



**Response to City of Newton  
Request for Proposal #18-17  
160 R Stanton Avenue**

**Jewish Community Housing for the Elderly  
October 5, 2017**

**JCHE**  
JEWISH COMMUNITY  
HOUSING FOR THE ELDERLY

**COPY**



*Board Chair*  
Bernard E. Kaplan

*President & CEO*  
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[jche.org](http://jche.org)

October 5, 2017

Mayor Setti Warren  
City of Newton  
1000 Commonwealth Avenue  
Newton, MA 02459

Dear Mayor Warren,

In response to the City of Newton's Request for Proposal #18-17, Jewish Community Housing for the Elderly (JCHE) is thrilled to submit this proposal to develop affordable housing on the Water Tower parcel at 160R Stanton Ave. This site presents a remarkable opportunity to create much-needed affordable senior housing with supportive services, and I thank the City for advancing this project as part of your visionary and strategic Newton Leads 2040 Housing Strategy. This holistic approach to housing and services is at the core of JCHE's vision for seniors to "age in community" and we would be honored to work together to expand our impact in Newton.

Through our four existing locations with 1,200 apartments, JCHE is demonstrating that affordable housing can create opportunities for "aging in community," in which seniors lead a full life of connection and purpose. JCHE raises approximately \$1.6 million each year to support an unbelievable array of programs and services that are available to our residents. Our role in every aspect of service delivery and property ownership and over 50 years of organizational experience means we provide each function with great skill, sensitivity and coordination.

Our proposal for 160R Stanton Ave. will significantly expand JCHE's existing Golda Meir House, which already has 199 units of affordable senior housing with extensive programming and services. We envision a physical connection between the new and old buildings in order to integrate new residents into this vibrant senior community and incorporate the building's management into a highly efficient operation. By joining JCHE's Golda community, new residents will benefit from efficiencies, capacity and resources otherwise unavailable to a standalone affordable housing building.

For this project, we have assembled a team with a depth of experience in affordable housing design, construction, property management, and service delivery. Our architect, PCA, has a proven track record of collaboration with JCHE including the ongoing 370 Harvard St. project in Brookline. Our General Contractor, Colantonio, is leading the current renovation of Golda Meir House – a complex modernization of an occupied building – without delays or cost overruns and a respectful and responsive relationship with Golda's neighbors. In addition, our supportive service provider Hearth is partnering



# JCHE

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with JCHE on the Weinberg House in Brighton, an expansion of our Brighton campus that includes units for chronically homeless individuals, that is currently under construction. With these collaborative relationships and our team's knowledge of the project context, we are confident that our team will work efficiently and effectively to deliver a transformative project once gaining site control.

Through our work at Golda Meir House, our team has an unmatched knowledge of the site and depth of relationships with the neighbors and other stakeholder groups. Our proposal outlines an open, transparent process for engagement with the community and other stakeholder groups, through which we will work with stakeholders and the City of Newton team to determine a desirable and feasible development program and other aspects of the building design. We commit to working with the City of Newton to achieve its requirements for the site, including the eligibility of units for the Subsidized Housing Inventory and inclusion of units for chronically homeless individuals.

Again, we are very excited about this opportunity to support the City of Newton's goals for affordable housing while advancing JCHE's vision for "aging in community." I look forward to further discussing our team's qualifications and approach to this project and am always available to answer any questions you may have.

Sincerely,



Amy Schectman  
President and CEO



Ulin House Leventhal House Genesis House Golda Meir House Coleman House Shillman House

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## Statement of Qualifications

# Team Overview



## **Jewish Community Housing for the Elderly Lead Developer and Property Manager**

Jewish Community Housing for the Elderly is a well-established non-profit provider of senior supportive housing in the Greater-Boston area. Since its founding in 1965, JCHE has developed eight distinct properties and 1,200 units, all of which we own, manage and provide services to: Ulin House, Leventhal House and Genesis House make up our Brighton Campus. We have two properties in Newton, Golda Meir House and Coleman House, and our most recent property, Shillman House, is in Framingham. Two projects are currently under development: the 61-unit Harry and Jeanette Weinberg House in Brighton and the 62-unit 370 Harvard Street in Brookline. Jewish Community Housing for the Elderly III, Inc. – a wholly-owned and controlled affiliate of JCHE – will be the developer for 160R Stanton Ave.



## **Prellwitz Chilinski Associates, Inc. Architect**

Since 1982, PCA's thoughtful, award-winning design has generated projects which thrive and bring lasting value to the community. Based in Cambridge, PCA has enjoyed steady growth over its three-decade history and has become greater Boston's 14th largest design firm. PCA's size, along with its collaborative culture and cutting-edge technology, allows the firm to commit extensive resources to its projects while retaining the accessibility and focus of a smaller organization. PCA is currently working with JCHE on 370 Harvard Street in Brookline, and its recent projects in Newton include the 171-unit Washington Place and 150-unit Mill Village.



## **Colantonio Inc. Pre-Construction Consultant and General Contractor**

Colantonio Inc. is a \$60 million construction manager and general contractor that specializes in complex renovations in the historical restoration, affordable housing, municipal and academic markets. Colantonio currently employs 44 people, 16 management and administrative personnel in our office in Holliston and 28 people in the field. Colantonio is currently JCHE's general contractor for the renovation of Golda Meir House and has additional experience in Newton including Haywood House and FA Day Middle School.

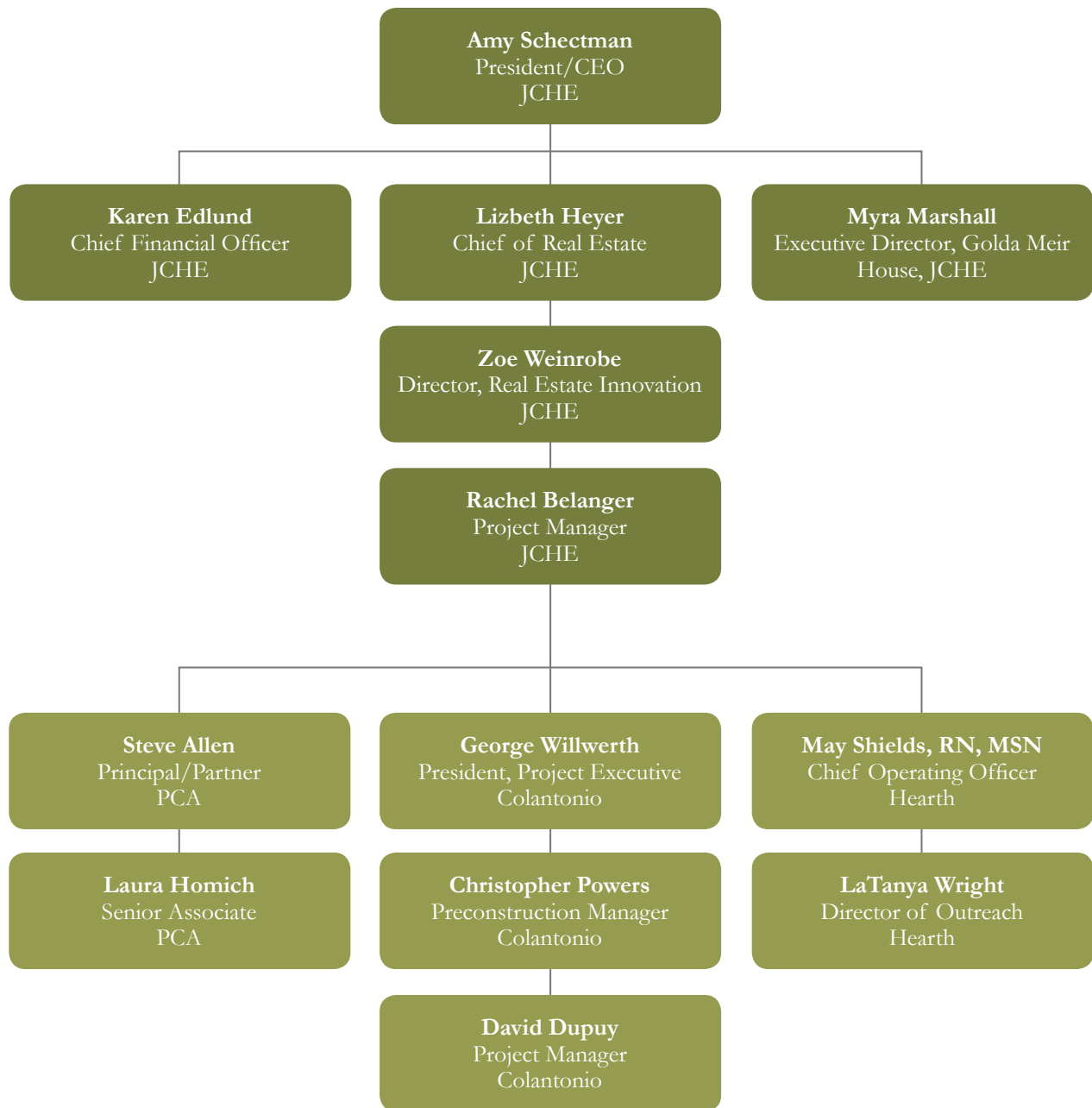


## **Hearth, Inc. Supportive Services Provider**

Hearth is a non-profit organization dedicated to the elimination of homelessness among the elderly. This mission is accomplished through a unique blend of prevention, placement, and housing programs all designed to help elders find and succeed in homes of their own. All housing operated by Hearth provides a creative array of supportive services that assist residents to age with dignity, regardless of their special medical, mental health, or social needs. Hearth is currently partnered with JCHE to provide services in the Weinberg House in Brighton that is currently under construction.



# Team Composition



**Amy Schectman**  
*President & CEO*

8/10 – Current **President and CEO, Jewish Community Housing for the Elderly**  
Lead and oversee all aspects of managing innovative, high-quality senior supportive housing organization with 1200 units in 8 buildings. Actions include:

- Launched agency-wide culture change process to modernize management systems and infuse spirit of empowerment into all operations, based on concept of mutual respect, mutual accountability.
- Restructured reporting relationships to lodge decision-making in staff closest to the residents—increasing authority and accountability in site staff.
- Initiated and conducted strategic planning process to define JHCE’s direction for the future, including bringing in outside speakers from other cities and countries to educate board and staff on innovations elsewhere.
- Re-financed Ulin House to allow our oldest property to be modernized.
- Opened Shillman House, JCHE’s first mixed-income community.
- Presented JCHE’s “aging in community” model at several national conferences and at The White House.

3/07 – 8/10 **Associate Director for Public Housing and Rental Assistance, Department of Housing and Community Development, Commonwealth of MA.**

Manage 90-person, \$300 million division overseeing 242 local housing authorities with 50,000 units and 9 regional agencies providing 25,000 rental vouchers and homelessness prevention.

- Transformed division from bureaucratic regulator to forward-thinking, pro-active partner:
  - *Restructured* the way Division works to promote entrepreneurial behavior and innovation, efficiencies in service delivery, collaborations across prior division silos and skills development to enhance performance.
  - *Restored partnership* between the state and local housing agencies--renewing honest communication, unleashing local creativity and generating enthusiastic support for gubernatorial priorities.
  - *Engaged a blue ribbon panel* of private, nonprofit and public sector experts to determine the true cost of operating and preserving the public housing portfolio.

- *Revolutionized capital planning* with comprehensive web-based system to target funding and measure the effectiveness of capital projects.
- Leveraged state and federal resources to maximize housing for extremely low-income households:
  - Utilized state capital funds to *preserve* 23,013 public housing units and restore more than 1,000 vacant units to occupancy.
  - *Maximized* federal funds to place low-income households in private housing by achieving 100% utilization of 19,000+ Section 8 vouchers.
  - Extended Family Self-Sufficiency (FSS) and Moving-to-Work (MTW) programs to help families improve their economic positions, and *obtained 200 new vouchers* for veterans and family unifications.
  - *Reformed* state rental voucher program to achieve 100% utilization (1st time in 5 years), restore rents to contract levels (making good on prior broken promises to landlords) and establish administrative infrastructure.
- Launched creative initiatives to save money, attract private investment and make housing greener:
  - *Created sustainability program* to install renewable and high efficiency energy systems and launched first phase of major water conservation effort expected to save the state \$1 million/year by 2011.
  - *Crafted new mixed-finance* housing redevelopment program to attract private equity into public housing. Attracted \$38M in private equity.
  - *Drew in private philanthropic dollars* to launch pilots of housing-based economic support/employment programs in public housing.

**4/04 – 3/07 Vice President, Real Estate Development Hebrew SeniorLife Boston, MA**

Shaped and permitted a one million square foot multi-generational senior campus.

- Successfully managed four highly contested permitting processes: MEPA and DON at state level; Conservation Commission and Planning Board at local level;
- Led process to develop goals for each campus component and campus as whole;

- Directed design process by involving direct care givers and administrators from various organizational service lines, including defining a new framework for long-term care on the campus;
- Managed relationship-building with group of 700 potential clients for the campus, including ongoing written communications, events and personal contact;
- Negotiated partnership agreement with K-8 school co-locating on site;
- Coordinated value management efforts for post-schematics round of design;
- Contributed critical elements to raising \$24 million of charitable equity for campus.

**4/95 – 6/04\* Economic Development Officer, Town of Brookline**

Established town's first economic development function; twin missions to expand tax base and protect local commercial areas.

