

**Newton Community Preservation Program Grant Proposal
Newton Cultural Alliance – Nathaniel Allen Homestead
November 2013**

Project Management

The project management team for the Nathaniel Allen House consists of the individuals listed below. Adrienne Hartzell, as Acting Managing Director of the Newton Cultural Alliance is serving as the coordinator of this team and to date has served to coordinate the project from the acquisition of the property from the former owner, the zoning and parking waiver considerations and work with the architect, development team and other professionals. When the project moves to the building stage a professional project manager knowledgeable about historic preservation and restoration, architecture and project coordination will be engaged and funded as part of the project development.

Project Development Team

Adrienne Hartzell
Acting Managing Director, Newton Cultural Alliance
JD Suffolk Law School, music degrees and arts administration background

Laurel Farnsworth
NCA Board of Directors
Facilities Manager, First Unitarian Society of Newton, 25 years

David Ennis
Affirmative Investment – see bio on following pages

Linda Parnas Goodwin
Architect – see bio on following pages

Julie Holbrook O'Connor
See bio on following pages

DAVID M. ENNIS

Affirmative Investments, Inc., 33 Union Street, Boston, MA 02108 617-367-4300

EXPERIENCE:

- 2001-Present **President, *Affirmative Investments, Inc.***, Boston, MA
Since 2001, has led Affirmative in two new directions – direct development in partnership with non-profit agencies and the development and financing of economic development projects using the New Markets Tax Credit. Affirmative has been involved in the financing and development of over \$1.0 billion in private and public financing, which includes over 6,000 affordable housing units and 500,000 square feet of commercial space. The new tools and new areas have allowed Affirmative to expand on its core mission to provide expanded opportunities to low-income communities and low-income persons.
- Relevant Experience**
Leonard Florence Center for Living - \$38 million new construction skilled nursing facility in Chelsea, MA utilizing New Markets Tax Credits as the key funding tool. Affirmative acted as the developer for the sponsor, overseeing design, engineering, zoning, permitting, contractor selection, construction oversight, and all of the financing.
- United Teen Equality Center (UTEC)** – UTEC renovated and expanded its facilities in Lowell, MA to include a renovated café and commercial kitchen, a performance center and classrooms to house UTEC’s youth education and workforce training programs. Affirmative acted as the developer for this \$12 million Platinum LEED project.
- Barnes School** - \$23 million rehabilitation of school in East Boston, using a combination of historic tax credits, low-income tax credits and HUD financing to create a new health center for the East Boston Neighborhood Health Center and 74 affordable units of housing for low-income seniors. Affirmative acted as development and financing consultant on this Article 80 project.
- 1989-2001 **Vice-President, *Affirmative Investments, Inc.***, Boston, MA
Helped transition Affirmative Investments from a small investment banking firm investing in non-profit projects to a financing and development consultant to non-profit agencies. During the 1990’s, led the effort to expand the range of services that Affirmative Investments provided its clients – with a focus on real estate, development and financing services for social service agencies
- 1986-1989 **President, *Interactive Investments, Inc.***, Boston, MA
Registered Investment Advisor providing investment advice to social investors interested in channeling capital to targeted investments and projects that directly impact low-income communities.

EDUCATION:

- 1987 Chartered Financial Analyst
 Institute of Chartered Financial Analysts
- 1983 Certificate in Business Administration
 New York University Graduate School of Business
- 1979 Ph.D. in Social Theory, **Boston University**, Boston, MA
- 1972 B.A. in History, **Brandeis University**, Waltham, MA

LINDA PARDUS-GOODMAN

108 Peach Tree Lane, North Andover, MA 01845

617.650.4753

LPGoodman@LPG-Designs.com

OVERVIEW

Registered Architect with over 18 years of experience in residential and institutional design and project management. Produced numerous projects from concept through construction including the directing of project teams, production of construction documents and construction administration. Proficient in AutoCAD.

