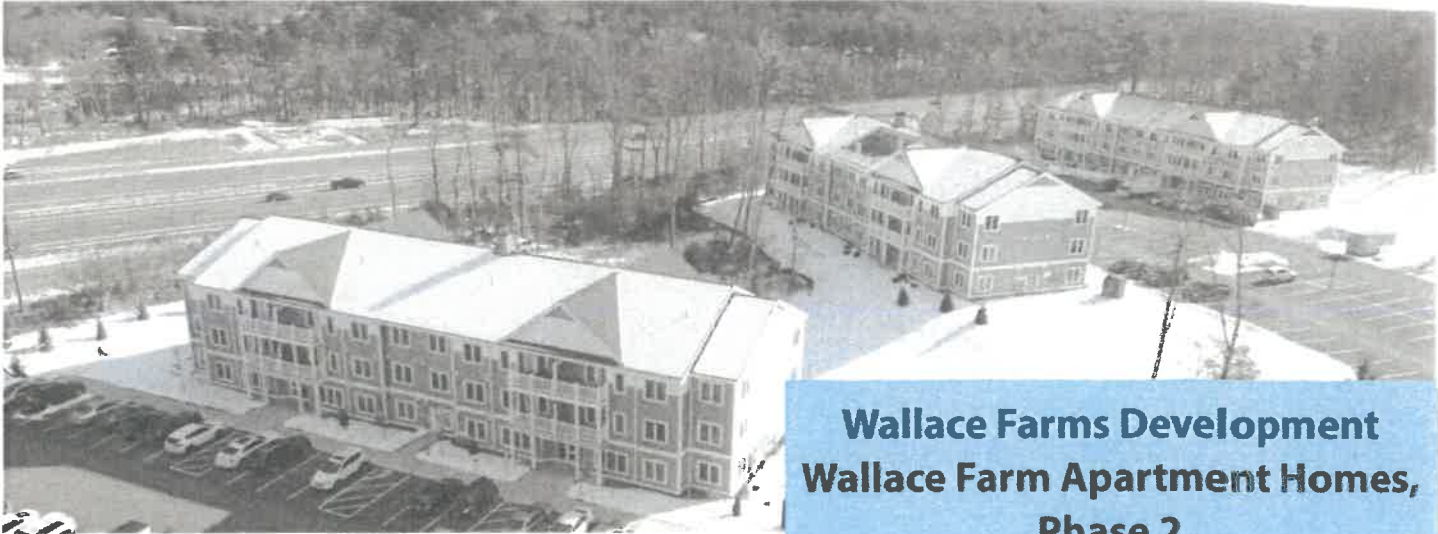
Red Oak at 409 Elm Street

New Construction
Manchester, NH

95,288 square feet/90 units

Mixed-use, 6-story podium construction with structural steel, concrete, and metal stud framing from basement to 2nd floor deck, wood-framed floors 2-6. Mixed-use on first floor and residential units on floors 2-6. Studio, one and two-bedroom apartments with upscale finishes, energy efficient features such as LED lighting, Energy Star rated appliances, built toward LEED standards.

Relevant Project Experience



Wallace Farms Development Wallace Farm Apartment Homes, Phase 2

Londonderry, NH

84,629 square feet/ 72 units



New construction of three, 24-unit apartment buildings of approximately 28,213 sf per building and related Phase 2 site and infrastructure work. Disciplines include: site work, masonry, metals, carpentry, insulation, roofing, siding, doors/flooring/hardware, wall coverings, painting, appliances, window treatments, casework, elevators, sprinklers, plumbing, HVAC, and electrical.



Relevant Project Experience



Concord Housing Authority Parmenter Place Workforce Housing

Concord, NH

New Construction

27,600 square feet/6 building/25 units

New construction of 25 affordable family housing units in 6 wood-framed buildings. Parmenter Place features two and three bedroom apartment and townhouse units for a total of 27,600 square feet. A community laundry room was also included. Construction of the wood-framed buildings included vinyl siding, asphalt roof shingles and were built using energy efficient green building techniques. The buildings received certification under the U.S. EPA ENERGY STAR program and silver level Green Building Certification from NAHB Research Center for conformance with the ICC 700-2008 National Green Building Standard.

Relevant Project Experience



Twin Pines Housing Trust Rivermere Family Housing

Lebanon, NH

25,246 square feet/21 units

New construction of 21 affordable family housing units in 2 two-story, wood-framed buildings. Work included site-work, underground utilities and improvements, demo, concrete, wood framing, roofing, siding, windows, doors/flooring/hardware, insulation, painting, casework, HVAC, plumbing, sprinkler & electrical.

BRUSS

project
management

Michael Bruss Bio



Professional Background

Michael was the founder and president of Bruss Construction Inc. and Integrated Building Energy Associates. Michael's passion and drive focuses on sustainability and resilience in the built environment. He has worked extensively on preservation and adaptive reuse projects respecting our architectural heritage and recognizing that the best way to preserve a building is to make it relevant in the 21st century.