- Generated over \$1 million/year in net new tax revenue by facilitating conversion of 5 formerly tax-exempt properties to private use:
  - Town hospital to assisted living facility with affordable set-asides;
  - State police headquarters to office/retail mix;
  - Town parking lot to new 180-room hotel with public parking and public open space;
  - Town garage to mixed-use residential (with affordable set-asides), commercial and retail;
  - Church to 59-unit mixed-income, primarily affordable housing.
- Managed significant and contentious public participation processes around major development proposals, including successfully shepherding 3 zoning changes through Town Meeting;
- Negotiated Town's first friendly 40B affordable housing development to create 50 units of mixed-income affordable, and 9 market rate units, and adaptive reuse of a church building plus preservation of landscaped courtyard;
- Conducted extensive public forums on key development issues;
- Launched new public celebrations, including successful 1<sup>st</sup> Light Festival, an annual tradition now for 15 years;
- Built partnership with local business community to preserve character of Town's small commercial centers;
- Helped recruit appropriate new businesses to fill key vacancies;
- Staffed Economic Development Advisory Board and Housing Opportunities Task Force and built strong relationships with other Town boards and commissions.

**\* 8/02 – 8/03 Sabbatical, Amsterdam, The Netherlands**

Took one-year sabbatical to live in Amsterdam. Attended semi-weekly seminar on comparative urban planning strategies at University of Amsterdam. Independently explored social housing, commercial development and urban planning of Dutch cities.

**9/92 – 4/95 Director of Program and Administration Boston Housing Authority**

Responsible for administration of \$100 million modernization program for 71 public housing developments, planning and capital budgeting, grant writing, communications with funding and regulatory agencies, and coordination of inter-departmental programs and planning efforts. Supervised staff of 14.

- Secured \$50 million Urban Revitalization Demonstration Grant for Mission Main Public Housing Development by developing and managing intra-agency program team. Ranked #1 in national competition of 31 housing authorities. Renovations have since been completed successfully.
- Secured \$30 million HOPE VI+ grant for Orchard Park Housing Development. Proposal incorporated community-based organizations, private developers, social and community service providers to create a neighborhood revitalization strategy that redefined the relationship between public housing and its neighbors. Redevelopment plan has now been successfully completed.
- Established capital budgeting systems for federal and state capital programs that helped restore confidence in BHA.
- Developed comprehensive vacancy reduction program and secured federal grant of \$7 million for implementation.
- Built coalitions with social service providers to increase educational and economic opportunities for BHA residents.

**6/87 – 9/92 Lecturer and Special Assistant to Department Head, Department of Urban Studies and Planning, Massachusetts Institute of Technology.**

Part-time position as liaison between professional and academic planning communities. Selected accomplishments include:

- Initiated and managed Professional Development Institute to provide continuing education to alumni/ae and offer students opportunities to develop professional skills. Institute is still in operation.

- Developed and coordinated a large-scale internship program. Program remains active today.
- Conducted departmental long-range planning process to help link professional aspirations of students with course and other departmental offerings.

6/83 – 6/87 **Director, Office of Capital Planning/Budgeting**, Division of Capital Planning and Operations, Commonwealth of Massachusetts  
First director of office which was responsible for preparation of Governor's annual capital budget, development and implementation of capital spending initiatives, and guidance to state agencies in formulating long-range facilities development plans. Supervised professional staff of 16.

- Developed new budget process to tie capital spending proposals to clearly articulated policy objectives and long-range planning goals.
- Initiated pilot project to test applicability of new contracting procedures to finance and install energy conservation improvements in public buildings. Program is still in effect and had saved the Commonwealth over \$8 million by 1995.
- Coordinated Administration efforts (at staff level) to address prison overcrowding, lack of adequate services for chronically mentally ill persons, and inadequate coordination of state higher education programs—culminating in comprehensive program initiatives and legislation filed by the Governor.
- Developed inter-agency program to address the problem of asbestos in state-owned buildings.
- Developed new statewide systems to correct effects of deferred maintenance.

Received 1985 Commonwealth Citation for Outstanding Performance

9/82 – 6/83 **Modernization and Energy Planning Consultant**, Cambridge Housing Authority. Responsible for full range of planning tasks related to modernization and energy conservation in CHA-owned developments.

## **EDUCATION**

Massachusetts Institute of Technology: Master of City Planning, 1982  
Johns Hopkins University: B.A., Political Science, 1978  
Honors: Graduated with University Honors and Departmental Honors; Thesis Award, Dean's List, all semesters.

## **Lizbeth Heyer**

*Chief of Real Estate Development*

### **PROFESSIONAL EXPERIENCE**

#### **Jewish Community Housing for the Elderly, Boston, MA, 3/14 – Current Chief of Real Estate Development**

Charged to lead JCHE's real estate expansion and re-investment strategy:

- Create and manage an innovative and highly skilled real estate team.
- Lead refinance and modernization to stabilize existing properties and leverage equity for expansion.
- Secure and oversee new development opportunities that support JCHE's "Aging in Community" model.
- Leverage creative development partnerships to expand and enhance JCHE's mission to allow seniors to age in vibrant communities in their own homes for as long as possible.

#### **Division of Public Housing and Rental Assistance, Department of Housing and Community Development, Commonwealth of MA, 8/10- 3/14**

##### **Associate Director**

- Managed 83-person division overseeing 242 local housing authorities with 55,000 units, 9 regional agencies administering 27,000 state and federal rental vouchers and, \$90M homeless prevention program.
- Co-chaired Governor's Commission on Public Housing Sustainability and Reform resulting in consensus recommendations to provide more efficient and cost-effective housing authority administration, greater transparency and accountability, and better tenant services.
- Led and implemented significant administrative reforms, innovative funding initiatives and legislation to consolidate 242 Local Housing Authorities into six regional bodies.
- Led division's work on the Governor's homeless reform by creating the HomeBASE program and expanding the Residential Assistance for Families in Transition program, which provide "housing first" opportunities for the Commonwealth's homeless families.
- Launched a web-based capital planning and asset management system to target funding and measure the effectiveness of capital and operating projects for the state's public housing portfolio.
- Expanded Family Self-Sufficiency and Moving-to-Work programs to help families improve their economic positions.

**Division of Public Housing and Rental Assistance, Department of Housing and Community Development, Commonwealth of MA, 11/07 – 8/10**

**Director of Program Development**

- Launched gubernatorial initiatives to restore and preserve 55,000 unit public housing portfolio.
- Managed entrepreneurial division of 4 staff to develop new initiatives and integrate them into the business practices of the division including new mixed-finance program, green energy and water conservation investments and, a capital planning system. Team raised over \$50M in federal and private resources for greening of state-aided public housing and leveraged over \$25M in private equity for state-aided public housing modernization.
- Led division-wide initiatives to promote internal team-work and partnership with housing authorities that turned challenges into collaborative problem solving opportunities.
- Integrated capital and operating programs into a comprehensive asset management system.
- Spearheaded design of a formula funding system to realign DHCD's modernization program to preserve distressed public housing portfolio.
- Led DHCD staff and housing authorities through a comprehensive planning process that built a strong consensus in support of formula funding.
- Led transformation of DHCD's inspection program into a high quality technical assistance operation to improve housing authority maintenance practices.

**Jamaica Plain Neighborhood Development Corporation, Boston, MA,**

*4/93 – 10-/07*

**Associate Director of Real Estate (2002-2007)**

- Planned and developed affordable housing and mixed-use projects totaling over \$80M, several of which involved non-profit and for-profit partners.
- Acquired, planned, permitted and funded 3.5 acre Blessed Sacrament property resulting in \$50M project with 118 mixed-income housing units, 7,500 square feet of retail space, redevelopment of historic church building, two school buildings and a one acre public plaza and green space.
- Built and maintained relationships with community stakeholders, lenders and development partners.



- Supervised staff of 3 that developed a prominent \$20M TOD parcel resulting in 30 affordable housing units and 6,000 square feet of retail and non-profit office space, refinanced and converted a 60 unit building into mixed-income condominiums and, developed and sold 23 homes for first-time homebuyers.

**Senior Project Manager (1995-2002)**

- Acquired and financed Pondview Apartments, a 60-unit HUD expiring-use project.
- Acquired and financed public and private vacant land, resulting in 20 first-time homebuyer homes.
- Directed year-long strategic planning initiative to realign organization's housing development strategy.
- Coordinated and taught first-time homebuyer training program.

**Project Manager (1993-1995)**

- Constructed 41 unit limited equity cooperative and oversaw creation and training of co-op organization.
- Coordinated community planning process for 45 unit abandoned property resulting in redevelopment under HUD's 202 program.

**Castle Square Tenants Organization, Boston, MA, 10/92 - 3/93**

**Interim Executive Director**

- Provided technical assistance including fiscal management and organizational and board development.
- Managed relationship with Winn Management, CSTO's development partner for 500-unit HUD expiring-use project.

**Massachusetts Tenants Organization, Boston, MA, 10/86 - 8/90**

**Tenant Organizer and Legislative Director**

- Directed city, state and federal HUD expiring-use preservation campaigns.
- Organized tenant groups in over 30 subsidized buildings across Massachusetts.
- Trained and supervised staff and interns.
- Coordinated successful grassroots fundraising projects.

**AWARDS and RELATED EXPERIENCE**

**Ricanne A. Hadrian Community Development Award Recipient, Massachusetts Association of Community Development Corporations, 1998**

**Federal Home Loan Bank Affordable Housing Competition, 2007**

- Provided support and mentoring to graduate student team for development of 13-acre parcel on MBTA land.

**Jamaica Plain Neighborhood Council Community Development Committee,**  
*Volunteer Member, 1998-2005*

- Spearheaded local advocacy to institute stronger inclusionary zoning requirements.
- Participated in neighborhood planning coalition to redevelop MBTA Arborway Yard.

**Minton Stable Gardens Steering Committee,** *Volunteer Member, 1999-2004*

- Participated in community effort to preserve, fund and renovate 40 plot community garden.

**Massachusetts Association of Community Development Corporations:  
Housing and Investment Committee,** *Member, 1993-2000*

**EDUCATION**

**Massachusetts Institute of Technology, Boston, MA**  
M.A. in City Planning, *1992*

**University of New Hampshire, Durham, NH**  
B.A. in Anthropology/Psychology, *1986*

**Karen L. Edlund**  
*Chief Financial Officer*

**SUMMARY**

***Senior Financial Executive** with over 20 years experience in key leadership positions in affordable multi-family and senior housing, real estate and tax-advantaged investing, high tech and manufacturing industries. Broad expertise in domestic and international finance, fund and partnership investment structuring, valuations and due diligence, treasury, IT, HR and risk management.*

**PROFESSIONAL EXPERIENCE**

**Jewish Community Housing for the Elderly (JCHE)** January 2012 – Present

*Brighton, MA – a not-for-profit developer and property manager for high quality affordable senior housing providing services for over 1,200 units of housing for seniors in the metropolitan Boston area.*

- **Chief Financial and Administrative Officer** – Responsible for finance and accounting, human resources, information technology and the administrative functions of JCHE. Responsible for budgeting, planning and financial reporting of existing 1,200 unit portfolio of affordable housing, as well as financing of new developments, refinancing of existing projects and compliance with regulatory requirements of HUD, Mass Housing, the Department of Housing and Community Development and the Section 42 LIHTC program. In November 2013, JCHE successfully refinanced a 242-unit 100% affordable senior project with \$42 million HUD-insured 221(d)(4) loan.

**TCAM Real Estate, LLC** 2011

*Boston, MA – Wholly-owned subsidiary of R.J. Finlay & Co providing asset management, workout and advisory services to institutional owners of real estate debt and equity investments*

- **Financial Consultant** – Provide high level financial analysis of tax credit portfolios, including analysis of cash flow and financial strength of underlying projects and funds.

**International Housing Solutions, S.à r.l.** 2007 – 2010

*Boston, MA – Luxembourg-based global private equity real estate investment firm specializing in affordable housing investment opportunities in emerging markets.*

- **Chief Financial Officer and Managing Director**– Reporting to the CEO, established finance, administration and risk management function for newly

formed joint venture with operations in Johannesburg, London, Dublin and the U.S. Created financial reporting function including budgeting, planning and cash flow forecasting for start up operations.. Spearheaded structuring, legal formation, financing and regulatory approval for \$240 million private equity South African real estate fund. Implemented tax-efficient cross-border cash management for fund and operating entities in five countries.

**Leggat McCall Properties**

2006 – 2007

*Boston, MA – Premier Boston-area real estate development, project and investment management company specializing in managing the construction and development of complex commercial, industrial, and residential real estate for institutional and corporate clients.*

- **Senior Vice President and Chief Financial Officer** – Reporting to the CEO, managed finance, accounting and human resource functions, including budget & planning, risk management and investor relations. Negotiated and administered debt and joint venture agreements for acquisitions, including non-recourse financing, interest rate hedging and tax strategy. Created cash flow, project costing systems and other metrics for analyzing profitability of company's project and development management business.

**MMA Financial**

1996 – 2006

*Boston, MA – Principal operating subsidiary of Municipal Mortgage & Equity ("MuniMae"), a Baltimore-based publicly traded finance company providing debt and equity for multi-family real estate investments. In 2003 MMA Financial acquired the Boston-based tax credit equity syndication business (formerly Boston Financial Group) from Lend Lease Corporation.*

- **Senior Vice President of Finance, Housing and Community Investing (1998-2006)** – Reporting to business unit EVP, responsible for budgeting, capital planning, investment fund financing and structuring, and performance metrics for MMA Financial's largest business unit, which grew from \$25 million to over \$80 million in revenues in seven years. Established and managed financing and treasury operations center to support business funding and financing requirements. Co-chair of developer loan committee and member of capital transactions committee overseeing workouts, sales and refinancings. Structured and closed international joint venture agreement to finance affordable housing outside of the U.S. Developed procedures and responsible for oversight of internal control initiatives for Sarbanes Oxley and GAAP requirements.
- **Vice President & Treasurer, Boston Financial Group (1996-1998)** – Negotiated company's corporate credit facilities and directed company's treasury operations, including treasury automation project to facilitate cash sweep and controlled disbursements of 200+ property management operations. Elected partner in 1998.

