

CPC USE ONLY:

Application #: _____

Eligible: Y N

**Town of Needham
Community Preservation Committee**

INITIAL ELIGIBILITY PROJECT APPLICATION (FY2026)

Deadline for completed applications is NOVEMBER 1, 2024. Submit via email to Cecilia Simchak csimchak@needhamma.gov and Lauren Spinney lspinney@needhamma.gov. For more information visit www.needham.gov/CPC.

- | | |
|--|--|
| <p>1. Applicant Name:
Charles River Center
Planning Office for Urban Affairs, Inc</p> <p>2. Applicant Address, Phone Number and Email:

Charles River Center
59 East Militia Heights Drive
Needham, MA 02492
P: 781-972-1022
E: abajwa@charlesrivercenter.org</p> <p>
Planning Office for Urban Affairs, Inc
10 Post Office Square, Suite 1310
Boston, MA 02109
P: 617-350-8885
E: whg@poua.org; philipc@poua.org</p> <p>Contact Name:
Anne-Marie Bajwa, President & CEO of CRC
William Grogan, President of POUA
Phil Crean, Project Manager</p> | <p>Submission Date: 11/1/2024</p> <p>3. Purpose (<i>select all that apply</i>)

☐ Open Space
☒ Community Housing
☐ Historic Preservation
☐ Recreation</p> |
|--|--|
- 4. Project Name:** East Militia Heights Development
- 5. Project Location/Address:** 59 East Militia Heights Drive, Needham, MA 02492
- 6. Property Ownership (Site Control):** Site owned fee simple by Charles River Center
- | | |
|---|---------------------|
| <p>7. Amount Requested:</p> | <p>\$3,500,000</p> |
| <p>8. Estimated Total Project Cost: (<i>f Different</i>)</p> | <p>\$50,122,908</p> |

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9. Critical Dates: *(If Applicable)*

- Executive Office of Housing and Livable Communities Winter funding round- October 2025 to February 2026
- EOHLC Award- June 2026
- Construction Period- October 2026 to March 2028
- Certificate of Occupancy- April 2028

10. Project Summary: *(please provide a brief summary of the project)*

The Charles River Center (CRC) was established in 1956 to empower and support people with developmental disabilities by offering high-quality, individualized opportunities that foster independence and community inclusion.

Programs that they offer include day, residential, family, and in-home support services. Day services include community-based day support, employment, and day habilitation. Residential services include 32 group homes in 10 communities. Family and in-home support services include respite services, after work programs, in-home behavioral services, vacation programming for school-aged children, educational trainings, family, navigation of services, and individual support and adult family care.

CRC recently partnered with the Planning Office for Urban Affairs (POUA), a nonprofit housing developer and affiliate of the Archdiocese of Boston, on the East Militia Heights Development to create an inclusive and vibrant community that provides an innovative and integrated housing model to address both the affordable housing crisis and the unmet housing needs for individuals with autism and intellectual and developmental disabilities. The project will entail 86-units of housing for households earning at or below 30% to 80% of Area Median Income.

For those units in the project that will be available through a closed referral system for people with autism and intellectual and developmental disabilities, CRC will provide a comprehensive network of support and services such as remote support for monitoring overnight, clinical support including medical, health and safety, college navigation, employment and career exploration, training and job support, adult companion and peer support and transportation services. The CRC units will focus on serving those who need less than 30 hours of staff support.

The project focuses on integrating all the units with the general community. The addition of a community center will provide opportunities for recreation, computer stations, gym facilities, office space, and a walking path around the property open to the public.

When complete, The East Militia Heights Development will provide a creative model of an inclusive community for other cities and towns across the state and beyond.

11. Community Need: *(In 100 words or less describe how the project meets the goals of the Needham Community Preservation Plan)*

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The proposed project meets two priority categories identified in the Community Preservation Plan. The proposed project supports households with limited income by providing a range of housing opportunities available to 86 households earning at or below 30% AMI to 80% AMI. The project creates special needs housing by providing approximately 43 units set aside for individuals with autism in an integrated setting with supportive services. Special needs housing was also identified as a key strategy for meeting community housing objectives.

12. Eligibility for Funding: *(In 100 words or less, state the legal basis for why this project is eligible for Community Preservation Act funding)*

The project is eligible for Community Preservation Act funding as defined by Section 2 of Chapter 44B. Upon completion, the development will provide low- and moderate-income housing to individuals and families up to 80% Area Median Income.

**Note: This application enables the Community Preservation Committee to review the request to assess eligibility for CPA funding. You will be notified of the Committee's determination by December 1, 2024. Additional information may be required.*

**NEEDHAM COMMUNITY PRESERVATION COMMITTEE
APPLICATION FOR FUNDING**

COMMUNITY HOUSING FOLLOW-UP QUESTIONS

Submit to: Cecilia Simchak csimchak@needhamma.gov
Lauren Spinney lspinney@needhamma.gov

Due Date: January 1, 2025

Application No: FY2026-03

Project Title: East Militia Heights Development

CPC Liaison(s): Maureen Callahan mbcallahan67@gmail.com
Betsy Millane betsymillane@gmail.com

APPLICANT INFORMATION:

Organization: Charles River Center & Planning Office for Urban Affairs, Inc.

Contact Name(s): Anne-Marie Bajwa, President & CEO, CRC
William Grogan, President, POUA
Phil Creen, Project Manager, POUA

Address: CRC, 59 East Militia Heights Drive, Needham, MA 02492
POUA, 10 Post Office Square, Suite 1310, Boston, MA 02109

Telephone No: CRC: (781) 972-1022
POUA: (617) 350-8885

Email(s): abajaw@charlesrivercenter.org; whg@poua.org; phillipc@poua.org

Please insert at least a brief narrative answer on all applicable subjects.(if a question is not relevant to the project, please list N/A.) If more space is needed, feel free to attach appendices and/or cross-reference other documents provided to the Community Preservation Committee.

PROJECT DETAILS

1. Summarize the scope and/or concept of the project:

a. Provide all design specifications and/or architectural plans applicable to the project.

The Heights at Charles River Center (the “Project” or “Heights”) is a project proposed by the Charles River Center (“CRC”) to redevelop 3.5 acres of land at 59 East Militia Heights Drive in Needham (the “Property”) to serve as an integrated housing and education complex where adults with intellectual disabilities can live side by side with people without intellectual disabilities.

By way of background, CRC was established in 1956 to empower and support people with developmental disabilities by offering high-quality, individualized opportunities that foster independence and community inclusion. Programs that CRC currently offers include day, residential, family, and in-home support services. Day services include community-based day support, employment, and day habilitation. Residential services

include 32 group homes in 10 communities. Family and in-home support services include respite services, after work programs, in-home behavioral services, vacation programming for school-aged children, educational training, family, navigation of services, and individual support and adult family care.

In 2023, CRC acquired the Property in hopes of addressing the unmet housing need for individuals with autism and intellectual disabilities. Recently, CRC partnered with the Planning Office for Urban Affairs (“POUA”), a nonprofit housing developer and affiliate of the Archdiocese of Boston, on the Project to create an inclusive and vibrant community that provides an innovative and integrated housing model to address this urgent need for housing.

The Heights at Charles River Center will entail 86-units of housing for households earning at or below 30% to 80% of Area Median Income. Approximately half of the units in the Project will be available through a closed referral system for people with autism and intellectual and developmental disabilities and CRC staff. CRC will provide a comprehensive network of support and services alongside educational opportunities within the Project, including remote support for monitoring overnight, clinical support including medical, health and safety, college navigation, employment and career exploration, training and job support, adult companion and peer support and transportation services.

As part of the CRC’s educational model, the remainder of the units in the Project will be available to households earning at or below 30% to 80% of Area Median Income but will not be restricted to individuals with autism and intellectual and developmental disabilities. The integration of adults with disabilities and adults without disabilities is a critical component of the CRC model and is mandated by both federal and state law, which require such individuals to have access to the greater community, and receive support in the least restrictive, and most typical setting possible. When complete, the Project will provide a creative model of an inclusive community for other cities and towns across the state and beyond.

b. List the names and addresses of project architects, contractors, and consultants.

- Architect: The Architectural Team (TAT), 50 Commandants Way, Chelsea, MA 02150
- Civil and Traffic Engineer: VHB, 260 Arsenal St #2, Watertown, MA 02472
- Landscape Architect: RBLA Design, 78 Greenlodge St., Dedham, MA 02026
- Owner’s Representative: WaypointKLA, 1295 Beacon St., Unit 200, Brookline, MA 02446
- Land Use Attorney: One Post Office Square, 25th Floor, Boston, MA 02109
- Attorney: Nolan Sheehan Patten, 84 State St., Suite 940, Boston, MA 02109

c. Provide a projected task plan and timeline. (Should you be awarded CPA funding, these tasks will be the basis of your Project Status Reports that will be due periodically until the project is complete).

Timeline	Milestone
Spring/Summer 2025	Permitting and Local Development Approvals
Fall 2025	Submit OneStop Pre-Application to EOHLC Winter Funding Round
Q1 2026	Submit OneStop Application to EOHLC Winter Funding Round
Q2 2026	EOHLC funding awards
Q3 2026	• General Contractor prequalification process • Financing partner prequalification process • Completion of Construction Documents • Application to Department of Energy Resources and MassSaves
Q4 2026	• General Contractor Selection • Lender and Investor Selection • DOER and MassSaves funding award
Q1 2027	• Construction financing closing • Construction Start (approximately 15 months)
Q2 2028	• Completed Construction • Certificate of Occupancy

d. Describe any maintenance requirements and estimated yearly costs of maintenance for the completed project.

Maintenance requirements will be typical operating costs associated with operation of a multi-family apartment community in Massachusetts. Operating expenses for the Project are projected to be \$13,360 per unit per year, which is in line with other supportive housing projects in Massachusetts.

Please see the *operating budget attached as Exhibit 1.b* for more details.

2. List the anticipated project cost:

- a. Provide a budget with line itemization, including any funding requested previously, as well as any possible future funding requests.**

Development budget attached as **Exhibit 1.c**

- b. Does this project leverage additional or multiple sources of public and/or private funding or assist in planning and development activities to facilitate such leverage? Please provide details.**

The Project will utilize and leverage over \$46 million from state and private financial resources. These sources include financing from EOHLC, MassHousing, Department of Energy Resources, and MassSaves rebates. Additionally, CRC will provide a loan to the Project as an offset for the acquisition costs. In addition to capital resources, the project will seek to utilize 33 project-based vouchers under the Massachusetts Rental Voucher Program to support the households earning at or below 30% and 50% of AMI. The Project respectfully requests \$3.5M from the Town of Needham, which represents approximately 7% of the project's total development costs.

- c. Indicate expenditures & funding (by municipal fiscal year)*:**

Fiscal Year	Total Project Estimated Expenditures	CPC Funds Requested	Other Funding Sources (Amount & Source)
FY '25	\$250,000 (pre-development)	\$0	\$250,000-Sponsor Financed until construction loan closing
FY '26	\$550,000 (pre-development)	\$0	\$550,000- Sponsor Financed until construction loan closing
FY '27	\$31,799,957 (construction close and construction)	\$3,150,000	\$13,493,998- Construction loan (of which, \$11.4 will convert to permanent debt) \$2,175,783- Equity from sale of Federal and State Tax Credits \$4,592,174- CRC loan \$500,000- MassHousing Workforce Program \$10,000,000- EOHLC
FY '28	\$17,376,552 (construction completion)	\$350,000	\$15,912,767- Equity from sale of Federal and State Tax Credits \$1,113,785- DOER/ MassSaves
FY '29	\$0	\$0	N/A

TOTAL:	\$49,976,509	\$3,500,000	\$46,476,509
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*Only permanent uses and sources included in calculation.

3. Supply detailed Project Information:

- a. Provide the deed and recorded plans, and maps or renderings of the subject property.**

The property's deed is attached as **Exhibit 2**.

- b. Provide inspection reports, existing conditions reports, 21E reports, and other environmental assessment reports.**

An existing condition plan and topographical map is attached as **Exhibit 3.a**. A Phase I Environmental Assessment is pending and will be made available in the Spring of 2025.

- c. Provide details of any natural resource limitations (wetlands, flood plain, etc.) to which the property is subject.**

The Property is not located in a flood plain or within 100 ft of a wetland. However, there is a drainage swale located within 100 ft. of the scope of work. As such, the project will need to submit a Notice of Intent to the Conservation Commission for issuance of an Order of Conditions.

- d. Provide details of any zoning restrictions (i.e. district, dimensional, and use regulations as applicable to the property) to which the property is subject.**

According to the Town's GIS website, the subject property is in a Single Residence A zoning district. Apartments or multi-family dwellings are not a permitted use. While there are several approaches, we could take to zone the project, we would propose to work with the town via a "friendly" Chapter 40B comprehensive permit to permit the use of the property. This zoning pathway is still under discussion with town officials.

e. Is the proposed project on the Select Board's capital priority list?

No. The Charles River Center and the Planning Office of Urban Affairs are private non-profit organizations.

f. Is the proposed project on the capital priority list of the applicant?

Yes, Charles River Heights is on the capital priority list for the Charles River Center.

g. Is there an urgency related to the timing of the project (including scheduling factors not controlled by the applicant)? Provide details.

It is urgent to receive the requested \$3.5 million CPA funding award as soon as possible because the state's funding rounds begin at the end of each calendar year. For the Project to put forth a competitive application, the project would require a local commitment of funds. Absent a local funding commitment, it is highly unlikely that EOHLIC would fund the project. This would result in a year delay, which would result in higher construction costs due to inflationary price pressures. Given the urgent need for deeply affordable and supportive housing in Needham, absent receiving CPA funding at the level proposed, the Project will not be able to proceed as currently envisioned.

4. Address CPA Application Evaluation Criteria:

a. Summarize how the proposed project utilizes, preserves, protects, increases, and/or enhances community housing resources in Needham.

Consistent with the Community Housing Resources and Needs outlined in the 2023 Needham Community Preservation Plan, the project increases and enhances community housing resources in Needham by:

- Creating 86 new affordable housing units in Needham to attract and retain low- and moderate-income families, the elderly on fixed incomes, the disabled, young persons, and public and private employees upon whom the town depends to provide high quality services in and for the town.
- Creating special needs housing with 43 handicapped accessible units and supportive services.

b. Explain how this project meets the following General Factors for Consideration of the Needham Community Preservation Plan. Provide details:

- **The project is consistent with the goals of the Town of Needham Community Preservation Plan.**

In addition to the response in question IV. The Project is consistent with supportive and affordable housing objectives and needs of the Town of Needham. Furthermore, the Project represents an efficient use of CPA funds as it will enable us to leverage 90% of the project's total sources.

- **The urgency of the project with particular consideration to those requests whose successful implementation is constrained by scheduling factors not controlled by the applicant.**

As described above, it is urgent to receive \$3.5 million in CPA funding award as soon as possible because it will allow the project to stay on the described timeline and enable a documented need for supportive housing units. Not receiving a funding commitment would delay construction by a year and increase the total development cost of the project.

- **The project is economically or otherwise reasonably feasible to implement and operate on a long-term basis.**

CRC and POUA have developed a financial plan based on prior successful projects. The capital resources are in line for a project of its scale and the operating budget was developed through a comparative analysis of similar projects in the POUA and CRC portfolio. Our capital sources consist of:

- 4% Low Income Housing Tax Credit Equity,
- State Low Income Housing Tax Credit Equity,
- Construction to permanent loan from MassHousing,
- EOHLC subordinate funding,
- CRC loan,
- MassHousing Workforce Housing subordinate funding,
- CPA Funding,
- Dept. of Energy Resources Low-Mod Income Retrofit Program and,
- MassSaves Incentives for Passive House Construction.

Please find a 20-year budget attached to this submission as **Exhibit 1.c**

- **The project satisfies federal, state, and local laws to the extent applicable.**

The Project will meet all applicable laws and regulations at the various levels of government.

- **The project leverages additional or multiple sources of public and/or private funding or assists in planning and development activities to facilitate such leverage may possibly be preferred.**

Yes, please see the description of capital stack above and **Exhibit 1.a**, the development budget with sources and uses.

- **The project utilizes, preserves, protects, increases, or enhances Town-owned open space, recreation, historic and/or housing assets.**

The project will create 86 affordable housing units, approx. 50% will be supportive housing units. The supportive housing units will be set aside for individuals with learning disabilities and CRC will be the service provider for these households. These units will be included on the SHI and be affordable in perpetuity.

- **A project that benefits privately owned resources shall include permanent restrictions to ensure a public benefit.**

Yes, there will be affordable housing deed-restriction on the property.

- **Awarding funds for the project is consistent with prudent long-term management of CPA funds.**

Yes, as the project will create 86 affordable housing units in perpetuity.

- **The project proponent has demonstrated to the reasonable satisfaction of The Committee the ability and competency to implement the project as proposed either by its record of successfully implementing similar projects or otherwise.**

Charles River Center

Since 1956, the Charles River Center has consistently demonstrated expertise, proven ability, and a commitment to delivering impactful programs and services tailored to individuals with intellectual and developmental disabilities, autism, and acquired brain injury. We currently support and serve over 1,000 adults and children through various programs. These include individuals living independently in apartments, living with their families, attending our day programs, receiving job exploration, and coaching, or residing in our group homes with 24-hour care.

With a highly skilled team of professionals, we have successfully developed and implemented initiatives that address essential aspects of life, including housing, employment, health, and social well-being. Our residential services encompass 32 group homes spread across 10 communities. Our in-home support services are services that support people with intellectual and developmental disabilities to live as independently as possible in their own apartment. We currently support twenty adults , with varying support levels living within the Metro and Middlesex regions of Massachusetts.

Providing services to families is a fundamental component of the Charles River Center. The primary goal of these services is to offer a comprehensive range of supports that empower families to care for their child at home for as long as possible. These services include:

- Respite care
- After-work programs
- Behavioral services
- Vacation programming for school-aged children
- Educational training
- Family navigation of services
- Individual support and adult family care

Day services are designed to support community-based engagement, employment opportunities, and day habilitation programs.

Our expertise is rooted in fostering collaboration with diverse stakeholders and managing resources efficiently. We actively partner with government agencies, non-profits, community groups, private sector organizations, and individual advocates. These collaborations enable inclusive decision-making, the pooling of expertise, and the alignment of shared goals. By employing strategic budgeting, securing grants, and forming strategic partnerships, we optimize available resources without compromising the quality of our services. Furthermore, we continuously evaluate our programs to ensure they are cost-effective, sustainable,

and responsive to community needs. This combination of collaboration and resource stewardship empowers us to deliver lasting, positive outcomes while maintaining the trust and confidence of our stakeholders.

At the Charles River Center, we prioritize a person-centered approach, ensuring meaningful outcomes that promote empowerment, equity, and sustainable community development for individuals with disabilities. We uphold the highest standards of accountability and are dedicated to fostering inclusive environments.

The Charles River Center is accredited by the Commission on Accreditation of Rehabilitation Facilities (CARF), an internationally recognized independent accreditor of health and human services. Additionally, our agency is licensed and certified by the Department of Developmental Services at the highest level possible.

Please find a one summary on CRC attached as **Exhibit 4.d**.