EXPERIENCE

LPG Designs, LLC, North Andover, Massachusetts **2005-Present**
Principal Architect

- Sole proprietor of small design practice providing full architectural services for residential and commercial projects. Met with clients to determine project objectives, establish budgets, review design and assist with contractor selection and construction.
- Contractor of architectural and interior design services including project management and computer drafting/construction document production. Projects include the project management of \$6,000,000+ in additions, renovations and site improvements at a 9,000 sf estate in Brookline, MA and interior design and documentation services for a 42,000 sf residential compound in Beijing, China.

Duckham Architecture & Interiors, Boston, Massachusetts **2001-2005**

Project Manager/Designer

- Served as primary contact between client, contractor and consultants delivering numerous large scale high-end residential projects.
- Produced detailed sets of construction documents including drawings, specifications and schedules and oversaw construction resolving unforeseen problems in the field.
- Developed office AutoCAD drafting and graphic standards and created a CAD object library establishing more efficient and consistent construction documentation.

HNTB Corporation, Boston, Massachusetts **2000-2001**

Assistant Project Manager

Boston Convention & Exhibition Center

- Directed staff in the production and coordination of floor plans, reflected ceiling plans, stair drawings and miscellaneous details for 2.2 million sf Convention Center.
- Established document control system to manage construction and design documents for fast-tracked project.
- Primary contact person for code and hardware consultants. Oversaw the implementation of consultant recommendations into construction documents.

Drummeys Rosane Anderson, Inc., Newton, Massachusetts **1995-2000**

Project Designer

- Consistently delivered public school projects from schematic design through construction. Projects ranged in size from 27,500 sf to 284,500 sf for new construction and 33,500 to 118,750 sf for renovation work.
- Managed in house design/drafting teams and out of house drafting services in producing quality design and thorough construction documents while maintaining tight schedules and budgets.

EDUCATION AND AFFILIATIONS

Rhode Island School of Design, Providence, Rhode Island
Master of Architecture and Bachelor of Fine Arts in Architecture

Bowdoin College, Brunswick, Maine
Bachelor of Arts in Art History, minor in Sociology

Registered Architect, Massachusetts and New Hampshire
National Council of Architectural Registration Boards, Certificate Holder
American Institute of Architects, Member
Boston Society of Architects, Member

JULIE HOLBROOK O'CONNOR
4 PARK ROAD #2
WINCHESTER, MA 01890
617-905-1713
jhoconnor@verizon.net

EXPERIENCE:

- 2001 - Present: **Development, Finance and Construction consulting** on a contract basis, including acting as clerk of the works and owner's representative during construction for non-profits. Development consulting contracts have included a health center, an affordable apartment complex, an affordable assisted living project, and the renovation of two former Catholic church complexes for use by churches and schools. Coordinated all aspects of development, from site acquisition, assembling of development team, design oversight, obtaining of many different sources of financing, and oversight of construction until successful completion.
- 1994 – 2000: **Development and Finance Consultant, *Affirmative Investments, Inc.***, Boston, MA. Structuring low income housing tax credit projects for non-profit and for-profit clients. Tasks include finding and negotiating with equity investors, obtaining financing, applying for subsidies, and coordinating all aspects of the closing process. Projects range in size from 25 to 97 units, both new construction and rehabilitation, inner city and suburban. Acted as owner's representative on several projects.
- 1993 – 1994 **Construction Project Manager, *Metric Corporation***, Brookline, MA
Project Manager for a general contractor. Responsible for projects including a rehabilitation of several South End buildings into SRO housing for the homeless, new construction of an Olive Garden restaurant, and renovation of the common areas of a downtown condominium building.
- 1990 – 1993 **Project Manager, *Just-A-Start Corporation***, Cambridge, MA
Project Manager for housing development projects with responsibility for projects such as the acquisition and adaptive re-use of a former church building into 32 low income apartments. Applied for and obtained a wide range of federal, state, and local subsidized and conventional financing sources. Acted as owner's representative/clerk of the works.
- 1989 – 1990 **Consultant**, Assisted real estate developers in planning, development and marketing affordable housing developments. Corporate trainer for Project Management workshops.