**M/A-COM, Inc.**

1991 – 1996

*Lowell, MA – Publicly-traded \$350 million, global microwave communications and semiconductor company.*

- **Vice President & Treasurer** – Domestic and international treasury responsibilities, including cash and risk management, portfolio investment, foreign exchange hedging, leasing, letters of credit, and real estate financing and divestitures.

**Dennison Manufacturing Company**

1986-1991

*Framingham, MA – Publicly-traded \$750 million Fortune 500 company acquired by Avery International in 1990.*

- **Corporate finance manager** - Various domestic and international finance roles including corporate mergers & acquisitions, benefit and executive compensation plan management including \$200 million defined benefit plan and \$85 million leveraged Employee Stock Ownership Plan, and internal audit for U.S. and overseas operations

**Howard Development Company, Wilmington, MA**

**Assistant Controller**

1985 – 1986

**Stewart Systems Corporation, Boston, MA**

**Accounting Manager**

1983 – 1985

**EDUCATION**

M.S. Finance, Boston College, 1990

B.A. *magna cum laude*, Economics and French, Middlebury College, 1983

**AFFILIATIONS**

President, Financial Executives International, Boston

Board Member, Women’s Institute for Housing and Economic Development

Finance Committee Member and Former Board Member, Respond, Inc.

Committee Chair and former Board Member, Real Estate Finance Association (REFA)

Former Member, Student Outreach Committee, New England Women in Real Estate (NEWIRE)

Board member, Rollins Square Association

Former Board member, Rutland Square Association

Past Treasurer, Friends of Hiscock Park

Member, Treasurer’s Club of Boston

Private Equity CFO Association

**Myra D. Marshall**  
*Executive Director, Golda Meir House*

**PROFESSIONAL EXPERIENCE**

**Jewish Community Housing for the Elderly; Newton, MA 6/13 – Present**  
**Executive Director, Golda Meir House**

Responsible for the overall management of this 199 unit market/tax credit/PRAC/Sec 202 property, including finances, maintenance, programming, resident relations, resident services, staff recruitment, performance, and evaluation, and community relations. In addition, as a member of the JCHE management team, I participate in efforts to create and implement best practices at JCHE.

- Consistently maintain excellent property conditions staying within the confines of Golda I and II operating budgets. The most recent 3rd party government REAC inspection resulted in superior scores for both Golda I and Golda II; 97/100.
- Earned industry recognition as a Community of Quality, receiving the 2014 Exemplary Elderly Community Award from the New England Affordable Housing Management Association.
- Worked with the Real Estate Project Development Team to redesign Golda Meir House apartments, common areas, and grounds for optimal communal spaces, accessibility, long-term infrastructure improvements and environmental sustainability.
- Manage the renovation project Relocation Team; moving all residents to temporary apartments and back to renovated apartments over a 15 month period. More than 40 moves have been successfully executed thus far. Established use of SmartSheets software to facilitate daily coordination between Golda Maintenance, General Contractor and the Relocation team for very time sensitive work in the temporary units and newly occupied renovated units.
- Coordinate daily with General Contractor and Golda staff to ensure construction work that impacts resident life, safety, and functionality of work and living spaces is thoughtfully approached and any issues resolved in a timely manner.
- Develop and implement a Resident Engagement Plan throughout the project design and construction process that keeps residents and families informed and supported during the upheaval of this 2-year occupied rehab project. Through involvement in appropriate parts of design, and meetings, surveys, Q&A sessions, stress management groups led by our Resident Services Coordinator, and more, we have fostered resident support for the project, tolerance for the process, and a greater sense of community as we move through this together.
- Establish & maintain a collaborative, team-based work environment across resident services, maintenance, compliance, and dining staff that ensures the highest level of service and support to residents, and a creative, dynamic work place.
- Foster continuous development of programs and services to create an engaging, inclusive, welcoming and active living environment where our diverse resident population can age together in a supportive community.

**Brightview Senior Living- Country Club Heights 3/2013 – 6/2013**  
**Program Director**

Hired on an interim basis to bring a more creative and robust slate of programs and activities to this community of 120 independent and assisted living residents. Established a wide range of intellectually, socially, engaging programs, developed collaborative relationships with marketing and food services directors, hired and trained new Vibrant Living Assistant.

**Assistant Activities Director Traditions of Wayland 12/2011 – 11/2012**

Involved in all aspects of developing and delivering stimulating programs for the independent, assisted living and memory care sections of this property.

- Successfully developed and implemented innovative new programs including community service projects, guided meditation, Holocaust Remembrance Program, computer skills training and use of programs such as Skype to connect with distant friends and family.



- Trained and supervised volunteers to engage residents and assist with activities.

**Consulting and Advocacy – Self Employed (2003 – 2013)**

- Worked with clients in mid to late stage Alzheimer’s and their families; developed, implemented and modified healthcare and habilitation plans with client’s family, medical staff, and outside agencies to maintain functionality, quality of life and enjoyment across the disease trajectory.
- Advised and represented parents in the pursuit of appropriate special education programs and services necessary for their children with autism and other disabilities. Secured optimal level of educational and therapeutic services for clients in public education systems.
- Organized grass roots committee of parents of children with autism that later became the first formal sub-committee of the Parents Advisory Council. The group researched best practices, developed proposals and through evidence-based advocacy, achieved the implementation of new or improved in-district programming including: Inclusion programs in the town middle and high school, elementary school co-taught inclusion classroom model, full day summer program to support both academic and social skills retention, and an alternative math curriculum for children with autism and other language-based learning disabilities.

**Corporate Compensation Manager (1988 to 1997)**

**Cabot Corporation, Boston, MA**

At the corporate office of this decentralized, multi-national corporation, I managed the corporate compensation function, including salary planning for exempt level employees across North America, and total compensation (salary, short and long-term incentive programs) of key employees and executive management worldwide, and reported to the Compensation Committee of the Board of Directors twice yearly.

- Planned and facilitated the implementation of a world-wide job evaluation system throughout a newly decentralized HR function. Served as in-house consultant to division offices; trained managers and employees in job analysis and description writing, trained and facilitated job evaluation committees,
- Administered short-term cash based incentive programs and long-term equity incentive restricted stock programs. Integrated the efforts of legal, tax, treasury, human resources and accounting functions and increased efficiencies through stronger communication and understanding across departments.
- Established and maintained computer-based record-keeping systems for individual and program level data, generating and analyzing reports as needed for department, corporate HR, and Board of Directors’ Compensation Committee decision making.

**EDUCATION**

**Southern Connecticut State University**

Bachelor of Science Degree, Communications, cum laude

**CERTIFICATIONS**

Certified Occupancy Specialist 9/17

Fair Housing Certificate 12/13

ARTZ® and Dementia: Innovation, Inclusion & Creative Expression 10/3/12

Mass ALFA Boot Camp Workshop 3/7/12 - including federal and state regulations

Professional in Human Resources Certification (PHR) 6/2011

Certificate in Special Education Advocacy 2008 from Federation for Children with Special Needs



**Zoe Weinrobe**  
***Director of Real Estate Innovation***

**Jewish Community Housing for the Elderly, *Director of Real Estate Innovation*, 2016 – Present**

- Manage all aspects of JCHE’s senior affordable rental development projects throughout greater Boston, both new construction and preservation/renovations. Tasks include strategic analysis and review for new real estate development opportunities, program development, innovative financing strategies, building complex financial models, hiring and overseeing project team members, procuring contractors and consultants, negotiating contracts, managing the zoning and permitting processes, manage financial closings, and oversee construction.
- Supervise Real Estate Innovation Project Manager.
- Current projects include:
  - \$71 million preservation and renovation of a 199-unit existing HUD 202 property with both Section 8 and PRAC rental assistance utilizing 4% LIHTC equity, tax-exempt bonds, utility rebates, and seller financing.
  - \$25 million 40B Comprehensive Permit new construction project including 62-units of mixed-income affordable rental housing, ground floor retail and common space utilizing 9% and MA LIHTC equity, city and state soft debt, and other public and private financing.

**Recap Real Estate Advisors, *Vice President*, 2015 – 2016, *Principal Consultant*, 2013 – 2015**

- Managed complex affordable housing transactions on behalf of client owners including advising clients on financial feasibility, transaction timing, due diligence documentation; building of complex financial models; preparation of funding applications; and overseeing closings.
- Led the Rental Assistance Demonstration (“RAD”) practice group, both public housing conversions and conversions of Moderate Rehab, Rent Supp, and RAP HAP contracts to project-based Section 8, including advising public housing authorities and private owners on RAD conversion feasibility; preparation and submission of RAD applications; manage all interaction and processing requirements with HUD; preparation of project proformas, public and private funding applications; and overseeing closings.
- Business development responsibilities including participation on conference panels, regular attendance at industry conferences and events, and preparation of responses to Request for Proposals and Qualifications.
- Projects included:
  - One of the first RAD conversions in the country, a \$26.3 million preservation and renovation of a 142-unit elderly/disabled public housing property in Ventura, CA utilizing 9% LIHTC equity, seller financing, utility rebates, and other public and private financing.
  - Two (2) RAD conversions of expiring Rent Supp contracts to 15-year project-based Section 8 HAP contracts, including maximizing utilization of project-based vouchers at the properties through the payoff of state-insured 236 loans and interest reduction payment (IRP) de-couplings.

**Urban Edge Housing Corporation, *Senior Project Manager*, 2011 – 2013, *Project Manager*, 2007 – 2010**

- Managed all aspects of urban real estate development projects, primarily affordable housing and mixed-use projects.
- Supervised Project Manager and Project Associate on project-related tasks.
- Projects included:



- Two (2) scattered site preservation and renovation projects (\$22.4 million, 82-units; \$24.2 million, 101-units) utilizing 4% LIHTC equity, tax-exempt bonds, MA historic tax credits, utility rebates, and other public and private financing.
- \$18 million green historic preservation and renovation of a 103-unit, scattered site property, utilizing ARRA-funded tax credit exchange funds, MA historic tax credits, Enterprise Green Communities funding, Federal Home Loan Bank of Boston Affordable Housing Program funding, and other public and private financing.

**City of Cambridge Community Development Department, *Housing Planner*, 2004 – 2007**

- Assessed feasibility of new affordable housing and preservation opportunities and need for City subsidy including site identification, zoning analyses, financial feasibility, underwrote proposed loans, identified financing strategies, and weighed public benefit.
- Managed permanent and construction loans for 12 projects totaling more than \$22 million, including drafting loan commitments and contracts, and managing closings, disbursements, and repayments.
- Oversaw two CDBG-funded programs with local non-profits: a home improvement program for low- and moderate-income homeowners and a rehab program for owners of affordable multifamily rental properties.
- Administered the City’s Inclusionary Zoning Ordinance with the private development community.
- Assisted in the development of housing policies and programs for low- and moderate-income residents.

**Massachusetts Department of Housing and Community Development, *Rappaport Fellow*, 2003**

- Developed a database of DHCD-funded projects to create threshold criteria including debt service, cash flow, developer fees, construction and operating costs, to be used to analyze future projects.
- Investigated affordable housing developments at-risk of losing affordable units due to expiring affordability restrictions and researched options for preserving or extending their affordability.
- Competitive Public Policy Summer Fellowship program funded by the Rappaport Institute at the Kennedy School of Government, Harvard University.

**Telesis Corporation, *Assistant Project Manager*, 2000 – 2002**

- Assisted in the development of mixed-income, affordable housing, and small-scale commercial developments across the country. Responsibilities included working with residents, community and government stakeholders, project budgeting, grant applications, scheduling, and GIS mapping.
- Prepared responses to Request for Proposals and Qualifications for new affordable housing and commercial development opportunities.
- Collaborated on three \$35 million HOPE VI applications to revitalize severely distressed public housing.

**AFFILIATIONS/ACCREDITATIONS**

Just-A-Start Corporation, Board of Directors (2010 – Present)  
 Jackson Square Partners, Board of Directors (2015 – Present)  
 LEED (Leadership in Energy & Environmental Design) Accredited Professional

**EDUCATION**

**Massachusetts Institute of Technology, *School of Architecture and Planning***  
 Department of Urban Studies and Planning, Master in City Planning, 2004  
 Concentration in Housing Finance, Economics, and Policy

**Cornell University, *College of Architecture, Art and Planning***  
 Department of Urban and Regional Studies, Bachelor of Science with Honors, 1999



**Rachel Belanger**  
*Project Manager*

**PROFESSIONAL EXPERIENCE**

**Jewish Community Housing for the Elderly, *Project Manager***

Boston, MA, August 2017 – Present

- Project Manager for new construction and renovation projects in Greater Boston area
- Assist other project teams with research such as zoning analysis, healthcare policy, supportive services, universal design, and sustainability

**Sasaki Associates, *Planning Intern***

Watertown, June – Aug. 2016

- Created site and context analysis diagrams for an institutional plan
- Produced visualizations of classroom utilization, facility condition and walkability for a campus plan
- Wrote case studies and recommendations on parks funding opportunities, shared streets design, tree canopy targets, cultural landscape reports, and park management plans
- Compiled and analyzed benchmark data for an operations assessment of a public parks agency

**Massachusetts Institute of Technology Office of Campus Planning, *Campus Planning Intern***

Cambridge, Nov. 2015 – March 2016

- Analyzed data and prepared presentations on development capacity, land use, and peer institutions
- Created presentation to synthesize issues and strategies from past 20 years of campus planning studies
- Provided additional research, analysis, and drawings as need to support campus planning activities

**Skidmore Owings & Merrill LLP, *Communications Coordinator***

Chicago, July 2012 – May 2015

- Led proposals for campus planning, urban design, and other master planning services
- Managed day-to-day activities of “The Governor’s Chair for Energy and Urbanism” a teaching and applied
- research partnership with The University of Tennessee and Oak Ridge National Laboratory
- Produced public communications for the City Design Practice, including press releases, op-eds, content for
- som.com, Twitter, and blog
- Assisted clients in writing grant proposals, such as to U.S. EPA, U.S. DOE, and IL Dept. of Natural Resources
- Supported project teams with research and report-writing

**Edelman, *Business + Social Purpose Intern***

Chicago, Feb. – July 2012

- Wrote internal and external communications related to corporate sustainability and social responsibility for several Fortune 500 companies
- Conducted benchmarking research on corporate sustainability initiatives and reporting practices

**Growing Home, Wood Street Urban Farm, Sustainability Analyst**

Chicago, Jan. 2009 – May 2010

- Assisted with farm production, farmers market sales, and job-readiness training program for formerly homeless individuals
- Implemented pilot study on energy efficiency of local food production with UChicago's Feeding the City Project
- Built and maintained database of harvest records and inputs to the farm
- Prepared report and trained researcher to continue partnership in the 2010 season

**EDUCATION**

**Massachusetts Institute of Technology**, Cambridge, Massachusetts

Master in City Planning, 2017

Concentration in City Design and Development

Select Coursework: Mixed-Income Housing, Real Estate Ventures, Real Estate Products, Real Estate Investment and Finance, Tools for Socially Responsible Development

**University of Chicago**, Chicago, Illinois

Bachelor of Arts in Environmental Studies with Honors, 2011

GPA 3.8/4.0, Phi Beta Kappa Society

**Archeworks**, Chicago, Illinois

Certificate in Public Interest Design, 2010

Steve provides solutions to PCA's residential, academic, retail, and restaurant clients. With a focus on BIM development and cost effective sustainable solutions, he remains heavily involved during all stages of his projects, contributing an understanding of the critical issues required for success, whether it's program, design inspiration or business.