Every project has its own set of challenges, its own unique cast of characters and its own opportunities for success or failure. A key role of the Construction Project Management Consultant is to provide a positive influence on the dynamic tension that is inherent in undertakings involving multiple stakeholders. The Consultant must work with the Design Team, Owner and the various project stakeholders to identify the challenges, facilitate solutions, and maintain focus on the project objectives.

With over 35 years of experience in Project development and management with a diverse group of building and design projects, Michael brings unmatched collaboration, innovation, and craftsmanship to every project that he is involved with.

Educational Background

University of Wisconsin Madison, Forestry Major
Northeastern University, Graduate Professional Certificate
Building Performance Institute, Building Performance Analyst
Lindquist Studios, Sculptor's apprenticeship

Affiliations

NESEA Bottom Lines Program Facilitator, <http://nesea.org/buildingenergy-bottom-lines>
NH State Parks Advisory Council (Member)
NH Preservation Alliance (Past Board member and Chair)
NESEA (Past Board member and Chair)
NH Businesses for Social Responsibility
US Green Building Council, UGBC LEED AP
American Institute of Architects, (AIANH)
Plan NH
NH Sustainable Energy Association
League of NH Craftsmen, Juried Woodworker

17 Springfield St.
Concord, NH 03301
603.856.8218
603.344.1552
mdbruss17@gmail.com



Current Projects List

Maple Hill Farm, A Nature Education Center

Owner: Beaver Brook Association
Architects: KCS Architects

Monadnock Conservancy Headquarters

Owner: Monadnock Conservancy
Architect: Sheldon Pennoyer Architects

Maine Audubon, Welcome Center, Stewardship Annex, various facility projects

Owner: Maine Audubon
Architect: Kaplan-Thompson Architects

Theatre UP, Masonic Temple renovations, Black Box Theater at 25 Ammonoosuc Street, Littleton, NH

Owner: Theatre UP
Architect: Alba Architects, Stewart and Associates

Dimond Hill Farm, Sustainability Planning

Owner: Equity Trust, NH Preservation Alliance
Facilitator: Bruss Project Management

Bradford Town Hall, Historic Rehabilitation

Owner: Town of Bradford, NH
Architect: Frank J Barrett, Jr Architects

Past Projects List

Concord Gasholder Restoration

Owner: NH Preservation Alliance/Liberty Utilities
Architect: Structures North

Southeast Land Trust of NH- Mathey Center for People and Nature, JP Chase Farmhouse rehabilitation

Owner: Southeast Land Trust of NH
Architect: Sheldon Pennoyer Architects

Meredith Veterans Memorial

Owner: Town of Meredith
Architect: Christopher P. Williams Architects



Loch Lyme Lodges, Infrastructure project for Lodge, community of 28 seasonal cabins

Owner: Richard Brown and Liz Ryan Cole
Engineers: Horizons Engineering and Dubois and King Associates

P.J. Noyes, Historic Rehabilitation, Lancaster, NH, Northern Forest Center

Owner Representative: Julie Renaud-Evans
Architect: Alba Architects

Meredith Public Library – Renovations and Addition to a historic Library

Owner: Town of Meredith, NH
Architect: LBPA – Ron Lamarre, Principal

Wonderwell Mt. Refuge, a Buddhist Retreat Center, Springfield, NH

Owner Representatives: Lama Willa Miller, Spiritual Director
Chris Hall, Facilities Manager
Architect: Coldham and Hartman Architects, Jesse Selman

Ben Franklin Block, Historic Rehabilitation Project

Owner: Michael DeLa Cruz
Architect: TMS Architects

St Johnsbury Academy, Brantview Dormitory, Historic rehabilitation and Addition

Owner: St. Johnsbury Academy
Architect: Black River Design

Littleton Studio School – 23 Ammonoosuc Street Redevelopment, Littleton, NH

Owner: Jessie Griffiths
Architect: Garland Mill, Ben Southworth

Petersen Engineering office, Historic Rehabilitation, Portsmouth, NH

Owner: James Petersen
Architect: DeStefano Architects, Joe Almeida

Seacoast Waldorf School, Addition and Renovations

Owner Representative: Deirdre McEachern, Director of School
Architect: Richard Renner Architects

Fracestown Town Hall Renovations

Owner Representative: Brad Howell, Selectman
Architect: Caitlin-Petrovick Architects, Mike Petrovic



Upper Valley Waldorf School

Owner Representative: Christine Scherding
Architect: Bread Loaf Corporation

Atlantic Orthopedics & Sports Medicine

Yvette Varney Practice Manager 603 559-8309 yvarney@smao.org

Current References

Southeast Land Trust of NH

Brian Hart Executive Director 603 686-4676 bhart@seltnh.org
Don Briselden Bldg. Comm. Chair 603 686-2479 briseldens@live.com

Meredith Public Library, Addition and Renovations

Erin Apostolos Library Director 603 279-5351 erin@meridethlibrary.org
Betty Strader Bldg. Comm. Chair 603 279-0369 bettyastrader@gmail.com