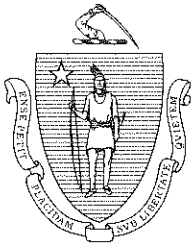
1986 – 1989 **Co-Project Manager**, *Cottonwood Company*, Boston, MA. Developed a 120 unit affordable housing townhouse property (HOP Program) in Lincoln, MA. Wrote a Guide to Producing Affordable Housing for the state. Consulted on the feasibility of developing town-owned sites for affordable housing.

AFFILIATIONS:

Corporator, East Cambridge Savings Bank
Town Meeting Member, Winchester
Board Member, Vineyard Christian Fellowship of Greater Boston
Taught first-time homebuyer courses for Boston (Public Facilities Department)
Development Consultant to artists developing live/work studios
Renovated several houses in Cambridge/Somerville/Winchester area

EDUCATION:

Wellesley College; Wheaton College (Wheaton, IL), BS and BA
Various courses, Harvard Graduate School of Design, Real Estate Finance



The Commonwealth of Massachusetts

HOUSE OF REPRESENTATIVES
STATE HOUSE, BOSTON 02133-1054

JOHN J. LAWN
STATE REPRESENTATIVE
10TH MIDDLESEX DISTRICT

Committees:
Economic Development & Emerging Technologies
Mental Health & Substance Abuse
Elder Affairs

STATE HOUSE, ROOM 134
TEL. (617) 722-2400 EXT. 7970
FAX. (617) 722-2774
John.Lawn@MAhouse.gov

Thomas Concannon, President
Newton Cultural Alliance
1301 Centre Street
Newton, MA 02459

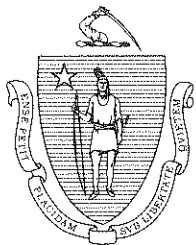
August 29, 2013

Dear Mr. Concannon,

In late 2012, the Newton Cultural Alliance (NCA) acquired the historic Nathaniel Allen Homestead house at 35 Webster St. in West Newton. The NCA is a non-profit organization of 25 arts and cultural organizations across Newton. The NCA is now working on the development and funding plan for rehabilitation of the Nathaniel Allen Homestead. This development, like the many other organizations by the NCA will build awareness of the richness in cultural activity, as well has contribute greatly to the economic development of Newton.

This property is one of the most prominent in West Newton Village, an historic home acquired in the 1800's, it was once used as a residence, then a school and has been an important part of Newton for many years. As a State Representative of Newton, I am proud to know that the NCA has taken the lead to restore this property, and intends to convert it into a community and non-profit arts and cultural center. I applaud the work of NCA and am happy to do whatever I can to support your efforts in the development and funding efforts for the property.

This project is one that embodies the spirit of the citizens of Newton. It encapsulates several of the attributes that characterize our city including our historic and ongoing interest in innovative and quality education, our strong creative sector of artists, historians and innovators, and deep civic pride and spirit of community volunteerism. Allen's work was truly that of a pioneer in education and this property is a testament to his legacy. I am happy to support the NCA in its



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JOHN J. LAWN
STATE REPRESENTATIVE
10TH MIDDLESEX DISTRICT

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Mental Health & Substance Abuse
Elder Affairs

STATE HOUSE, ROOM 134
TEL. (617) 722-2400 EXT. 7970
FAX. (617) 722-2774
John.Lawn@MAhouse.gov

efforts to develop a funding plan for this important community asset and thank you for your efforts.

A handwritten signature in cursive script that reads "John J. Lawn".