### EDUCATION

University of Kentucky  
*Bachelor of Architecture, 1978*

### REGISTRATION

Massachusetts  
LEED Accredited Professional

### AFFILIATIONS

Boston Society of Architects  
American Institute of Architects  
US Green Building Council  
Society College & University Planners

### PROFESSIONAL EXPERIENCE

Prellwitz Chilinski Associates, Inc.  
*Principal, 2005- Present*  
*Senior Associate, 2000; Assoc., 1998; Project Mgr., 1993*

Dion & Sokol, Inc. Architects  
*Associate, 1983-1993*

Hamill & McKinney Architects & Engineers  
*Architect, 1981-1983*

### COMMUNITY SERVICE

President, His Presence Christian Fellowship,  
Concord, MA

### SELECTED PROJECTS

CEA Group, SouthCoast Marketplace, Fall River, MA:  
*120,000 SF Multi-Building Shopping Center*

CEA Group, North Shore Crossing, Beverly, MA: *66,000 SF Multi-Building Shopping Center*

City Sports, Legacy Place, Dedham, MA

Charles River Realty, Dedham, MA: *16,000 SF Shopping Center*

South Cape Village, Mashpee, MA; *160,000 SF Shopping Village (8 Buildings)*

Delaware North Companies - Restaurant and Retail Shops in Newark, NJ (with Westfield Corporation); Nashville, TN; Richmond, VA; Ft. Lauderdale, FL; and Detroit, MI

Washington Place, Newtonville, MA: *40,000 SF Retail, 171 Apartment Units*

Wilber School Apartments, Sharon, MA: *75 Units*

Mill Village, Newton, MA; *430,000 SF retail, 150 residential mixed-use project*

Cambridge Street Mixed Use Development / Mark Investments, Cambridge, MA: *15,000 SF Retail, 40 Apartments*

Charles River Realty, Elm Street, Somerville, MA: *30,000 SF Retail, 45,000 SF Offices*

JCHE, Brookline, MA: *5,000 SF Retail, 61 Apartments*

Cherry Hill Townhouses, Holyoke, MA

Laura is responsible for the design, documentation, and management of some of PCA's most high-profile projects, from multifamily housing to retail and complex mixed-use developments. She enjoys the complexities involved in the adaptive reuse of industrial buildings or a mixed-use infill, especially in an urban setting.

## EDUCATION

Rensselaer Polytechnic Institute  
*Bachelor of Architecture, 1996*  
*Bachelor of Building Science, 1995*

## REGISTRATION

Massachusetts  
LEED Accredited Professional, Building Design + Construction

## PROFESSIONAL EXPERIENCE

Prellwitz Chilinski Associates, Inc.  
*Senior Associate 2011-Present*  
*Associate 2009-2011*  
*Project Architect 2006-2009*

Domenech Hicks and Krockmalnic Architects,  
*2001-2006*

Peace Corps Volunteer, *1997-2000*

Arrowstreet, Inc., *1996-1997*

## SELECTED PROJECTS

Bedford Place @ South River Road / Encore Realty,  
Bedford, NH  
Mixed-Use office / retail / entertainment / restaurant / hotel

The Parkside on Adams / Peregrine Group, Roslindale, MA  
Mixed-Use housing, office

Third Rail Restaurant @ Roslindale Substation / Chris Douglass (chef), Roslindale, MA Adaptive reuse

The Street / WS Development, Chestnut Hill, MA  
Mixed-Use Retail and Corporate Headquarters

Pawtucket Waterfront Planning / Peregrine Group,  
Pawtucket, RI  
Mixed-Use housing, office, retail

Andover Senior Housing / B'nai B'rith New England,  
Andover, MA

Lesley University, Porter Exchange Renovation,  
Cambridge, MA

Port Landing Apartments / Capstone Communities,  
Cambridge MA

Scotts Wharf / Peregrine Development, Newport, RI  
Mixed-Use housing, office restaurant

900 Beacon Street Apartments / Lineage Ventures, Boston,  
MA

839 Beacon Street / Miner Realty, Boston, MA

Arlington Village Shops, Arlington, MA; LEED Core & Shell Silver Certified retail

Inman Lofts / GFC Development & Boston Investments,  
Somerville, MA; 6-unit townhouse conversion and addition

UConn McMahan Dining Hall, Storrs, CT; 15,000 SF,  
450-seat addition and renovation

Rumford Mill Adaptive Reuse, East Providence, RI;  
Mixed-use renovation and residential conversion of  
historic mill buildings

Massachusetts College of Art Media Lab / Classrooms,  
Boston, MA;  
Renovation of 600 SF space into AV/IT integrated  
classroom, computer lab and printing facility



## GEORGE WILLWERTH ▲ PRESIDENT, PROJECT EXECUTIVE

YEARS WITH CI : 23 YEARS IN CONSTRUCTION : 28

George joined Colantonio as a high school student in 1988 and worked every school and summer vacation throughout high school and college. He left for Kiewit in 1994 after earning a Civil Engineering degree, but returned to Colantonio in 1999 when working for a family-oriented company became a priority. George’s experience includes surveying, estimating, and project management on projects ranging from the Central Artery Tunnel to affordable housing to historic restorations.

- ▲ *Historical Renovation*
- ▲ *Affordable Housing*
- ▲ *Low-Income Housing Tax Credits*
- ▲ *Constricted Sites with Limited Access*
- ▲ *Hard Deadlines / Aggressive Schedules*

### EDUCATION:

#### WORCESTER POLYTECHNIC INSTITUTE

BS Civil Engineering, with distinction, 1993

### CERTIFICATION/TRAINING:

Class 2A Hoisting License

Certified CPR and First Aid

OSHA 10-Hour Safety Certification

### REFERENCES:

#### Dave Thunell (Fitchburg Yarn Works)

Vice President of Construction  
WinnCompanies  
617.594.0049  
dthunell@wincco.com

#### Timothy Bonfatti (Field School)

President  
Compass Project Management  
508.359.6111  
tbonfatti@compasspinc.com

#### Margaret Wood (Golda Meir House)

Project Director  
Pinck & Co.  
617.216.5760  
mwood@pinck-co.com

#### 31 Elm Street - Court Square Hotel Renovation, Springfield, MA (in Preconstruction)

- \$40 million, 132,752 sf historic restoration of Court Square Hotel constructed in 1892
- Mixed use including first floor retail, second floor office, and four floors of residential
- Reuse and restoration of existing intricate woodwork, aluminum replica window replacement, elevator retro-fit, marble preservation, brick facade restoration
- Low-income tax credits, historic tax credits

#### Haywood House, Newton Housing Authority, Newton, MA (in Preconstruction)

- \$16.5 - \$19 million, 50,000 sf building
- 44-55 units of affordable housing
- Low Income Tax Credits

#### State House Senate Chamber Renovation, Boston, MA (under construction)

- \$14 million, 12,000 sf, renovation to MA State House Senate Chamber
- Restoration of historic woodwork, light fixtures, glass, and plasterwork along with MEP and ADA upgrades
- Maintenance of existing State House operations during construction
- Constricted urban location
- Limited site access

#### Fitchburg Yarn Works, Fitchburg, MA

- \$26 million, 182,500 sf
- Rehab of the historic Nockege Mill into 96 housing units
- Major heavy timber structural renovation, aluminum replica window replacement
- Low-income tax credits, Historic tax credits



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### **Mystic Water Works, Somerville, MA (under construction)**

- \$9.8 million, 24,000 sf
- Gut renovation/reuse of 19th century water works building into 20 units of affordable housing
- Removal of existing interior structure, replacement with 2-story structure
- Low-income tax credit financing

### **Golda Meir House, Newton, MA (under construction)**

- \$30 million, 178,200 sf
- Phased, occupied renovation of 199 senior living units
- Major systems and accessibility
- Constricted area, limited site access
- Low-income tax credit financing

### **86 Dummer Street, Brookline Housing Authority, Brookline, MA**

- \$13 million, 38,500 sf
- New construction of a 32-unit, wood-frame building
- Included underground garage, extensive site work
- Restricted Brookline location
- Low-income tax credit financing

### **Eliot Upper School, Boston, MA**

- \$19 million, 36,000 s.f.
- Complete gut renovation of an historic masonry and wood-frame building
- Restricted North End location
- Complex shoring plan to support the exterior walls
- Masonry repair and repointing, new windows, doors

### **Fitchburg Place Apartments, Fitchburg, MA (**

- \$19 million, 42,500 sf, 100 affordable housing units
- M/E/P, kitchen and bath upgrades
- Constricted urban location
- Limited site access
- Low-income tax credit financing
- **CMAA 2013 Project Achievement Award**

### **Trustman Apartments, Brookline, MA**

- \$6.6 million, 84 units
- Occupied renovation for the Brookline Housing Authority
- Updated the kitchens, heating, and security systems
- Constricted site with limited access

### **470 Main Street, Fitchburg, MA**

- \$8 million, 60,000 sf
- Renovation and restoration of a former HM Francis-designed, wood frame commercial bank building
- Features 1, 2 and 3 bedroom apartments and office space





## CHRISTOPHER POWERS ▲ PRECONSTRUCTION MANAGER

YEARS WITH CI : 5 YEARS IN CONSTRUCTION : 13

Chris has 13 years of estimating, procurement and project management experience in the public and private sectors, using both the CM at Risk and hard bid delivery methods. His direct involvement with estimating and procurement streamlines information between project stakeholders accurately and thoroughly. With his deep knowledge of site work, logistics, and operations, Chris is an excellent leader of the design review, estimating, value engineering and bidding process.

- ▲ *Historical Renovation*
- ▲ *Affordable Housing*
- ▲ *Low-Income Housing Tax Credits*
- ▲ *Constricted Sites with Limited Access*
- ▲ *Hard Deadlines / Aggressive Schedules*

### EDUCATION:

#### University of Massachusetts, Amherst

BS in Building Materials and Wood Technology

### CERTIFICATION/TRAINING:

Timberline Estimating Software  
 PlanSwift OnScreen Take-off Software  
 Precision Cut/Fill  
 InSite SiteWork and Utility Estimating Software  
 GradeBeam Bid Solicitation  
 OSHA 10-hour Certification

### REFERENCES:

#### Margaret Wood (Golda Meir House)

Project Director  
 Pinck & Co.  
 617.216.5760  
 mwood@pinck-co.com

#### Janet Haines (Dummer St.)

Director of Real Estate  
 Brookline Housing Authority  
 774.244.6284  
 jhaines@brookline housing.org

#### David Thunell (Fitchburg Yarn Works)

Vice President of Construction  
 WinnCompanies  
 617.594.0049  
 dthunell@wincco.com

### 31 Elm Street - Court Square Hotel Renovation, Springfield, MA (in Preconstruction)

- \$40 million, 132,752 sf historic restoration of Court Square Hotel constructed in 1892
- Mixed use including first floor retail, second floor office, and four floors of residential
- Reuse and restoration of existing intricate woodwork, aluminum replica window replacement, elevator retro-fit, marble preservation, brick facade restoration
- Low-income tax credits, historic tax credits

### Haywood House, Newton Housing Authority, Newton, MA (in Preconstruction)

- \$16.5 - \$19 million, 50,000 sf building
- 44-55 units of affordable housing
- Low Income Tax Credits

### State House Senate Chamber Renovation, Boston, MA (under construction)

- \$14 million, 12,000 sf, renovation to MA State House Senate Chamber
- Restoration of historic woodwork, light fixtures, glass, and plasterwork along with MEP and ADA upgrades
- Maintenance of existing State House operations during construction
- Constricted urban location
- Limited site access

### Golda Meir House, Newton, MA (under construction)

- \$30 million, 178,200 sf
- Phased, occupied renovation of 199 senior living units
- Major systems and accessibility
- Constricted area, limited site access
- Low-income tax credit financing





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### **Mystic Water Works, Somerville, MA (under construction)**

- \$9.8 million, 24,000 sf
- Gut renovation/reuse of 19th century water works building into 20 units of affordable housing
- Removal of existing interior structure, replacement with 2-story structure
- Low-income tax credit financing

### **86 Dummer Street, Brookline, MA**

- \$13 million, 38,500 sf
- New construction of an 32-unit, wood-frame building
- Includes underground garage, extensive site work
- Restricted Brookline location
- Low-income tax credit financing
- **Reduced the project budget by 11%**

### **Fitchburg Yarn Works, Fitchburg, MA (Private CM at Risk)**

- \$26 million, 182,500 sf
- Rehab of the historic Nockege Mill into 96 housing units
- Major heavy timber structural renovation, aluminum replica window replacement
- Low-income tax credits, Historic tax credits
- **Reduced the project budget by 7.5%**





## DAVID DUPUY ▲ PROJECT MANAGER

YEARS WITH CI : 1    YEARS IN CONSTRUCTION : 13

David joined Colantonio in May 2016 with 12 years of experience in project management and estimating. His background includes historic restoration, retail and healthcare with former employers Dellbrook Construction, Callahan Construction Managers and McCourt Construction.