(The Principal Architect for this project was fired by his partners ¾ of the way through construction)

Littleton Studio School – 23 Ammonoosuc Street Redevelopment

Ben Southworth Design - Builder 603 631-0164 ben@garlandmill.com
Jessie Griffiths Owner 603 616-9875 jessgriffiths3@gmail.com

Bradford Town Hall

Karen Hambleton Town Administrator 603 938-5900 administrator@bradfordnh.org

Parker J Noyes Building Rehabilitation. The Northern Forest Center

Julie Renaud Evans Program Director 603 724-8322 jevans@northernforest.org
Stuart Anderson Architect 603 745-4700 sanderson@albaarchitects.com

Design Team References

C&H Architects: Tom Hartman/Jesse Selman 413 549-3616 tom@candharchitects.com

S Pennoyer Architects: Sheldon Pennoyer 603 856-723 skp@spennoyerarchitects.com

Kaplan Thompson Architects Phil Kaplan 207 842-2888 phil@kaplanthompson.com

MA-KE Architects Chris Kennedy 603 643-8868; 102 ckennedy@ma-ke-arch.com

Petersen Engineering: James Petersen 603 436-4233 james@petersenengineering.com

Black River Design: John Hemmelgarn 802 223-2044 john@blackriverdesign.com

17 Springfield St.
Concord, NH 03301
603 856 8218
603.344.1553
mdbruss17@gmail.com



Bruss Construction Projects

Relevant Projects

2006 - 2013

Concord Food Coop

MacDowell Colony, complete renovations to historic Colony Hall

SPNHF French Wing

Canterbury Shaker Village, Visitor Education Center

Harris Center for Conservation Education

Fuller Public Library, historic renovations

The Lyme Inn

Bradford Memorial Library

Newbury Public Library

Newbury Town offices

Newbury Public Works Building

Upper Valley Oral Surgery

St Paul's School Boat House, Additions and Renovations

Lake Opechee Inn and Spa

IORA Healthcare

LRCS Federal Building Renovations

Concord Eye Care

Lake Sunapee Bank, numerous branch renovations

Phillips Exeter Academy, Faculty Housing 6 units

Concord Hospital, Pediatrics, Family Place, Pharmacy, etc.

Concord Imaging, addition and renovations

Valley Regional Hospital, renovation projects

UU Church of Concord, major energy efficiency and mechanical work

Gutsell and Phipps Dentistry

Bara Dental

Proctor Academy, New construction of 4 new dorms, faculty residence buildings, dining hall renovations, new construction of the Teddy Maloney Hockey Arena and Locker Rooms, Proctor Daycare Center

Henniker Police Station

Genera Home for TBI adult independent living

Heart CATH Lab renovations, Concord Hospital

Breathe NH, Historic renovations for new headquarters building

Concord Breast Care Center, renovations

JBH Helicopter, Additions and Renovations to the Hangar facility

Upper Valley Neurology

Concord Eye Care, 1st round renovations

Cricenti's Market, New London and Hillsboro, additions and renovations

Lake Sunapee Country Club, Additions and Renovations

Robin H. LeBlanc

RHL Strategies



EMAIL robin@rhlstrategies.com

PHONE NUMBER 603-498-6388

WORK ADDRESS 51 Picnic Rock Drive
Dover, NH 03820

WEBSITE <https://www.rhlstrategies.com>

REGIONS SERVED

NH Statewide

Managing Change

Meeting Facilitation

Strategic & Organizational Planning & Development

Strategic Planning

RHL Strategies LLC provides facilitation services for thoughtful, client-driven discussions on a variety of topics, as well as organization, project and program planning. Our philosophy is simple: the client holds the key to the solutions they seek. RHL Strategies is the guide to get there.

We have three areas of particular interest:

1. Four steps to take before diving into a "strategic plan." These four steps (revisiting the origin story, the vision, mission and strategy) create a strong foundation and clarity for the plan's development.
2. Working with leaders, managers and organizations who are "stuck," or are facing resistance to new ideas and/or change. How often have you presented an idea or a plan to a group, only to be faced with pushback (or worse)? We can work with you for the next time you want to propose something new – or would like a fresh approach to a persistent challenge.
3. For special-event planning (meetings, conferences, off-sites, other), RHL Strategies will work with your team to design a powerful, memorable event that connects people to each other and to the event's purpose. Incorporating the principles of the "art of hosting" is an emerging concept that is changing the dynamics of gatherings of all kinds.

Robin H. LeBlanc was the Executive Director of Plan NH for well over a decade. In that role, she sat on several state-wide boards and roundtables, and developed an interest in community planning and design, especially for older adults, as well as the role of choices in places to live for everyone.

As a facilitator, Robin has been an active Steering Committee member of Portsmouth Listens, designing and facilitating dialogs about diverse topics important to the community, and has also worked with NH Listens. In addition, Robin has an extensive background in project and program development, and has been recognized at the state level for her work.