John J. Lawn
State Representative
10th Middlesex District



The Commonwealth of Massachusetts
MASSACHUSETTS SENATE

SENATOR CYNTHIA STONE CREEM

First Middlesex and Norfolk District

STATE HOUSE, ROOM 312A
BOSTON, MA 02133-1053
TEL. (617) 722-1639
FAX (617) 722-1266

August 29, 2013

Chair
SENATE POST AUDIT AND OVERSIGHT

CYNTHIA.CREEM@MASENATE.GOV
WWW.MASENATE.GOV

Thomas Concannon, President
Newton Cultural Alliance
1301 Centre Street
Newton, MA 02459

Dear Tom,

I am pleased to write this letter in support of the Newton Cultural Alliance's request for Massachusetts Historic Tax Credits applicable to the funding plan for the rehabilitation of the Nathaniel Allen Homestead in West Newton. The NCA's plan to renovate and develop the Allen House in West Newton as a non-profit community arts and education facility is admirable.

The Allen House, located at 35 Webster Street, is listed on the National Registry of Historic places and, as a Newton Historic Landmark, this property is essential to the historic fabric of the City of Newton. Built prior to the Civil War, this was the home of renowned educator Nathaniel Topliff Allen and was later used as a school run by his daughters.

Renovating this property is a project that embodies the spirit of the citizens of Newton. It encapsulates several of the attributes that characterize our city including our historic and ongoing interest in innovative and quality education, our strong creative sector of artists, historians and innovators, and deep civic pride and spirit of community volunteerism. Nathaniel Allen's work was truly that of a pioneer in education and the completed facility will be a testament to his legacy.

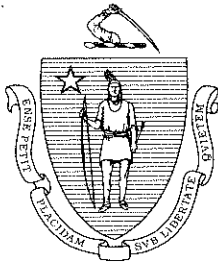
I am happy to support the NCA in its efforts to develop a funding plan for this important community asset and thank you for your efforts.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Cynthia Stone Creem'.

Cynthia Stone Creem
State Senator

Cc: Adrienne Hartzell, NCA Clerk



The Commonwealth of Massachusetts

HOUSE OF REPRESENTATIVES
STATE HOUSE, BOSTON 02133-1054

RUTH B. BALSER
STATE REPRESENTATIVE
12TH MIDDLESEX DISTRICT
NEWTON

ROOM 136, STATE HOUSE
TEL: (617) 722-2396
FAX: (617) 626-0340
Ruth.Balsler@MAhouse.gov

Thomas Concannon, President
Newton Cultural Alliance
1301 Centre Street
Newton, MA 02459

August 29, 2013

Dear Tom,

Recently I was pleased to learn that the Newton Cultural Alliance (NCA), after acquiring the historic property in late 2012, is now working at a rapid pace to put into motion its development and funding plan for rehabilitation of the Nathaniel Allen Homestead in West Newton. This property is a community historic gem and as a state elected representative of Newton I am proud to know that the NCA has taken the lead to save this property and intends to convert it to community and non-profit arts and cultural educational use. As a listing on the National Registry of Historic places and a Newton Landmark, this property is essential to the historic fabric of the City of Newton. I applaud the work of NCA and am happy to do whatever I can to support your efforts in the development and funding efforts for the property.

This project is one that embodies the spirit of the citizens of Newton. It encapsulates several of the attributes that characterize our city including our historic and ongoing interest in innovative and quality education, our strong creative sector of artists, historians and innovators, and deep civic pride and spirit of community volunteerism. Allen's work was truly that of a pioneer in education and this property is a testament to his legacy. I am happy to support the NCA in its efforts to develop a funding plan for this important community asset and thank you for your efforts.

Sincerely,

A handwritten signature in cursive script that reads "Ruth B. Balsler".

Ruth B. Balsler
State Representative

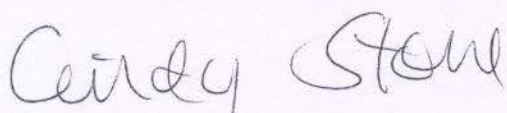
Tom Concanon,
Board President
Newton Cultural Alliance

Dear Tom,

I am writing in support of the NCA's application to the Mass Historical Commission for a Preservation Projects grant. The Allen House is an important historic property in the city of Newton. Nathaniel Allen ran one of the first co-ed desegregated schools in the country where many of the Boston area abolitionists sent their children. Many of his ideas were incorporated into Horace Mann's educational philosophy. The site was also served as a station on the Underground Railroad.