David is managing the occupied renovation of the 199-unit Golda Meir House, an independent living community owned and managed by the Jewish Community Housing for the Elderly (JCHE).

- ▲ *Historical Restorations*
- ▲ *Mill Conversions*
- ▲ *New Construction*
- ▲ *Affordable Housing Experience*
- ▲ *Multi-unit Residential Housing*

### EDUCATION:

#### THE OHIO STATE UNIVERSITY

BA in Telecommunications & Electronic Media

### CERTIFICATION/TRAINING:

OSHA 10-Hour Safety Certification  
Procore Project Management Software  
On-Screen Takeoff Software

### REFERENCES:

#### Gerry Frank (Golda Meir House)

Principal  
Bechtel Frank Erickson Architects  
781.862.3313  
gfrank@bfearc.com

#### Chris Lane, AIA (Eliot School)

Senior Associate  
Finegold Alexander  
617.227.9272 x208  
clane@faainc.com

#### Simon Tempest (Hill School)

Project Director  
Hill International  
111-222-3333  
name@email.com

### Golda Meir House, Newton, MA (current)

- \$30 million, 178,200 sf
- Phased, occupied renovation of 199 senior living units
- Major systems and accessibility
- Constricted area, limited site access
- Low-income tax credit financing

### SELECTED PRIOR PROJECTS:

#### The Lofts at 30 Pine, Gardner, MA

- \$13.8 million, gut renovation
- Historical mill conversion to 55 apartments
- Structural shoring, extension interior masonry work
- **Recipient of 2016 Thomas Menino Legacy Award**

#### Cross Pavilion, Foxborough, MA

- \$6.3 million, 20,000 sf
- New construction of Business Center at Gillette Stadium
- Extremely tight schedule
- Started project with 60% drawings, completed the job as D/B
- Performed work around football and soccer games at Gillette

#### Mass Audubon, Worcester, MA

- \$2 million
- Deep energy retrofit of Conservation Center

#### Liberty Plaza, East Boston, MA

- \$1.4 million
- Shopping Plaza facade renovation

#### Barrett's Alehouse, Bridgewater, MA

- \$1.5 million
- Fire damage renovation

# May Shields, RN, MSN

## Chief Operating Officer, Hearth



### SUMMARY

- Experienced Project Development and Implementation Director
- Seasoned; results oriented Chief Operating Officer
- Team player at all levels with the ability to negotiate and collaborate positive outcomes
- Proven ability to integrate fiscally responsible, customer oriented, quality solutions to long range strategic plans

### EMPLOYMENT

**HEARTH, INC.** – Boston, MA  
June 2003 – Present

#### Chief Operating Officer

*Responsible for all operations at seven housing sites and an Outreach Department, including budget oversight, personnel management, delivery of health care services, vacancy management, marketing and city wide outreach services. Ensure organizations compliance with various governmental program regulations including Executive Office of Elder Affairs, Department Of Medical Assistance and the Department Of Mental Health. Participate in planning and implementation of agency programs and additional property development. (April 2007 – present)*

#### Director of Health Services

*Responsible for the supervision and coordination of health services and wellness programs at five supported housing sites and one assisted living residence. Responsible for assisting with the development of business plans for new service site proposals and for developing, coordinating and implementing technology strategies that enhance business processes. (June 2003 – March 2007)*

**TUFTS HEALTH PLAN** – Watertown, MA  
October 2002 – June 2003

#### Senior Project Manager/Planner, Pharmacy Services Planning and Development

*Responsible for analysis and evaluation of pharmacy industry and local marketplace dynamics in order to evaluate the current strategic position of Tufts Health*

*Plan in respect to pharmacy benefit management and to identify strategic opportunities. Responsible for the development and implementation of a long-range strategic plan for the Pharmacy Department and management of pharmacy benefits redesign and technology innovation projects for implementation in 2005.*

**VISITING NURSE ASSOCIATION OF BOSTON**  
Boston, MA  
September 1977 – September 2002

#### Director of Special Projects

- *Developed, coordinated and implemented most major Operations projects.*
- *Initiated the analysis and development of data driven solutions to new operational challenges of Prospective Payment*
- *Operations Project Manager for information systems conversion to McKesson's Horizon Home Care software*
- *Operations Project Manager for VNABs successful participation in 1997-2000 Centers for Medicare and Medicaid Services Prospective Payment Demonstration Project*
- *Project lead for major district office consolidation and clerical redesign initiatives*
- *Developed and implemented a congestive heart failure telemedicine pilot project*
- *Developed and implemented an Enterostomal Nurse consultation program*
- *Developed VNAB Living with Cancer Program*

#### Director of Home Health Aide Operations

*Directed all day to day operations of the Home Health Aide Division, which at the time was the largest division within VNAB.*

#### Extended Hours Service Manager

*Responsible for agency operations during night, weekend and holiday hours.*

#### Project Development Specialist

*Responsible for quality assurance programs, utilization review and developing and coordinating contract services. Consultant to Boston Housing Authority Elder Services.*

### **Personnel Manager**

*Responsible for directing the Human Resource Department in recruitment, compensation and benefits, staff development and employee relations.*

### **Patient Services Manager – Clinical Operations**

*Responsible for day to day operations of a multidisciplinary service delivery team.*

### **Staff Nurse**

*Provided and coordinated direct patient care in the home.*

**SIMIONE AND SIMIONE** – Framingham, MA  
part-time 1988

### **Consultant**

*Provided management consultation services to home health care agencies.*

**MGH INSTITUTE OF HEALTH PROFESSIONS** –  
Boston, MA 1/85 - 4/85

### **Lecturer**

*Responsible for clinical instruction and supervision of graduate nursing students in a community health setting.*

## **EDUCATION**

**Boston College** – Boston, MA  
MSN in Community Health Nursing

**Northeastern University** – Boston, MA  
BSN

## **PUBLICATIONS**

Martin, A., Bernard, A., Shields, M., (1996), **24 Hours A Day – Meeting the Needs of Home Care Patients.** “Home Health Care Nurse”, pp 45-50.

## **PRESENTATIONS**

2015 Leading Age National Conference speaker - Boston

2015 Corporation For Supportive Housing Aging Summit speaker - Chicago

2014 National Health Care For The Homeless Conference speaker – New Orleans

National Alliance To End Homeless Conference speaker 2010 and 2013 –Washington D.C.

Mass-ALFA 2004 Fall Conference and Trade Show – Medication Management

National Association for Home Care **Prospective Payment System Workshop** – Washington, Chicago and Dallas

New Hampshire Home Health Care Association – **Prospective Payment Implementation Strategies**

## **CREDENTIALS**

MA RN Registration

Computer skills include proficiency in Microsoft Word, Excel and PowerPoint

## **HONORS**

Current member of the Governor’s Assisted Living Advisory Council

Board Member Mass ALFA – 2009 to present

EOEA Assisted Living Regulations Work Group

Boston Business Journal - 2008 Champion In Health Care

# LaTanya Nicole Wright

## Director of Outreach, Hearth



### EDUCATION

#### **Doctor of Education, Expected 2018**

Specialization in Educational Management and Leadership  
Capella University, Minneapolis, MN

#### **Master of Science in Human Services, 2013**

Concentration: Organizational Management and Leadership  
Springfield College, Boston, MA

#### **Bachelor of Science, 1998**

Major: Sociology; Minor: Early Childhood Education  
University of South Carolina, Columbia, SC

### COMMISSIONS

#### **Notary Public, Massachusetts**

(Commission expires April 8, 2022)

### WORK EXPERIENCE

#### **SPRINGFIELD COLLEGE: SCHOOL OF PROFESSIONAL AND CONTINUING STUDIES**

– Boston, MA

#### **Adjunct Professor, 2014 - Present**

- Develop and implement a core curriculum for adult learners in the area of Human Services.
- Utilize creative teaching methods based on a facilitative rather than a lecture model.
- Meet with the Assistant Dean as required to review updates and status of the overall curriculum when requested.
- Responsible for the development, set-up, and use of Moodle for web enhanced instruction as per policy for the course assigned.
- Evaluate student's class performance.
- Meet all guidelines for submission of grade reports and other valuable information as required per College and Federal guidelines.

#### **HEARTH, INC. – Boston, MA**

#### **Director of Outreach, 2013 – Present**

- Direct program staff in the coordination of services to outreach clients and to maintain and develop collaborative relationships with community service organizations, housing partners, and funders.
- Hire, orient, train, direct and supervise outreach staff (Senior Case Manager, Housing Advocates, Social Work Students, Volunteers, and Data Manager) in prevention case management, shelter-based case management, housing search, peer support group facilitation, and follow up stabilization services.
- Oversee the coordination of accurate and timely documentation/reporting as required by program funders and other sources.
- Manage Outreach Department budget, procurement of goods, work space, and day to day operations.
- Report to Chief Operating Officer and discuss program activities.

#### **VICTORY PROGRAMS INC. – Boston, MA**

#### **Program Director/Supported Housing 2013 - 2013**

- Managed 6 sites which included budgeting, staffing, quarterly and annual reports for funding sources (i.e. DND, HOME, HOPWA).
- Scheduling, staffing, and training.

#### **PINE STREET INN – Dorchester, MA**

#### **Site Manager/Relief Coordinator 2010 –2013**

- Managed 2 residential sites and provided the direct supervision of residential counselors.
- Provided and supervised the support and rehabilitation services to consumers with psychiatric disabilities and a percentage with co-occurring disorders.
- Coordinated a group of relief direct care staff to ensure there is availability of staffing for coverage among the residential programs within the Paul Sullivan Housing residential programs.

**Relief-Direct Care/Case Management, 2008-2010**

- Provided coverage on an on-call as needed basis to various residential programs.
- Provided support and rehabilitation services to consumers with co-occurring disorders and assist program management and person served in development of resources related to substance abuse.

**VINFEN CORPORATION – Dorchester, MA**

**Program Director I, 2007 – 200**

- Supervised 2 site managers and assisted with supervision of 12 residential counselors.
- Managed 3 program sites according to the company's and Department of Mental Health's policy (i.e. staffing, budgeting, licensing, and safety).
- Provided and supervised the support and rehabilitation services to 20 consumers with psychiatric disabilities and a percentage with co-occurring disorders.
- Attended community and neighborhood meetings and maintained open contacts with landlords and housing departments.

**Residential Counselor/Site Manager I, 2002 – 2007**

- Managed program site according to the policy (i.e. staffing, budgeting, and safety).
- Completed assessments, monthly progress notes and assist with proper collection of information required by Vinfen and affiliates (i.e. DMH).
- Attended case conferences, clinical meetings and provided on-call services.

**VOLUNTEER EXPERIENCE**

**Sister Clara Muhammed Cooperative – Dorchester, MA**

*President of the Board 2005-2014*

# References

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# Recent New Construction Experience – JCHE

## Harry and Jeanette Weinberg House

The Harry and Jeanette Weinberg House, located at 132 Chestnut Hill Avenue in Brighton, will expand JCHE’s supportive senior housing campus in Brighton with 61 new units. In addition to delivering high-quality, service-enriched affordable housing, the building includes a ground floor commercial use, advancing JCHE’s vision for senior housing that serves as a neighborhood center for its residents and surrounding community. Construction began in September 2017, with an expected completion in late 2018.

A bridge connecting the new building to JCHE’s existing 700-unit campus will allow the residents of Weinberg House to access our senior-specialized fitness center, uniquely-equipped computer center, multi-lingual library, auditorium, art room, meeting rooms and lounge areas. Residents will also access our intergenerational programming, an active schedule of lectures, concerts, events and discussion groups, and have access to JCHE’s handicapped accessible van. A team of 8 (7.5 FTE’s) resident service coordinators will help residents navigate concerns both small and large.

Fifty-six of the 61 apartments will be one-bedroom, and the remaining five units will be studios. JCHE will further its mission by achieving the highest standards of universal design possible in apartments and throughout the building and site, so that residents can make Weinberg House home regardless of physical ability. The building will also meet LEED Silver and Enterprise Green Community standards.

In addition to providing units for Extremely Low Income households, the Weinberg House will serve two special populations: chronically homeless and individuals aging with developmental disabilities. Through a service partnership with Hearth, JCHE will house 7 homeless or chronically homeless seniors who are transitioning into permanent housing. JCHE’s resident services staff will work closely with Hearth placement and support services staff to support a successful transition from homelessness to permanent housing. JCHE is also very excited to collaborate with Jewish Family & Children’s Service (JF&CS) to provide housing for five adults aging with lifelong developmental disabilities.



## 370 Harvard Street

370 Harvard Street advances JCHE's mission to support aging in community with 62 units of 100% affordable, service-enriched housing for seniors in the heart of Brookline's Coolidge Corner. The project consists of 52 one-bedroom and 10 two-bedroom apartments. 370 Harvard Street will achieve the highest standards of universal design possible in the apartments and throughout the building and site, so that residents can make 370 Harvard Street home regardless of physical ability. The highly-efficient and sustainable building will meet Enterprise Green Community standards bringing improved health, economic and environmental benefits to our residents while reducing our carbon footprint and adding green space.