The Planning Office for Urban Affairs

The Planning Office for Urban Affairs is a foremost non-profit housing developer in the Northeast whose mission is to serve as a catalyst for social justice through its work in housing development, neighborhood revitalization and affordable housing advocacy. Since its inception in 1969, the Planning Office has developed over 3,000 units of elderly, family, mixed income and special needs housing, channeling approximately over \$650 million of investment into developments throughout metropolitan Boston, and POUA currently has nearly 500 additional housing units, across several properties, under active development. The emphasis of the Office is not on numbers, though, but on having a qualitative impact on the harsh reality of housing deprivation for families, middle-income people, the elderly and disabled persons.

This means producing high quality residential developments; forming strong communities characterized by economic, racial, and ethnic diversity for people of all ages and abilities; providing both affordable rental and homeownership opportunities; and undertaking development efforts that address the needs of a wide-ranging population including the most vulnerable among us, as well as those of moderate means.

The Office has also been a leading advocate for affordable housing and strong communities over the years, providing leadership in the development of high quality mixed-income housing; the preservation of existing affordable housing; building permanent supported housing for the homeless; the protection of homeowners and tenants in foreclosure; the creation of additional programs and resources to support affordable housing; and the continued integrity and strength of the State's inclusionary zoning law, Chapter 40B, to help all cities and towns provide housing for our neighbors in need.

The properties developed by the Planning Office for Urban Affairs demonstrate the capacity, drive, knowledge, and commitment to social justice that enables the Office to succeed in undertaking complex, mixed-income residential developments that create strong, diverse, and healthy communities. We are most grateful to our development and finance partners with whom we share this success, for their tremendous support over the years.

A firm overview list of completed projects is included as **Exhibit 4.b and 4.c**.

- **The applicant has site control, or the written consent by the property owner (or relevant Town agency or board) to submit an application.**

CRC acquired the subject property fee simple in 2023. Please see **Exhibit 2** for a copy of the deed.

- **The Committee prefers to bring projects to the Annual Town Meeting in May, though under special extraordinary circumstances that affect the project negatively, a project may be considered to be presented at a Special Town Meeting.**
- **CPA funding will enable the project.**

Yes, as previously stated, the Project will not be able to put together a strong Low-Income Housing Tax Credit and subordinate funding application to EOHLIC if the application is missing a local funding commitment. CPA funding will be essential for moving the Project forward.

- c. **Explain how the project addresses or supports the Community Housing Goals articulated in the 2014 Needham CPA Plan:**

- **Seek to increase the supply of affordable housing units while seeking to preserve the existing pattern and density of Needham's established residential neighborhoods.**

The Heights at Charles River Center will increase the supply of affordable housing and through a medium density development on an undeveloped parcel. There are no established single family neighborhoods in the immediate vicinity.

- **Enable Needham to shape its own housing and development future and outcomes.**

The Heights provides the town with much needed affordable and supportive housing. The Project will also create additional community space at the Property.

- **Achieve progress towards the Town's responsibilities under Chapter 40B.**

While Needham is over the 10% SHI threshold, all of the 86 proposed units would count on the town's SHI.

- **Encourage the preservation and development of a diversity of housing resources that fosters a range of choices and housing options including affordable units to meet the Town's growing demand and current and future needs for affordable housing.**

The Project will be developed on a site that formerly housed obsolete veterans housing. The site is currently vacant and located in an area away from single family residences. We propose utilizing the existing mature forest to obscure any visual impacts to the single-family neighborhoods in the adjacent areas. The Project fulfills an important need in providing supportive housing in the town for adults with intellectual and developmental disabilities. As contemplated, the project would be a “friendly 40B,” which means that all 86 units would count towards the Town’s Subsidized Housing Inventory.

d. **Explain how this project addresses the Community Housing Factors for Consideration in the 2014 Needham CPA Plan:**

- **Preserves the affordable component of existing “expiring use” affordable units.**

N/A- new construction

- **Supports scattered-site low-density affordable unit development and avoids concentrated or high-density development.**

While the project is higher density than the surrounding community. The project consists of several buildings in a campus style development. The largest building is 3 stories, which is lower than the North Hill Retirement Community, and takes advantage of dense forest to minimize any visual impacts.

- **Is consistent with and assures fair housing practices.**

Yes, at a future date we will hire a qualified property manager and, in close coordination, develop an affirmative fair housing marketing and tenant selection plan.

- **Redevelops, utilizes, improves or expands existing housing structures and infrastructure for affordable housing use. Projects that redevelop existing structures will be preferred.**

The site was previously a U.S Army base and consisted of abandoned and underutilized homes. The project will revitalize the area with a campus style integrated community with households with disabilities and tenants residing in traditional affordable and workforce housing.

- **Provides affordable housing opportunities on identified parcels of townowned land as set forth in the Town of Needham Open Space Report to the Board of Selectmen.**

☐ N/A

- **Provides affordable housing opportunities in the business districts, including the Town Center, Needham Heights, and Chestnut Street Corridor, compatible with existing infrastructure. Serves an underserved population or populations by establishing affordability restriction in perpetuity.**

☐ N/A

- **Considers the various development needs of the Town.**

Affordability in Perpetuity: The development ensures long-term affordability to serve underserved populations.

Local Housing Needs:

- The Housing Needs Assessment highlights a significant local need for barrier-free, accessible housing with supportive services.
- Approximately 7.4% of the local population (2,262 residents) has a disability, per 2020 Census data.
- Aging demographics emphasize the importance of universal design and accessibility in housing.

Target Populations:

- Half the units will be dedicated to individuals referred by the Department of Developmental Services, providing them with comprehensive support to live independently.
- Five affordable apartments will be available for Charles River Center staff to ensure emergency support after hours.

Special Needs Focus:

- The initiative aligns with the priorities of the Needham Special Education Parent Advisory Council (SEPAC).
- It focuses on populations with Autism Spectrum Disorder and Down Syndrome, who often transition to Department of Developmental Services programs at age 22.

Broader Goals: The project underscores the town's commitment to:

- Increasing handicapped-accessible housing.
- Supporting home modifications to aid individuals with disabilities.

- **Project proponent has satisfied the requirements of 40B (to the extent applicable).**

The Project is contemplated as a friendly- 40B, pending feedback from relevant town officials and staff. All the units will count towards Needham's SHI.

5. Supporting documents:

- 1. Please attach letters, references, studies, maps, statistics or any other documents which support the merits of the application.**

Please find support letters and references to recent studies in Exhibit 5.

Project Specific Questions:

1. PUBLIC OUTREACH

- a. Describe public outreach activities conducted thus far and summarize the feedback received.**

Since 2022, the Charles River Center has engaged in extensive stakeholder communication and public outreach. These efforts included both group and one-on-one meetings with key stakeholders, supported by visual renderings of the project. Several community meetings were also conducted to engage residents, provide project updates, answer questions, and gather feedback.

The communication focused on three primary areas:

1. The need for affordable housing and integrated support services.
2. The proposed design and layout of the project.
3. Funding strategies for the support services provided by the Charles River Center.

Key professionals engaged in the outreach include:

- o Kate Fitzpatrick, Needham Town Manager
- o Representative Denise Garlick
- o Reg Foster, Needham Housing Authority
- o Katherine Craven, Chief Administrative and Financial Officer, Babson College
- o Jane Ryder, Commissioner of the Department of Developmental Services for MA
- o Kaitlyn Spencer, regional Director of the Department of Developmental Services for MA
- o Jared Ramos, Adult Autism Manager at the Department of Developmental Services in MA
- o Cathy Boyle, Founder & CEO of the Autism Housing Pathways
- o Leo Sarkissian, Executive Director of the Arc of Massachusetts
- o Katie King, Deputy Town Manager; Kevin Keane, Select Board Chair; Heidi Frail, Select Board Co-Chair

Feedback has been overwhelmingly positive. The project is recognized as innovative, particularly for creating a space where individuals with disabilities and people from the broader community can connect and engage equally. This

approach is seen as cutting-edge within the disability community. The demand for affordable housing and integrated support services has been significant, especially following the pandemic, which exacerbated workforce and housing shortages. The 2022 Needham Housing Plan report also highlighted this growing need.

To further ensure transparency and engagement, the Charles River Center mailed updates to over 200 local residents and sent digital communications to more than 6,000 subscribers, providing regular updates on project milestones and opportunities for community involvement.

b. What additional outreach activities are planned and what is the timeline for same?

The Charles River Center plans to continue its public engagement efforts with:

- Regular community meetings and engagement events.
- A dedicated project webpage on the CRC website featuring updates, timelines, FAQs, and contact information.
- Online surveys to gather feedback and suggestions.
- Inclusive events, such as walking tours of the project site.

Ongoing community engagement remains a priority to provide updates on progress, address concerns, and offer opportunities for post-development involvement.

c. Is the community center open to the public, or only the walking path?

Yes, both the community center and the walking path will be open to the public. These spaces will provide areas for various activities, services, and community engagement opportunities.

d. Describe how parking and access for non-residents is incorporated into the plan.

The plan will designate specific parking spaces for non-residents to avoid overlapping with resident parking. Clear signage will mark visitor parking zones, ensuring easy navigation and compliance. Visitor parking will be located near key amenities, such as the community center, to enhance accessibility and convenience.

There were questions raised regarding the potential for increased traffic. It is important to note that the majority of individuals supported by the Charles River Center are unlikely to drive, which would significantly reduce traffic to and from Charles River Heights. Additionally, we have engaged VHB, as the Project's Civil and Traffic Engineer, to conduct a thorough study addressing this concern. To further mitigate any potential traffic impact, we plan to provide a shuttle bus service for non-drivers, ensuring they can access community resources as needed.

2. LOCAL/STATE APPROVALS

a. Describe key local/state approvals required by project phase and comment on the risk on non-attainment.

If it is determined by the town that a Friendly 40B would be the most advantageous process:

- Project Eligibility Letter (“PEL”) application- 2- 3months
 - o Risk: very minimal as the project would meet all requirements for EOHLC to determine whether the site is an eligible location for housing under Chapter 40B.
- ZBA application- 3-9 months
 - o Risk: As Needham has achieved a statutory minima threshold, the ZBA can attach conditions that make the project financially infeasible or deny the project with minimal recourse. We would work with town officials and staff prior to our PEL application to minimize the potential for either noted risk.

b. Does this project require variances or site plan review? Please describe and provide the timeline for that process.

The Project is zoned in a Single Residence A district and would need to be rezoned or use a friendly 40B approach as described above. The Project would request waivers from various local bylaws. Boards and town departments would provide comments to the Zoning Board with regards to any waivers requested.

c. Does this project require environmental review and approvals? If so, please describe and provide the timeline for same.

Depending on the funding sources, the project may require HUD Environmental Review. This would typically be completed prior to construction closing and would be able to begin the review process at issuance of an Order of Conditions from the Conservation Commission. The time frame for HUD environmental clearance is 90 to 120 days. At present, the project does not appear to trigger Massachusetts Environmental Protection Act (“MEPA”) review.

3. FUNDING

a. Provide a sources and uses schedule and project pro forma showing anticipated funding sources, expenditures, cash flow, etc.

Please refer to the development budget, operating proforma, and 20-year cash flow analysis attached to this document.

b. Describe the timeline for obtaining the various funding sources envisioned for the project and comment on the risks of each.

1. EOHLC- Tax Credits and subordinate debt
 - a. Application Q1 2026
 - b. Funding award Q2/3 2026
 - c. Risk: Funding award may be delayed for 6 months to a year, which would set back the project and increase construction costs.
2. MassHousing Permanent Loan and Subordinate Debt

- a. Application Q1 2027
 - b. Risk: Minimal. Project contemplates a construction to permanent loan. The loan would convert to permanent debt upon completion and sustained occupancy.
- 3. Dept Of Energy Resources
 - a. Application Q4 2025
 - b. Funding award Q2 2026
 - c. Risk: This grant is competitive and may not be funded. We would seek additional sustainability and green building funding offered by other federal and state agencies.
- 4. MassSaves
 - a. Application Q1 2026
 - b. Award: After Passive House certification
 - c. Risk: Project may not achieve Passive House certification. Our project architect has substantial experience designing buildings to meet and achieve Passive House.

- c. Is the October 2025-February 2026 Winter Funding Round your first attempt at obtaining an EOHLC award for this project? What is the likelihood of success in obtaining an EOHLC award in June 2026? If you are not successful, how does this impact the project timeline?**

Yes, this would be the first application to EOHLC. The project team has had initial conversations with the state about the project. Given its uniqueness and target demographic, we believe it has a high chance for funding in the first round, so long as there is a local commitment to the project and has been zoned. If the initial application is not successful, we would look to apply in the state's "mini-round" for projects that are well positioned to proceed but did not receive funding in the Winter Funding Round. This would set the project back by approximately 6 months.

- d. How much money has been expended on the project so far? From what sources?**

At present, money associated with the acquisition of land and sitework are the only expenditures. These activities were funded by Charles River Center.

- e. How much money is committed but not yet expended?**

N/A

- f. Detail how CPA funds will be used in this project.**

CPA funds would be utilized to pay for construction costs. We would propose that the funds are released at construction closing with a to be determined amount holdback until construction completion.

- g. Discuss project impacts if you are granted less CPA funding than requested.**

If we were granted less than the requested amount, we could be delayed as we will need to explore additional sources of funding outside the capital resources described. We may also request the waiver of local fees (ex. building permit fee, filing fees, etc.) to help bridge the funding gap.

- h. Discuss project impacts if a CPA funding grant was delayed a year.**

The project would likely not receive state funding and would not be able to close on the timeline described. This would increase the need for more state and local resources as construction costs continue to rise.

4. CONSTRUCTION

- a. What is the status of developer selection for the project?**

CRC and POUA are the developers of the project. A general contractor will be selected through a competitive bid after the project is awarded funding from EOHLC.

- b. What is the status of design development and the proposed schedule for same?**

Architectural Drawings	
Timeline	Status
December 2024	Conceptual
Spring/ Summer 2025	Schematic Design
Q1 2026	50% Design Development
Q2 2026	100% Design Development
Q3 2026	100% Construction Documents

- c. Describe any work that has been done thus far?**

The site has been purchased and the buildings have been demolished and removed.

- d. Is there any hazardous waste removal involved in this project?**

We do not believe there will be any hazardous waste removal, but that information is pending an updated Phase I ESA.

- e. Per unit cost is estimated at \$581k. Is this in line with comparable units currently being constructed plus escalation?**

Yes, the estimated construction cost and total development cost was extrapolated from recent pricing on several Greater Boston area projects in the POUA pipeline. We will obtain the services of a well-qualified general contractor for pre-construction pricing

and design feedback once the project is ready to apply to EOHLC for tax credits and subordinate financing.

5. SCHEDULE

- a. **Provide a more detailed timeline for financing and construction.**

Please refer to the timeline described in Question 1.c.

6. RESTRICTIONS/PREFERENCE

- a. **Will any deed restrictions be imposed? If so, describe.**

Yes, EOHLC would require an affordable housing deed-restriction on the property. The restriction would run with the property in perpetuity.

- b. **Will there be any other restrictions?**

None contemplated at this time.

- c. **Will there be any preference offered for Needham residents?**

To the extent permitted by EOHLC, we would allow for a local preference at initial lease up.

Exhibits

- Exhibit 1: Project Pro Formas December 26, 2024
 - Exhibit 1.a: Development Budget
 - Exhibit 1.b: Operating Budget
 - Exhibit 1.c: 20-Year Cash Flow Analysis
- Exhibit 2: Site Control
- Exhibit 3: Site Plans
 - Exhibit 3.a: Existing Conditions
 - Exhibit 3.b: Conceptual Designs
- Exhibit 4: Development Team
 - Exhibit 4.a: The Architectural Team Resume
 - Exhibit 4.b: Planning Office for Urban Affairs Resume
 - Exhibit 4.c: Planning Office for Urban Affairs, Prior Development Experience
 - Exhibit 4.d: Charles River Center Resume
- Exhibit 5: Community Support
 - Exhibit 5.a Letters of Support
 - Exhibit 5.b Reports

Exhibit 1: Project Pro Formas December 26, 2024

- o Exhibit 1.a: Development Budget
- o Exhibit 1.b: Operating Budget
- o Exhibit 1.c: 20-Year Cash Flow Analysis

Section 3

Sources of Funds

[illegible]

Section 4

OPERATING PRO-FORMA

Operating Income

Rent Schedule:			Contract	Utility	Total	No. of
			Rent	Allowance	Gross Rent	Units
222 .	Low-Income (Rental Assisted):					
	SRO					
	0 bedroom		\$2,132	\$31	\$2,163	33
	1 bedroom		\$2,247	\$41	\$2,288	10
	2 bedrooms		\$2,907	\$61	\$2,968	7
	3 bedrooms					
	4 bedrooms					
HUD 202s have a fixed gross rent. Utilities are paid by owner and contract rent is increased accordingly. Contract rent is thus higher than gross rent.						
223 .	Low-Income (below 50%):					
	SRO					
	0 bedroom					
	1 bedroom					
	2 bedrooms					
	3 bedrooms					
	4 bedrooms					
224 .	Low-Income (below 60%):					
	SRO					
	0 bedroom					
	1 bedroom		\$1,703	\$41	\$1,744	25
	2 bedrooms		\$2,032	\$61	\$2,093	1
	3 bedrooms					
	4 bedrooms					
225 .	Other Income 80% AMI					
	SRO					
	0 bedroom					
	1 bedroom		\$2,285	\$41	\$2,326	3
	2 bedrooms		\$2,730	\$61	\$2,791	2
	3 bedrooms					
	4 bedrooms					
226 .	Market Rate (unrestricted occupancy):					
	SRO		\$2,288			5
	0 bedroom					
	1 bedroom					
	2 bedrooms					
	3 bedrooms					
	4 bedrooms					
Commercial Income:			(average)			
227 .	Square Feet:	0	@		/square foot =	\$0
Parking Income:			(average)			
228 .	Spaces:	67	@	\$0.00	/month x 12 =	\$0

Other Operating Income Assumptions:

229 . Laundry Income (annual): \$ -

Optional user calculations

230 . Other Income: a.

b.

c.

d.

e.

f.

Vacancy Allowance:

231 . Low-Income (Rental Assistance) 3.0%

232 . Low-Income (below 50%)

233 . Low-Income (below 60%) 5.0%

234 . Other Income (User-defined) 5.0%

235 . Market Rate 8.0%

236 . Commercial **Trending Assumptions for Rents:**

Year 2

Year 3

Years 4-5

Years 6-20

237 . Low-Income (Rental Assistance) 2.5% 2.5% 2.5% 2.5%

238 . Low-Income (below 50%) % % % %

239 . Low-Income (below 60%) 2.0% 2.0% 2.0% 2.0%

240 . Other Income (User-defined) 2.0% 2.0% 2.0% 2.0%

241 . Market Rate % % % %

242 . Commercial Space Rental % % % %

243 . Laundry Income % % % %

244 a Other Income - % % % %

Operating Subsidy and Capitalized Operating Reserves:

245 . Subsidy Source I Massachusetts Rental Voucher Program (MRVP)

246 . Subsidy Source II 247 . Capitalized Operating Reserve Amount: \$ Source:

248 . Yearly Draws on Subsidies and Reserves:

Subsidy
Source ISubsidy
Source IIDraw on
Oper. Reserve

Year 1	\$	\$	\$
Year 2	\$	\$	\$
Year 3	\$	\$	\$
Year 4	\$	\$	\$
Year 5	\$	\$	\$
Year 6	\$	\$	\$
Year 7	\$	\$	\$
Year 8	\$	\$	\$
Year 9	\$	\$	\$
Year 10	\$	\$	\$
Year 11	\$	\$	\$
Year 12	\$	\$	\$
Year 13	\$	\$	\$
Year 14	\$	\$	\$
Year 15	\$	\$	\$
Year 16	\$	\$	\$
Year 17	\$	\$	\$
Year 18	\$	\$	\$
Year 19	\$	\$	\$
Year 20	\$	\$	\$
Year 21	\$	\$	\$

249 . Annual Operating Income (year 1) \$2,092,596

Operating Expenses

	Annual Operating Exp.:	Total	Residential	Commercial	Comments
250	Management Fee	\$104,798	\$104,798		
251	Payroll, Administrative	\$130,000	\$130,000		
252	Payroll Taxes & Benefits, Admin.	\$39,000	\$39,000		
253	Legal	\$2,500	\$2,500		
254	Audit	\$10,000	\$10,000		
255	Marketing	\$500	\$500		
256	Telephone	\$7,500	\$7,500		
257	Office Supplies	\$400	\$400		
258	Accounting & Data Processing	\$12,000	\$12,000		
259	Investor Servicing	\$2,500	\$2,500		
260	HLC Monitoring Fee	\$1,000	\$1,000		And misc
261	Training	\$1,000	\$1,000		
262	Asset Management Fee	\$8,000	\$8,000		
263	Subtotal: Administrative	\$214,400	\$214,400	\$0	
264	Payroll, Maintenance	\$90,000	\$90,000		
265	Payroll Taxes & Benefits, Admin.	\$27,000	\$27,000		
266	Janitorial Materials	\$10,000	\$10,000		
267	Landscaping	\$15,000	\$15,000		
268	Decorating (inter. only)	\$5,000	\$5,000		
269	Repairs (inter. & ext.)	\$16,200	\$16,200		
270	Elevator Maintenance	\$12,500	\$12,500		
271	Trash Removal	\$15,000	\$15,000		
272	Snow Removal	\$15,000	\$15,000		
273	Extermination	\$10,000	\$10,000		
274	Recreation	\$0	\$0		
275	Fire Alarm & Misc	\$22,500	\$22,500		
276	Subtotal: Maintenance	\$238,200	\$238,200	\$0	
277	Resident Services	\$103,461	\$103,461		
278	Security	\$0	\$0		In resident services
279	Electricity	\$130,000	\$130,000		
280	Natural Gas	\$0	\$0		
281	Oil	\$0	\$0		
282	Water & Sewer	\$78,000	\$78,000		
283	Subtotal: Utilities	\$208,000	\$208,000	\$0	
284	Replacement Reserve	\$30,100	\$30,100		
285	Operating Reserve	\$0	\$0		
286	Real Estate Taxes	\$100,000	\$100,000		
287	Other Taxes	\$0	\$0		
288	Insurance	\$150,000	\$150,000		
289	MIP	\$0	\$0		
290	Other:	\$0	\$0		
291	Subtotal: Taxes, Insurance	\$250,000	\$250,000	\$0	
292	TOTAL EXPENSES	\$1,148,959	\$1,148,959	\$0	

Section 4. Operating Pro-Forma				Page 17			
Other Operating Expense Assumptions							
Trending Assumptions for Expenses				Year 2	Year 3	Years 4-5	Years 6-20
293	Sewer & Water & Utilities.....			3.0%	3.0%	3.0%	3.0%
294	Real Estate Taxes			3.0%	3.0%	3.0%	3.0%
295	All Other Operating Expenses			3.0%	3.0%	3.0%	3.0%
Reserve Requirements:							
296	Replacement Reserve Requirement			\$350.00	per unit per year		
297	Operating Reserve Requirement			\$0.00	per unit per year		
Debt Service:				Annual Payment			
298	MHFA	MHFA Program 1					
299	MHFA	MHFA Program 2					
300	MHP Fund Permanent Loan						
301	Other Permanent Senior Mortgage			\$819,493			
	Source:	TE Permanent Loan	0				
302	Other Permanent Senior Mortgage						
	Source:						
303	Total Debt Service (Annual)			\$819,493			
304	Net Operating Income			\$943,637 (in year one)			
305	Debt Service Coverage			1.15 (in year one)			
Affordability: Income Limits and Maximum Allowable Rents							
306	County	Norfolk	MSA				
	This MSA does not match the county you have chosen						
307	Maximum Allowed Rents, by Income, by Unit Size:				Income Limits last updated on		April 2024
		Maximum Income			Maximum Rent (calculated from HUD income data)		
		50%	60%	80%	50%	60%	80%
	SRO	\$57,100	\$68,520	\$79,940	\$1,428	\$1,713	\$1,499
	0 bedroom	\$57,100	\$68,520	\$79,940	\$1,428	\$1,713	\$1,998
	1 bedroom	\$61,200	\$73,440	\$85,680	\$1,530	\$1,836	\$2,142
	2 bedrooms	\$73,450	\$88,140	\$102,830	\$1,836	\$2,204	\$2,570
	3 bedrooms	\$84,875	\$101,850	\$118,825	\$2,122	\$2,546	\$2,970
	4 bedrooms	\$94,700	\$113,640	\$132,580	\$2,368	\$2,841	\$3,314
	Area median income for a family of		\$163,200				
308	H.U.D. "Fair Market Rents" (Maximum):						
		0 bedroom	\$1,887				
		1 bedroom	\$2,090				
		2 bedrooms	\$2,542				
		3 bedrooms	\$3,168				
		4 bedrooms	\$3,444				
		5 bedrooms	\$3,961				
						FMR Information last updated on	2024

21-Year Operating Proforma (Years 1-5)

NOTE: Do not fill out this section. It is automatically filled in by program.

		Year 1	Year 2	Year 3	Year 4	Year 5
	Calendar Year:	N/A	N/A	N/A	N/A	N/A
INCOME:						
Low-Income, Rental Assisted		\$1,358,028	\$1,391,979	\$1,426,778	\$1,462,448	\$1,499,009
Low-Income, Below 50%		0	0	0	0	0
Low-Income, Below 60%		535,400	546,108	557,030	568,171	579,534
Other Income (User-defined)		147,770	150,726	153,740	156,815	159,951
Market Rate		137,280	137,280	137,280	137,280	137,280
Gross Potential Income		2,178,478	2,226,092	2,274,828	2,324,713	2,375,774
Less vacancy		85,882	87,759	89,680	91,647	93,660
Effective Gross Residential Income		2,092,596	2,138,333	2,185,148	2,233,067	2,282,114
Commercial (includes parking)		0	0	0	0	0
Less vacancy		0	0	0	0	0
Net Commercial Income		0	0	0	0	0
Effective Rental Income		2,092,596	2,138,333	2,185,148	2,233,067	2,282,114
Other Income: Laundry		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Total Gross Income		2,092,596	2,138,333	2,185,148	2,233,067	2,282,114
Operating Subsidies		0	0	0	0	0
Draw on Operating Reserves		0	0	0	0	0
Total Effective Income		\$2,092,596	\$2,138,333	\$2,185,148	\$2,233,067	\$2,282,114
EXPENSES:						
Management Fee		104,798	107,089	109,434	111,833	114,290
Administrative		214,400	220,832	227,457	234,281	241,309
Maintenance		238,200	245,346	252,706	260,288	268,096
Resident Services		103,461	106,565	109,762	113,055	116,446
Security		0	0	0	0	0
Electrical		130,000	133,900	137,917	142,055	146,316
Natural Gas		0	0	0	0	0
Oil (heat)		0	0	0	0	0
Water & Sewer		78,000	80,340	82,750	85,233	87,790
Replacement Reserve		30,100	31,003	31,933	32,891	33,878
Operating Reserve		0	0	0	0	0
Real Estate Taxes		100,000	103,000	106,090	109,273	112,551
Other Taxes		0	0	0	0	0
Insurance		150,000	154,500	159,135	163,909	168,826
MIP		0	0	0	0	0
Other:		0	0	0	0	0
Total Operating Expenses		\$1,148,959	\$1,182,575	\$1,217,184	\$1,252,816	\$1,289,502
NET OPERATING INCOME		\$943,637	\$955,759	\$967,964	\$980,250	\$992,612
Debt Service		\$0	\$0	\$0	\$0	\$0
Debt Service Coverage		N/A	N/A	N/A	N/A	N/A
Project Cash Flow		\$943,637	\$955,759	\$967,964	\$980,250	\$992,612
Required Debt Coverage		\$0	\$0	\$0	\$0	\$0
(Gap)/Surplus for Cov.		\$943,637	\$955,759	\$967,964	\$980,250	\$992,612
#						

21-Year Operating Proforma (Years 6-10)

NOTE: Do not fill out this section. It is automatically filled in by program.

		Year 6	Year 7	Year 8	Year 9	Year 10
	Calendar Year:	N/A	N/A	N/A	N/A	N/A
INCOME:						
Low-Income, Rental Assisted		\$1,536,484	\$1,574,896	\$1,614,269	\$1,654,625	\$1,695,991
Low-Income, Below 50%		\$0	\$0	\$0	\$0	\$0
Low-Income, Below 60%		\$591,125	\$602,947	\$615,006	\$627,306	\$639,852
Other Income (User-defined)		\$163,150	\$166,413	\$169,742	\$173,137	\$176,599
Market Rate		\$137,280	\$137,280	\$137,280	\$137,280	\$137,280
Gross Potential Income		2,428,039	2,481,537	2,536,296	2,592,348	2,649,723
Less vacancy		95,720	97,829	99,988	102,198	104,460
Effective Gross Residential Income		2,332,319	2,383,708	2,436,308	2,490,150	2,545,263
Commercial Income		0	0	0	0	0
Less vacancy		0	0	0	0	0
Net Commercial Income		0	0	0	0	0
Effective Rental Income		2,332,319	2,383,708	2,436,308	2,490,150	2,545,263
Laundry Income		0	0	0	0	0
Other Income:		0	0	0	0	0
Other Income:		0	0	0	0	0
Other Income:		0	0	0	0	0
Other Income:		0	0	0	0	0
Other Income:		0	0	0	0	0
Other Income:		0	0	0	0	0
Other Income:		0	0	0	0	0
Total Gross Income		2,332,319	2,383,708	2,436,308	2,490,150	2,545,263
Operating Subsidies		0	0	0	0	0
Draw on Operating Reserves		0	0	0	0	0
Total Effective Income		\$2,332,319	\$2,383,708	\$2,436,308	\$2,490,150	\$2,545,263
EXPENSES:						
Management Fee		116,804	119,377	122,012	124,708	127,468
Administrative		248,548	256,005	263,685	271,596	279,743
Maintenance		276,139	284,423	292,956	301,745	310,797
Resident Services		119,940	123,538	127,244	131,061	134,993
Security		0	0	0	0	0
Electrical		150,706	155,227	159,884	164,680	169,621
Natural Gas		0	0	0	0	0
Oil (heat)		0	0	0	0	0
Water & Sewer		90,423	93,136	95,930	98,808	101,772
Replacement Reserve		34,894	35,941	37,019	38,130	39,274
Operating Reserve		0	0	0	0	0
Real Estate Taxes		115,927	119,405	122,987	126,677	130,477
Other Taxes		0	0	0	0	0
Insurance		173,891	179,108	184,481	190,016	195,716
MIP		0	0	0	0	0
Other:		0	0	0	0	0
Total Operating Expenses		\$1,327,273	\$1,366,160	\$1,406,198	\$1,447,420	\$1,489,862
NET OPERATING INCOME		\$1,005,046	\$1,017,547	\$1,030,110	\$1,042,730	\$1,055,401
Debt Service		\$0	\$0	\$0	\$0	\$0
Debt Service Coverage		N/A	N/A	N/A	N/A	N/A
Project Cash Flow		\$1,005,046	\$1,017,547	\$1,030,110	\$1,042,730	\$1,055,401
Required Debt Coverage		\$0	\$0	\$0	\$0	\$0
(Gap)/Surplus for Cov.		\$1,005,046	\$1,017,547	\$1,030,110	\$1,042,730	\$1,055,401
#						

21-Year Operating Proforma (Years 11-15)

NOTE: Do not fill out this section. It is automatically filled in by program.

		Year 11	Year 12	Year 13	Year 14	Year 15
	Calendar Year:	N/A	N/A	N/A	N/A	N/A
INCOME:						
Low-Income, Rental Assisted		\$1,738,391	\$1,781,850	\$1,826,397	\$1,872,057	\$1,918,858
Low-Income, Below 50%		\$0	\$0	\$0	\$0	\$0
Low-Income, Below 60%		\$655,849	\$672,245	\$689,051	\$706,277	\$723,934
Other Income (User-defined)		\$181,014	\$185,540	\$190,178	\$194,933	\$199,806
Market Rate		\$140,712	\$144,230	\$147,836	\$151,531	\$155,320
Gross Potential Income		2,715,966	2,783,865	2,853,461	2,924,798	2,997,918
Less vacancy		107,071	109,748	112,491	115,304	118,186
Effective Gross Residential Income		2,608,895	2,674,117	2,740,970	2,809,494	2,879,731
Commercial (includes parking)		0	0	0	0	0
Less vacancy		0	0	0	0	0
Net Commercial Income		0	0	0	0	0
Effective Rental Income		2,608,895	2,674,117	2,740,970	2,809,494	2,879,731
Other Income: Laundry		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Other Income: 0		0	0	0	0	0
Total Gross Income		2,608,895	2,674,117	2,740,970	2,809,494	2,879,731
Operating Subsidies		0	0	0	0	0
Draw on Operating Reserves		0	0	0	0	0
Total Effective Income		\$2,608,895	\$2,674,117	\$2,740,970	\$2,809,494	\$2,879,731
EXPENSES:						
Management Fee		130,655	133,921	137,269	140,701	144,219
Administrative		288,136	296,780	305,683	314,854	324,299
Maintenance		320,121	329,725	339,616	349,805	360,299
Resident Services		139,043	143,214	147,511	151,936	156,494
Security		0	0	0	0	0
Electrical		174,709	179,950	185,349	190,909	196,637
Natural Gas		0	0	0	0	0
Oil (heat)		0	0	0	0	0
Water & Sewer		104,825	107,970	111,209	114,546	117,982
Replacement Reserve		40,452	41,665	42,915	44,203	45,529
Operating Reserve		0	0	0	0	0
Real Estate Taxes		134,392	138,423	142,576	146,853	151,259
Other Taxes		0	0	0	0	0
Insurance		201,587	207,635	213,864	220,280	226,888
MIP		0	0	0	0	0
Other:		0	0	0	0	0
Total Operating Expenses		\$1,533,920	\$1,579,284	\$1,625,993	\$1,674,087	\$1,723,606
NET OPERATING INCOME		\$1,074,975	\$1,094,833	\$1,114,977	\$1,135,407	\$1,156,126
Debt Service		\$0	\$0	\$0	\$0	\$0
Debt Service Coverage		N/A	N/A	N/A	N/A	N/A
Project Cash Flow		\$1,074,975	\$1,094,833	\$1,114,977	\$1,135,407	\$1,156,126
Required Debt Coverage		\$0	\$0	\$0	\$0	\$0
(Gap)/Surplus for Cov.		\$1,074,975	\$1,094,833	\$1,114,977	\$1,135,407	\$1,156,126
#						

21-Year Operating Proforma (Years 16-21)

NOTE: Do not fill out this section. It is automatically filled in by program.

		Year 16	Year 17	Year 18	Year 19	Year 20	Year 21	
	Calendar Year:	N/A	N/A	N/A	N/A	N/A	N/A	
INCOME:								
Low-Income, Rent. Astd.		\$1,966,829	\$2,016,000	\$2,066,400	\$2,118,060	\$2,171,012	\$2,225,287	
Low-Income, Below 50%		\$0	\$0	\$0	\$0	\$0	\$0	
Low-Income, Below 60%		\$742,033	\$760,583	\$779,598	\$799,088	\$819,065	\$839,542	
Other Income (User-define		\$204,801	\$209,921	\$215,169	\$220,548	\$226,062	\$231,714	
Market Rate		\$159,203	\$163,183	\$167,262	\$171,444	\$175,730	\$180,123	
Gross Potential Income		3,072,866	3,149,687	3,228,430	3,309,140	3,391,869	3,476,666	
Less vacancy		121,141	124,170	127,274	130,456	133,717	137,060	
Eff. Gross Res. Income		2,951,725	3,025,518	3,101,156	3,178,685	3,258,152	3,339,606	
Commercial Income		0	0	0	0	0	0	
Less vacancy		0	0	0	0	0	0	
Net Commercial Income		0	0	0	0	0	0	
Effective Rental Income		2,951,725	3,025,518	3,101,156	3,178,685	3,258,152	3,339,606	
Other Income: Laundry		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Other 0		0	0	0	0	0	0	
Total Gross Income		2,951,725	3,025,518	3,101,156	3,178,685	3,258,152	3,339,606	
Operating Subsidies		0	0	0	0	0	0	
Draw on Operating Res.		0	0	0	0	0	0	
Total Effective Income		\$2,951,725	\$3,025,518	\$3,101,156	\$3,178,685	\$3,258,152	\$3,339,606	
EXPENSES:								
Management Fee		147,824	151,520	155,308	159,190	163,170	167,249	
Administrative		334,028	344,049	354,371	365,002	375,952	387,230	
Maintenance		371,108	382,241	393,708	405,520	417,685	430,216	
Resident Services		161,189	166,025	171,005	176,135	181,419	186,862	
Security		0	0	0	0	0	0	
Electrical		202,536	208,612	214,870	221,316	227,956	234,794	
Natural Gas		0	0	0	0	0	0	
Oil (heat)		0	0	0	0	0	0	
Water & Sewer		121,521	125,167	128,922	132,790	136,773	140,877	
Replacement Reserve		46,895	48,302	49,751	51,243	52,781	54,364	
Operating Reserve		0	0	0	0	0	0	
Real Estate Taxes		155,797	160,471	165,285	170,243	175,351	180,611	
Other Taxes		0	0	0	0	0	0	
Insurance		233,695	240,706	247,927	255,365	263,026	270,917	
MIP		0	0	0	0	0	0	
Other:		0	0	0	0	0	0	
Total Operating Expenses		\$1,774,593	\$1,827,092	\$1,881,147	\$1,936,805	\$1,994,113	\$2,053,120	
NET OPER. INC.								
		\$1,177,132	\$1,198,426	\$1,220,009	\$1,241,880	\$1,264,039	\$1,286,485	
Debt Service		\$0	\$0	\$0	\$0	\$0	\$0	
Debt Service Coverage		N/A	N/A	N/A	N/A	N/A	N/A	
Project Cash Flow		\$1,177,132	\$1,198,426	\$1,220,009	\$1,241,880	\$1,264,039	\$1,286,485	
Required Debt Coverage		\$0	\$0	\$0	\$0	\$0	\$0	
(Gap)/Surplus for Cov.		\$1,177,132	\$1,198,426	\$1,220,009	\$1,241,880	\$1,264,039	\$1,286,485	

Exhibit 2: Site Control

After recording, return to:

Meredith Sterritt
ROPES & GRAY LLP
Prudential Tower, 800 Boylston Street
Boston, MA 02199-3600

Exemption from taxation is claimed under M.G.L. Chapter 64D, Section 1

Reviewed by Todd E. Waldman, Assistant District Counsel, U.S. Army Corps of Engineers,
Norfolk District, 803 Front Street, Norfolk, Virginia 23510-1096.

Property Address: Forest Street, Needham, MA

**QUITCLAIM DEED
NATICK SOLDIER SYSTEMS CENTER
NEEDHAM HOUSING SITE
NEEDHAM, MASSACHUSETTS**

THIS QUITCLAIM DEED, (hereinafter referred to as the "Deed") by and between the **UNITED STATES OF AMERICA** (hereinafter referred to as the "Grantor"), acting by and through the Interim Director of Real Estate, Headquarters, United States Army Corps of Engineers, pursuant to a delegation of authority from the Deputy Assistant Secretary of the Army (Installations, Housing and Partnerships), under the authority of section 2844 of Public Law 115-91, whose address is U.S. Army Engineer District, Norfolk, 803 Front Street, Norfolk, VA 23510-1011, and the **CHARLES RIVER ASSOCIATION FOR RETARDED CITIZENS, INC.** (hereinafter referred to as the "Grantee"), a nonprofit corporation duly organized and existing under the laws of the State of Massachusetts, whose address is 59 East Militia Heights Drive, Needham, Massachusetts 02492.

WITNESSETH THAT:

THE GRANTOR, for and in consideration of FIVE MILLION FIVE HUNDRED THIRTY EIGHT THOUSAND AND NO/100 DOLLARS (\$5,538,000.00), the receipt of which is hereby acknowledged, does hereby remise, release and forever quitclaim unto the Grantee, its successors and assigns, all its right, title and interest in and to eleven parcels of land situated, lying, and being in the Town of Needham, County of Norfolk, Commonwealth of Massachusetts, identified as Tract A, Tract BE-1, Tract BE-2, Tract BE-3, Tract BE-4, Tract BE-5, Tract BE-6, Tract BE-7, Tract BE-8, Tract BE-9, and Tract BE-10, containing 5.4 acres in total, more or less, ("Property") and being the same premises conveyed to the Grantor, as follows:

Tract A – Parcel One as set forth in Deed from Babson Institute dated August 29, 1957 and recorded with the Norfolk County Registry of Deeds in Book 3590, Page 336

Tract BE-1 – Parcel Two as set forth in Deed from Babson Institute dated August 29, 1957 and recorded with the Norfolk County Registry of Deeds in Book 3590, Page 336

Tract BE-2 – Parcel Three as set forth in Deed from Babson Institute dated August 29, 1957 and recorded with the Norfolk County Registry of Deeds in Book 3590, Page 336

Tract BE-3 – Grant of easement from Babson Institute dated November 14, 1956 and recorded with the Norfolk County Registry of Deeds in Book 3522, Page 149

Tract BE-4 – Grant of easement from Arthur Millette and Corinne M. Millette dated November 14, 1956 and recorded with the Norfolk County Registry of Deeds in Book 3522, Page 147

Tract BE-5 – Judgment on the Declaration of Taking dated June 26, 1959 and filed with the Norfolk County Registry District of the Land Court in Certificate of Title No. 48507 as Document No. 209491

Tract BE-6 – Judgment on the Declaration of Taking dated June 26, 1959 and filed with the Norfolk County Registry District of the Land Court in Certificate of Title No. 51958 as Document No. 209491

Tract BE-7 – Judgment on the Declaration of Taking dated June 26, 1959 and filed with the Norfolk County Registry District of the Land Court in Certificate of Title No. 54761 as Document No. 209491

Tract BE-8 – Judgment on the Declaration of Taking dated June 26, 1959 and filed with the Norfolk County Registry District of the Land Court in Certificate of Title Nos. 35720 and 41558 as Document No. 209491

Tract BE-9 – Judgment on the Declaration of Taking dated June 26, 1959 and filed with the Norfolk County Registry District of the Land Court in Certificate of Title No. 48507 as Document No. 209491

Tract BE-10 – Right of Way Easement in Deed from Babson Institute dated December 17, 1954 and recorded with the Norfolk County Registry of Deeds in Book 3328, Page 106

SUBJECT TO all valid and existing restrictions, reservations, covenants, conditions, and easements including, but not limited to, rights-of-way for railroads, highways, pipelines and public utilities, if any.

TO HAVE AND TO HOLD the Property granted herein to the Grantee, its successors and assigns, together with all and singular the appurtenances, rights, powers, and privileges thereunto belonging or in anywise appertaining, and all the estate, right, title, interest, or claim whatsoever of the Grantor, either in law or in equity, and subject to the reservations, covenants, conditions, and restrictions hereinafter set forth in this Deed.

AND IT IS FURTHER AGREED AND UNDERSTOOD by and between the parties hereto that the Grantee, by its acceptance of this Deed and as part of the consideration for this Deed, covenants and agrees for itself, its successors and assigns, forever, that this Deed is made and accepted upon each of the following covenants, conditions, and restrictions which shall be binding upon and enforceable against the Grantee, its successors and assigns in perpetuity by the Grantor and other interested parties as may be allowed by law; that the covenants, conditions, and restrictions set forth herein are a binding servitude on the Property and shall be deemed to run with the land in perpetuity; and that the failure to include the covenants, conditions, and restrictions in subsequent conveyances of the Property does not abrogate their status as binding upon the Grantor and the Grantee, its successors and assigns.

1. NOTIFICATION OF PETROLEUM OR PETROLEUM PRODUCT STORAGE, RELEASE OR DISPOSAL

The Grantee is hereby provided the summary of the storage, release, or disposal of petroleum or petroleum products on the Property attached hereto as Exhibit A and made a part hereof. Said summary is based on the best information available to the Department of the Army and believed to be correct but no warranty as to completeness or accuracy is provided with respect thereto.

2. "AS IS" CONDITION OF PROPERTY

The Grantee acknowledges that it has inspected, or has had the opportunity to inspect, the Property and accepts the condition and state of repair of the Property. The Grantee understands and agrees that the Property is conveyed "AS IS" without any representation, warranty, or guaranty by the Grantor as to quantity, quality, title, character, condition, size, or kind, or that the same is in condition or fit to be used for the purposes intended by the Grantee, and no claim for allowance or deduction upon such grounds will be considered.

No warranties, either express or implied, are given with regard to the condition of the Property including, without limitation, whether the Property does or does not contain asbestos or lead-based paint. The Grantee shall be deemed to have relied solely on its own judgment in assessing the condition of the Property including, without limitation, any asbestos, lead-based paint, or other conditions on the Property. The failure of the Grantee to inspect or to exercise due diligence to be fully informed as to the condition of the Property will not constitute grounds for any claim or demand against the Grantor.

Nothing in this provision will be construed to modify or negate any of the Grantor's statutory obligations.

3. INDEMNITY AND HOLD HARMLESS

To the extent authorized by law, the Grantee, for itself, its successors and assigns, covenants and agrees to indemnify and hold harmless the Grantor, its officers, agents, and employees from (1) any and all claims, damages, judgments, losses, and costs, including fines and penalties, arising out of the violation of the covenants, conditions, and restrictions in this Deed by the Grantee, its successors and assigns, and (2) any and all claims, damages, and judgments arising out of, or in any manner predicated upon, exposure to asbestos, lead-based paint, or other condition on any portion of the Property after the date of this Deed.

The Grantee, for itself, its successors and assigns, covenants and agrees that the Grantor shall not be responsible for any costs associated with modification or termination of the covenants, conditions, and restrictions in this Deed including, without limitation, any costs associated with additional investigation or remediation of asbestos, lead-based paint, or other condition on the Property.

Nothing in this provision will be construed to modify or negate any of the Grantor's statutory obligations.

4. POST-TRANSFER DISCOVERY OF CONTAMINATION

If a release or threatened release of a hazardous substance is discovered on the Property after the date of this Deed, the Grantee, its successors or assigns, shall be responsible for such newly discovered release or threatened release of a hazardous substance unless the Grantee is able to demonstrate that such release or threatened release of a hazardous substance was due to the Grantor's activities, use, or ownership of the Property. If the Grantee, or its successors or assigns believe the newly discovered hazardous substance is due to the Grantor's activities, use or ownership of the Property, the Grantee or its successors or assigns shall immediately secure the site and notify the Grantor of the existence of the release or threatened release of the hazardous substance and the Grantee or its successors or assigns shall not further disturb or allow the disturbance of such hazardous substance without the prior written permission of the Grantor.

The Grantee, for itself, its successors and assigns, as part of the consideration for the conveyance of the Property, hereby releases the Grantor from any liability or responsibility for any claims arising solely out of the release or threatened release of any hazardous substance on the Property occurring after the date of this Deed where such hazardous substance was placed on the Property by the Grantee, or its successors, assigns, employees, invitees, agents, contractors, or any person other than the Grantor after the date of this Deed.

5. ENVIRONMENTAL PROTECTION PROVISIONS

The Grantee shall neither transfer the Property, lease the Property, nor grant any interest, privilege, or license whatsoever in connection with the Property without including the environmental protection provisions set forth in Exhibit B, attached hereto and made a part hereof, and shall require the said provisions be included in all subsequent deeds, easements, transfers, leases, or grant of any interest, privilege, or license in, of, on, or to the Property or any portion thereof.

6. ANTI-DEFICIENCY ACT

The Grantor's obligation to pay or reimburse any money under this Deed is subject to the availability of funds appropriated for this purpose to the Department of the Army and nothing in this Deed shall be interpreted to require obligations or payments by the Grantor in violation of the Anti-Deficiency Act, 31 U.S.C. § 1341.

7. NO WAIVER

The failure of the Grantor to insist in any one or more instances upon timely or complete performance of any obligation of the Grantee, or its successors or assigns required by the covenants, conditions, or restrictions set forth in this Deed shall not be construed as a waiver or a relinquishment of the Grantor's right to future performance of any such obligation of the Grantee or its successors or assigns in accordance with the said covenants, conditions, and restrictions, and all such obligations of the Grantee, its successors and assigns shall continue in full force and effect.

SIGNATURE PAGES FOLLOW

IN WITNESS WHEREOF, the Grantor has caused this Deed to be executed in its name by the Interim Director of Real Estate, Headquarters, U.S. Army Corps of Engineers, this 25th day of February, 2023.

UNITED STATES OF AMERICA

By: Paula S. Johnson-Muic
 Paula S. Johnson-Muic
 Interim Director of Real Estate
 Headquarters, U.S. Army Corps of
 Engineers

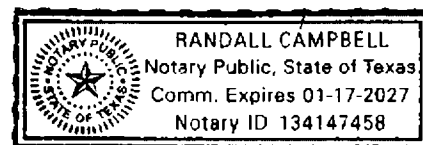
ACKNOWLEDGMENT

STATE OF TEXAS)
) ss
 COUNTY OF Collin)

I, Randall Campbell, a Notary Public in and for the State of Texas, do hereby certify that this 25 day of February, 2023, Paula S. Johnson-Muic, Interim Director of Real Estate, Headquarters, U.S. Army Corps of Engineers, known to me or proven through satisfactory evidence of identity to be the person whose name is subscribed to the foregoing document, appeared in person and acknowledged before me that the signature on the document was voluntarily affixed by her for the purposes therein stated and that she had due authority to sign the document in the capacity therein stated.

Randall Campbell
 NOTARY PUBLIC

My commission expires the 4th day of January, 2027



ACCEPTANCE BY GRANTEE

IN WITNESS WHEREOF, the Grantee hereby accepts the conveyance herein subject to the covenants, conditions, and restrictions contained therein, this 8th day of March, 2023.

**CHARLES RIVER
ASSOCIATION FOR
RETARDED CITIZENS, INC.**

By: Anne-Marie Bajwa
Anne-Marie Bajwa
President

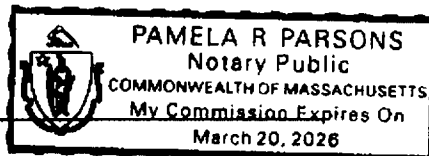
ACKNOWLEDGMENT

COMMONWEALTH OF MASSACHUSETTS)
) ss
COUNTY OF ~~NORFOLK~~ Suffolk)

I, Pamela R. Parsons, a Notary Public in and for the Commonwealth of Massachusetts, do hereby certify that this 8th day of March, 2023, Anne-Marie Bajwa, President, Charles River Association for Retarded Citizens, Inc., known to me or proven through satisfactory evidence of identity to be the person whose name is subscribed to the foregoing document, appeared in person and acknowledged before me that the signature on the document was voluntarily affixed by him for the purposes therein stated and that he had due authority to sign the document in the capacity therein stated.

Pamela R. Parsons
Notary Public

My Commission Expires: _____



CERTIFICATE OF AUTHORITY

*ALICE TAYLOR**Chairman*

DO
WMA
I, ~~Raymond Brassard~~, certify that I am the ~~Clerk~~ of the Charles River Association for Retarded Citizens, Inc. , and that Anne-Marie Bajwa, who signed the foregoing instrument on behalf on the Grantee, was then the President of the said nonprofit corporation. I further certify that the said officer was acting within the scope of powers delegated to this officer by the governing body of the Grantee in executing said instrument.

Date: March 8, 2023Signed: *Alice Taylor*

EXHIBIT A**Notification of Petroleum Product Storage, Release, or Disposal****No. 2 Fuel Oil Underground Storage Tanks Installed in 1958**

Address	Removal / Replace Date	Replacement Tank	Comments at Time of Removal
1 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
2 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
3 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
4 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
5 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
6 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
7 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
8 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
9 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
10 EMH	Sep/Oct 1987	300 gal. single wall steel UST	Oil release and soil contamination noted. UST, its contents, and an unspecified quantity of impacted soil removed/disposed. Incident closed from regulatory perspective (USACE, 2019)
11 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
12 EMH	Apr/May 1989	550 gal. double wall steel UST	No release or soil contamination noted
EMH = East Militia Heights Road Tanks installed in 1958 were 275-gallon single-walled steel USTs			

No. 2 Fuel Oil Underground Storage Tanks Removed in 2004 (see table above for UST type/capacity)

Address	Removal Date	Comments at Time of Removal
1 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
2 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
3 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
4 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
5 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
6 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
7 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
8 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
9 EMH	October 2004	Petroleum-related soil contamination above Mass DEP cleanup standards noted. Limited Removal Action implemented. 10 cy of impacted soil removed. Regulatory closure with Mass DEP. No further action required (USACE, 2019; Nobis, 2005a; Nobis, 2005b)
10 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
11 EMH	October 2004	No release or soil contamination above Mass DEP cleanup stds. noted (USACE, 2019)
12 EMH	October 2004	Petroleum-related soil contamination above Mass DEP cleanup standards noted. Limited Removal Action implemented. 10 cy of impacted soil removed. Regulatory closure with Mass DEP. No further action required. (USACE, 2019; Nobis, 2005a; Nobis, 2005c)

EMH = East Militia Heights Road

USTs were removed in October 2004 were not replaced as natural gas became available to the housing area.

EXHIBIT B**Environmental Protection Provisions****1. NOTICE OF THE PRESENCE OF ASBESTOS AND COVENANT**

- a. The Grantee is hereby informed and does acknowledge that non-friable asbestos or asbestos-containing material ("ACM") has been found on the Property. The Property may contain improvements, such as buildings, facilities, equipment, and pipelines, above and below the ground, that contain non-friable asbestos or ACM. The Occupational Safety and Health Administration (OSHA) and the Environmental Protection Agency have determined that such unprotected or unregulated exposure to airborne asbestos fibers increases the risk of asbestos-related diseases, including certain cancers that can result in disability or death.
- b. The Grantee covenants and agrees that its use and occupancy of the Property will be in compliance with all applicable laws relating to asbestos. The Grantee agrees to be responsible for any remediation or abatement of asbestos found to be necessary on the Property to include ACM in or on buried pipelines that may be required under applicable law or regulation.
- c. The Grantee acknowledges that it has inspected or has had the opportunity to inspect the Property as to its asbestos and ACM condition and any hazardous or environmental conditions relating thereto. The Grantee shall be deemed to have relied solely on its own judgment in assessing the overall condition of all or any portion of the Property, including, without limitation, any asbestos or ACM hazards or concerns.

2. NOTICE OF THE PRESENCE OF LEAD-BASED PAINT (LBP) AND COVENANT AGAINST THE USE OF THE PROPERTY FOR RESIDENTIAL PURPOSE

- a. The Grantee is hereby informed and does acknowledge that all buildings on the Property, which were constructed or rehabilitated prior to 1978, are presumed to contain lead-based paint. Lead from paint, paint chips, and dust can pose health hazards if not managed properly. Every purchaser of any interest in Residential Real Property on which a residential dwelling was built prior to 1978 is notified that there is a risk of exposure to lead from lead-based paint that may place young children at risk of developing lead poisoning.
- b. Available information concerning known lead-based paint and/or lead-based paint hazards, the location of lead-based paint and/or lead-based paint hazards, and the condition of painted surfaces is contained in the

Environmental Condition of Property (ECP) report (USACE, 2019) and in the Lead Paint Compliance Information provided as provided in Appendix I of said report, and in the January 2020 technical memorandum addendum to said report (USACE 2020). The Grantee has been provided with the federally approved pamphlet on lead poisoning prevention. The Grantee hereby acknowledges receipt of all of the information described in this subparagraph.

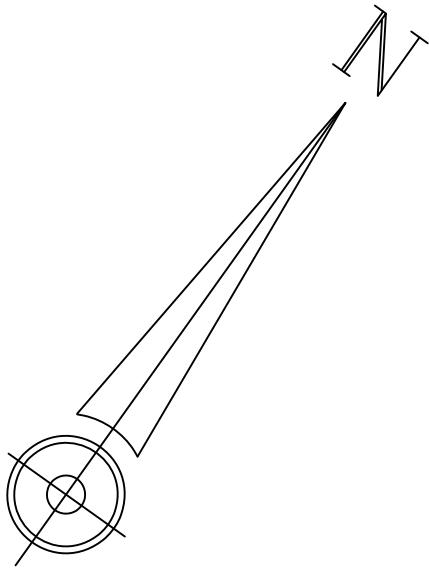
- c. The Grantee covenants and agrees that it shall not permit the occupancy or use of any buildings or structures on the Property as Residential Property, as defined under 24 Code of Federal Regulations Part 35, without complying with this section and all applicable federal, state, and local laws and regulations pertaining to lead-based paint and/or lead-based paint hazards. Prior to permitting the occupancy of the Property where its use subsequent to sale is intended for residential habitation, the Grantee specifically agrees to perform, at its sole expense, the Army's abatement requirements under Title X of the Housing and Community Development Act of 1992 (Residential Lead-Based Paint Hazard Reduction Act of 1992).
- d. The Grantee acknowledges that it has inspected or has had the opportunity to inspect the Property as to its lead-based paint content and condition and any hazardous or environmental conditions relating thereto. The Grantee shall be deemed to have relied solely on its own judgment in assessing the overall condition of all or any portion of the Property, including, without limitation, any lead-based paint hazards or concerns.

3. PESTICIDE NOTICE AND COVENANT

- a. The Grantee is hereby notified and acknowledges that registered pesticides have been applied to the Property conveyed herein and may continue to be present thereon. The Grantee and Grantor know of no use of any registered pesticide in a manner (1) inconsistent with its labeling or with the Federal Insecticide, Fungicide, and Rodenticide Act (FIFRA)(7 U.S.C. § 136, et seq.) and other applicable laws and regulations, or (2) not in accordance with its intended purpose.
- b. The Grantee, for itself, its successors and assigns hereby covenants and agrees that if the Grantee takes any action with regard to the Property, including demolition of structures or any disturbance or removal of soil that may expose, or cause a release of, a threatened release of, or an exposure to, any such pesticide, Grantee assumes all responsibility and liability therefor.

Exhibit 3: Site Plans

- o Exhibit 3.a: Existing Conditions
- o Exhibit 3.b: Conceptual Designs



- UNDERGROUND UTILITIES
- | | |
|------|----------------|
| - c | CABLE TV |
| - cs | COMBINED SEWER |
| - d | DRAIN |
| - e | ELECTRIC |
| - g | GAS |
| - s | SEWER |
| - st | STEAM |
| - t | TELEPHONE/COM |
| - w | WATER |
- R = (RM ELEVATION)
= (INVERT)

SCALE: 1" = 30'	DATE: 10/20/2023
DRAWN BY: RPH	FILE: RPH42
JOB NUMBER: 4528	CHECKED BY: SDC
COUNTY: NORFOLK	
TITLE:	

Building A
3 story
67,000 gsf
(15) CRC studios with common area
(10) CRC 1 bedrooms with common area
(33) 1 bedroom units
(10) 2 bedroom units
68 units total

4,400 sf Community Space
1,900 sf Lobby / Amenity

Building B
1 story
4,000 gsf
(6) CRC studios with common area

Building C
1 story
4,000 gsf
(6) CRC studios with common area

Building D
1 story
4,000 gsf
(6) CRC studios with common area

61 parking spaces



Aerial View



Building A
3 story
67,000 gsf
(15) CRC studios with common area
(10) CRC 1 bedrooms with common area
(33) 1 bedroom units
(10) 2 bedroom units
68 units total

4,400 sf Community Space
1,900 sf Lobby / Amenity

Building B
1 story
4,000 gsf
(6) CRC studios with common area

Building C
1 story
4,000 gsf
(6) CRC studios with common area

Building D
1 story
4,000 gsf
(6) CRC studios with common area

61 parking spaces



Building A | Ground Floor Plan



- Studio
- 1 bedroom
- 2 bedroom

CRC units
5 - studio
5 - 1 bedroom

Non CRC units
5 - 1 bedroom
2 - 2 bedroom

Total
5 - studio
10 - 1 bedroom
2 - 2 bedroom
17 units





- Studio
- 1 bedroom
- 2 bedroom

CRC units
5 - studio
5 - 1 bedroom

Non CRC units
11 - 1 bedroom
4 - 2 bedroom

Total
5 - studio
16 - 1 bedroom
4 - 2 bedroom
25 units

(5) CRC 1 bedroom
units with shared
community room

(5) CRC studio units with
shared community room





- Studio
- 1 bedroom
- 2 bedroom

CRC units
5 - studio

Non CRC units
17 - 1 bedroom
4 - 2 bedroom

Total
5 - studio
17 - 1 bedroom
4 - 2 bedroom
26 units



Aerial View



Pedestrian Level View



Pedestrian Level View



Pedestrian Level View



Exhibit 4: Development Team

- o Exhibit 4.a: The Architectural Team Resume
- o Exhibit 4.b: Planning Office for Urban Affairs Resume
- o Exhibit 4.c: Planning Office for Urban Affairs, Prior Development Experience
- o Exhibit 4.d: Charles River Center Resume



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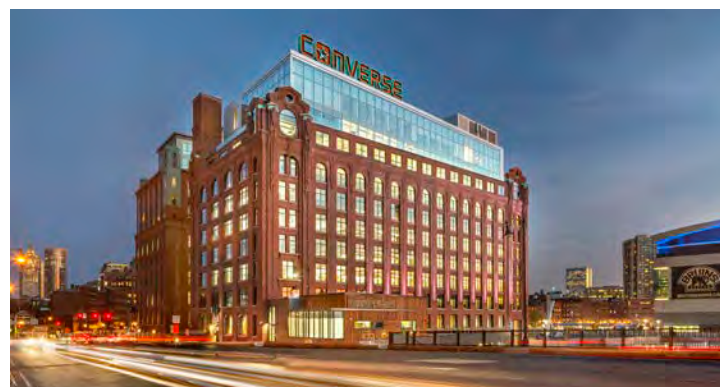
As trusted advisors

and active listeners

we are dedicated to building
meaningful relationships
and creating positive and
lasting transformation in
the communities we serve.

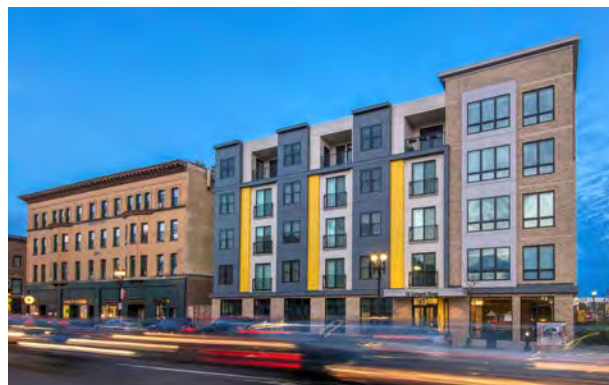
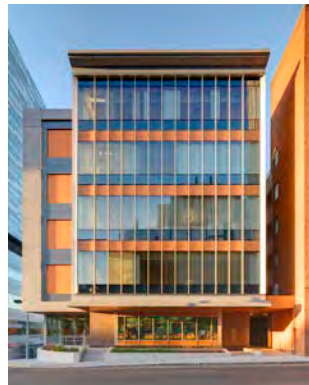
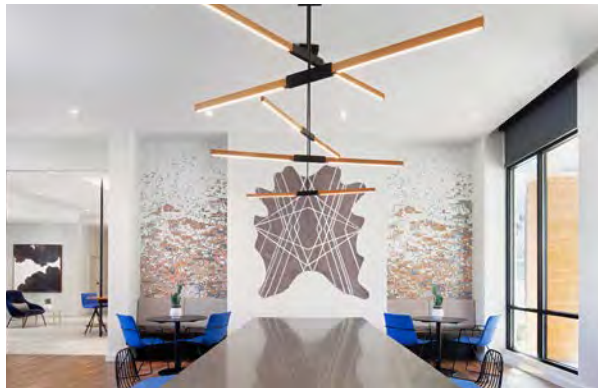


The Architectural Team is driven by a commitment to exceptional design and an unyielding focus on achieving client objectives. Our insightful, pragmatic design solutions reflect our respect for site, context, and environmental sustainability. Here's a look at a selection of featured projects.





Inspired design doesn't happen in isolation. It is the result of a committed partnership between the client and the design team where regard for the character and quality of the natural and built environment is fundamental.



200+ DESIGN EXCELLENCE AWARDS

85% BUSINESS THROUGH
REPEAT CLIENTS

52 YEARS OF EXPERIENCE

29 STATES IN WHICH
TAT IS LICENSED

46% WOMEN

95+ TAT TEAM MEMBERS

54% MEN

350+ HISTORIC ADAPTIVE
REUSE DEVELOPMENTS

200,000+ UNITS

1,750+ DEVELOPMENTS
COMPLETED



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.

related work



Uphams Crossing

Dorchester, MA

SERVICE

Architecture
Interior Design

TYPE

Historic Preservation | Restoration +
Adaptive Reuse
Hospitality + Mixed-Use
Multifamily
New Construction

CLIENT

Planning Office for Urban Affairs

SIZE

102,000 sf







Harbor Place

Haverhill, MA

SERVICE

Architecture
Interior Design

TYPE

Commercial
Hospitality + Mixed-use
Multifamily
New Construction
Waterfront

CLIENT

Planning Office for Urban Affairs
Greater Haverhill Foundation

SIZE

236,254 sf







The Union at 48 Boylston

Boston, MA

SERVICE

Architecture
Interior Design

TYPE

Commercial
Historic Preservation | Restoration +
Adaptive Reuse
Multifamily

CLIENT

Planning Office for Urban Affairs

SIZE

15,710 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







The Anne M. Lynch Homes at Old Colony Phase 3C

South Boston, MA

SERVICE

Architecture
Master Planning

TYPE

Senior Living
New Construction

CLIENT

Beacon Communities Development
Boston Housing Authority

SIZE

51,000 sf

SUSTAINABILITY

Passive House Certified, Transit-Oriented
Development







St. Therese

Everett, MA

SERVICE

Architecture
Interior Design

TYPE

Historic Preservation | Restoration +
Adaptive Reuse
Hospitality + Mixed-Use
Senior Living

CLIENT

The Neighborhood Developers

SIZE

88,885 sf







Ellen S. Jackson Apartments

Roxbury, MA

SERVICE

Architecture
Interior Design

TYPE

Hospitality + Mixed-use
New Construction
Senior Living

CLIENT

Nuestra Comunidad Development Corp.

SIZE

47,735 sf



AFFORDABLE SENIOR LIVING

80 MASON STREET, Boston, MA

Program: 129 units

Construction Type: Restoration and adaptive reuse of the former Boston Herald newspaper headquarters

ADMIRALS TOWER, Chelsea, MA *

Program: 100 units

Construction Type: New construction

ASHER'S PATH, Mashpee, MA

Program: 56 units

Construction Type: New construction

ARLINGTON ESTATES CO-OP, Baltimore, MD

Program: 68 units

Construction Type: New construction

BARSTOW VILLAGE, Hanover, MA

Program: 66 units

Construction Type: New construction

BLACKSTONE APARTMENTS, Boston, MA

Program: 145 units

Construction Type: Moderate rehabilitation

BLUE LEDGE CO-OP, Roslindale, MA *

Program: 80 units

Construction Type: New construction

BOWDOIN SCHOOL, Boston, MA

Program: 35 units

Construction Type: Adaptive reuse

BOWLEY'S GARDEN VILLA COOPERATIVE APARTMENTS, Baltimore, MD *

Program: 80 units of affordable senior housing

Construction Type: New construction

BRIARCLIFF SUMMIT APARTMENTS, Atlanta, GA

Program: 201 units

Construction Type: Moderate rehabilitation of a luxury apartment building

BRIDGEPORT ELDERLY APARTMENTS, Bridgeport, CT

Program: 85 units

Construction Type: Moderate Rehabilitation

BRUYERE GARDENS | D'YOUVILLE, Lowell, MA *

Program: 42 units

Construction Type: New construction

CAPTAIN HATHAWAY APARTMENTS, Saugus, MA *

Program: 100 units

Construction Type: New construction

CASTLE COVE CO-OP, South Boston, MA *

Program: 65 units

Construction Type: New construction

CHAUNCY HOUSE, Boston, MA

Program: 87 units

Construction Type: Adaptive reuse of an office building

COBBET HILL APARTMENTS, Lynn, MA

Program: 117 units

Construction Type: Adaptive reuse of a school

CONGREGATIONAL HOMES, Melrose, MA *

Program: 100 units

Construction Type: New construction

CONSTITUTION COOPERATIVE, Charlestown, MA *

Program: 120 units

Construction Type: New construction

COOLIDGE SCHOOL APARTMENTS, Watertown, MA

Program: 38 units

Construction Type: Restoration and adaptive reuse

CURTAIN LOFTS, Fall River, MA

Program: A LEED Certifiable community that provides 97 mixed-income units for the 55+ population

Construction Type: Renovation and adaptive reuse of a historic textile mill

D'YOUVILLE LIFE & WELLNESS COMMUNITY, Lowell, MA *

Program: 208-bed long-term skilled nursing facility with assisted living units, memory care and affordable independent housing for seniors

Construction Type: New construction

DIAMOND SPRING GARDENS, Lawrence, MA

Program: 97 units

Construction Type: Adaptive reuse of a factory combined with new construction

ELLEN S. JACKSON APARTMENTS, Roxbury, MA

Program: 40 units and 5,900 sf of commercial space

Construction Type: New construction

EVERETT NON-PROFIT COOPERATIVE, Everett, MA *

Program: 78 units

Construction Type: New construction

EVERGREEN VILLAGE AT BLOOMINGTON, Bloomington, IN

Program: 115 units

Construction Type: New construction

EVERGREEN VILLAGE AT FORT WAYNE, Fort Wayne, IN

Program: 125 units

Construction Type: New construction

FRED B. ROONEY BUILDING, Bethlehem, PA

Program: 100 units of affordable senior housing

Construction Type: Rehabilitation and adaptive reuse

FORESTDALE PARK ASSISTED LIVING, Malden, MA *

Program: 98 units

Construction Type: Historic restoration and new construction

FOUR FREEDOMS HOUSE, Philadelphia, MA *

Program: 282 units of multifamily housing

Construction Type: Rehabilitation and adaptive reuse

FRANCIS CABOT LOWELL MILL, Waltham, MA

Program: 257 units

Construction Type: Adaptive reuse of a historic mill

FRANKLIN PARK VILLA CO-OP APARTMENTS, Jamaica Plain, MA *

Program: 62 units

Construction Type: New construction

FRANKLIN SQUARE HOUSE, Boston, MA

Program: 193 units

Construction Type: Adaptive reuse of a historic hotel

GOVERNOR APARTMENTS, Boston, MA

Program: 80 units

Construction Type: Moderate rehabilitation of six rowhouses

HAMILTON WADE HOUSING, Brockton, MA

Program: 84 units

Construction Type: Adaptive reuse of a 20th century leather factory

HART'S HILL HEIGHTS, Wakefield, MA *

Program: 23 units

Construction Type: New construction

HEARTH AT FOUR CORNERS, Dorchester, MA

Program: 54 units

Construction Type: New construction

HIGHLANDTOWN PLAZA COOPERATIVE APARTMENTS, Baltimore, MD *

Program: 74 units

Construction Type: Rehabilitation and adaptive reuse of a trolley car garage

ILLYRIAN GARDENS, Worcester, MA *

Program: 80 units

Construction Type: New construction

INDEPENDENCE LANE, Ashland, MA

Program: 64 units of affordable senior housing

Construction Type: New construction

ISLAND CREEK VILLAGE, Duxbury, MA

Program: 204 units of affordable senior housing

Construction Type: New construction

KENMORE ABBEY, Boston, MA

Program: 84 units

Construction Type: Adaptive reuse of a historic hotel

KING JAMES COURT, Orange, MA

Program: 120 units

Construction Type: New construction

KNITTING MILL, Fall River, MA

Program: 129 units

Construction Type: Adaptive reuse of a historic mill

LAFAYETTE PLACE, Fall River, MA

Program: 125 units

Construction Type: Adaptive reuse of an historic convent

LINWOOD MILL APARTMENTS, Northbridge, MA

Program: 75 units with a resident lounge and library

Construction Type: Historic adaptive reuse of a cotton mill

LIVINGSTON SCHOOL APARTMENTS, Albany, NY

Program: 103 units

Construction Type: Adaptive reuse of a historic school

MANOMET PLACE, New Bedford, MA

Program: 147 units for active adults age 55+ with support services

Construction Type: Historic adaptive reuse of a mill building

MARY IMMACULATE PHASE II, Lawrence, MA *

Program: 65 units

Construction Type: New construction

MCBRIDE HOUSE, Boston, MA *

Program: 17 units

Construction Type: New construction

MCNAMARA HOUSE, Brighton, MA *

Program: 80 units

Construction Type: Adaptive reuse and new construction

MONSIGNOR NEAGLE APARTMENTS, Malden, MA *

Program: 109 units

Construction Type: New construction

MOUNT CARMEL APARTMENTS, Worcester, MA *

Program: 80 units

Construction Type: New construction

NEVINS MANOR, Methuen, MA *

Program: 44 units

Construction Type: Adaptive reuse of a historic home for the aged

NORTH FARM SENIOR ESTATES, Somerset, MA

Program: 90 units

Construction Type: New construction

QUINCY TOWER APARTMENTS, Boston, MA

Program: 162 units for active adults age 62+

Construction Type: Moderate rehabilitation

R.H. STEARNS BUILDING, Boston, MA

Program: 150 units with commercial space

Construction Type: Adaptive reuse of an 11-story historic department store

RESIDENCES AT HIGHLAND GLEN, Westwood, MA

Program: 180 units for active adults age 55+

Construction Type: Moderate rehabilitation

RESIDENCES AT MILL 10, Ludlow, MA

Program: 83 units

Construction Type: Adaptive reuse of a historic building located on a textile mill complex

RESIDENCES AT WELLS SCHOOL, Southbridge, MA

Program: 56 affordable units for active adults aged 55+

Construction Type: Adaptive reuse of a middle school

RILEY HOUSE, Hyde Park, MA *

Program: 61 units

Construction Type: Adaptive reuse of a convent and new construction

ROBERT HILL WAY, Ashland, MA

Program: 64 units

Construction Type: New construction

ROSE HILL MANOR, Billerica, MA *

Program: 41 units

Construction Type: New construction

ROSLINDALE NON-PROFIT SENIOR HOUSING,

Roslindale, MA

Program: 80 units of affordable senior housing

Construction Type: New construction

SAINT CECILIA'S HOUSE, Boston, MA *

Program: 123 units

Construction Type: New construction

SAMUEL KELSEY APARTMENTS, Washington, DC

Program: 150 units

Construction Type: Adaptive reuse of a historic bank

SENIOR LIVING AT BELLINGHAM HILL, Chelsea, MA

Program: 60 units

Construction Type: Adaptive reuse of a hospital

SOUTH BOSTON NON-PROFIT COOPERATIVE,

South Boston, MA

Program: 65 units of affordable senior housing

Construction Type: New construction

ST. HELENA'S, Boston, MA *

Program: 74 units

Construction Type: New construction

ST. MARY'S, Lynn, MA *

Program: 99 units

Construction Type: Adaptive reuse of a school building combined with a seven-story addition

ST. MARY'S, Waltham, MA *

Program: 70 units

Construction Type: Adaptive reuse of a school combined with a new addition

ST. THERESE, Everett, MA

Program: 77 units with a health center, six townhomes, and public green space

Construction Type: New construction

STERLING LOFTS, Attleboro, MA

Program: 93 units with adult daycare facility

Construction Type: Adaptive reuse

TABCO TOWER, Towson, MD *

Program: 200 units of multifamily housing

Construction Type: Rehabilitation and adaptive reuse

TABER MILL APARTMENTS, New Bedford, MA

Program: 151 units

Construction Type: Adaptive reuse of a historic early-20th century textile mill

THE ANNE M. LYNCH HOMES AT OLD COLONY PHASE 3C, South Boston, MA *

Program: 55 unit Passive House Certified affordable senior housing

Construction Type: New construction

THE CAR BARN, New Bedford, MA

Program: 114 units

Construction Type: Adaptive reuse of a 20th century trolley car barn

THE CHARLESTOWN, Boston, MA

Program: 48 units of affordable senior housing

Construction Type: Conversion of an assisted living facility

THE COOLIDGE AT SUDBURY PHASE I + II, Sudbury, MA

Program: 120 units

Construction Type: New construction

THE FAIRWAYS, Lakeville, MA

Program: 56 units

Construction Type: New construction

THE HILLS AT PAXTON VILLAGE, Paxton, MA

Program: 50 units of senior housing

Construction Type: New construction

THE MACHON, Swampscott, MA

Program: 38 one-bedroom units of affordable senior housing

Construction Type: Restoration and adaptive reuse of an elementary school and new construction of an addition

THE TYLER, East Haven, CT

Program: 70 units

Construction: Adaptive reuse of a former high school

THE WENTWORTH, Lowell, MA

Program: 40 units and commercial space

Construction Type: Adaptive reuse of a historic mid-19th century boarding house and office building

TOWNHOUSE OF LOWELL, Lowell, MA

Program: 96 units

Construction Type: New construction

UPSALA STREET SCHOOL, Worcester, MA *

Program: 50 units

Construction Type: Adaptive reuse of a schoolhouse

WALKER AVENUE CO-OP, Baltimore, MD *

Program: 88 units

Construction Type: New construction

WALKER SCHOOL APARTMENTS, Taunton, MA

Program: 40 units

Construction Type: Adaptive reuse of a historic school and new construction

WHALER'S PLACE APARTMENTS, New Bedford, MA

Program: 75 units

Construction Type: Adaptive reuse of a historic mill

COMPREHENSIVE PERMIT (CHAPTER 40B) DEVELOPMENTS

25 CASE STREET, Southbridge, MA

Program: 100 one- and two-bedroom affordable multifamily units

Construction Type: Historic preservation and adaptive reuse of mill #13 of the former American Optical Company complex

ALEXAN 3 NORTH, Billerica, MA

Program: 178 unit multifamily development consisting of three buildings

Construction Type: New construction

ASHER'S PATH, Mashpee, MA

Program: 56 units of affordable senior housing

Construction Type: New construction

ATWOOD, Saugus, MA

Program: 300 unit multifamily community

Construction Type: New construction

AVALON ACTON PHASE II, Acton, MA

Program: The addition of 86 direct entry multifamily units and townhomes

Construction Type: New construction

AVALON EASTON, Easton, MA

Program: Mixed-income multifamily community with 246 apartments, 44 townhouse units, clubhouse, and amenity space

Construction Type: New construction

AVALON EASTON PHASE II, Easton, MA

Program: 44 direct-entry multifamily units

Construction Type: New construction

AVALON SUDBURY, Sudbury, MA

Program: Redevelopment of the Raytheon site into 250 units, adjacent to 80,000 sf of retail space

Construction Type: New construction

BARSTOW VILLAGE, Hanover, MA

Program: 66 units of LEED-certified affordable senior housing with a community room, outdoor courtyard, and in-house laundry facility

Construction Type: New construction

BRUSHWOOD FARMS, Lenox, MA

Program: 65 Townhouse units of low income and workforce housing

Construction Type: New construction

CONANT VILLAGE, Danvers, MA

Program: An affordable rental community with 60 apartments, fitness center, and parking

Construction Type: New construction

ELM PLACE, Swampscott, MA

Program: 128 units of mixed-income housing

Construction Type: New construction

GREENWAYS AT WAYLAND, Wayland, MA

Program: 17 senior condominiums

Construction Type: New construction

HANCOCK VILLAGE | SHERMAN + ASHEVILLE BUILDINGS

Brookline, MA

Program: 12 buildings with a combined 377 units and 11 townhomes

Construction Type: New construction

ISLAND CREEK VILLAGE, Duxbury, MA

Program: Expansion of existing multifamily community comprised of 214 units in multiple buildings

Construction Type: New construction

JACOB'S POND ESTATES, Norwell, MA

Program: 44 senior condominium units

Construction Type: New construction

KESSLER WOODS, Brookline, MA

Program: 80 unit multifamily housing community

Construction Type: New construction

LITTLETON DRIVE, Wareham, MA

Program: 92 units of senior and multifamily housing

Construction Type: New construction

MEETING HOUSE AT STOW, Stow, MA

Program: 60 units of senior independent living

Construction Type: New construction

MEETING HOUSE ESTATES, Scituate, MA

Program: 35 units of senior housing

Construction Type: New construction

MODERA MARSHFIELD, Marshfield, MA

Program: Multifamily community consisting of 248 units across 15 buildings

Construction Type: New construction

MODERA NEEDHAM, Needham, MA

Program: Multifamily development with 136 units

Construction Type: New construction

MODERA WESTON, Weston, MA

Program: 180 units including 10 townhomes, 2 historic buildings, and a new clubhouse

Construction Type: New construction and adaptive reuse

NORTH FARM SENIOR ESTATES, Somerset, MA

Program: 90 units of senior housing

Construction Type: New construction

OAKWOOD ESTATES, Swansea, MA

Program: 120 units of senior housing

Construction Type: New construction

PENNROSE CAPE COD, Orleans, MA

Program: 62 units of affordable housing

Construction Type: New construction

PILOT GROVE II, Stow, MA

Program: 30 units of affordable housing

Construction Type: New construction

SHERBORN MEADOWS, Sherborn, MA

Program: 24 senior condominium units

Construction Type: New construction

SOUTHBRIDGE MILLS, Southbridge, MA

Program: 48 one-, two-, and three-bedroom affordable multifamily units

Construction Type: Historic preservation and adaptive reuse of mill #12 of the former American Optical Company complex

THE COOLIDGE AT SUDBURY PHASE I + II, Sudbury, MA

Program: 120 units of affordable senior living

Construction Type: New construction

THE ESPLANADE, Hudson, MA

Program: 140 senior condominium units and 10,000 sf of retail

Construction Type: New construction

THE LEDGES, Ashland, MA

Program: 64 units of affordable senior housing

Construction Type: New construction

THE MACHON, Swampscott, MA

Program: 38 one-bedroom units of affordable senior housing

Construction Type: Restoration and adaptive reuse of an elementary school and new construction of an addition

TURTLE CROSSING, Braintree, MA

Program: 201 condominiums, a community center, swimming pool, and fitness room

Construction Type: New construction

VILLAGE AT NAUSET GREEN, Eastham, MA

Program: 65 units of affordable and workforce housing

Construction Type: New construction

client references

CLIENT REFERENCES

While our work has been honored with many awards, we are most proud of our clients' successes and the firm's long-standing relationships that account for nearly 85 percent of TAT's repeat business. Our ability to understand and draw inspiration from our clients' goals has resulted in a national reputation as a design leader. We encourage you to speak with any of our references.

332 Main Street Associates

340 Main Street
Worcester, MA 01608
Contact: Katie Krock | President
Phone: 508.791.9258

Anthology Senior Living

2401 E 2nd Ave, Suite 500
Denver, CO 80206
Contact: Michael Duggan | Senior Vice President
Development
Phone: 720.805.0497

AvalonBay Communities

58 South Service Road, Suite 303
Melville, NY 11747
Contact: Matt Giammanco | Senior Director Development
Phone: 516.501.6000

AvalonBay Communities

101 Old Short Hills Road, PH1
West Orange, NJ 07052
Contact: Scott Fishbone | Vice President Development
Phone: 732.404.4827

AvalonBay Communities

600 Atlantic Avenue
Boston, MA 02210
Contact: Bill McLaughlin | Vice President
Michael Roberts | Senior Vice President
Phone: 617.654.9500

Balfour Senior Living

183 S. Taylor Avenue, Suite 155
Louisville, CO 80027
Contact: Michael Schonbrun | Founder + CEO
Susan Juroe | Co-Founder + General Counsel
Phone: 303.549.0044

Beacon Communities Development

2 Center Plaza, Suite 700
Boston, MA 02108
Contact: Howard Cohen | Chairman
Dara Kovel | CEO
Phone: 617.574.1100

Berkeley Investments

125 High Street, Suite 531
Boston, MA 02110
Contact: Tony Tanery | Executive Vice President
Phone: 617.439.0088

B'nai B'rith Housing New England *

34 Washington Street
Brighton, MA 02135
Contact: Susan Gittelman | Executive Director
Phone: 617.731.5291

Boylston Properties

800 Boylston Street, Suite 1390
Boston, MA 02199
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Boys & Girls Clubs of Boston *

200 High Street, 3rd Floor
Boston, MA 02110
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CA Ventures

448 North La Salle Drive
Floor 2, Chicago, IL 60654
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Development
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Center Court Partners

955 Massachusetts Avenue
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Phone 914.522.0759

Chestnut Hill Realty

300 Independence Drive
Chestnut Hill, MA 02467
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Conifer Realty

1000 University Avenue, Suite 500
Rochester, NY 14607
Contact: Tim Fournier | Chairman + CEO
Sam Leone | President
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Curry College

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Milton, MA 02186
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Davis

125 High Street, Suite 2111
Boston, MA 02210
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Stephen Davis | Co-President
Michael Cantalupa | Chief Development Officer
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Diversified Funding

63 Atlantic Avenue
Boston, MA 02110
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EA Fish Development

60 William Street, Suite 220
Wellesley, MA 02481
Contact: Matt Mittelstadt | Managing Director
Phone: 781.380.1600

Essence Development

6 Greene Street, Suite 600
New York, NY 10013
Contact: Jamar Adams | Founder + Managing
Principal
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Evergreen Partners

560 NE 44th Street
Oakland Park, FL 33334
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Phone: 954.332.1436

Federal Realty Investment Trust

450 Artisan Way
Somerville, MA 02145
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Phone: 617.684.1516

Fox Development

220 Boylston Street, Unit 1020
Boston, MA 02116
Contact: Robert Fox | President
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Greystar

One Federal Street, Suite 1804
Boston, MA 02110
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Harbor Run Development

103 Border Street
Cohasset, MA 02025
Contact: Ted Lubitz | Principal
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Hart Development Associates

37 Bay State Road
Boston, MA 02215
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Hearth *

1640 Washington Street
Boston, MA 02118
Contact: Mark Hinderlie | President + CEO
Phone: 617.369.1550

Heatherwood Luxury Rentals

58 Vanderbilt Motor Parkway, Suite 100
Commack, NY 11725
Contact: Christopher Capece | President
Phone: 631.775.2220

Housing Partnership Network *

1 Washington Street
Boston, MA 02108
Contact: Lisa Alberghini | Executive Vice President
Phone: 617.720.1999

Jefferson Apartment Group

2227 Washington Street, Suite 302
Newton Lower Falls, MA 02462
Contact: Sandi Silk | Senior Vice President
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Kenney Development

120 Fulton Street
Boston, MA 02109
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Kensington Investment Company

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Contact: Alan Lewis | Founder
Kurt Therrien | President of Real Estate Operations
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LCB Senior Living

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Norwood, MA 02062
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Ed SanClemente | VP of Property Development
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Leggat McCall Properties

10 Post Office Square
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Phone: 617.422.7031

Lendlease

20 City Square, 2nd Floor
Boston, MA 02129
Contact: Nicholas Iselin | General Manager of
Development
Phone: 617.557.6400

Lincoln Property Company

53 State Street, 8th Floor
Boston, MA 02109
Contact: Scott Brown | Executive Vice President
Scott Faber | Senior Vice President
Phone: 617.951.4100

MassHousing

One Beacon Street
Boston, MA 02108
Contact: Crystal Kornegay | Executive Director
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Meredith Management

12 Broadway
Beverly, MA 01915
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Phone: 617.965.2200

Mill Creek Residential Trust

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Boston, MA 02109
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Director of Development
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MRK Partners

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Los Angeles, CA 90045
Contact: Sydne Garchik | Founder + President
Cathy Coler | COO
Phone: 424.999.4581

Hunneman

303 Congress Street
Boston, MA 02110
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Phone: 617.457.3400

Noannet Group

425 Boylston Street
Boston, MA 02216
Contact: Jordan Warshaw | President
Phone: 617.933.7715

Nordblom

71 Third Avenue
Burlington, MA 01803
Contact: Todd Nordblom | President,
Todd Fremont-Smith | Senior Vice President + Director
of Mixed-Use Projects
Phone: 781.272.4000

Nuestra Comunidad Development Corporation *

56 Warren Street, Suite 200
Roxbury, MA 02119
Contact: Diane Clark | Director of Real Estate
Phone: 617.427.3599

Peabody Properties

536 Granite Street
Braintree, MA 02184
Contact: Melissa Fish-Crane | Principal + COO
Betsy Collins | Vice President of Development
Phone: 781.794.1000

Pennrose Properties

50 Milk Street, 16th Floor
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Phone: 857.415.4650

Pennrose Properties

1301 North 31st Street
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Phone: 267.362.8660

Planning Office for Urban Affairs *

84 State Street, Suite 600
Boston, MA 02109
Contact: Bill Grogan | President
Phone: 617.350.8885

Preservation of Affordable Housing *

2 Oliver Street, Suite 500
Boston, MA 02109
Contact: Rodger Brown | Managing Director of
Real Estate
Phone: 617.261.9898

Rees-Larkin Development

179 Boylston Street, Building P
Jamaica Plain, MA 02130
Contact: Jon Rudzinski | Owner
Phone: 617.838.9388

Related Companies

30 Hudson Yards
New York, NY 10001
Contact: Jeffrey Brodsky | Vice Chairman
Michael Antonik | Senior Vice President
Phone: 212.801.1000

Rise Construction Management

12 Ericsson Street
Dorchester, MA 02122
Contact: Jim Grossman | Founder + CEO
Phone: 877.828.7473

RPT Realty

19 W 44th Street, Suite 1002
New York, NY 10036
Contact: David Ortner | Vice President of
Development
Phone: 212.221.1261

Saunders Hotel Group

715 Boylston Street, Suite 310
Boston, MA 02116
Contact: Gary Saunders | Chairman
Phone: 617.425.0900

Silver Street Development Corporation

33 Silver Street, Suite 200
Portland, ME 04101
Contact: Roger Gendron | President
Matt Kesselhaut | Partner + CIO
Phone: 207.780.9800

The Barkan Companies

24 Farnsworth Street
Boston, MA 02210
Contact: Peter Barkan | CEO
Phone: 617.482.5500

The Caleb Group *

491 Humphrey Street
Swampscott, MA 01907
Contact: Debbie Nutter | President + CEO
Phone: 781.592.0770

The Community Builders *

185 Dartmouth Street, 9th floor
Boston, MA 02116
Contact: Bart Mitchell | CEO
Phone: 617.695.9595

The Green Cities Company

1477 NW Everett Street
Portland, OR 97205
Contact: Kelly Saito | Managing Partner
Phone: 503.802.6613

The HYM Investment Group

One Congress Street, 10th floor
Boston, MA 02114
Contact: Thomas O'Brien | Managing Partner + CEO
Douglas Manz | Partner + CIO
Phone: 617.248.8905

The Kraft Group

One Patriot Place
Foxborough, MA 02035
Contact: Ted Fire | Development Vice President
Daniel Krantz | Director of Site Development
Phone: 508.384.4230

The Neighborhood Developers *

4 Gerrish Avenue #2
Chelsea, MA 02150
Contact: Rafael Mares | Executive Director
Phone: 617.545.8301

The Northbridge Companies

71 Third Avenue
Burlington, MA 01803
Contact: James Coughlin | CEO
Wendy Nowokunski | President
Phone: 781.272.2424

Toll Brothers

116 Flanders Road Suite 1200
Westborough, MA 01581
Contact: Ketan Joshi | Director of Development and Construction
Lou Tamposi | Sr. Acquisitions + Development Manager
Phone: 855.897.8655

Trammell Crow Residential

2276 Washington Street, Suite 100
Newton Lower Falls, MA 02462
Contact: Andy Huntoon | Managing Director
Phone: 781.489.3280

Trinity Financial

75 Federal Street
Boston, MA 02110
Contact: Patrick Lee | Principal
James Keefe | Principal
Phone: 617.720.8400

V10 Development

190 Old Colony Avenue
Boston, MA 02127
Contact: John Tocco | Managing Partner + COO
Ricky Beliveau | Managing Partner + CFO
Phone: 781.405.2179

Welltower

233 Wilshire Boulevard
Santa Monica CA 90401
United States of America
Contact: Patrick Keppenne | Assistant Vice President
Phone: 419.360.9086

Wingate Companies

100 Wells Avenue
Newton, MA 02459
Contact: Mark Schuster | CEO
Phone: 617.558.4001

Wingate Healthcare

63 Kendrick Street
Needham, MA 02494
Contact: Scott Schuster | Founder + CEO
Phone: 781.707.9500

WinnCompanies

One Washington Mall, Suite 500
Boston, MA 021098
Contact: Gilbert Winn | CEO
Larry Curtis | President + Managing Partner,
WinnDevelopment
Phone: 617.742.4500

Wood Partners

91 Hartwell Avenue
Lexington, MA 02421
Contact: Jim Lambert | Managing Director
Mark Theriault | Managing Directors
David Moore | Vice President of Preconstruction
Phone: 978.369.8111

Villebridge Real Estate Development

1150 Great Plain Avenue #920056
Needham, MA 02492
Contact: Lars Unhjem | Founder
Phone: 617.418.3575

Daily we are reminded that our mission goes beyond designing buildings. It is a life-work commitment to making the world a better place in which to work, to live, to learn and to grow. It is our obligation, through our work, to demonstrate that TAT is advancing the living standards of people through an improved environment and making the architectural profession of ever-increasing service to society.



Bob Verrier, FAIA NCARB
Founder | 1940–2021



Michael Liu



Mike Binette



Ed Bradford



Gary Kane



Jay Szymanski



Bill Moran



tat

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DEVELOPER:
Planning Office
for Urban Affairs



84 State Street, Suite 600
Boston, MA 02109
Tel. (617) 350-8885
Fax (617) 350-8889

OVERVIEW & MISSION

The Planning Office for Urban Affairs is a foremost non-profit housing developer in the Northeast whose mission is to serve as a catalyst for social justice through its work in housing development, neighborhood revitalization and affordable housing advocacy. Since its inception in 1969, the Planning Office has developed over 3,000 units of elderly, family, mixed income and special needs housing, channeling approximately over \$650 million of investment into developments throughout metropolitan Boston, and POUA currently has nearly 500 additional housing units, across several properties, under active development. The emphasis of the Office is not on numbers, though, but on having a qualitative impact on the harsh reality of housing deprivation for families, middle-income people, the elderly and disabled persons.

This means producing high quality residential developments; forming strong communities characterized by economic, racial, and ethnic diversity for people of all ages and abilities; providing both affordable rental and homeownership opportunities; and undertaking development efforts that address the needs of a wide-ranging population including the most vulnerable among us, as well as those of moderate means.

The Office has also been a leading advocate for affordable housing and strong communities over the years, providing leadership in the development of high quality mixed-income housing; the preservation of existing affordable housing; building permanent supported housing for the homeless; the protection of homeowners and tenants in foreclosure; the creation of additional programs and resources to support affordable housing; and the continued integrity and strength of the State's inclusionary zoning law, Chapter 40B, to help all cities and towns provide housing for our neighbors in need.

The properties developed by the Planning Office for Urban Affairs demonstrate the capacity, drive, knowledge and commitment to social justice that enables the Office to succeed in undertaking complex, mixed-income residential developments that create strong, diverse, and healthy communities. We are most grateful to our development and finance partners with whom we share this success, for their tremendous support over the years.

For additional information on our developments please visit our website at www.poua.org, or call 617-350-8885.

WILLIAM H. GROGAN
PRESIDENT



William H. Grogan, President of the Planning Office for Urban Affairs, has been involved in affordable housing and economic development for over 25 years with a particular focus on complex legal and financial deal structuring to accomplish mission objectives. Bill was appointed President in July 2019 and has been with the Planning Office since 2005. Prior to becoming President, Bill was the Chief Operating Office & General Counsel. He has been involved with the acquisition, financing, construction, and development of nearly 800 units of affordable and mixed-income housing, representing nearly \$300 million of investment throughout the Commonwealth. He is overseeing over 750 units of housing at various stages of development. In this role, he has developed mixed-income, family and special needs housing, and housing for the homeless and vulnerable populations, as well as mixed-use developments. Bill has also been responsible for managing the operations of the Office, including all budget, accounting and financial aspects, working with the Board of Trustees,

managing all corporate entities, and serving as General Counsel on both corporate and development project matters.

Prior to joining the Planning Office, Bill was an attorney at Goulston & Storrs, P.C., a nationally known real estate firm, where he specialized in the areas of affordable housing development and finance. He has also worked with state agencies in the development of bond financing and tax credit programs. As a result, Bill is actively involved in creating innovative approaches to financing affordable and mixed-income, mixed-use developments and has extensive experience utilizing a wide range of federal, state and local sources of financing, including 4% and 9% federal low-income housing tax credits, state housing tax credits, federal and state historic tax credits, and tax increment financing arrangements.

Previously, Bill worked in the Low-Income Housing Tax Credit Program at the Massachusetts Department of Housing and Community Development. Bill received his Juris Doctor degree from Suffolk University Law School, a Masters in Government Administration degree from the University of Pennsylvania and a Bachelor of Arts degree from Trinity College. Bill has been active in the affordable housing industry, having spoken at conferences sponsored by Catholic Charities USA, the American Bankers Association, the American Bar Association Forum on Affordable Housing, the National Association of Affordable Housing Lenders and the National Housing and Rehabilitation Association.

COTE VILLAGE

An award-winning mixed-income family housing development as a neighborhood catalyst

The development of Cote Village by the Planning Office for Urban Affairs, Inc. (POUA), and the Caribbean Integration Community Development (CICD) is a unique partnership between two non-profit organizations who share a commitment and vision to increase affordable and workforce housing opportunities and generate economic benefits in the development of residential and mixed-use projects in Boston's neighborhoods. POUA and CICD have come together to combine their collective expertise and vision in redeveloping the former Cote Ford Dealership into a vibrant and welcoming destination that has converted a vacant, abandoned property into a thriving part of the Mattapan neighborhood. The development is in close proximity to transit, as it is adjacent to the Blue Hill Avenue station on the Fairmount Line. Cote Village was awarded Best Family Project in the Nation through Affordable Housing Finance's 2022 Readers' Choice Awards.

POUA and CICD have created a mixed-income, mixed-use development that is comprised of 76 units of affordable and workforce housing, commercial space, and community-oriented activity space. The 76 homes are part of 5 buildings with a mix of 1-bedroom, 2-bedroom and 3-bedroom units. Cote Village will also include a rental office, community room, ground-floor commercial spaces, and 84 parking spaces. Twelve units are for residents with incomes below 30% of the area median income (AMI). Of these 12 units, 8 units are set aside for formerly homeless individuals and families; 2 units are for residents with incomes below 50% AMI; 42 units are for residents with incomes below 60% AMI; 12 units are for residents with incomes below 80% AMI; 8 units are for residents with incomes below 100% AMI. POUA and CICD have created a true mixed-income community that provides housing opportunities to a diverse range of households in an integrated setting. This new, inclusive community will contribute to the vitality and prosperity of the neighborhood. As such, Cote Village represents an important step in creating new housing opportunities across Boston's communities.



Developers: Planning Office for Urban Affairs
Caribbean Integration Community
Architect: Davis Square Associates
Contractor: Bilt-Rite Construction
Owner's Rep: WaypointKLA, Inc.
Civil Engineer: Nitsch Engineering
Landscape Architect: RBLA Design LLC
Interior Design: A Square Design
Environmental: GZA GeoEnvironmental Inc.
Attorneys: Nixon Peabody; Pulgini & Norton



Management Agent: Maloney Properties, Inc.
Diversity Consultant: Beverley Johnson
Sustainability: New Ecology
Predevelopment Consultant: Nina Schwarzschild
Financing: Commonwealth of Massachusetts:
Department of Housing & Community Development;
Community Economic Dev. Assistance Corporation;
MassHousing Finance Agency
City of Boston: Mayor's Office of Housing;
Neighborhood Housing Trust
Bank of America

ROLLINS SQUARE

Bridging the income gap with broad economic diversity

Rollins Square is a 184-unit mixed-income development built on a two-acre site in Boston's South End neighborhood. Of the units: 20% are low-income rental apartments, 40% are moderate-income first time homebuyer units and 40% are market-rate condominiums. This vibrant community offers high quality housing units for people with a broad range of incomes, providing economic diversity in a neighborhood that had luxury condos and public housing, but little in between. Rollins Square, which opened in 2004, sets a new standard for affordable housing development in the Boston area.

Rollins Square was built on land acquired from the Boston Redevelopment Authority and integrates two distinct styles of the neighborhood in its design: low-scale brick townhouses mimic the South End's attractive 19th century residential streets, while taller buildings with larger windows at the edge of the property are inspired by the neighborhood's warehouse buildings. The grounds include a landscaped park, 6,000 square feet of retail space and an underground parking garage.

Rollins Square has received the FNMA Maxwell Award of Excellence, the Builder's Choice Grand Award, the Charles Edson Tax Credit Award, the Boston Preservation Alliance Award and the John Clancy Award for Socially Responsible Housing. It has been recognized by the Urban Land Institute, Harvard University, Boston College, the University of Pennsylvania and at numerous national conferences.

The development is even innovative in its operations: the condominium association recently installed a co-generation unit for the development, saving \$75,000 per year in energy costs.



Developer: Planning Office for Urban Affairs

Development Consultant: Development Synergies LLC

Architect: Childs, Bertman, Tsekaris, Inc.
CBA Landscape Architects

Contractor: Suffolk Construction

Manager: Maloney Properties, Inc.

Financing:

Bank of America/Fleet Boston Financial

Commonwealth of Massachusetts:

Department of Housing & Community Development

Massachusetts Department of Environmental Protection

MassHousing

City of Boston: *Boston Redevelopment Authority*

Department of Neighborhood Development

Neighborhood Housing Trust

AFL-CIO Investment Trust

Federal Home Loan Bank of Boston

Highland Street Foundation

Photos: Robert Benson



ROLLINS SQUARE

Bridging the income gap with broad economic diversity

John M. Clancy Award for the design of socially responsible housing, 2005

Boston Preservation Alliance, Preservation Achievement Award, 2005

In recognition of notable new construction in harmony with Boston's built environment

Fannie Mae Foundation, Fifteenth Anniversary Maxwell Awards of Excellence, 2004

10th Annual Charles L. Edson Tax Credit Excellence Awards, 2004

Metropolitan/Urban Housing, Honorable mention

Builder's Choice Award, Builder magazine, 2004

HARBOR PLACE

Transformative mixed-income housing in downtown Haverhill

Harbor Place was developed by Merrimack Street Ventures (MSV), a joint venture between The Planning Office for Urban Affairs and the Greater Haverhill Foundation, working together to transform a significant portion of downtown Haverhill. Together, they developed 80 units of affordable and mixed-income housing for households earning from 30% AMI to market-rate and featuring six different income-tiers. Harbor Place includes Harbor Place Residences, the 80 units of housing, with over 12,000 s.f. of ground floor commercial/retail space; a 5-story commercial/retail/educational building that includes two floors for the University of Massachusetts Lowell, a bank headquarters, a media company and office space; a 145-space below-grade parking garage; and a spacious new public plaza, complete with outdoor dining and performance areas, and a grand 15' wide boardwalk that runs the entire length of the site and beyond. The boardwalk is accessed by three pedestrian walkways that run through the development, bringing residents to the Merrimack River in this section of downtown Haverhill for the first time in over eighty years.



Developers:

Planning Office for Urban Affairs
Greater Haverhill Foundation

Architects:

The Architectural Team
Copley Wolff Design Group

Contractor: Dellbrook Construction Company

Owner's Project Manager: WaypointKLA

Attorneys:

Nolan Sheehan Patten LLP
Richard Sheehan, Esq.
Goulston & Storrs P.C.

Property Management:

Peabody Properties

Financing:

Commonwealth of Massachusetts: Exec. Office of
Housing & Economic Dvlpmnt; MassWorks; Dept. of
Housing & Community Dvlpmnt; MassHousing;
Mass. Housing Partnership Fund;
MassDevelopment; CEDAC

City of Haverhill
North Shore HOME Consortium
Bank of America
Pentucket Bank & Haverhill Bank



HARBOR PLACE

An award-winning transformative mixed-income housing development in downtown Haverhill

Urban Land Institute Excellence in Affordable and Workforce Housing Award, 2018

Recognizes best practices in the development of housing that is affordable to people with a broad range of incomes

Multifamily Executive Awards, 2018

Project of the Year: Mixed Income (National award)

PRISM Award For Achievement in Building and Design: Silver Winner, 2017

DEVELOPMENT INFORMATION

DEVELOPMENTS COMPLETED:

Project Name	Location	Completion Date	Housing Units	Development Cost	Type
1 North Ridge	Beverly, MA	1975	98	\$9,300,000	Family, Cooperative
2 Pine Grove	Lexington, MA	1977	16	\$1,050,000	Family, Cooperative
3 Wood Ridge	North Andover, MA	1979	230	\$13,500,000	Family, Cooperative
4 Kent Village	Scituate, MA	1983	64	\$8,000,000	Family, Rental
5 Constitution Coop.	Charlestown, MA	1985	120	\$7,500,000	Elderly, Rental
6 Fenwick House	Lynn, MA	1985	96	\$6,000,000	Elderly, Rental
7 McNamara House	Brighton, MA	1985	80	\$5,000,000	Elderly, Rental
8 Paul Revere House	Boston, MA	1985	24	\$2,500,000	Family, Cooperative
9 St. Helena House	Boston, MA	1986	74	\$7,000,000	Elderly, Rental
10 Collins Non-Profit Apts.	Chelsea, MA	1986	100	\$6,000,000	Elderly, Rental
11 Friendly Garden Coop	Revere, MA	1986	107	\$6,000,000	Elderly, Cooperative
12 Siena Village	Watertown, MA	1987	84	\$14,000,000	Family, Elderly, Ownership, Rental
13 Hesed House	Billerica, MA	1990	12	\$681,500	Special Needs, Rental
14 Mt. Carmel Housing	Worcester, MA	1991	75	\$5,200,000	Elderly, Rental
15 Cardinal's Rehab	Boston, MA	1994	81	\$5,300,000	Family, Homeownership, Scattered Site Rehab
16 St. Cecilia House	Boston, MA	1995	123	\$8,500,000	Elderly, Rental
17 Tuttle House	Dorchester, MA	1995	26	\$1,020,000	Elderly, Supportive Housing, Rental
18 Neagle Apts.	Malden, MA	1996	76	\$5,800,000	Elderly, Rental
19 West End Place	Boston, MA	1997	183	\$32,800,000	Family, Cooperative
20 McBride House	Boston, MA	1998	17	\$2,600,000	People with HIV/AIDS, Rental
21 St. Mary's	Waltham, MA	2001	70	\$5,600,000	Elderly, Rental
22 Rollins Square (Cost includes housing, retail, subsurface garage, park)	Boston, MA	2004	184	\$73,660,000	Family, Homeownership & Rental
23 St. John of God, Phase I ¹	Brighton, MA	2003	213	\$68,900,000	Family, Elderly, Special Needs, Rental
St. John of God, Phase II	Brighton, MA	2006	78	\$10,000,000	
24 St. Jean Baptiste	Lynn, MA	2005	38	\$9,150,000	Family, Homeownership & Rental
25 Riley House	Hyde Park, MA	2005	40	\$7,200,000	Elderly, Rental
26 D'Youville Elderly Housing	Lowell, MA	2009	42	\$8,460,000	Elderly, Rental
27 St. Aidan (Cost includes subsurface garage, historic, conservation easement)	Brookline, MA	2009	59	\$36,850,000	Family, Homeownership & Rental
28 Hayes Building	Haverhill, MA	2010	57	\$20,350,000	Family, Rental
29 Upton Street	Boston, MA	2011	19	\$10,167,642	Supportive Housing, Rental
30 Rose Hill Manor	Billerica, MA	2011	41	\$11,240,000	Elderly, Rental
31 Barstow Village ¹	Hanover, MA	2012	66	\$11,700,000	Elderly, Rental
32 St. Joseph's	Salem, MA	2013	51	\$20,050,000	Family, Rental
33 Hadley Apartments	Worcester, MA	2013	45	\$20,050,000	Family, Rental
34 Uphams Crossing	Dorchester, MA	2015	80	\$36,750,000	Family, Rental
35 The Apartments at 165 Winter	Haverhill, MA	2015	12	\$5,075,000	Family, Rental

DEVELOPMENT INFORMATION

DEVELOPMENTS COMPLETED:

Project Name	Location	Completion Date	Housing Units	Development Cost	Type
³⁶ Harbor Place ² (Cost includes commercial building, subsurface garage, public plaza and boardwalk)	Haverhill, MA	2016	80	\$71,000,000	Family, Rental
³⁷ Sancta Maria House	Boston, MA	2017	9	\$1,750,000	Special Needs, Rental
³⁸ Kennedy Building Apartments	Hanover, MA	2018	37	\$15,745,000	Family, Supportive Housing, Rental
³⁹ The Union at 48 Boylston ³ (Cost includes administrative office and business venture space)	Boston, MA	2018	46	\$34,650,000	Family, Individual, Rental
⁴⁰ The Ledges (Robert Hill Way) ¹	Ashland, MA	2020	64	\$20,750,000	Elderly, Rental
⁴¹ Cote Village Townhomes ⁴	Boston, MA	2021	24	\$15,375,000	Elderly, Rental
⁴² Cote Village ⁴	Boston, MA	2022	52	\$33,250,000	Family, Rental
⁴³ 872 Morton Street ⁴	Mattapan, MA	2023	40	\$22,336,500	Family, Rental/Homeownership
⁴⁴ Sanctuary Place	Wrentham, MA	2023	9	\$2,450,000	Special Needs, Rental
TOTAL Completed			3,142	720,260,642	

DEVELOPMENTS UNDERWAY:

Project Name	Location	Projected Completion Date	Housing Units	Development Cost	
¹ Constitution Inn ³	Boston, MA	2024	100	\$51,750,000	Family, Individual, Rental
² 150 River Street ⁴	Mattapan, MA	2024	30	\$13,815,000	Elderly, Rental
³ 41 LaGrange ³	Boston, MA	2025	126	\$127,000,000	Family, Individual, Rental
⁴ Harbor Place Phase 2 ²	Haverhill, MA	2025	57	\$26,275,000	Family, Rental/Home Ownership
⁵ Thatcher Street 40R Phase 1	Brockton, MA	2025	121	\$45,075,000	Family, Rental, Homeownership
⁶ Drexel Village	Boston, MA	2026	217	\$136,570,000	Family, Rental, Homeownership
⁷ Thatcher Street 40R Phase 2	Brockton, MA	2028-2030	39	\$30,200,250	Elderly, Rental
TOTAL Underway			690	\$430,685,250	
TOTAL			3,832	\$1,150,945,892	

1. with EA Fish Associates

2. with Greater Haverhill Foundation

3. with St. Francis House

4. with Caribbean Integration Community Development



Mission: To empower and support people with developmental disabilities by offering high- quality, individualized opportunities that foster independence and community inclusion.

Who we are:

- Charles River Center began as a preschool in 1956. Long recognized as a leading agency in Massachusetts where excellence is pursued, and high standards are maintained.
- \$43 million dollar operating budget.
- Funding sources include the Department of Developmental Services, Mass Health, Mass Commission for the Blind, Mass Rehabilitation Commission, and private pay.
- Provide services to adults and children with intellectual and developmental disabilities, and autism.
- Launched Wings for Autism® in 2011 to help children with autism ease the stress of flying.
- More than 500 full- and part-time staff.
- More than 500 individuals served each day.
- More than 1000 individuals and families served each year.
- 89 cents of every dollar is spent on serving individuals.
- Accreditations from: MA Department of Developmental Services and Commission for the Accreditation of Rehabilitation Facilities (CARF)
- Affiliations with: Arc of Massachusetts, Association of Developmental Disabilities Providers, Advocacy for Autism of MA and Autism Coalition of MA.

What we do:

Day Services

- Day Habilitation is a medical/therapeutic program. Serving 96 adults ages 22 and over
- Employment Services offers job training and placement; Community Based Day Supports foster skill building for independence. Serving 136 adults ages 22 and over.

Residential Services

- 32 homes and 22 apartments located throughout Norfolk, Middlesex, Bristol and Plymouth counties that offer support levels ranging from 15 hours a day to 24 hours a day, 7 days a week. Serving 138 adults ages 22 and over.

Family and In-home Support Services

- In-home support services provide flexible support to maximize independence in their own home. Serving 22 adults ages 22 and over.
- Weekend respite for individuals; after-school and after-work programs; in-home respite services; in-home behavioral services; school vacation programming for children; education and training programs and seminars for family members. Serving 375 children and adults ages 7 and over.
- Adult Family Care supports families caring for a loved one with disabilities in their home. Serving 42 adults ages 18 and over.

Exhibit 5: Community Support

- o Exhibit 5.a Letters of Support
- o Exhibit 5.b Reports

December 17, 2024

Community Preservation Committee

1471 Highland Av.
Needham, MA 02492

Dear Community Preservation Committee,

I am the mother of a 32-year-old profoundly autistic man, and also I am special needs estate planner. I am writing to express my strong support for Charles River Center's proposed development of an affordable housing community that I believe will provide a vital resource for adults with disabilities in the Metro Boston region of Massachusetts. This project represents a meaningful opportunity to address critical housing needs while fostering independence, dignity, and inclusion for individuals who are too often overlooked in our society.

As the mother of a disabled adult child, I am acutely aware of the challenges that adults with disabilities face in finding supported, affordable housing that meets their unique needs. The Charles River Center has demonstrated a proven track record of delivering high-quality, supportive housing solutions combined with wrap-around services that empower residents to lead fulfilling, independent lives.

This development goes beyond simply providing housing. It incorporates:

- **Integrated design elements** that ensure accessibility and inclusion for individuals with diverse physical and cognitive abilities.
- **Comprehensive wrap-around services**, including case management, vocational training, and mental health supports, which are essential for residents to successfully transition to and maintain independent living.
- **A community-centric approach** that fosters social connection and integration with the surrounding neighborhood, reducing stigma and promoting understanding.

The proposed project aligns seamlessly with our community's goals of creating sustainable, equitable, and inclusive housing opportunities. Furthermore, it reflects the mission of the Community Preservation Act by addressing affordable housing needs while enhancing the overall quality of life for a vulnerable population.

I urge the Community Preservation Committee to prioritize this project and allocate the necessary funding to ensure its successful completion. By doing so, you will be investing in a transformative initiative that not only provides housing but also builds resilience, independence, and hope for some of our community's most deserving members.

Thank you for your consideration and your ongoing commitment to the betterment of our community. Please do not hesitate to contact me by either phone or email if you would like to discuss this further or require additional information.

Sincerely,

Karen B. Mariscal



*For people with intellectual
and developmental disabilities*

The Arc of Massachusetts
217 South Street
Waltham, MA 02453-2710
781.891.6270
arcmass@arcmass.org
www.arcmass.org

Achieve with us.

Janet Sweeney Rico, Ph.D.
President

Maura Sullivan, MPA
Chief Executive Officer

12/27/24

Community Preservation Committee
1471 Highland Ave
Needham, MA 02492

Dear Members of the Community Preservation Committee,

On behalf of The Arc of Massachusetts, I am writing to express our unequivocal support for an affiliate, the Charles River Center their proposed integrative supported housing development. This initiative is not only innovative but urgently needed to address the critical housing shortage faced by individuals with intellectual and developmental disabilities, including autism, in our state.

Across Massachusetts, approximately 36,000 adults with intellectual and developmental disabilities are living with aging caregivers. Many of these families face the imminent challenge of finding safe, affordable, and supportive housing when they are no longer able to provide care. Yet, the current housing infrastructure is woefully inadequate, with long waitlists and limited options that often isolate individuals from their communities. This project directly addresses these gaps by offering a new model of integrative, community-based living.

From The Arc of Massachusetts' perspective, this initiative stands out for several reasons:

- **Holistic Design:** By combining affordable housing with tailored supports, the project ensures residents can live independently while accessing the services they need to thrive. This approach aligns with national best practices for disability-inclusive housing.

The Arc in Massachusetts Includes the Following Local Chapters:

Berkshire County • Bristol County • Greater Brockton • Center of Hope Foundation • Charles River Center • Communitas
Community Connections • Greater Haverhill-Newburyport • Incompass HS • Lifeworks. • Minute Man • Northeast
Opportunities for Inclusion • The Arc of Opportunity • Plymouth and Upper Cape • South Shore • The United Arc

- **Integration, Not Segregation:** This housing development fosters meaningful inclusion, embedding individuals with disabilities in a broader neighborhood setting where they can actively participate and contribute to their community.
- **Critical Demand:** According to the National Council on Disability, over 70% of adults with disabilities want to live in community-based settings, yet fewer than 12% have access to such opportunities. This project exemplifies the type of housing solution that can meet this overwhelming demand.

The Charles River Center has long demonstrated their expertise and commitment to serving individuals with disabilities. Their deep understanding of the unique needs of this population and their collaborative approach ensure this development will succeed in both design and execution.

We believe this project aligns with the mission of the Community Preservation Act by addressing critical affordable housing needs while fostering equity and inclusion. Furthermore, its success will serve as a model for other communities seeking to replicate this innovative approach.

The Arc of Massachusetts strongly encourages the Community Preservation Committee to support this transformative initiative. Your investment will not only address an urgent housing crisis but also advance a vision of Massachusetts as a leader in inclusive community development.

I welcome the opportunity to discuss this project further or provide additional data on housing needs for individuals with disabilities in Massachusetts. Please feel free to contact me directly at 781 530-8274 or sullivan@arcmass.org.

Thank you for your consideration and your commitment to building stronger, more inclusive communities.

Sincerely,

A handwritten signature in cursive script that reads "Maura Sullivan".

Maura Sullivan, CEO

The Arc of Massachusetts

400 TradeCenter, Suite 5900.
Woburn, MA 01801
617-604-4362
www.autismhousingpathways.org



December 20, 2024

Community Preservation Committee
1471 Highland Av.
Needham, MA 02492

Dear Members of the Community Preservation Committee,

My name is Catherine Boyle, and I am the president of Autism Housing Pathways, a Massachusetts non-profit that works to increase housing options for adults with developmental disabilities.

I am writing to express my strong support for Charles River Center's proposed development of a state-of-the-art, integrated affordable housing community that will provide a vital resource for adults with disabilities in the Metro Boston region of Massachusetts. Our research has shown that the demand for supported affordable housing for adults with autism could be 600+ new units per year statewide. This project represents a meaningful contribution to addressing this critical housing need, while fostering independence, dignity, and inclusion.

As someone who conducts over 150 individual housing counseling appointments per year, I am acutely aware of the challenges that adults with disabilities face in finding safe, affordable housing that meets their unique needs. The Charles River Center has a proven track record of delivering high-quality, supportive housing solutions combined with wrap-around services that empower residents to lead fulfilling, independent lives.

This development goes beyond simply providing housing. It incorporates:

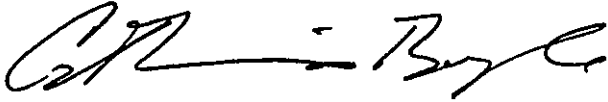
- **Integrated design elements** that ensure accessibility and inclusion for individuals with diverse physical and cognitive abilities. Disability-friendly design elements play a critical role in helping residents to live independently.
- **Comprehensive wrap-around services**, including case management, vocational training, and mental health supports, which are essential for residents to successfully transition to and maintain independent living.
- **A community-centric approach** that fosters social connection and integration with the surrounding neighborhood, reducing stigma and promoting understanding.

The proposed project aligns seamlessly with our community's goals of creating sustainable, equitable, and inclusive housing opportunities. Furthermore, it reflects the mission of the Community Preservation Act by addressing affordable housing needs while enhancing the overall quality of life for a vulnerable population. Projects like this one represent the true answer to homelessness prevention.

I urge the Community Preservation Committee to prioritize this project and allocate the necessary funding to ensure its successful completion. By doing so, you will be investing in a transformative initiative that not only provides housing but also builds resilience, independence, and hope for some of our community's most deserving members.

Thank you for your consideration and your ongoing commitment to the betterment of our community. Please do not hesitate to contact me at 617-604-4362 or ccampboyle@autismhousingpathways.org if you would like to discuss this further or require additional information.

Sincerely,

A handwritten signature in black ink, appearing to read "Catherine Boyle". The signature is fluid and cursive, with the first name "Catherine" written in a larger, more prominent script than the last name "Boyle".

Catherine Boyle
President
Autism Housing Pathways, Inc.



December 27, 2024

Community Preservation Committee
1471 Highland Ave.
Needham, MA 02492

Dear Members of the Community Preservation Committee,

On behalf of the North Hill Retirement Community in Needham, I am writing to express our enthusiastic support for the Charles River Center's innovative initiative to develop an integrated, supportive, and affordable housing community on East Militia Heights. As a leading provider of assisted living services in the area, we recognize the vital importance of creating housing solutions that address the diverse needs of our shared community, particularly for those who require affordable and supportive environments.

The Community Preservation Committee's mission to develop this housing community aligns closely with its core values of fostering inclusion, independence, and dignity for all individuals, regardless of their circumstances. By integrating supportive services with affordable housing, you are addressing critical gaps in housing accessibility while also promoting stability and well-being for residents who may otherwise face significant challenges.

At North Hill we have witnessed firsthand how access to affordable housing paired with supportive services can transform lives. By creating an adjacent community that complements our own facilities, you are not only enhancing the quality of life for future residents but also fostering a sense of collaboration and mutual benefit between our organizations and the broader town community. We envision a future where this development strengthens social ties, promotes shared opportunities, and contributes to the overall well-being of the town's residents.

Please know that North Hill Retirement Communities stands ready to support the Charles River Center's efforts in any way we can. Whether through advocacy, resource sharing, or exploring potential partnerships, we are eager to contribute to the success of this development.

Thank you for your vision and commitment to improving the lives of those in our community. Together, we can create a town that exemplifies compassion, inclusivity, and resilience.

Sincerely,

Joseph Frias
President and CEO
North Hill Retirement Communities, Inc.



Supporting evidence: Reports and references

In Massachusetts, there is a significant unmet need for housing among individuals with autism and intellectual and developmental disabilities (I/DD). A 2017 statewide survey conducted by the Massachusetts Autism Commission highlighted the scarcity of affordable supportive housing for adults with autism and I/DD. The survey emphasized the necessity for increased housing options that offer appropriate support services to this population.

Massachusetts Government

Autism Housing Pathways, a Massachusetts-based organization, reports that approximately 80% to 85% of individuals with autism in the state are likely to require some form of affordable, supported housing beyond what is currently provided by the Department of Developmental Services (DDS). This indicates a substantial gap between the existing housing provisions and the actual needs of the community.

Massachusetts Housing Think Tank

Furthermore, a 2022 survey by Autism Housing Pathways revealed that many individuals with autism and their families are concerned about future housing arrangements, expressing a desire for more independent living situations with appropriate supports. The survey underscored the importance of expanding housing options to accommodate the diverse preferences and needs of this population.

Autism Housing Pathways

The lack of adequate housing options not only affects the quality of life for individuals with autism and I/DD but also places additional stress on families and caregivers. Addressing this unmet need requires a concerted effort from policymakers, service providers, and community organizations to develop and implement housing solutions that are both affordable and supportive.



CHARLES RIVER
HEIGHTS

Charles River Heights

Aerial View



Charles River Autism Supportive Housing
Hawthorn, MA | August 07, 2024 | #23022 | © The Institutional Trusts, Inc.



Mission: To provide inclusive housing and a full spectrum of supportive services that empower individuals with disabilities to live independently, achieve their personal goals, and actively participate in their communities.

Current Challenges: A considerable percentage of adults with ASD face challenges in achieving independent living. Studies indicate that only about 5% of autistic adults live independently, while 37% require overnight care. This underscores a significant gap of **58%** of individuals who need support services necessary to foster autonomy among this population.

Proposed Solution: By offering inclusive housing and flexible, integrated support services—including assistance with daily living activities, vocational training, and social skills development—we can empower adults with ASD to access their communities, gain employment and live more independently.

This impacts not only benefits individuals but also enhances the broader community by fostering diversity and inclusion.

Charles River Heights

Creating **86** new affordable housing units to attract and retain households earning at or below 30% to 80% of the Area Median Income (AMI), including elderly residents, individuals with disabilities, young professionals, and public/private employees essential to the town's services.

43 handicapped-accessible units with integrated supportive services, including:

- Remote monitoring for overnight support Clinical services
- Health and safety monitoring
- College navigation
- Career exploration
- Job support
- Adult companion
- Peer support services
- Transportation assistance

Five affordable apartments for Charles River Center staff to provide emergency support after hours.

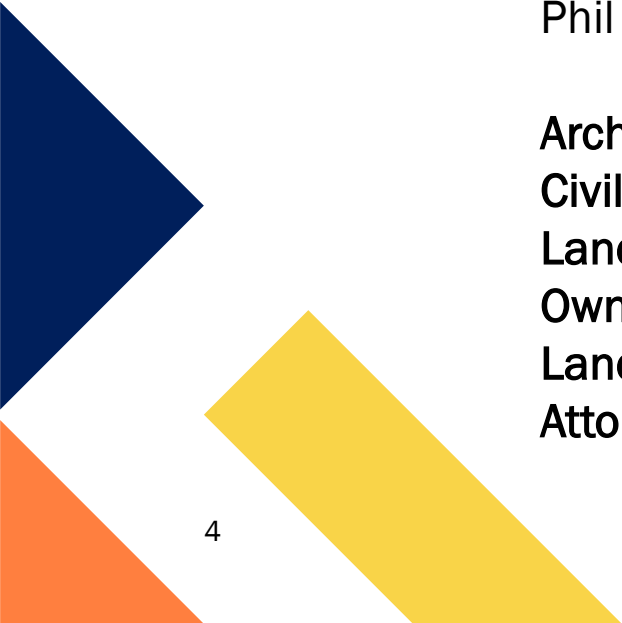
Community Center: 4,400 sf- to bring the community to us

- Commercial grade kitchen and dining space (events)
- Office space
- Recreation Room
- Computer stations
- Gym

Green space with walking trails
Covered outdoor space

Model Community: Establishing a creative, inclusive model that other municipalities across the state and beyond can replicate.

Project Team Members



Developer:

Planning Office for Urban Affairs

Project team members:

Anne-Marie Bajwa, President and CEO, Charles River Center

William Grogan, President, Planning Office for Urban Affairs

Phil Crean, Project Manager, Planning Office for Urban Affairs

Architect: The Architectural Team (TAT)

Civil and Traffic Engineer: VHB

Landscape Architect: RBLA Design

Owner's Representative: Waypoint KLA

Land Use Attorney: Goulston and Storrs

Attorney: Nolan Sheehan Patten

Overview of POUA

Mission

Develop high-quality housing where people can live with dignity and respect in homes that they can afford, in order to create inclusive and vibrant communities

Overview

- Formed in 1969 by the Archdiocese of Boston
- Affordable, workforce and mixed-income housing
- Commercial and community development
- Neighborhood and community revitalization
- Focus on building vibrant and inclusive communities

Experience

- Completed over 3,000 units to date, with financing over \$650M
- Developed over 1,400 housing units across a variety of Boston neighborhoods
- Provided for a wide range of affordable rental & homeownership opportunities throughout a variety of income levels



Project Design



Building A

- 3 story
- 67,000 gsf
- (15) CRC studios with common area
- (10) CRC 1 bedrooms with common area
- (33) 1-bedroom units
- (10) 2 bedroom units
- **68 units total**
- 4,400 sf Community Space
- 1,900 sf Lobby / Amenity

Building B, C, D

- 1 story
- 4,000 gsf
- (6) CRC studios with common area

Building A
 3 story
 67,000 gsf
 (15) CRC studios with common area
 (10) CRC 1 bedrooms with common area
 (33) 1 bedroom units
 (10) 2 bedroom units
 68 units total

 4,400 sf Community Space
 1,900 sf Lobby / Amenity

Building B
 1 story
 4,000 gsf
 (6) CRC studios with common area

Building C
 1 story
 4,000 gsf
 (6) CRC studios with common area

Building D
 1 story
 4,000 gsf
 (6) CRC studios with common area

 61 parking spaces





Building A | Ground Floor Plan



- Studio
- 1 bedroom
- 2 bedroom

- CRC units
- 5 - studio
- 5 - 1 bedroom

- Non CRC units
- 5 - 1 bedroom
- 2 - 2 bedroom

- Total
- 5 - studio
- 10 - 1 bedroom
- 2 - 2 bedroom
- 17 units



Studio
1 bedroom
2 bedroom

CRC units
5 - studio
5 - 1 bedroom

Non CRC units
11 - 1 bedroom
4 - 2 bedroom

Total
5 - studio
16 - 1 bedroom
4 - 2 bedroom
25 units



Studio
1 bedroom
2 bedroom

CRC units
5 - studio

Non CRC units
17 - 1 bedroom
4 - 2 bedroom

Total
5 - studio
17 - 1 bedroom
4 - 2 bedroom
26 units



(5) CRC studio units with shared community room



Aerial View



Pedestrian Level View



Pedestrian Level View



Rental Income by Unit Type

Low-Income (rental assisted)

	Contract Rent	Utility Allowance	Total Gross Rent	# of Units
0 bedroom	\$2,132	\$31	\$2,163	33
1 bedroom	\$2,247	\$41	\$2,288	10
2 bedrooms	\$2,907	\$61	\$2,968	7

MRVPs and Section 8s have a fixed gross rent. Utilities are paid by owner and contract rent is increased accordingly.

Low-Income (below 60%)

	Contract Rent	Utility Allowance	Total Gross Rent	# of Units
1 bedroom	\$1,703	\$41	\$1,744	25
2 bedrooms	\$2,032	\$61	\$2,093	1

Rental Income by Unit Type

Other Income 80% AMI

	Contract Rent	Utility Allowance	Total Gross Rent	# of Units
1 bedroom	\$2,285	\$41	\$2,326	3
2 bedrooms	\$2,730	\$61	\$2,791	2

Market Rate (CRC Staff occupancy)

	Contract Rent	Utility Allowance	Total Gross Rent	# of Units
1 bedroom	\$2,288	\$0	\$2,288	5

Funding Sources For Construction

Fiscal Year	Total Project Estimated Expenditures	CPC Funds Requested	Other Funding Sources (Amount & Source)
FY '25	\$250,000 (pre-development)	\$0	\$250,000-sponsor financed until construction loan closing
FY '26	\$550,000 (pre-development)	\$0	\$550,000-sponsor financed until construction loan closing
FY '27	\$31,799,957	\$3,150,000	\$13,493,998- Construction loan (of which, \$11.4M will convert to permanent debt) \$2,175,783- Equity from sale of Federal and State Tax Credits \$4,592,174- CRC loan \$500,000- MassHousing Workforce Program \$10,000,000- EOHLC
FY '28	\$17,376,552 (construction completion)	\$350,000	\$15,912,767- Equity from sale of Federal and State Tax Credits \$1,113,785- DOER/ MassSaves
FY '29	\$0	\$0	\$0
TOTAL	\$49,976,509	\$3,500,000	\$46,476,509

Various Funding Sources & Risk

EOHLC- Tax Credits and subordinate debt

- Application Q1 2026
- Funding award Q2/3 2026
- **Risk:** Funding award may be delayed for 6 months to a year, which would set back the project and increase construction costs.

MassHousing Permanent Loan and Subordinate Debt

- Application Q3 2026
- **Risk:** Minimal. Project contemplates a construction to permanent loan. The loan would convert to permanent debt upon completion and sustained occupancy.

Dept Of Energy Resources

- Application Q4 2025
- Funding award Q2 2026
- **Risk:** This grant is competitive and may not be funded. We would seek additional sustainability and green building funding offered by other federal and state agencies.

MassSaves

- Application Q1 2026
- Award : After Passive House certification
- **Risk:** Project may not achieve Passive House certification. Our project architect has substantial experience designing buildings to meet and achieve Passive House.

Key Milestone Dates

Timeline	Milestone
Spring/Summer 2025	Permitting and Local Development Approvals
Fall 2025	Submit OneStop Pre-Application to EOHLC Winter Funding Round
Q1 2026	Submit OneStop Application to EOHLC Winter Funding Round
Q2 2026	EOHLC funding awards
Q3 2026	• General Contractor prequalification process • Financing partner prequalification process • Completion of Construction Documents • Application to Department of Energy Resources and MassSaves
Q4 2026	• General Contractor Selection • Lender and Investor Selection • DOER and MassSaves funding award
Q1 2027	• Construction financing closing • Construction Start (approximately 15 months)
Q2 2028	• Completed Construction • Certificate of Occupancy

Questions & Comments

Aerial View



Charles River Autism- Supportive Housing
Hawthorne, MA | August 07, 2024 | #23002 | ©TheArchitectureTeam, Inc.