We think that the usage that the NCA proposes is an excellent match for the site. The anchor tenant will be a music school using progressive educational methods like the Allen School did. It will also provide sorely needed performance, rehearsal and meeting spaces for the cultural community in Newton. Historic Newton plans to collaborate with the NCA in developing exhibitions about this historic property.

Over the years there have been many plans for this property, some of which, in our opinion, did not mesh well with its historical and educational opportunities. We believe this proposed project does. It is my hope that the MHC will support this application.


Cindy Stone
Historic Newton

Susan & Gorham Brigham
401 Cherry Street
West Newton, MA 02465-1831

March 14, 2013

Mr. Tom Concannon
President, Newton Cultural Alliance
1301 Centre Street
Newton, MA 02459

Dear Mr. Concannon:

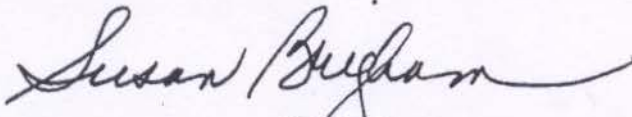
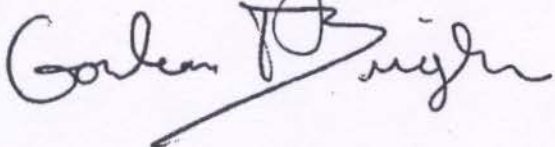
We are writing to let you know how delighted we were to learn that the Newton Cultural Alliance has acquired the Allen House property in West Newton.

Nathaniel Topliff Allen and his mentor, Cyrus Peirce, were significant players in developing leading edge education philosophies and practices in the 1800s and we need to commemorate and continue to recognize their important contributions. Restoring and renovating Allen House is one meaningful way to preserve this legacy.

As the northern edge of West Newton village gradually transitions to more multi-family buildings, of which our residence is one, we are comforted and pleased that Allen House will not fall into this category. It is far more important to know that its historical character will remain intact and we welcome its addition as a signal component of the village cultural scene.

Please accept our gratitude for undertaking this project and for engaging with our community as your development plans move forward.

With kindest regards,

HISTORIC *Newton*

527 Washington Street, Newton, MA 02458
TELEPHONE 617-796-1450
FAX 617-552-7228
www.historicnewton.org

March 12, 2013

Tom Concannon
President, Newton Cultural Alliance

Dear Tom,

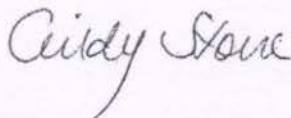
Historic Newton is pleased to support the Newton Cultural Alliance's application for funding to rehabilitate the Nathaniel Allen House in West Newton. As a member of the Cultural Alliance, we are pleased to see this property converted to a facility that the whole community can use. We look forward to seeing it develop into both classrooms and an intimate performance space, both of which are sorely needed by the cultural community in Newton.

Moreover, as the Historical Society of Newton, we are thrilled that such an important historic property will be preserved for public use. As you know, Nathaniel Allen opened the first co-ed and first integrated school in the United States. Many of the abolitionists sent their children there. So it is very appropriate that the building continue to harbor a progressive educational function.

For our part, we will be delighted to work with the Alliance to mount historical exhibitions about the history of the school, to hold lectures in its assembly spaces and to include the property on our walking tours of West Newton and African-American history.

Best wishes for the success of this project. Please let me know if there is anything else I could do to help.

Sincerely,



Cindy Stone
Executive Director,
Historic Newton

JACKSON HOMESTEAD AND MUSEUM
DURANT-KENRICK HOUSE AND GROUNDS
HISTORIC BURYING GROUNDS PRESERVATION
NEWTON HISTORICAL SOCIETY, INC.