This development will also advance JCHE's vision to develop a village center that invites neighbors into our ground floor with community-oriented retail and programming, and multiple public open spaces, adding to the vibrancy of our residents' lives and the Coolidge Corner community. JCHE's award winning programs and services, including educational classes, intergenerational programs, senior-specific fitness classes, cultural events and more will be available in this new community. The development will connect to the Congregation Kehillath Israel (KI) Synagogue via a front link, providing the residents access to extensive program space in KI's function hall, library, and meeting rooms. In addition to all that Coolidge Corner offers, residents will also enjoy the programs and services at the Brookline Senior Center located a few blocks away.

JCHE was selected via a competitive RFP by KI to acquire a portion of their property at the corner of Harvard and Williams Streets in 2014. Prior to submitting the 40B comprehensive permit application in November 2016, JCHE held a 15-month community process, including 13 public meetings and presentations, to develop a neighborhood responsive building design. The development meets a number of local priorities, including increasing the amount of green open spaces with public seating and managing traffic and pedestrian congestion. During the permitting process with the Town, the design evolved further based on the feedback we received from the community as well as various Town boards and commissions.

Due to this extensive community process, we have been able to garner significant neighborhood support for the project. This community support is evidenced by a recent vote of the Brookline Board of Selectmen, with the support of the Housing Advisory Board (HAB), to commit up to \$2.5 million to in a combination of Brookline Housing Trust, HOME and/or CDBG funds, to the project. Groundbreaking is expected in late 2018 and the anticipated project completion is in 2020.

Public comments and more information and regarding the permitting process and are available on the Town of Brookline's website: <http://www.brooklinema.gov/1331/384-Harvard-Street-JCHE>.



# Additional Development Experience – JCHE

## Golda Meir House (2016)

Golda Meir House, built over two phases in 1978 and 1995, has 199 units: 193 one-bedroom units and 6 two-bedroom units. With a \$71 million preservation and modernization transaction, JCHE is currently leading an occupied rehab with a total ground floor redesign and reconfiguration to serve as a “Village Center” with many inviting community spaces. Funded through LIHTC equity, a new permanent mortgage, utility rebates, and seller financing, the renovation includes an overhaul of the building systems for a 30-year life cycle investment and requires coordinating tenant moves, asbestos abatement and temporary relocation of the kitchen to continue offering the lunch program while the kitchen and dining room are renovated.

Once completed, the units will be new from the “studs in,” allowing for some insulation to be added to the exterior walls. The kitchens, with new cabinetry and energy star appliances, were reconfigured for increased accessibility and to provide natural light. Complete bathroom renovations included converting step-in tubs to low-barrier showers with seats and grab bars. All lighting in the units has been increased to tenant needs and each unit now has its own thermostat, allowing tenants to regulate temperature in their own unit for the first time. Because of the level of complexity, virtually everyone at JCHE has had a role in this project with a high level of engagement from the Tenant Council and directly with tenants.



*Recently renovated apartment in Golda Meir House*

## Genesis House/Kurlat House (2016)

JCHE is currently under construction with a \$81 million preservation and modernization transaction of Genesis House utilizing LIHTC equity and a new permanent mortgage. In 2016, Genesis House was renamed the Gita and Saul Kurlat House but the legal entity will continue to be Genesis House. Genesis House was built in 1978 and has 209 units, containing 189 one-bedrooms and 20 two-bedrooms. The renovation project is very similar to Golda Meir House in scope in that it is an occupied rehab of all of the apartments from “the studs in” with kitchen, bathroom and lighting universal design features. The project is also installing new building systems for a 30 year life cycle investment. Since the Multipurpose Center was recently renovated in 2011 (described below), only portions of the ground floor program spaces will be renovated. These include the Adult Day Health Center and the basement of the building. Similar to Golda Meir House, the tenants were highly engaged in the apartment redesign efforts.

## Ulin House (2015)

In 2015, JCHE completed a \$21 million preservation transaction of Ulin House. Built in 1971, Ulin is a 242-unit building containing 170 studios and 72 one-bedroom units. The project was an occupied rehab, and required coordinating tenant moves, asbestos abatement, and construction in a building housing JCHE's most frail tenants. In addition, a new front entrance was created including a glass back wall and ceiling. This “greenhouse” has become a popular place for tenants to gather for conversation, and provides a sheltered spot for tenants waiting for a ride to the store or doctor.

## Genesis House Multipurpose Center (2011)

In 2011, JCHE completed the expansion and renovation of the Genesis Program Center. Originally, the space provided a connection between the two towers of Genesis and included an auditorium. Over the years, hallway space had been captured to provide much-needed office space. The renovation added 9,420 square feet, including a 3,900 sf second story. The cost of the project totaled \$5.5 million, combining \$1.75 million of excess replacement reserves with \$3.75 million realized from the preservation transaction involving JCHE's Leventhal House.

The new Program Center has become the hub of resident programs and services. The renovated auditorium is now fully accessible and a backstage area, also accessible, was added. In addition, hearing assist devices are now available for hearing impaired tenants and there is a system that allows for simultaneous translation of programs into three different languages. The new Multi-Language Library houses collections in Russian, Chinese and English with tenants volunteering for librarian duty. The new Computer Center doubled our space for tenants and now provides a drop-down screen for classes to be easily taught. The Fitness Center is substantially larger, offering more strength training and aerobic, senior friendly equipment. The Wellness Center has allowed JCHE to provide space for chiropractors, podiatrists, and nurse practitioners to answer questions and counsel tenants on healthy lifestyle choices. The Multipurpose Room and Community Kitchen are used all day, every day for fitness classes, language classes, small groups, cooking demonstrations, and other tenant activities. The renovation added a covered area for drop off and pick up that is universally designed for maximum usage. Finally, an upper level porch, complete with rockers and conversation benches, provides a covered and much-adored outdoor space.

## Shillman House (2011)

Shillman House was JCHE's first new residential project in 15 years. A \$42 million project, the 150-unit Shillman House is a certified Enterprise Green Community. As such, it includes increased insulation, a geothermal heating system, solar PV, water saving faucets, toilets and showers, low VOC paints and carpets, and drought resistant landscaping. Shillman is JCHE's first mixed-income community, combining Section 8, LIHTC units, and market rate units. Fourteen sources of financing were used in Shillman including MHFA Permanent loan, HUD 202, LIHTC, TCAP, PDA, AHTF, HSF, HIF, CBH, Home and \$5M of privately raised philanthropic equity. This 150-unit mixed-income senior development has already won the distinction of a "Community of Quality" by the New England Affordable Housing Management Association.



## Relevant Experience – PCA

PCA's goal is to create the next great place to live – combining site planning, architecture and interior design to make residents feel at home and get the community excited and on board to welcome new neighbors. In PCA's experience designing market rate and affordable housing, it is clear that even a tight budget can be enhanced with good design. Bringing a creative, open mind, PCA's team finds ways to use more standard materials in interesting and thoughtful ways.

PCA's value added approach has been used on a number of our projects to keep budgets in line, while also giving developer clients and ultimately, the residents, a sense of a unique, well designed space they can call home. PCA has taken this approach to housing developments such as the 20-unit, 100% affordable Port Landing, and the 79-unit Edge Apartments in Allston, MA. In Jamaica Plain, PCA recently helped create Jackson Commons, a 78% affordable housing development that has dedicated eight units to extremely low-income households, some who are transitioning out of homelessness.

PCA's portfolio of multifamily housing continues to grow, with many additional projects currently in permitting, review or construction. Each development is tailored to the site and the client's goals, providing consistently high returns on investment with units renting and selling well before opening day. This means that PCA's design is both contemporary and contextual, fulfilling community wish lists as needed without compromising budget or program. This success is demonstrated in the high level of repeat clients – developers and owners who return to PCA again and again to find solutions for their most complex challenges.

PCA's experience in affordable and multi-family housing includes leading numerous project reviews involving rigorous community processes. The firm's track record of approvals in downtown Boston's surrounding neighborhoods, including Newton, Cambridge, Dedham, and Easton to name a few, demonstrate that the importance of good communications with all stakeholders is the key to the long-term success of the project.



*Edge Apartments*



*Jackson Commons*

## Relevant Experience – Colantonio

PROJECT NAME	PROJECT DESCRIPTION	SIZE	VALUE
<b>Golda Meir House Newton, MA</b>  General Contractor  Jan. 2016 - present	Occupied renovation of JCHE's 199-unit apartment complex, with a complete modernization of apartments and ground floor community spaces	178,300 s.f.	\$31,634,000
<b>86 Dummer Street Brookline, MA</b>  CM at Risk  June 2014 - Dec. 2015	New construction of a three-story, wood frame building for 32 affordable housing apartments. Included construction of underground garage and extensive site work (self-performed).	38,500 s.f.	\$12,585,108
<b>Fitchburg Place Apartments Fitchburg, MA</b>  CM at Risk  Nov. 2011 - Aug. 2012	Redevelopment of abandoned property into 96 units of affordable rental housing for the elderly and disabled. All HVAC systems were replaced with high-efficiency boilers and a cogeneration unit. The building also received a new roof and the fire and safety systems were upgraded.	42,528 s.f.	\$19,000,000
<b>Trustman Apartments Brookline, MA</b>  General Contractor  Sept. 2010 - Jan. 2012	Phased renovation with updates to the kitchen, heating and security system for 86 units, all while fully occupied. Each unit received new kitchen counters, cabinets, flooring and appliances. A forced hot water heating system replaced the electric base-board system. The fire alarm system was also upgraded.	40,000 s.f.	\$6,830,850
<b>F.A. Day Middle School Newton, MA</b>  General Contractor  Sept. 2012 - Aug. 2013	Addition to the school for a new entrance and six additional classrooms; upgraded administrative offices and security system; installed new sprinkler and fire protection systems; and expanded the cafeteria and parking area.	55,000 s.f.	\$6,400,000

## Relevant Experience – Hearth, Inc.

Hearth serves men and women in the Boston area who are at least 50 years old and homeless, or at risk of becoming homeless. A leader in the field for almost 25 years, Hearth has addressed elder homelessness in the Greater Boston area by providing housing and supportive services to elders in need.

### Hearth's Housing

Hearth owns or operates 188 units of service-enriched housing in seven sites in the Boston area, including 43 units of Assisted Living in Roxbury. Hearth service-enriched housing model starts with a safe home, but also provides a holistic approach to care with its on-site team that includes nurses, social workers, and certified home health aides, who work together to address resident's physical, behavioral health and social needs. The cost of Hearth housing is estimated to be significantly less than half the cost of institutional alternatives such as long-term care, and significantly less than the cost of leaving people homeless.

### Hearth's Outreach Program

Hearth housing has long waiting lists, so the Outreach Team works to place their over 275 homeless clients, and another 50 who are at risk of homelessness, into other appropriate, affordable housing opportunities and connect them with the services necessary to succeed in that housing. Once housed, the team provides stabilization services for 6 months to one year after placement. Since inception, Hearth has placed close to 2000 elders into affordable, safe, and permanent homes. Hearth has received 17 different local and national awards recognizing its community leadership, high-quality innovative programs, fiscal responsibility, and achievements in increasing the supply of affordable housing for vulnerable populations.



*Hearth at Olmsted Green, Dorchester  
59 apartments with supportive services*



*Hearth Outreach – celebrating a client's new permanent home*



CITY OF NEWTON

DEVELOPER'S QUALIFICATIONS AND REFERENCES FORM

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City for purposes of determining bidder responsiveness and responsibility with regard to the requirements and specifications of the Contract.

- 1. FIRM NAME: Jewish Community Housing for the Elderly III, Inc.
- 2. WHEN ORGANIZED: 1975
- 3. INCORPORATED?  YES  NO DATE AND STATE OF INCORPORATION: 1975 – MA
- 4. IS YOUR BUSINESS A MBE?  YES  NO WBE?  YES  NO or MWBE?  YES  NO
- \* 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:  
Not applicable
- \* 6. HAVE YOU EVER FAILED TO COMPLETE A CONTRACT AWARDED TO YOU?  
 YES  NO  
IF YES, WHERE AND WHY?
- \* 7. HAVE YOU EVER DEFAULTED ON A CONTRACT?  YES  NO  
IF YES, PROVIDE DETAILS.
- \* 8. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT:  
Not applicable
- \* 9. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.  
  
PROJECT NAME: Genesis House and Golda Meir House renovations  
OWNER: JCHE VI, Inc. (JCHE-controlling affiliate)  
CITY/STATE: Brighton, MA / Newton, MA

Golda: \$37,800,000  
DOLLAR AMOUNT: \$ Genesis: \$56,790,000 DATE COMPLETED: ongoing – under construction  
PUBLICLY BID? YES  NO  
TYPE OF WORK?: Permanent Mortgage  
CONTACT PERSON: Deborah Morse TELEPHONE #: (617) 854-1133  
CONTACT PERSON'S RELATION TO PROJECT?: MassHousing – Relationship Manager  
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: Genesis House and Golda Meir House renovations  
OWNER: JCHE VI, Inc. (JCHE-controlling affiliate)  
CITY/STATE: Brighton, MA / Newton, MA  
DOLLAR AMOUNT: \$ Golda: \$20,195,483 / Genesis: \$19,415,207 DATE COMPLETED: ongoing – under construction  
PUBLICLY BID? YES  NO  
TYPE OF WORK?: Low Income Housing Tax Credit Equity  
CONTACT PERSON: Jennifer Crampton TELEPHONE #: (617) 603-4229  
CONTACT PERSON'S RELATION TO PROJECT?: Wells Fargo – Vice President and Senior Relationship Manager, Community Lending & Investment

PROJECT NAME: Shillman House  
OWNER: JCHE Framingham Limited Partnership  
CITY/STATE: Framingham, MA  
DOLLAR AMOUNT: \$ \$2.9M bridge financing / \$3.2M equity DATE COMPLETED: 2011  
PUBLICLY BID? YES  NO  
TYPE OF WORK?: Bridge Loan and Investor Equity  
CONTACT PERSON: Bill MacKenzie TELEPHONE #: (617) 927-7951  
CONTACT PERSON'S RELATION TO PROJECT?: Brookline Bank – EVP & Division Executive, Commercial Banking

PROJECT NAME: Ulin House  
OWNER: JCHE Ulin, Inc.  
CITY/STATE: Brighton, MA  
DOLLAR AMOUNT: \$ \$42 million DATE COMPLETED: 2015  
PUBLICLY BID? YES  NO  
TYPE OF WORK?: Permanent Loan  
CONTACT PERSON: Linda Pellegrino TELEPHONE #: (978) 675-2010  
CONTACT PERSON'S RELATION TO PROJECT?: Rockport Mortgage – Vice President  
(i.e., contract manager, purchasing agent, etc.)

10. The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City in verification of the recitals comprising this statement of Bidder's qualifications and experience.

DATE: 10/04/17 BIDDER: Jewish Community Housing for the Elderly III, Inc.

SIGNATURE: 

PRINTED NAME: Karen Edlund TITLE: Chief Financial Officer

END OF SECTION



**Our Approach**

# Project Understanding and Vision

## The Opportunity

JCHE is extremely excited about the possibility of developing high quality new affordable homes for seniors at 160R Stanton Ave. and expanding its existing vibrant community programming and supportive services currently offered at our neighboring Golda Meir House property. Golda Meir House, currently undergoing a \$30 million renovation, has 199 units of affordable senior housing along with extensive programming and services.

Our proposed team has an unmatched knowledge of the Water Tower Parcel, both in terms of the physical conditions of the site and the potential for supportive, affordable housing. Being located a short walk from the Green Line means that seniors can stay active in the Greater Boston area without needing to rely on their own vehicles, family members, or unreliable and costly private transportation. It is a great location to support community-wide senior programs.

JCHE's strategic plan outlines our vision that all seniors will have opportunities to age in communities of connection and meaningful engagement, where a concentration of others with similar interests makes it infinitely easier to age with ease and independence. JCHE properties all function as "village centers" to draw in people from the neighborhood to share our programs and spaces.



*Golda Meir House – Village Center currently under construction*

This vision is informed by our more than 50 years of experience as developers, owners, property managers and service providers; it incorporates a commitment to building on our foundation and pushing for even more richness in our future developments. The Water Tower Parcel offers innumerable opportunities to further this vision.

JCHE is uniquely positioned to create housing with a strong offering of supportive services, given its existing resources of the Golda Meir House. In keeping with our mission to advance "aging in community," JCHE proposes for the project to focus on units for senior households. We envision the new project connecting to the existing Golda Meir House and sharing staff and programming resources with our incredibly active community in Golda, creating operational efficiencies described in more detail on page 62. Our ambitions for the 160R Stanton Ave. project include for a portion of the new building to be dedicated to resident programs and community use.

## Minimum Project Criteria

Our team is committed to meeting the City of Newton's requirements described in the RFP, including the creation of permanently affordable units, eligibility of all units for the Subsidized Housing Inventory, and the designation of 9-12 units for chronically homeless individuals with disabilities. The specific mix of incomes, number of units and building size will be determined through a collaborative process of stakeholder engagement and further discussion with City of Newton staff, along with analysis of the site by our design and construction team. We will make best efforts to deliver the units for chronically homeless individuals by May 2020; however, our proposed schedule on pages 58-59 shows our anticipated timeline based on our expectations for the permitting and financing process.

## Understanding of City of Newton Objectives

The Newton community is facing challenges that are increasingly common across the Boston region – high housing prices and a shortage of affordable supported housing options for seniors, including those living in Newton but fear they can’t afford to age here. With “Newton Leads 2040” and “Housing Needs Analysis and Strategic Recommendations,” the City of Newton has taken impressive leadership towards understanding these gaps in Newton and identifying priority actions for the next few years. From this research, it is clear that addressing affordability in Newton must involve the construction of new units, and that city-owned land presents some of the most promising opportunities to generate this new housing.

As the owner and operator of both Golda Meir House and Coleman House in Newton – and as a leading provider of affordable senior housing in Greater Boston – JCHE is exceptionally qualified to execute on the City’s goals for the development of 160R Stanton Ave. Over the last few years, JCHE has engaged in the City of Newton’s surplussing and rezoning process to make the site available for development including attending the public hearings and Zoning and Planning Committee meetings, which provided important insights into the City’s goals for the project.



Newton Leads 2040

## Understanding of Stakeholders

Over the last few years, in preparation for the potential development of 160R Stanton Ave, JCHE has engaged numerous neighbors and other stakeholder groups regarding potential expansion of our Golda Meir House. Through these conversations we have gained an understanding of local concerns that we are prepared to address through on-going engagement with neighbors and stakeholders as we plan the project, such as the following:

- Parking and traffic flow
- Contextual design
- Construction period mitigation
- Shadows and wind impact on adjacent properties

In addition, our project architect PCA has a great track record of working effectively with the City of Newton staff and local stakeholders in shaping projects that are economically feasible, vibrant additions to the community fabric. PCA has worked collaboratively with local city planning and city design groups and have earned their respect through the high quality solutions brought for their review.



Site Context

# Engagement and Design Process

## Community Engagement Plan

JCHE is committed to actively partnering with each community in which its properties are located. Two of JCHE's current development projects – Weinberg House in Brighton and 370 Harvard Street in Brookline – illustrate the type of engaged and responsive community process that neighbors and other stakeholders of 160R Stanton Ave. can expect. JCHE worked diligently with numerous stakeholder groups to advance the vision for the Brighton and Brookline projects and identify opportunities to expand the projects' positive impacts. For example, in Brookline, prior to submitting our comprehensive permit application for the 370 Harvard St. project, JCHE held a 15-month community process that included 13 public meetings and presentations, to develop a neighborhood responsive building design. In Brighton, JCHE worked extensively with the local neighborhood association and participated in a detailed review with members of an Impact Advisory Group that was appointed by the Boston Planning and Development Association. Throughout both processes, JCHE adapted our project to address neighborhood concerns, resulting in developments with strong community support.

For the 160R Stanton Ave. project, we will work with City of Newton staff early in the process to identify stakeholder groups and confirm a timeline for stakeholder engagement. We intend to reach out to a number of local stakeholders and housing groups as well, including the following:

- Newton Senior Center
- Newton Housing Authority
- Livable Newton
- Newton CAN-DO
- Newton at Home
- Newton Commission on Disability

In addition to inviting these groups to participate in public forums, we propose a series of smaller meetings in order to understand their priorities, needs, and vision for the Water Tower site in greater depth. Through these conversations, we will explore new opportunities for programming so that JCHE can truly be a partner to improve quality of life for Newton seniors and other residents.

As part of an extensive community planning process for the Water Tower site, we will host a series of meetings with our neighbors, community stakeholders, and City planning and zoning staff soon after gaining site control. We anticipate a community process of several months prior to submitting a Project Eligibility Application to DHCD and then an second round of public meetings during the 40B permitting process.

## Anticipated Design Process

Multifamily and affordable housing development projects by their very nature engage the community in the design process. We envision a highly collaborative design process to launch during a pre-40B community planning process in early 2018. Design development would extend over several months in order to build off the stakeholder engagement during the 40B public process. PCA and JCHE will work closely together to create resources to communicate design ideas and solicit feedback such as presentations, models, and community meetings using mixed media to make design and planning concepts accessible in order to engage all members of the community in dialogue and feedback.

## Design Principles for All JCHE Buildings

### 1. Aging in Community

JCHE's vision is for our residents to age in community - to live a full life of connection and purpose in a dynamic, supportive environment. Our buildings should above all be a reflection of this vision. When someone walks into a JCHE building, whether it's in a neighborhood downtown or in the metro suburbs, they should instantly understand that they are not simply entering an apartment building, but that they are entering a community in the fullest sense of the word, where our residents form meaningful connections and live full and engaged lives.

### 2. Apartments for Life

JCHE strives to build deeply supportive housing in which our residents can live independently. From a design perspective, this means that we aspire for our residents to not have to move to an institutional facility because of physical constraints of their apartment, even as they age and their physical space needs change.

### 3. Supportive

Accommodate the "continually evolving support services to meet the needs of our diverse residents as they age." Apartment units should facilitate the supports that many residents will need as they age, while the common spaces should accommodate the wide variety of well-being and social programs that are offered on campus.

### 4. Village Centers

One of JCHE's primary objectives is "building connections and community within our walls and in our surrounding neighborhoods." While the components of what makes a great Village Center will change based on project location, we always want our buildings to be vibrant hubs of activity that enrich, and are enriched by, our residents and our neighbors.

### 5. Quality

JCHE builds and operates "superior senior housing that is broadly affordable." Our housing should be attractive, pleasant, and comfortable; maintainable; and durable.

### 6. Affordable

JCHE is a mission-driven housing provider, and all our housing - from deeply affordable to moderate income - must be affordable to the people we serve. Throughout the design process, it's important to have an understanding of both the up-front and long-term costs of systems and materials, and to make educated decisions based on the trade-offs involved.

### 7. Sustainable

JCHE strives to be a good steward of our resources. Our buildings should exemplify best practices in green building in terms of comfort, efficiency, health, and resiliency.

### 8. Emerging Technology

We want our buildings to be ready for the next level of technology, both in common areas and in apartments. We anticipate that our reliance on technology will grow as more and more supportive technology for seniors is developed and as it becomes a more critical component of enabling seniors to live independently. Technology is being developed far faster than our buildings will be renovated, and so to the greatest extent possible building design should anticipate ways to adapt to future technologies.

# Integrating Housing and Supportive Services

## JCHE's Approach to Service-Enriched Housing

JCHE is proud of our history as an affordable housing provider, but providing a decent and safe place to live is only the beginning of our work. Our housing model is a supportive one, where we ensure that basic needs are addressed, and then focus on the important work of keeping seniors healthy and supported with multiple opportunities for community building, engagement and connection.

The backbone of our wrap-around service platform is our resident service coordinators (RSC) who help ensure that our residents have access to the supports they need to successfully live independently. Golda Meir House currently has two full-time RSCs, which we would expand to three with this project, who assist residents with benefits navigation and provide a host of programming aimed at engaging older adults and combating social isolation. Our RSCs, who have special training in geriatric concerns including memory loss, do everything from reading a confusing bank statement to planning our annual Chinese New Year celebration. When necessary, our RSCs work with resident's family, or other appropriate informal and formal supports. All of our staff, from the janitors to accountants, is trained to be sensitive to our seniors' needs, and back-up our resident service coordinators as the eyes and ears of our community.

The RSCs also connect our residents to our broad range of programs, which include fitness programs specially designed for senior wellness, computer classes, numerous volunteer opportunities, and a constant flow of activities in our many public gathering spaces. Organized van trips for shopping, social and cultural outings further connect residents to Newton's villages and downtown Boston.

Golda Meir House presents additional opportunities for service-enriched housing, with its recently renovated commercial kitchen. Residents currently participate in an affordable daily lunch program, including a kosher options for those who choose.

Our RSCs and other staff have observed that not only are the healthy meals an amazing social opportunity, but that once out of their apartments and downstairs for meals, many residents stay for other programs and activities.

In addition to the partnership with Hearth described in the next section, we are exploring other relationships to expand our service offerings. We intend to reach out to Newton Wellesley Hospital to explore potential areas of collaboration that could provide enhanced health and program benefits to our residents, many of whom receive care at NWH. We plan to explore ways to extend these potential new integrated community health programs to the greater Newton senior community. We also believe that there is great potential in senior housing for an intergenerational music program, and we have had positive initial conversations with the New England Conservatory about potentially housing up to 10 graduate students who would commit to performances and engagement with our residents.

Our supportive housing model not only creates a great place to live, but also offers real health advantages to the seniors who live at JCHE. Numerous studies have shown that chronic loneliness is an extreme health hazard for older adults. Living in a community setting reduces rates of cognitive decline, a major issue among the population we serve. In fact, on average JCHE residents live in independent housing eight years longer than the general population, and only 3% of our residents move to nursing homes every year. Expanding our Golda Meir campus means giving dozens of new seniors an opportunity to live in a place where they can focus on the things that matter most to them, rather than having to choose between paying rent or a medical bill, or living in isolation and loneliness.



## **Supportive Services Plan for Chronically Homeless Individuals**

Hearth, Inc., an agency that shares our mission to focus on affordable and enriched opportunities for seniors to age successfully, will be our service partner on this component of the project. Hearth's specific focus on homeless services makes them an excellent fit to provide support for the 9-12 chronically homeless individuals.

Hearth will initially assist JCHE to identify and support applicants for the homeless set-aside units. Hearth's Director of Outreach will assume responsibility for providing comprehensive housing search services to identify applicants for these set-aside units. Hearth will direct case management staff to assist homeless applicants with applications, interviews, appeals, mitigation, and stabilization services.

Once housed, Hearth will provide case management services per each resident's service plan as they transition into the permanent housing setting in the new development. These services will be provided again continuously as units turn over. Hearth and JCHE will have a Memorandum of Understanding for services, but the services will be arranged through Hearth's CSPECH (Community Support for People Experiencing Chronic Homelessness) Program to provide housing search, placement and stabilization services.

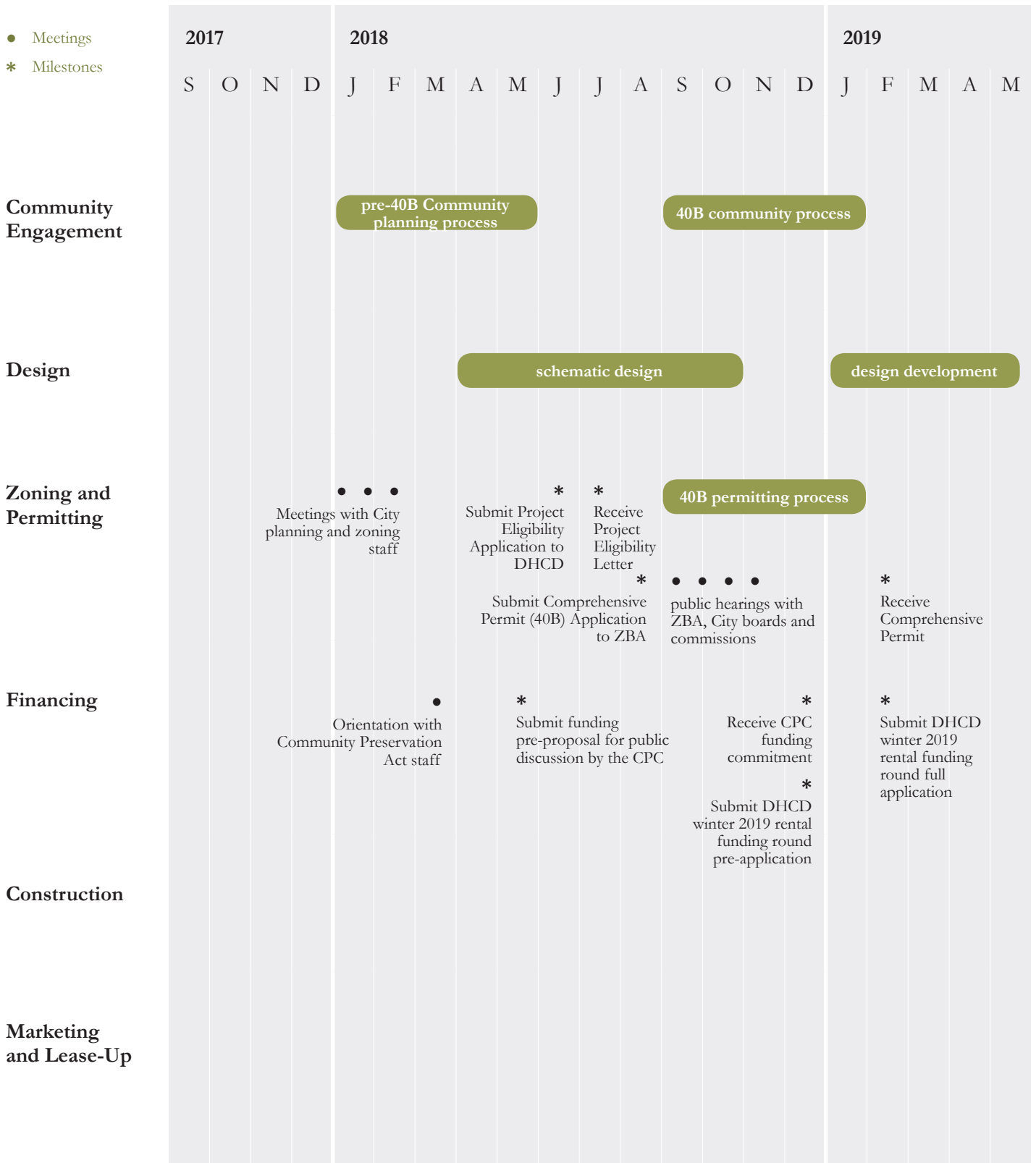
Based on Hearth and JCHE's experience, we expect that the needs of each client will vary. Case management staff will assess each client's needs and provide or obtain services to meet these needs. Information and referrals to outside community resources will likely be needed to assist these clients in successfully maintaining their housing. Special service needs, served by Hearth, could be in the areas of information and referral for healthcare, behavioral healthcare, money management, orientation to amenities in the neighborhood and ongoing support and assistance to maintain housing. These services will be provided for at least six months after the resident

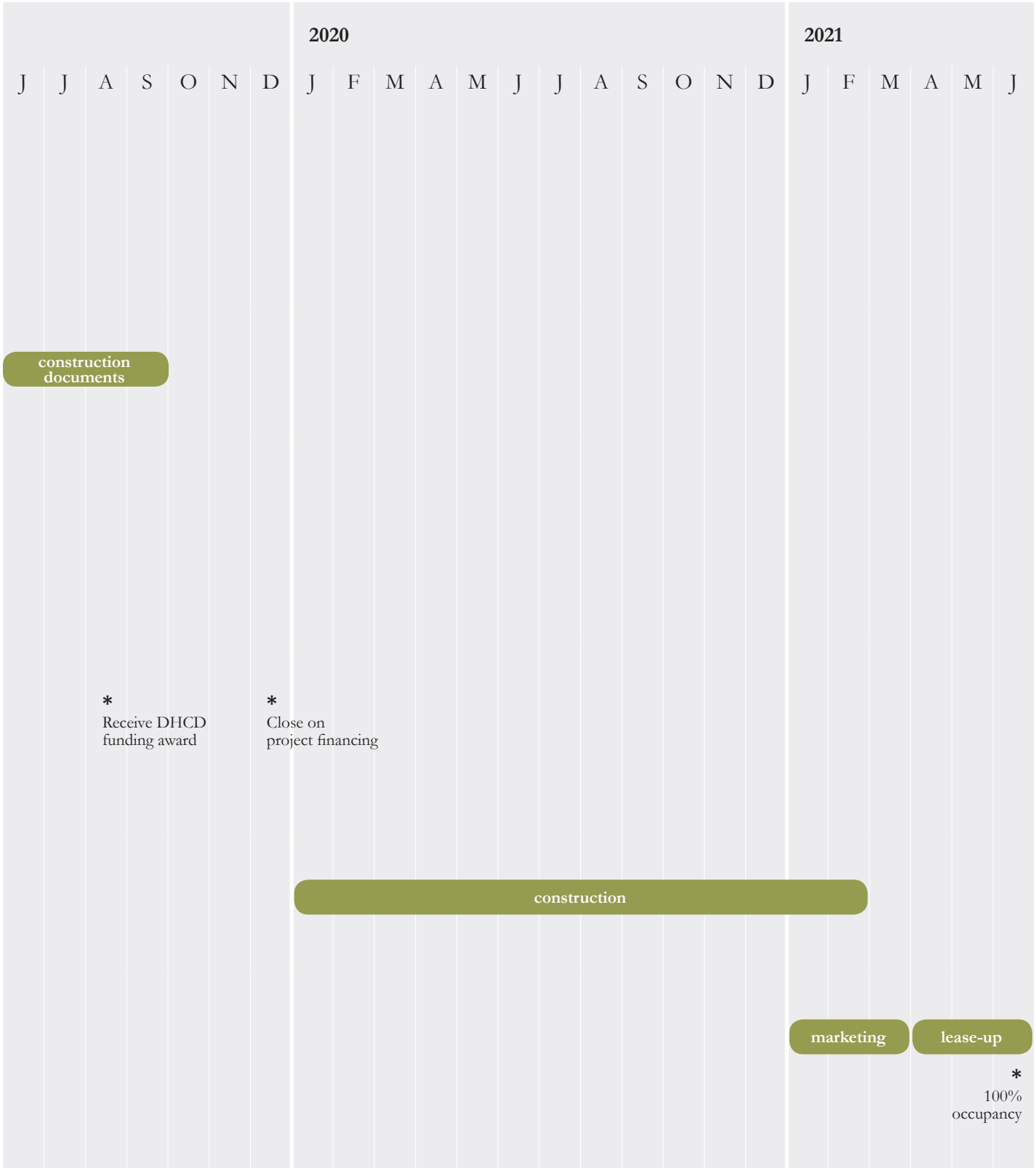
is housed, and services could be provided for a longer period of time if the resident qualifies for specific programs with longer-term commitments.

In addition to the services Hearth will provide, Hearth's case management staff will coordinate with property staff to ensure these residents are able to make a successful transition to permanent housing. Our RSCs will give special care to integrating these residents into the larger vibrant community, making sure they have access to and feel included in the daily programs and services that make the Golda campus such a special place to live.

# Proposed Development Schedule

(Assuming site control by 12/31/17)









## Financial Information

## Anticipated Financial and Management Interests

Throughout its 50-year history, JCHE – through its affiliates – has served as developer, owner, housing marketing agent, manager, and service provider for all of its properties. During that time, JCHE has developed 1,200 apartments in eight buildings on four campuses in Greater Boston. JCHE will continue this multi-functional tradition for 160R Stanton Ave, which enables operational efficiencies as well as a collaborative design process informed by the long-term view of operational staff.

Jewish Community Housing for the Elderly Services, Inc. is the entity that provides management and services to all of the properties under the JCHE umbrella. Although it is a separate legal entity than the entity that would own 160R Stanton Ave., JCHE would share a common staffing and organizational structure with JCHE Services, Inc.

160R Stanton Ave would be incorporated into the overall management of JCHE's Golda Meir House, and the staff and systems would be appropriately expanded to support the additional operational requirements. Current Golda Meir House staffing includes five full-time maintenance staff; a dedicated property accountant (with a depth of accounting staff behind them); a full-time property manager; an expertly managed compliance team of two with expertise in tax credits and voucher administration; two full-time Resident Service Coordinators; and two part-time bilingual interpreters, one who speaks Cantonese, Mandarin and English, and one who speaks Russian and English. The campus also has 24-hour emergency coverage through two dedicated site representatives who live on the campus and are on-call during non-business hours. JCHE also has capital projects staff who work across our portfolio to ensure long-term sustainability of all of JCHE's properties. JCHE has multilingual staff (primarily Russian and Chinese) in all of our departments so that every resident, no matter what they need, can communicate in their native language.

All JCHE properties have Identity of Interest agreements with Jewish Community Housing for the Elderly Services, Inc. for each service. These contracts determine a small fee on a per apartment basis and are renewed annually by both parties. A small portion of the services are carried in the operating budget of each JCHE property in the resident services category. Residents pay nominal fees to participate in wellness programs, the computer center and some cultural and social programs. The majority of funding comes from the over \$1.5M that JCHE raises in private philanthropy each year.

# Strategy for Securing Equity and Financing

Assembling financing to construct new affordable rental housing projects can be complicated. For the 160R Stanton Ave. project, we anticipate seeking multiple federal, state and local sources to support housing affordability, which may include:

- Low Income Housing Tax Credits (both federal and state)
- DHCD Subordinate Debt (combination of Affordable Housing Trust Funds, Housing Innovation Funds, and Housing Stabilization Funds)
- HOME (federal through DHCD and/or City)
- Section 8 and/or MRVP rent vouchers (through DHCD and/or Newton Housing Authority)
- Community Preservation Act (CPA) funds from the City of Newton
- Utility Rebates

Conditioned on obtaining site control in late 2017 and obtaining a local funding commitment and comprehensive permit by the end of 2018, we anticipate applying for funding from the Massachusetts Department of Housing and Community Development (DHCD) in the winter 2019 rental funding round, with hopes of receipt of a funding award in August 2019. Based on our experience with DHCD funding cycles, we feel that the following timeline is realistic:

- December 2018: Submit DHCD winter 2019 rental funding round pre-application
- January 2019: Receive DHCD invitation to submit full application for winter 2019 rental funding round
- February 2019: Submit DHCD winter 2019 rental funding round full application
- August 2019: Receive DHCD funding award

After receipt of the 9% and State LIHTC allocations, JCHE intends to seek competitive proposals in order to select an equity investor that will provide the best pricing and overall investment terms. Receipt of a DHCD award in August 2019 would enable the team to close on project financing and start construction by early 2020.

To secure CPA funds from the City, we anticipate the following steps and timeline, also shown in the proposed project schedule:

- March 2018: Orientation meeting with Community Preservation Act staff
- May 2018: Submit funding pre-proposal for public discussion by the Community Preservation Committee (CPC)
- September 2018: Submit full funding proposal to CPC
- November 2018: CPC public hearing
- December 2018: Receive CPC funding commitment

The proposed December 2018 CPC funding commitment is based on the requirement for City funding to be secured prior to the DHCD rental funding round application deadline.





**CERTIFICATE OF NON-COLLUSION**

Pursuant to the requirements of M.G.L. c.30B, §10, the undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee club, or other organization, entity, or group or individuals.



\_\_\_\_\_

(Signature of individual)

Jewish Community Housing for the Elderly III, Inc.

Name of Business

## CERTIFICATION OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A and requirements of the City, the undersigned acting on behalf of the Contractor certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth relating to taxes including payment of all local taxes, fees, assessments, betterments and any other local or municipal charges (unless the Contractor has a pending abatement application or has entered into a payment agreement with the entity to which such charges were owed), reporting of employees and contractors, and withholding and remitting child support.\*

\_\_\_\_\_  
\*\*Signature of Individual (Mandatory)

\_\_\_\_\_  
\*\*\* Contractor's Social Security Number  
(Voluntary) or Federal Identification Number

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

**OR**

Jewish Community Housing for the Elderly III, Inc.

Company Name

(Corporation, Partnership, I.L.C. etc.)

By:  \_\_\_\_\_  
\*\*Corporate Officer (Mandatory)

Print Name: Karen L. Edlund

Date: October 4, 2017

\* The provision in this Certification relating to child support applies only when the Contractor is an individual.

\*\* Approval of a contract or other agreement will not be granted until the City receives a signed copy of this Certification.

\*\*\* Your social security number may be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended.