

Attachments struck out below are posted separately on the Newton CPC website.

Project TITLE		CRESCENT STREET Final Design & Construction – ATTACHMENTS CHECKLIST	
↓ Check off submitted attachments here.			
REQUIRED for pre- & full proposal.	X	PHOTOS	of existing site or resource conditions (2-3 photos may be enough)
	X	MAP	of site in relation to nearest major roads
A. — PROJECT FINANCES — printed and as computer spreadsheets, with both uses & sources of funds			
REQUIRED for both pre- and full proposal.	X	development pro forma/capital budget: include total cost, hard vs. soft costs and contingencies, and project management — amount and cost of time from contractors or staff (in-kind contributions by existing staff must also be costed)	
Please submit separate, detailed budget attachments, both printed and as Excel files.	X	operating/maintenance budget, projected separately for each of the next 10 years (CPA funds may not be used for operations or maintenance)	
	X	non-CPA funding: commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions	
	X	Market analysis: including prevailing/trending rents or prices & target population	
	None	Rental subsidy, if any: sources, commitment letters or application/decision schedules	
B. SPONSOR FINANCES & QUALIFICATIONS, INSTITUTIONAL SUPPORT			
REQUIRED for full proposal.	X	for sponsoring/owning City departments, most recent annual operating budget summary & org. chart; please highlight staff assigned to this project & budgets that will be available for maintenance upon project completion	
For this project, the next 2 attachments may represent both City staff and contracted project or property managers.			
REQUIRED for full proposal.	X	for project managers: relevant training & track record of managing similar projects	
	X	organization mission & current housing portfolio , including how this project fits both; summary of previous similar projects completed, with photographs	
	X	Capital Improvement Plan	current listing/ranking & risk factors for this project
	X	Custody & Mgmt	long-term custody & management arrangements for the property
C. — DEED RESTRICTION			
REQUIRED for full proposal.	X	plan for enforceable deed restriction for permanent affordability	
D. — ZONING & PERMITTING			
REQUIRED for full proposal.	X	summary of Development Review Team (DRT) and City site approval process (558 review)	
	X	brief property history	
	X	environmental mitigation: progress report on site cleanup & preparation to date	
	X	zoning relief and permits required	
E. — DESIGN & CONSTRUCTION			
REQUIRED.	X	professional design & cost estimates: include site plan, floor plans & elevations	
	X	project features or details, incl. materials & finishes relevant to estimated costs and public benefits; highlight “green” or sustainable features & materials	
F. — COMMUNITY OUTREACH & SUPPORT			
REQUIRED for full proposal.	X	Results & Plan	summary of community outreach to date & planned
OPTIONAL.	X	Letters of support	from Newton residents, organizations, or businesses
G. — FAIR HOUSING & ACCESSIBILITY — may represent experience of both key City staff and contracted project or property managers.			
REQUIRED for full proposal.	X	Affirmative marketing & resident selection plan	
	X	Fair housing: training completed, summary of any past complaints & their resolution	
	X	Reasonable accommodation/reasonable modification policy.	

**CRESCENT STREET Final Design & Construction
ATTACHMENTS:**

**B. SPONSOR FINANCES & QUALIFICATIONS,
INSTITUTIONAL SUPPORT**

Public Buildings

Mission Statement

To plan, construct, renovate, repair and maintain all public buildings; provide safe, secure, accessible and sustainable facilities in approximately 2.7 million square feet of space in 78 municipal and school buildings.

Fiscal Year 2017 Accomplishments

Project Management - Continued management of Zervas and Cabot school projects, Fire Station #3 project, as well as Manet Road building.

Capital Planning - Continued to update CIP and ensure residents were informed of progress on key projects.

Effective Maintenance and Operations - Expanded preventive maintenance program and improved efficiency of work-order completion.

Energy Efficiency - Achieved 20% improvement from 2008 baseline.

Design Review Committee - Continued to recommend qualified members.

Fiscal Year 2018 Desired Outcomes

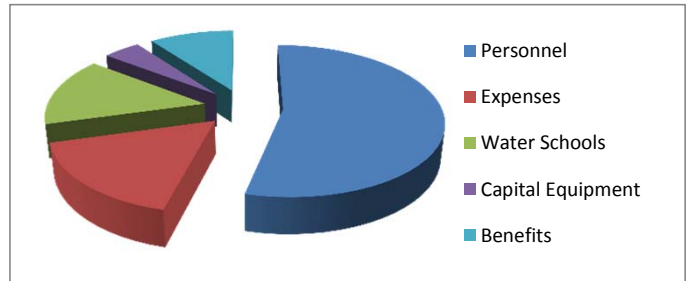
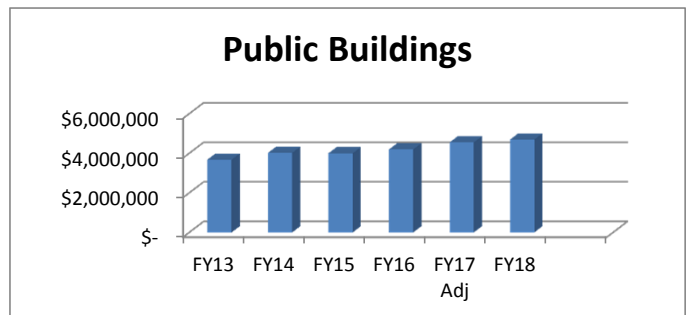
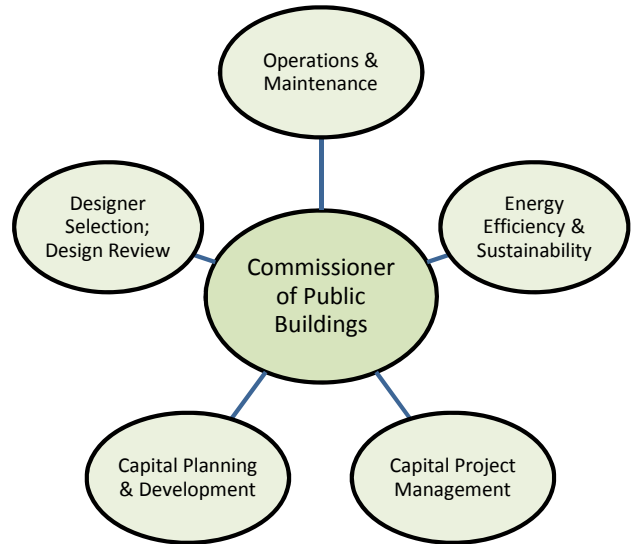
Project Management - Continue managing Zervas and Cabot projects, Fire Station #3 project, and former Aquinas School.

Capital Planning - Continue to update CIP and ensure residents are informed of progress on key projects.

Effective Maintenance and Operations - Expand preventive maintenance program and improve efficiency of work-order completion.

Energy Efficiency - Expand solar footprint and implement Green Communities Grant Projects.

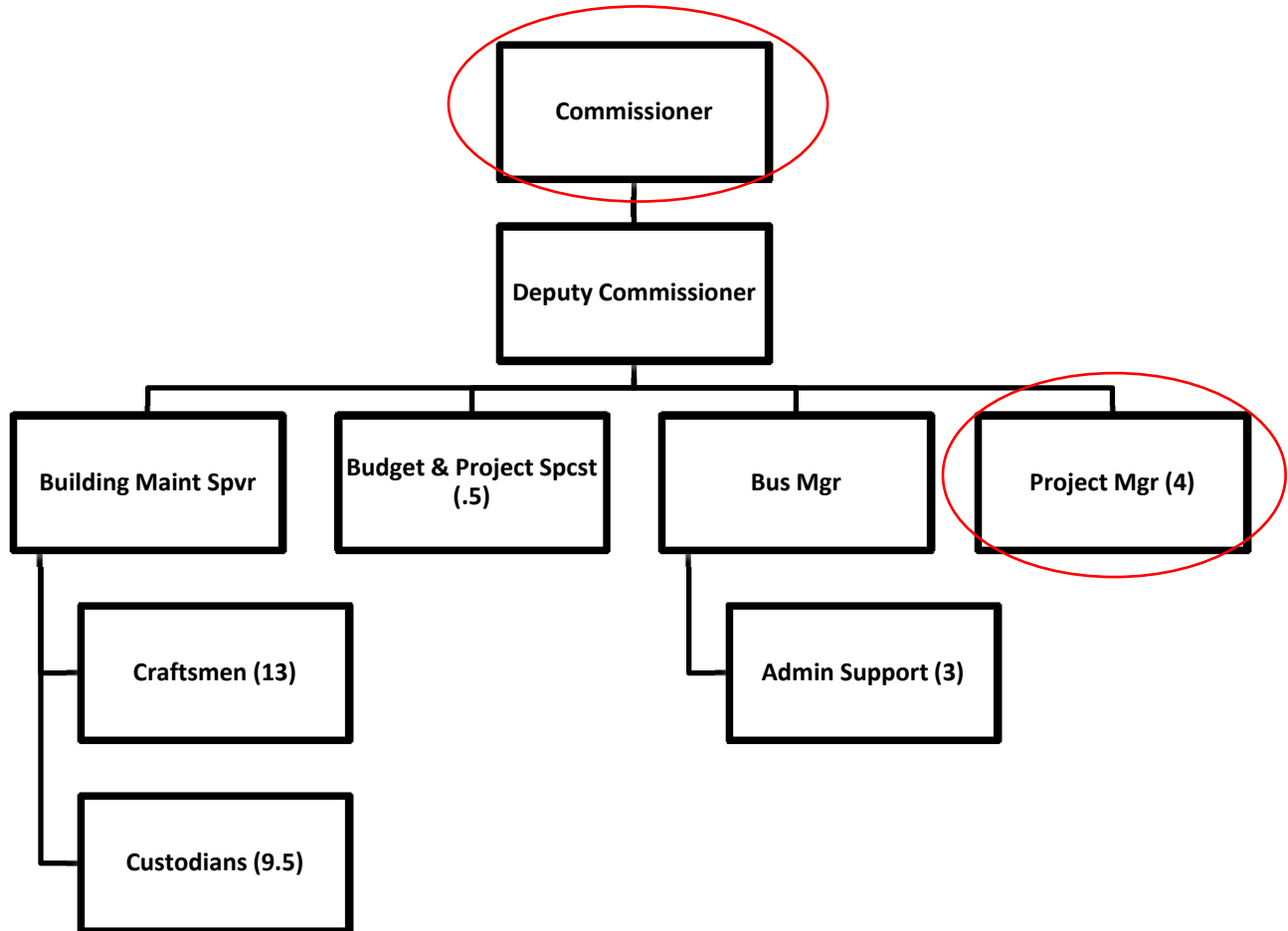
Design Review and Designer Selection Committees - Continue to recommend qualified members.



Department Detail

	Actual				Adj Budget		Proposed	
	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2018	
Expenditure by Core Function								
Personnel	\$ 1,868,498	\$ 2,042,040	\$ 2,202,659	\$ 2,271,793	\$ 2,445,123	\$ 2,531,434		
Expenses	\$ 911,740	\$ 919,930	\$ 949,279	\$ 796,182	\$ 805,398	\$ 785,956		
Water Schools	\$ 387,629	\$ 526,208	\$ 454,944	\$ 640,914	\$ 637,657	\$ 694,000		
Capital Equipment	\$ 162,989	\$ 173,142	\$ 28,424	\$ 78,882	\$ 219,500	\$ 210,000		
Benefits	\$ 347,259	\$ 360,150	\$ 366,425	\$ 410,132	\$ 442,622	\$ 475,841		
Total	\$ 3,678,115	\$ 4,021,470	\$ 4,001,731	\$ 4,197,903	\$ 4,550,300	\$ 4,697,231		
% Incr		9.34%	-0.49%	4.90%	8.39%	3.23%		
Personnel								
Full-Time	30	32	33	33	32	33		
Part-Time	2	1	2	2	1	2		
Total	32	33	35	35	33	35		

PUBLIC BUILDINGS



RAFIK E. AYOUB, ASSOCIATE AIA

West Roxbury, MA | (617) 325-7725 | rafik02132@verizon.net

PROFESSIONAL QUALIFICATIONS

Facilities Project Manager experienced in architectural design of institutional, public and residential projects. Proven track record in managing new construction, additions and renovations of projects from design through construction and closeout, completing projects on time and on budget. Skilled in:

- Development of scope of work
- Selection of design team
- Design constructability review
- Oversight of project execution
- Budgets and timelines
- Coordination of design process
- Management of bid / award process
- Conflict resolution

CONSTRUCTION PROJECT MANAGEMENT EXPERIENCE

Project Manager II, Property and Construction Management Department 2013 - 2014
City of Boston, MA

(The Property and Construction Management Department manages building projects ranging from \$200K to \$10M.)

- Provide management and oversight of \$400K - \$1.5M envelope and interior restoration for three community center projects.
- Manage replacement of \$350K heating systems in two Boston Centers for Youth and Family.
- Ensure compliance with public procurement practices for designers and contractors.
- Act as member of designer's selection team.

Senior Engineering Consultant / Project Manager, Facilities Management Department 1994 - 2013
Roman Catholic Archdiocese of Boston, Braintree, MA

(The Archdiocese facilities department manages all capital construction projects for all parishes throughout the metropolitan Boston area. Project size ranges from \$50K to \$7M.)

- Simultaneously managed up to six major construction projects for churches, schools, parish centers and rectories in all phases of planning, design, budgeting and construction.
- Customized each parish's needs through collaboration and coordination with architects, engineers and consultants.
- Determined requirements related to building codes, handicap accessibility and energy efficiency.
- Evaluated bids for building improvements designed in-house and by architects; participated in value engineering process.
- Conducted scheduled meetings to review project status, develop punch lists and commission projects. Ensured quality and safety standards were met by contractors.
- Reviewed and approved design team and construction contractor applications for payment.
- Managed and completed multiple electrical and HVAC projects following all related environmental safety requirements.
- Specified, field observed and completed major exterior envelope restoration of multiple parish buildings. Envelope restoration of St. Mary of the Nativity formally recognized in 2008 by the Brookline Historical Society.
- Collaborated with designers to obtain special variances from state agencies on behalf of the parishes.

ADDITIONAL EXPERIENCE

Freelance Architect, Greater Boston Area

- Provided architectural design services for private clients and several architectural firms. Projects included design of new homes, additions and renovations as well as completion of construction documents for elementary school renovation project.

RAFIK E. AYOUB

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Designer / Project Manager

MFPA, Inc., Natick, MA

(MFPA specializes in medical facilities design.)

- Designed and completed construction documents for new playground and existing playroom Tufts Medical Center Floating Hospital for Children.
- Developed design, construction documents and construction administration for 12,000 square feet of new offices expansion space at American Red Cross Facilities in Dedham, MA. Also performed redesign and alteration of three laboratories for a total of 6,000 square feet.
- Designed and oversaw renovation of four-bed unit and new offices for Nuclear Medicine Department at Boston Children's Hospital.

Associate Architect

Laurence L. Rubin, Architect, Wellesley, MA

(Projects included private homes, commercial and public works.)

- Assisted project architect in developing and completing construction document drawings for architectural phase of a park structure in the state of Connecticut.
- Participated in the design for a pavilion and waiting station at the ferry boat pier at Logan Airport (MassPort).

EDUCATION

Harvard University, Graduate School of Design Professional Development Program, Cambridge, MA

- Certificate in Renovation and Adaptive Reuse of Older Buildings
- Certificate in Advanced Training in ADA Standards, UFAS, and the Fair Housing Amendments Act

Wentworth Institute of Technology, Boston, MA

- Courses in AutoCAD technology and drafting

Damascus University, Damascus, Syria

- Bachelor's Degree in Architecture - Cum Laude

PROFESSIONAL AFFILIATIONS

Associate Member, American Institute of Architects, Boston, MA

1995 - present

Associate Member, Boston Society of Architects, Boston, MA

1995 - present

Parks & Recreation

Mission Statement

To provide traditional and innovative recreation, leisure and cultural activities in a quality environment for all residents of Newton, as well as managing the preservation, maintenance, and enhancement of the natural resources of the City.



Fiscal Year 2017 Accomplishments

Programs - Created and administered programming for a diverse audience, and increased in departmental programming.

Parks and Facilities - Continued Crystal Lake Watershed improvements; replacement of three playground structures; completed capital improvements to ensure highest possible quality of parks and playgrounds.

Forestry - Conducted citywide high-risk tree assessment and updated FY17 removal/pruning plan. Continued to implement tree planting plan.

Beautification - Expanded successful beautification programs such as Box Art, flower planting, and traffic island improvements; improved public collection of trash and recycling with addition of BigBelly units throughout the city.

Cultural Affairs - Worked collaboratively with City departments to provide diverse, fun and informative programming for a diverse audience; Utilized newly accessible War Memorial for programs and events.

Fiscal Year 2018 Desired Outcomes

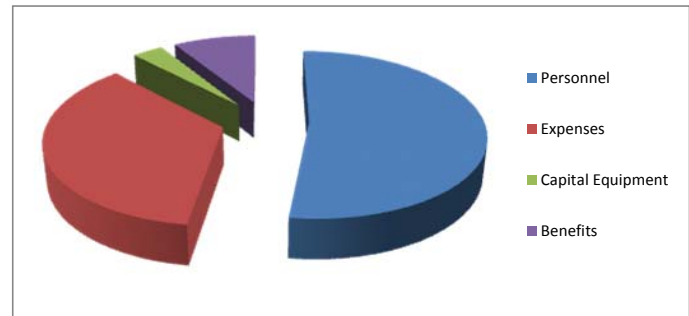
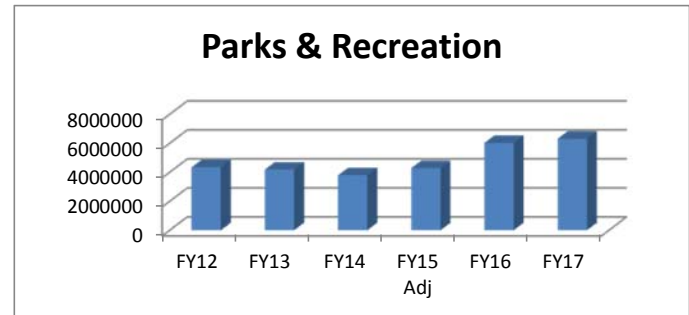
Programs - Develop farmers market transportation program; add robotics camp and increase golf programming; increase use of online registration.

Parks and Facilities - Develop plan for small-dog off-leash site; advertise RFP for watershed management improvements.

Forestry - Continue removal of stumps and at-risk trees; expand proactive pruning of trees; increase planting program.

Beautification - Assist in beautification of West Newton Square and Newton Corner; expansion of flower boxes and BoxArt program; Continue to monitor BigBelly data and make adjustments as needed.

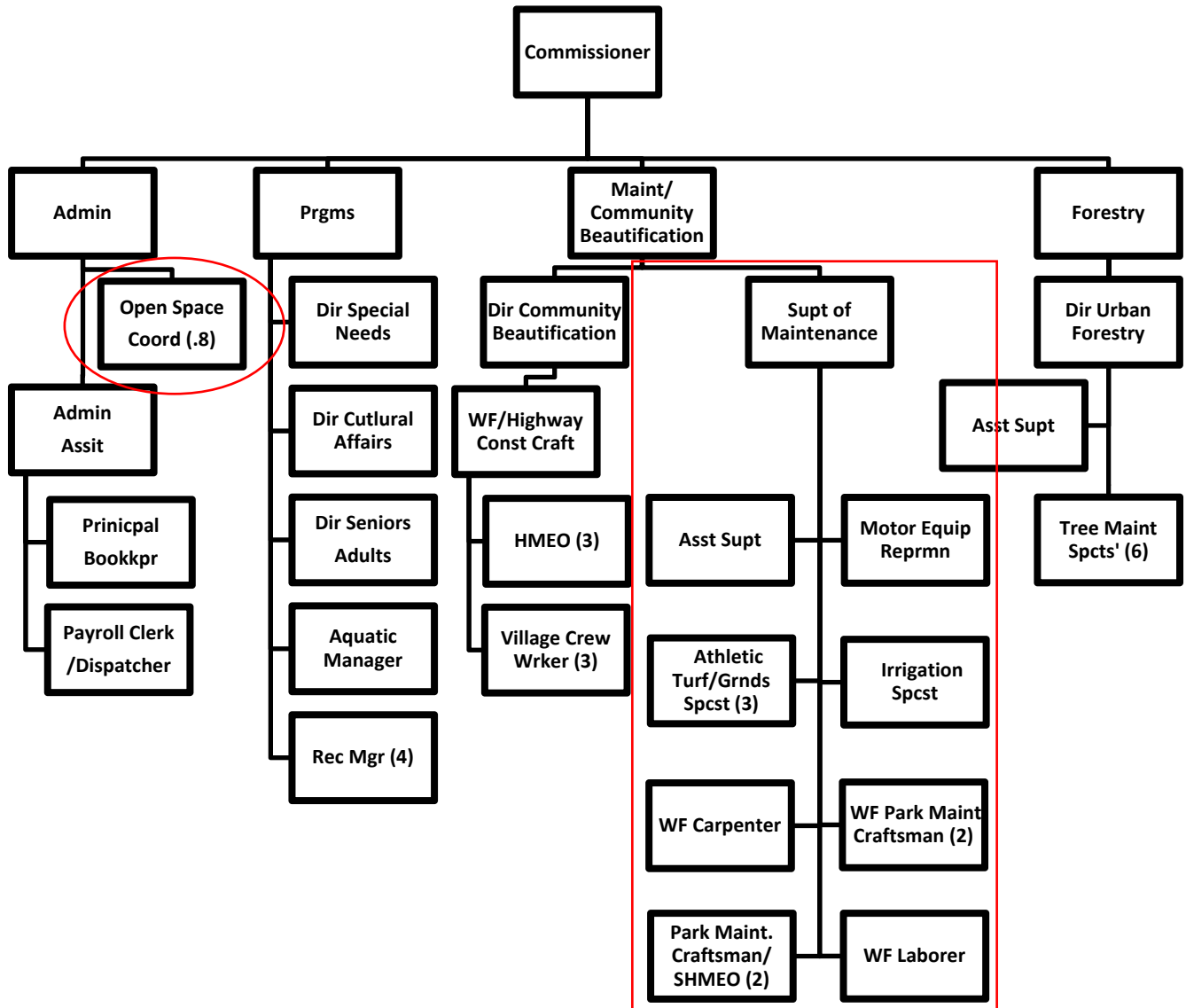
Senior and Disabled Populations - Create new programming for teens with disabilities; increase awareness of Over 55 programs; update website and other informational materials.



Department Detail

	Actual				-<Adj Budget->		-<Proposed->	
	FY2013**	FY2014	FY2015	FY2016	FY2017	FY2018	FY2018	
Expenditure by Core Function								
Personnel	\$ 2,181,327	\$ 2,179,011	\$ 2,287,415	\$ 3,102,641	\$ 3,293,208	\$ 3,341,620		
Expenses	\$ 1,695,078	\$ 1,193,646	\$ 1,595,385	\$ 2,353,295	\$ 2,246,535	\$ 2,325,003		
Capital Equipment	\$ -	\$ 70,000	\$ 48,925	\$ 210,000	\$ 210,000	\$ 210,000		
Benefits	\$ 309,162	\$ 348,445	\$ 353,697	\$ 537,515	\$ 561,656	\$ 637,201		
Total	\$ 4,185,567	\$ 3,791,102	\$ 4,285,422	\$ 6,203,451	\$ 6,311,399	\$ 6,513,824		
% Incr		-9.42%	13.04%	44.76%	1.74%	3.21%		
Personnel								
Full-Time	35	31	30	42	42	42		
Part-Time	4	4	2	2	2	2		
Total	39	35	32	44	44	44		

PARKS & RECREATION DEPARTMENT



FUND: 01 - GENERAL FUND
DEPARTMENT: 602 - PARKS RECREATION DEPT

CITY OF NEWTON BUDGET
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2015	ACTUAL 2016	AMENDED 2017	YTD 4/4/2017	RECOMMENDED 2018	CHANGE 2017 to 2018
PARKS & RECREATION DEPT SUMMARY						
51 - PERSONAL SERVICES	2,218,425	3,025,068	3,293,208	2,430,458	3,341,620	48,412
52 - EXPENSES	1,585,005	2,329,294	2,246,535	1,796,415	2,325,003	78,468
58 - DEBT AND CAPITAL	48,925	210,000	210,000	75,000	210,000	0
57 - FRINGE BENEFITS	353,697	537,515	561,656	437,694	637,201	75,545
TOTAL DEPARTMENT	4,206,052	6,101,878	6,311,399	4,739,568	6,513,825	202,426
PARKS/REC ADMIN.						
51 - PERSONAL SERVICES	820,592	849,154	871,999	635,650	878,671	6,672
52 - EXPENSES	24,894	27,452	27,705	20,092	28,325	620
57 - FRINGE BENEFITS	126,219	151,548	158,470	105,306	150,729	-7,741
TOTAL PARKS/REC ADMIN.	971,705	1,028,155	1,058,174	761,048	1,057,725	-449
PUBLIC GROUNDS MAINT						
51 - PERSONAL SERVICES	746,638	805,388	862,454	634,264	880,780	18,326
52 - EXPENSES	727,164	795,064	789,654	682,598	815,960	26,306
58 - DEBT AND CAPITAL	0	150,000	150,000	15,000	150,000	0
57 - FRINGE BENEFITS	107,782	140,734	153,582	110,667	157,161	3,579
TOTAL PUBLIC GROUNDS MAINT	1,581,584	1,891,185	1,955,690	1,442,528	2,003,901	48,211
FORESTRY SERVICES						
51 - PERSONAL SERVICES	406,770	545,224	610,046	449,841	632,152	22,106
52 - EXPENSES	402,136	926,005	631,510	505,731	719,010	87,500
57 - FRINGE BENEFITS	78,198	95,759	87,291	85,298	136,463	49,172
TOTAL FORESTRY SERVICES	887,104	1,566,988	1,328,847	1,040,871	1,487,625	158,778
SNOW/ ICE CONTROL						
51 - PERSONAL SERVICES	0	0	0	2,156	0	0
57 - FRINGE BENEFITS	0	0	0	2,108	0	0
TOTAL SNOW/ ICE CONTROL	0	0	0	4,264	0	0
RECREATION ACTIVITIES						
52 - EXPENSES	3,927	3,376	4,280	1,791	4,280	0
57 - FRINGE BENEFITS	0	0	216	0	224	8
TOTAL RECREATION ACTIVITIES	3,927	3,376	4,496	1,791	4,504	8

Planning and Development

Mission Statement

Newton's Department of Planning and Development is committed to community-based planning that guides the future of the city while promoting equity, healthy lifestyles, diverse housing options, a resilient economy, varied transportation options, and preservation of the built and natural environment.



Fiscal Year 2017 Accomplishments

Community Engagement - Initiated in-person and online community engagement around housing and transportation strategies, West Newton and Walnut Street enhancement projects and Zoning Redesign.

Development Review - Provided skilled professional guidance to members of the public and various Boards and Commissions related to matters involving Special Permits, Historic Review, Conservation, Urban Design and Zoning Board of Appeals.

Economic Development - Continued staff support to Newton Innovation Center, Economic Development Commission, N2 Innovation District and general business community.

Community Development and Housing - Funded and implemented programs and projects consistent with Consolidated Plan.

Strategic Planning - Completed long-range comprehensive strategic planning guides for Housing and Transportation.

Fiscal Year 2018 Desired Outcomes

Community Engagement - Advance engagement activities across all platforms to include housing, transportation, economic development, conservation, historic preservation and proposed development projects.

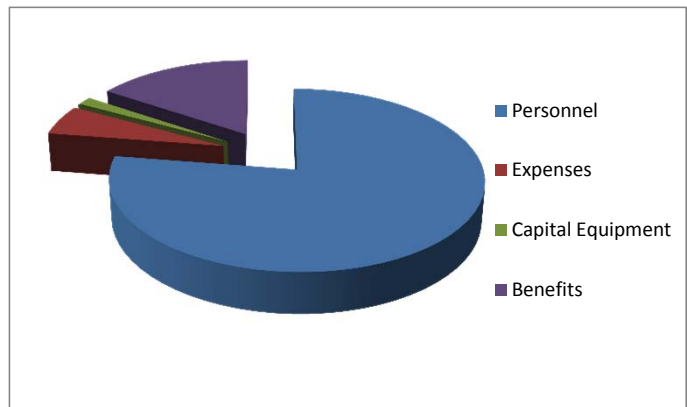
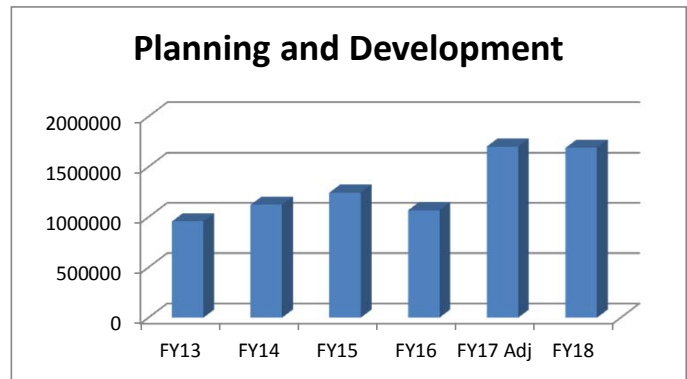
Implementation - Implement priorities identified in housing and transportation strategies.

Development Review - Strive both to provide customer-friendly, efficient processes and excellent technical guidance for members of the public and Boards and Commissions alike.

Economic Development - Initiate a Strategic Economic Development study to identify priority actions.

Community Development and Housing - Develop priorities & allocate funding to address needs identified in Consolidated Action Plan for CDBG, HOME and ESG funding.

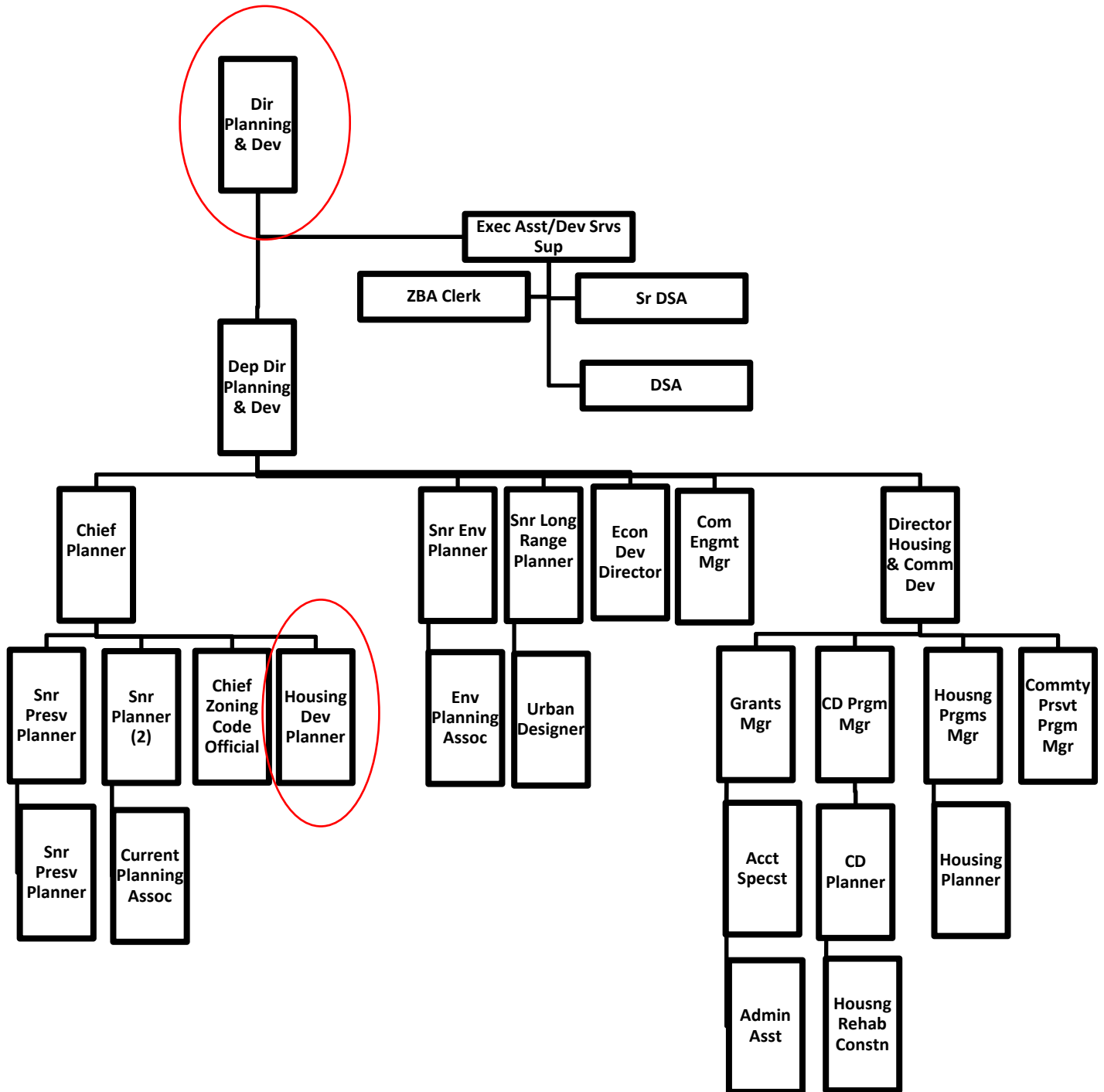
Strategic Planning - Continue efforts to anticipate and coordinate policy, planning and engagement around housing, transportation, economic development, conservation, historic preservation, and proposed development projects.



Department Detail

	Actual				-<Adj Budget->		-<Proposed->	
	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018	FY2018	
Expenditure by Core Function								
Personnel	\$ 865,393	\$ 921,965	\$ 866,216	\$ 903,133	\$ 1,307,664	\$ 1,469,931		
Expenses	\$ 141,054	\$ 161,471	\$ 61,755	\$ 307,264	\$ 92,627	\$ 87,499		
Capital Equipment	\$ -	\$ 25,000	\$ 111	\$ 92,462	\$ 25,000	\$ 25,000		
Benefits	\$ 115,949	\$ 134,705	\$ 139,372	\$ 149,674	\$ 263,810	\$ 251,421		
Total	\$ 1,122,396	\$ 1,243,141	\$ 1,067,454	\$ 1,452,533	\$ 1,689,101	\$ 1,833,851		
% Incr		10.76%	-14.13%	36.07%	16.29%	8.57%		
Personnel								
Full-Time	10	10	11	15	17	20		
Part-Time	6	5	4	1	2	2		
Total	16	15	15	16	19	22		

Planning & Development



QUALIFICATIONS

CITY POINT PARTNERS

December 7, 2017



OWNER'S PROJECT MANAGEMENT

...managing the owner's interest, achieving success



Our OPM practice includes an accomplished team of Resident Engineers and Construction Inspectors. This distinguished group includes Licensed Construction Supervisors, who have overseen an array of multi-million dollar projects from schools and libraries to laboratories and various facilities for Higher Education clients.

OUR OPM PHILOSOPHY

Experience shows us that efficient project management is essential to the success of any project. Retaining an Owner's Project Manager early on can add the depth, value, and proficiency necessary to effectively achieve each milestone of your project from planning to completion.

The OPM is essentially a hands-on consultant for clients who often have little or no construction experience. As the eyes and ears of the Owner, the OPM helps an Owner understand how the project is progressing, where the project objectives may be in jeopardy, and when the potential for problems first appears so that a resolution can be achieved within the project parameters.



OWNER'S PROJECT MANAGEMENT CLIENTS:

- City of Newton, MA
- MassDOT
- Pioneer Valley Transit Authority
- Rising Tide Charter Public School
- Northeastern University
- University of Massachusetts
- Massport
- Excel Academy Charter School
- Erickson Living

OWNER'S PROJECT MANAGEMENT SERVICES:

- Program/Project Management
- Constructability Reviews
- Construction Schedule Expertise
- Change Order Management
- Cost Reviews
- Permit Oversight
- Procurement Assistance
- Grant Assistance
- Claims Management
- Public Outreach
- Project Communication and Reporting
- Project Closeout

City of Newton, Crescent Street Housing and Reverend Ford Playground Redevelopment Project



Project Description:

The City of Newton has designated a 2-acre parcel containing a Parks and Recreation Department maintenance building and a land-locked playground with no public access, as surplus property and clearing the way for this housing development. Located within a residential community anchored by the historic Myrtle Baptist Church, this development must be context sensitive. City Point Partners is the City of Newton's Owners Project Manager for this project which consists of 8 units of rental housing, no fewer than 4 of which must be affordable, and the expansion and redevelopment of the existing Reverend Ford Playground. This project is unique as it is one of the

first of its kind in Massachusetts to feature a municipality acting as its own developer of affordable housing.

As the OPM, we understand that active civic engagement is extremely important to the success of this project. The Crescent Street Project is run by a committee known as the Crescent Street Working Group, a combination of neighborhood representatives and City officials. We developed the overall community engagement narrative, which the project team is using to manage the public meetings on this project. We are also making sure that the project stays on schedule by designing a master project schedule that outlines all the major steps required to navigate the City's Feasibility, Schematic Design and Site Plan Approval process. The Working Group, design team and various City departments are all kept well informed with regards to both long and short-term objectives so that the project's overall goals are met.

Project Location:

Newton, MA

Services:

Owner's Project Management
Project Controls

Owner:

City of Newton

Project Value:

\$3.6M

Project Duration:

Winter 2017-Fall 2019

Our project controls group is also providing cost validation and value engineering services verifying the architect's cost estimate as well as identifying any areas for greater cost efficiency.

CONSTRUCTION SERVICES

... your construction management partner

CITY POINT PARTNERS

A WBE/DBE Firm



Colleen P. Moore, MCPPO, President, founded City Point Partners after a 30-year career in consulting and construction. We specialize in professional services offered to the

construction phase of public projects. City Point Partners employs 29 people and serves over 20 clients on public and private sector projects.

PVTA Cottage Street Operations and Maintenance Facility — Construction oversight of the new 227,500 sf, \$55.7M facility built on an 18-acre site providing bus maintenance and storage for the Springfield fixed-route operation.

Northeastern University—Project management and construction oversight services in support of capital improvement projects on all campuses.

MassDOT Central Research and Materials Laboratory — Construction oversight for the replacement of the existing lab located in South Boston with a new \$29.1M state-of-the-art facility to be located in Hopkinton.

Massport—Construction inspection and field services under multiple two-year task order contracts for a variety of vertical and horizontal construction projects.

City of Boston—Providing construction inspection and engineering services for various street reconstruction projects including roadway and sidewalk infrastructure.

MBTA—Various projects providing public outreach services, design and construction scheduling, document control services, and rail safety training for several commuter rail lines. The projects will improve service, enhance reliability and reduce commute times.



Our team of professionals has experience in a broad range of construction and engineering services with both public and private projects, vertical and horizontal construction.

CONSTRUCTION MANAGEMENT SERVICES:

- Owner's Project Manager
- Project & Program Management
- Resident Engineering
- Construction Inspection
- Claims Management and Analysis
- Scheduling
- Project Administration
- Document Control

BUILDABILITY:

- Peer Reviews
- Constructability Reviews

PUBLIC OUTREACH:

- Stakeholder Management
- Meeting Facilitation
- Message Management
- Project Web Site Management
- Media Planning



RESUME

Rudolph (Rudy) Barajas, CSL, MCPPO **Project Manager**

Rudy is a client service oriented Project Manager/Construction Manager on projects ranging in size from \$1M to over \$160M. He has been responsible for a quality management delivery process from multiple perspectives on projects which were up to \$500M in cost. Rudy's broad construction industry experience spans many industry sectors with increasing levels of responsibility. Rudy has excellent communication, meeting management, scheduling and graphic presentation skills. He is experienced with building projects from pre-construction through operation phases including transitions between phases. His background is primarily in civil construction and vertical construction while he has also managed engineering operations. Project Management experience includes: CM-at-Risk, design-bid-build, design-build, union and non-union, K-12 schools, laboratories, food service areas, computer rooms, auditoriums, LEED certified buildings, athletic complexes, asbestos abatement, building demolition, wetlands construction and land development. His expertise also includes claims avoidance, claims management, CPM schedule development, estimating, quality control, quality assurance, 3-D/BIM mechanical coordination, commissioning and ADA compliance. Additional building experience includes, town hall, apartment building rehab, roof-mounted photovoltaic systems, deep foundations and massive earth support systems.

PROJECT EXPERIENCE:

- Owner's Project Manager, City of Newton Crescent Street Housing OPM Services
Owner's Project Manager for the design and construction of 8 new housing units 4 of which will be affordable and the redevelopment of the existing Reverend Ford Playground at 70 Crescent Street. Developed the overall community engagement narrative to manage the public meetings and is making sure that the project stays on schedule by designing a master project schedule that outlines all the major steps required to navigate the City's Feasibility, Schematic Design and Site Plan Approval processes.
- Owner's Representative, Erickson Living, Linden Ponds Retirement Community, Hingham, MA
Ground-up 7-story, 156,000 sf independent living residential building. Building 2.5 is the latest addition to the Linden Ponds Retirement Community. This new building adds 107 living units to the sprawling Linden Ponds campus. Serving as the Owner's Representative overseeing all aspects of construction including monitoring construction activities, reviewing pay applications, reviewing RFI's and change order requests; maintaining an electronic file of project correspondence; reporting safety violations; reviewing punchlist items and participating in the project closeout process.
- Project Manager, Comm Glen Apartments Rehabilitation, Allston, MA
\$15M renovation of 235 apartments across 17 buildings on Commonwealth Avenue and Glenville Avenue. Renovations included demolition and abatement, fire alarms, sprinkler piping, doors and finishes, select bathrooms, kitchens and unit areas. Also included common area flooring, stairway modifications and handrails, storefronts, mailboxes, handrails and finishes in vestibules. The project included the renovation of the management office as well as community spaces. Exterior work included historic

Page 2 Resume

Rudolph (Rudy) Barajas, CSL, MCPPO

brick, metal cornice and roof restoration. Site work included groundwater recharge system, water and sewer systems installations.

- Residential Remodel Project Designed by the Institute for Human Centered Design Braintree, MA
Residential renovation project to enlarge an existing upstairs bathroom and increase its usefulness for a handicapped child. The renovation included new plumbing fixtures, light fixtures, accessories, interior finishes, doors, and custom cabinetry. The building was not occupied during construction
- Project Manager, Marlborough Senior Center, Marlborough, MA
This 22,625 sf, \$6.5M project was a new, 2-story wood-framed slab-on-grade building with site work and parking for 70 cars. The building was built at Ward Park as part of a revitalization program to upgrade the park and transform it into a recreational center. The building includes a commercial kitchen, multipurpose space, fitness room, exercise and wellness rooms, library, billiards room, computer lab, offices and storage.
- CPM Scheduler, ADA Restroom Upgrade Project, UMASS Boston, Dorchester, MA
Scheduler for the campus-wide ADA upgrades project performed across multiple buildings on this urban campus.

EDUCATION LICENSES & CERTIFICATIONS

B.S., University of Nebraska, Construction Engineering Technology, 1989

Certificate, Northeastern University, Construction Project Management, 2003

Graduate Coursework, Organizational Communications, Northeastern University, 2007 – 2009

Executive Certificate in Home Modifications (Universal Design) administered through Andrus School of Gerontology at University of Southern California, 2010

Modular Construction Training Seminar, Vanguard Modular Building Systems

Certified Aging-In-Place Specialist

PROFESSIONAL AFFILIATIONS

MA Certified Owner's Project Manager (**MCPPO**)

Licensed Mass. Construction Supervisor (No. CS075704)

OSHA 30-Hour Trained in Construction Safety and Health

NAHB Certified-Aging-In-Place-Specialist (CAPS) pending application



Abacus Architects + Planners is an award winning full service design firm founded in Boston in 1989. We are small enough that partners David Eisen and David Pollak are involved in the day to day progress of every job, and large enough to offer the range of expertise needed to follow through efficiently and effectively. Our comprehensive approach emphasizes thoughtful design that is based on client and community values, responsiveness to site and context, cost-effective construction, sustainability, and an inclusive planning process.

David Eisen FAIA has been a Partner since 1995. He was educated at the University of Illinois and Harvard's Graduate School of Design. His prior experience includes five years leading his own firm and three years as a project designer at Graham Gund Architects. David is also an author, writing on architecture for the Metropolitan Museum of Art, the Boston Herald, and the Boston Phoenix, and was an adjunct Professor of Architecture from 1989 – 2000 at Roger Williams University.

Founding partner **David Pollak AIA** holds degrees from Dartmouth College and Harvard's Graduate School of Design. David is a LEED AP BD+C and oversees the integration of sustainable design principles into the firm's work. David has taught architecture and urban design at Roger Williams University from 1988-2003 and at RISD from 2000-2002, 2005 and 2013. David was elected to the Brookline School Committee in 2013 and is also a member of the Building Commission and Clerk of the Board of the Brookline Music School. He also serves as a Director of Draper & Kremer, a real estate development and management company in Chicago and is a former director of Starmount Company in Greensboro, NC.

Our diverse staff brings in a broad range of planning, design, detailing and construction administration experience, along with a thorough knowledge of codes and best practices. We are a Revit based firm - with all drawings based on 3-D modeling to help coordinate the work of various trades, and provide clients and stake holders with unlimited views of design as it develops.



View Down Mass Ave.



Typical Kitchen



Back Porch on Garfield Street

**Garfield Family Housing
Cambridge Housing Authority / The Equity Company**

Cambridge, MA

An award-winning 8 unit affordable development on a prominent corner in Cambridge creates a thoughtful transition between a commercial street and a neighborhood of Victorian houses. The massing steps back to create a series of stairs and porches that give the building an appropriate scale. Every apartment has a sense of openness and generous views outside. Winner of a Boston Society of Architects Housing Award.



Operable windows are located to maximize natural ventilation, and passive solar heating



New Accessible Housing Stoneham Housing Authority

Stoneham, MA

New free-standing duplex buildings are fit into tight public housing neighborhoods while defining welcoming open space. Bays and clerestories bring light deep into each unit and provide passive solar heating. Winner of the 2013 AIA/HUD Secretary's Housing Award and Boston Society of Architects Socially Responsible Housing Award.



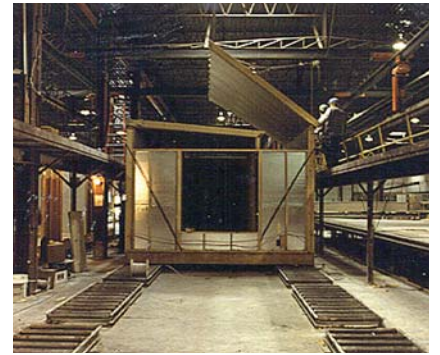
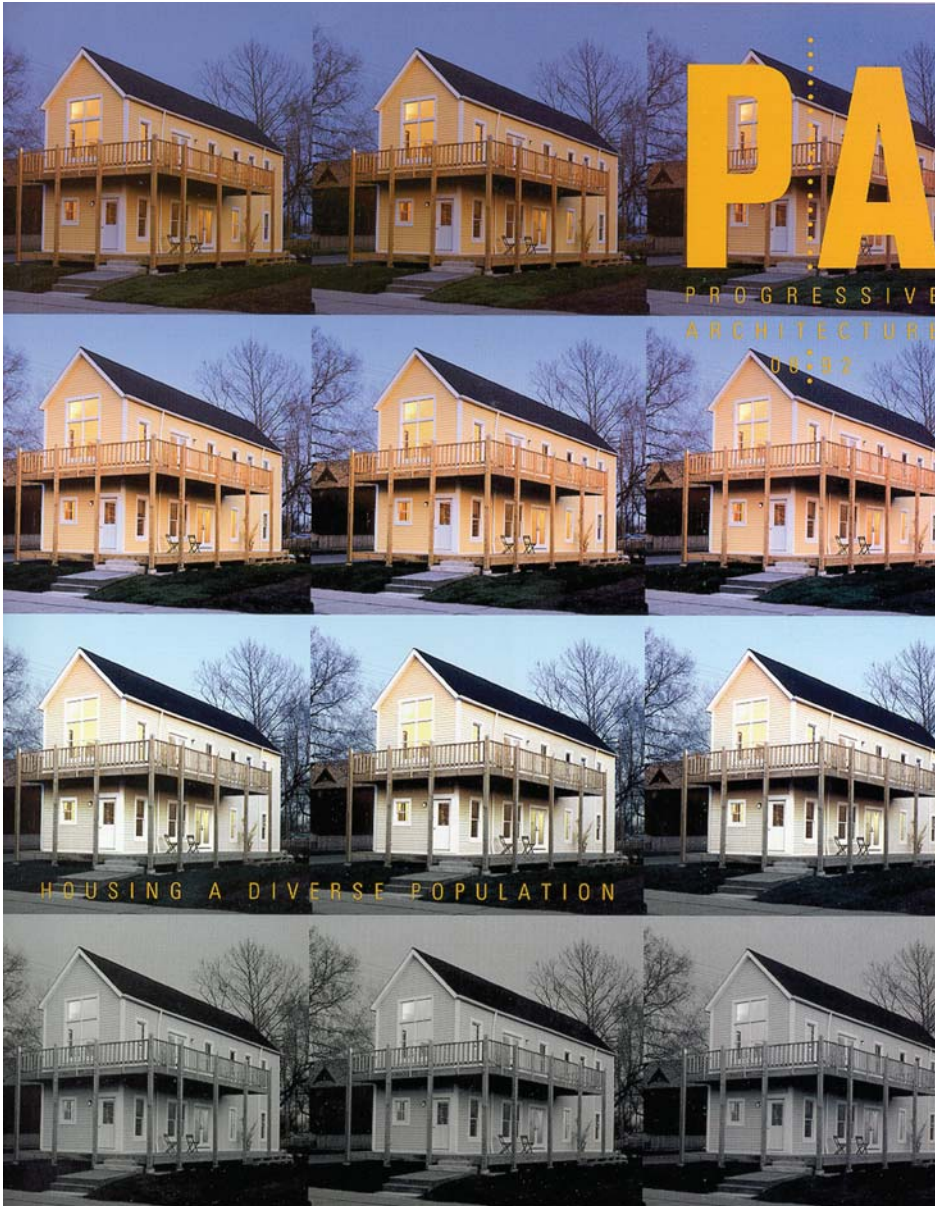
First Floor Plan



**Affordable Housing
Groveland Housing Authority + DHCD**

Groveland, MA

A new prototype two-family development provides a model for affordable infill housing construction. The massing breaks down the size into appropriately scaled volumes that fit well in traditional neighborhoods, and provide each family with their own entry and porch. It is designed to be either stick built or modular.



Module Under Construction.



Module assembled on site.



Double height space.



PA House Progressive Architecture Magazine

Cleveland, OH
-Pittsburgh, PA

Affordable housing requires design ingenuity to insure economical construction and to meet the diverse needs of its residents. Abacus's competition winning design for Progressive Architecture Magazine's housing competition used mass production techniques for affordability and a flexible interior organization to accommodate different family structures within. The Cleveland prototype was developed further for a CDC in Pittsburgh.

DENEEN CROSBY, ASLA
PRINCIPAL-IN-CHARGE



Principal Deneen Crosby, ASLA, is a registered landscape architect with 38 years of experience planning and designing open spaces, trails, and streetscapes for multiple client types. She is one of three founding Principals and is the Director of Landscape Architecture at CSS.

- B.L.A. State University of New York and Syracuse University, 1979
- Registered Landscape Architect: Massachusetts #750; Ohio #849; Connecticut #909
- Member of American Society of Landscape Architects (ASLA) and Boston Society of Landscape Architects (BSLA)
- Commissioner for the Boston Civic Design Commission
- Designator for the George B. Henderson Foundation

REPRESENTATIVE PROJECT EXPERIENCE

Cambridge Parks, Cambridge, MA

Ms. Crosby was Principal-in-Charge for design services for four open space parcels located in a densely populated section of Cambridge, MA. Areas planned for redesign included lots adjacent to schools and commercial property, a neighborhood playground, athletic fields, and a newly created central open space. The parcels were redesigned for the purpose of both recreational and passive open space, and the process included highly participatory community involvement.

Mission Park, Boston, MA

Ms. Crosby is currently Principal-in-Charge and Project Manager for the design of multiple projects at Mission Park, an urban residential community in Mission Park, Boston. Work includes the design of a recreational corridor, the redesign of Kempton Street and Playground, and the New Whitney streetscape and park design, including subsurface parking garage repairs.

The Wyeth, Cambridge, MA

Ms. Crosby was recently the Principal-in-Charge for the redevelopment of two former mid-rise masonry buildings into residential units in Cambridge, MA. The work included overall site planning and design as well as courtyard design for individual ground level units. The work includes the design of courtyards with wood decks and custom screening as well as overall site circulation, plantings and furnishings. Green fence technology has been incorporated into site staircases and fencing. The project team is LEED Certified Platinum and won the American Builders and Construction 2014 Green Building Award.

Farnham Connolly State Park, Canton, MA

Ms. Crosby was recently CSS's Principal in Charge and Project Manager for the reuse of the former Canton Airport site. She participated in the development of a master plan which linked the riverfront site to the regional trail system. She was responsible for final design for the first phase of construction which caps areas in need of remediation while shaping the site for park use. The park includes parking for canoe launch access, a multi-use pathway system, interpretive elements, extensive plantings, site furnishings, a pedestrian bridge and overlook decks over recreated wetlands, and a custom designed pavilion. The project is a recipient of the Boston Society of Landscape Architects Award of Excellence 2016.

DANIEL NORMAN, ASLA
PROJECT LANDSCAPE ARCHITECT



Mr. Norman is a landscape architect and urban designer with over 10 years of experience with streetscape, parks, and residential and institutional design projects.

- M.L.A., University of Virginia, 2006
- B.A. Environmental Science and Policy, Clark University, 1997
- Registered Landscape Architect, Commonwealth of Massachusetts #4007, State of Rhode Island #461
- LEED AP
- Member: American Society of Landscape Architects (ASLA), Boston Society of Landscape Architects (BSLA)

REPRESENTATIVE PROJECT EXPERIENCE

Mission Park, Boston, MA

Mr. Norman is currently the Landscape Architect for the design and installation of multiple phases of work at Mission Park, an urban residential community in Mission Park, Boston. Currently he is working on Phase III of the New Whitney Streetscape Project, a landscape renovation project entirely located above a parking structure. A previous phase included park/playground design.

Farnham Connolly State Park, Canton, MA

Mr. Norman was a landscape architect for the remediation and reuse of the former Canton Airport. The project included developing a master plan as well as the final design work for a park and pathway system which will eventually connect north to the Blue Hills Reservation and south to The Warner Trail. The final design allows community access to the 328 acre parcel while being sensitive to its former uses and the extensive floodplain and wetlands within the site. Mr. Norman's responsibilities included design development, materials selection, and construction administration. Construction of the project was completed in Fall 2015 and was the recipient of the 2016 Boston Society of Landscape Architects Award of Excellence.

Riverside Plaza, Medford, MA

Mr. Norman is currently the Landscape Architect for the reconstruction of Riverside Plaza in Medford, MA. Located in the heart of Medford Square, the plaza is undergoing re-design to provide a more inclusive and accessible event space for the city.

Boylston Street, Audubon Circle, Fenway-Yawkey Multi-use Path, Boston, MA

Mr. Norman is currently the Landscape Architect for the design of Fenway area projects including Boylston Street, Audubon Circle, and the Fenway Multi-use Path in the City of Boston. CSS has been working closely with the city and with multiple development teams to coordinate the design and implementation of roadway improvements that will improve pedestrian mobility, encourage local and regional bicycle travel, and improve vehicular congestion.

The Wyeth at 120 & 124 Rindge Avenue Cambridge, MA

LEED Platinum
Green Building Award, Eagle Level 2014

CSS recently completed the landscape design for the development of 'The Wyeth' at 120 and 124 Rindge Avenue, a housing development in Cambridge MA.

The work includes overall site planning and design as well as courtyard design for individual units. Upon entering the site, the curved entry drive allows filtered views into the residential community from the street. A large front lawn is bordered by a garden planting that creates a serene space reflective of the site's religious past while acting as a privacy buffer for neighbors.

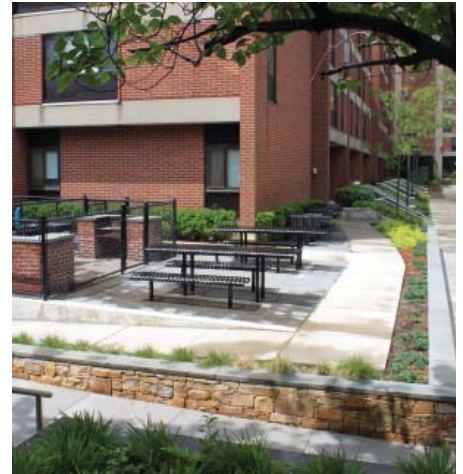
The old brick buildings have main entrances to access the second and third floor units on either end of the building. Green fence technology has been incorporated into the staircases and fencing. Plantings create privacy between private courtyards and overall site circulation. A custom wood screen with a low planter, and a wood deck are designed to soften the masonry building and create a private outdoor space for unit occupants.



Mission Park

Boston, MA

CSS is responsible for the design of four projects in this urban residential community in Mission Park, Boston as part of a multi-phased Master Plan. Work includes the redesign of Kempton Street and Kempton Street Playground, the redesign of a section of New Whitney Street and repairs to the underground parking garage, and the redesign of the pedestrian and recreational corridor between three residential buildings. Improvements to seating, private residences, two outdoor grill areas, plantings, three children's play areas; two with water spray amenities, and walkways complement other recent site improvements creating a safe and enjoyable residential community for both adults and children alike. Concerns for accessibility were integrated into the design. New path lighting and private terraces improve public safety while the new playgrounds create a safe and fun new environment for children of ages 2 through 12.



Firm Overview

The Ciccolo Group (TCG) is a planning and community development consulting firm assisting corporations and communities to build success. We provide services to municipalities, businesses, and non-profits in the areas of community and economic development, project implementation, construction oversight, licensing and permitting, grant writing, large capital project management, historic preservation/renovation, transportation implementation, personnel development, interim management, planning, visioning, public outreach, and consensus building.

TCG was incorporated in 2008 by Michelle Ciccolo, the firm's President and CEO. While working part-time as the Community Development Director for the Town of Hudson, she started the Ciccolo Group, LLC to help other communities with their municipal needs. In spring 2015, she left employment with the Town of Hudson to transition the consulting company to a full-time enterprise. TCG employs two additional full-time staff members complementing Michelle's expertise, and utilizes part-time associates to expand our team's background and capacity when needed.

The strength and unique value of TCG is that its personnel are skilled in both theoretical and practical realms. All TCG employees and associates have real hands-on experience working to execute real planning efforts and implement real projects. We have practical knowledge of state and municipal government and a passion for community engagement. We know how to facilitate public process to create visionary plans, as well as how to ensure those plans are realistic, practical, and able to be implemented.

- *Community & economic development*
- *Downtown revitalization*
- *Planning, visioning & consensus building*
- *Public hearing & forum facilitation*
- *Capital project implementation & management*
- *Real estate development & construction oversight*
- *Licensing & permitting*
- *Planning document development & writing*
- *Grant writing & project financing*
- *Transportation planning & implementation*
- *Bike & pedestrian projects*
- *Complete Streets & active transportation*
- *Historic preservation & renovation*
- *Open space & natural resource preservation, sustainability*
- *Open Space & recreation planning*
- *Community Preservation Act grant applications & project management*
- *Affordable housing development*
- *Brownfields redevelopment*
- *Personnel studies, job descriptions & interim management*
- *Public outreach, neighborhood relations & public participation*

The Ciccolo Group affiliates with professional for each unique project, assembling the team of professionals best qualified to meet the needs and objectives of our clients.

To read more about our projects, please visit our website: www.ciccologroup.com.

Firm Overview

- ◆ Municipal Planning & Community Development firm
 - ◆ Planning, visioning & consensus building
 - ◆ Public outreach, neighborhood relations, public participation & forum facilitation
 - ◆ Park planning & creation
 - ◆ Affordable housing
 - ◆ Mobility & access advocates

A Passion for Community Engagement!



Project Team — 30+ years municipal & planning experience



Michelle Ciccolo
Principal & CEO

- 20+ years municipal experience
- Former Dir. Community Development
- Lexington Selectman



Kerin Shea
Public Outreach

- 8+ years municipal experience
- Specializing in citizen participation
- Graphic Designer



Alyssa Languth
Housing & Finance

- MBA & MA in Community Development & Planning
- 2+ years municipal experience
- Affordable housing & financing

Relevant Project Experience

- ◆ Successfully designed & constructed urban skateboard/splash park
- ◆ Built & managed several large capital projects including Assabet River Rail Trail
- ◆ Ran public outreach campaign for Wellesley
- ◆ Created/ managed Affordable Housing Trust
- ◆ Created 5-Town Affordable Housing consortium
- ◆ Worked with Sudbury on two 40B's.

Michelle Ciccolo: Principal-in-Charge



MA, UMASS Boston, John W. McCormack Graduate School of Public Policy, 1995
BA, Villanova University, 1989

MAPC, President 2011 – 2014
MMA, Secretary of Mass. Selectman's Association
Lexington Planning Board, elected 2011-2014
Selectman – Town of Lexington, 2014- present

Planned and oversaw construction of the first phase of the Assabet River Rail Trail and Cellucci Skate and Splash Park.

Project managed the Site Assessment and Remediation of a brownfield site.

Serves on MassDOT's GreenDOT Advisory Committee and the Healthy Transportation Compact Advisory Committee.

Former ADA Coordinator for the Town of Hudson

Michelle Ciccolo has two decades of experience working in municipal management serving at high levels of responsibility with a primary focus on Community Development functions. Overseeing countless complex and capital intensive construction endeavors, Michelle has specialized in implementing major projects involving intricate financing through grants and bond issues, multiple state agency stakeholders, numerous technical agents, rigorous permitting requirements, and sophisticated strategic analysis. Through these project endeavors, she has conducted sensitive real estate negotiations, marketed projects to a wide audience developing the public consensus necessary to move forward, and overseen multi-million dollar contracts for project implementation. She draws on her skills in diplomacy to providing clear and logical instructions to project partners keeping deadlines and timelines on track, while also exercising decisive decision making to prevent confusion or project delays. She is highly organized, well-spoken and articulate, and versatile in her project management style which allows her to be approachable and effective in numerous different work environments.

For 14 years, Michelle served as the Assistant Town Administrator for the Town of Hudson and for six years, continued on in a part-time capacity in Hudson as the Town's Community Development Director, before coming to the Ciccolo Group full-time. She is also currently an elected member of the Lexington Board of Selectmen and was previously a Planning Board Member in Lexington. Michelle serves on the GreenDOT Advisory Committee of MassDOT and the Healthy Transportation Compact Advisory Committee. Both of these committees have a focus on green and healthy transportation alternatives. Michelle has served as a past President of the Metropolitan Area Planning Council (MAPC), chairs MAPC's Legislative Committee, and is currently serving as the first Vice-President of the Mass. Selectmen's Association (MSA) on the Mass. Municipal Association's (MMA) Executive Committee.

Some of Michelle's signature capital projects include:

- Renovating and expanding the Hudson Senior Center, a \$5.5 million dollar project;
- Building a regional rail-trail through multiple towns;
- Upgrading state highway corridor Route 85 through Hudson, an \$11 million dollar effort;
- Renovating the Historic Hudson Town Hall;
- Developing the Lexington Community Center site, a \$40 million dollar endeavor with multiple buildings and assets;
- Upgrading more than 10 privately-owned, commercial retail facades throughout the Historic District in Downtown Hudson;
- Building multi-million dollar parks with features such as water splash elements, band stands, and in-ground, sculpted skateboard amenities;
- Upgrading commercial streetscapes to include comprehensive bike, pedestrian, and aesthetic features;
- Site assessment, cleanup and auction of a brownfields site.

Michelle has also written Master Plans for communities, and developed statewide legislation in the area of Complete Streets. Michelle's work included overseeing the Affordable Housing strategies in Hudson. Through the Ciccolo Group, Michelle has also assisted numerous communities in interim management, personnel recruitment, and strategic project implementation. For private sector clients, she has provided guidance on economic development financing, written Tax Increment Financing (TIF) agreements, and advised on permitting procedures.

Michelle's extensive and diverse background, and numerous state and regional committees have provided her with knowledge of intricate state regulations, programs, and procedures. In addition, it has provided her with strategic relationships with key individuals throughout the Commonwealth of Massachusetts. Michelle is able to draw on these contacts to assist in opening doors, breaking down roadblocks, and expediting projects.



Michelle Ciccolo
Principal & CEO

EMPLOYMENT

The Ciccolo Group, LLC

President & CEO

2008-Current

Originally formed TCG in 2008 to perform occasional consulting projects for a wide number of clients, primarily area municipalities but also including for-profit businesses and 501-C6 organizations. Moved to full-time brick and mortar operation with full-time staff in 2015.

Municipal client list includes: The Towns of Stow, Clinton, Bolton, Hudson, Sudbury and the City of Marlborough, among others

Projects include: Produced Stow's Master Plan, wrote successful \$900,000 CDBG proposal to help Clinton restore a historic building as its new Senior Center • Helped Clinton survey Blight Target Area for DHCD • Served as Interim Town Administrator in Bolton • Interim Community Development Director in Marlborough • Developed personnel plans and job descriptions • Conducted hiring process for Town Administrator in Bolton, and new CD Director in Marlborough.

Town of Hudson

Director of Community Development

2008-2015

Continued on as Community Development Director in part-time capacity after leaving Assistant Town Administrator position. Responsibilities include:

Grant Writing and Project Management: Completely responsible for project and fund management producing dramatic results: rehabilitation of downtown, demolition of abandoned warehouse, renovation of Town Hall, construction of parks and trails, road & bridge upgrades, property assistance, \$5 Million Senior Center Expansion, Library window replacement • Authored numerous successful grant & funding applications resulting in approximately \$33 million from various sources: Transportation Enhancement, CDBG, TIP, ARRA, TDM, CDAG, Mass. Historical Commission, Demolitions Projects Grant, DEM Recreational Trails, Soft Second Loans • Co-author of PWED grant, Land and Water Conservation Fund, Housing Rehab / HOME program • Primary TIP contact for the town and obtained \$5 Million in CMAQ funds for 5.5 miles of bike trail & related bridge structures

Planning & Community Development: Oversaw Master Planning Process, with document winning Outstanding Planning Award from APA-MA • Wrote annual Community Development Strategy and grant projects for CDBG • Managed production of Hudson's Community Development Plan • Orchestrated Hudson's EOEAsponsored Urban River Visions program • Prepared submittals to Commonwealth Capital & • EO 418 Housing Certification • Wrote, evaluated, and promoted By-law modifications • Facilitated Community Preservation Act requests • Heritage Landscape Project Coordinator

Economic Development: Managed Town's Economic Opportunity Area program including the writing and preparation of Tax Increment Financing Agreements (TIFs) • Liaison to Chamber of Commerce • Assisted with efforts to attract new businesses • Facilitated Economic and Community Development projects as they arose.

Rail Trail: Municipal coordinator for the Phase 1 implementation of the Assabet River Rail Trail a five town, 12.5 mile rails to trails project built in Hudson and Marlborough and currently in design and development for the remaining 3 towns. Responsible for land acquisition, funding, consultant management, and coordination.

Transportation: Transportation project planning (bridges, major routes, intersection upgrades, trails) • complete streets implementation including author of CIC Grant Application • transit coordination (Hudson is a new member of the Metrowest RTA) • Streetscapes beautification projects • Bicycle and pedestrian mobility coordinator

Housing: Oversaw the 5-Town Regional Shared Housing Consultant Services project to help preserve and create affordable housing • Assisted the Hudson Affordable Housing Trust develop projects for implementation

Awards Won: *Outstanding Plan Award (2014)* - Granted by the MA Chapter of the American Planning Association to Hudson for its Master Plan, winning in the Comprehensive Planning Award category, recognizing a plan, program or process of unusually high merit from a municipality with a population under 50,000. • *Leading By Example Award (2011)* - Granted by Executive Office of Energy and Environmental Affairs to Hudson for 3 of Community Development Department projects which incorporated sustainability improvements and energy efficiency into municipal construction – Library windows, Senior Center GeoThermal+, and Argeo R. Cellucci Park water recirculation at the children's splash pad

Town of Hudson

Assistant Town Administrator & Director of Community Development

1995-2008

• Responsible for all aspects of Municipal Management for the Town, which has a home rule charter, a population of 19,000 and an operating budget of \$65+ million • Assistant Administrator reports directly to the Executive Assistant, who is the Chief Administrative Officer, Chief Financial Officer, Personnel Director, and Chief Procurement Officer • Assistant Administrator's duties are extremely varied as well as technical, and include the following primary areas of management. See description above for concurrent Community Director duties.

Budget/Capital Plan: Produced documents, schedules, and spreadsheets pertaining to the budget and Capital Plan • Met with Department Heads to review their annual fiscal requests • Attended hearings with Selectmen and Finance Committee • Recommended budget figures for accounts administered by the Executive Assistant.

Supervisory: Supervised staff in Board of Selectmen's Office, who were also responsible for all Licensing and Insurance • Supervised the Town Planner and oversaw the administration of the Town's Land Use Boards: (Planning, Zoning Board of Appeals, Conservation Commission, and Economic Development).

Personnel: Oversaw Non-Union Position Classification and Compensation Study • Wrote and revised job descriptions as needed • Evaluated position re-classifications • Member of Management team responsible for bargaining with Clerical Union • Updated and maintained personnel regulations • Edited and/or authored annual Department Head evaluations • Conducted recruiting, interviews, evaluation and review of applicants for new positions.

Facilities Manager: Supervised maintenance staff responsible for Town buildings including: Town Hall, Library, Police Station, and Senior Center • Prepared invitation to bid specifications for large building related purchases and renovations • Orchestrated volunteer landscape beautification projects • Coordinated and contract for Town Electrician and Plumber.

Purchasing: Wrote and prepared numerous complex and elaborate Request for Proposals and Invitation to Bid documents pursuant to Chapter 30B (and Section 39M), Chapter 149 and Chapter 7-Designer Selection • Identified needs by researching options and evaluating programmatic goals • Revised Town's Standard General Contract and all procurement documents • Reviewed contracts and procurement submittals for accuracy and completeness.

Computer Systems Oversight: Spearheaded creation of new Information Technology Department including definition of job descriptions and justification of budget • Coordinated GIS team with creation, implementation, and maintenance of digitized mapping • Assisted in the management of Town's website • Created relational databases.

Selectmen Meeting Preparation: Wrote agendas for bi-weekly meetings • Reviewed Department Head's submissions for completeness • Produced briefing packets • Attended public and executive sessions.

Town Meetings: Produced Warrant for bi-annual Town Meetings • Developed, drafted and reviewed articles for accuracy.

PROFESSIONAL / CIVIC ASSOCIATIONS & VOLUNTEER ACTIVITIES

Ad-hoc Community Center Advisory Committee, Lexington – Chairman	2013-Current
Community Farming Committee, Lexington – Member	2013-Current
Lexington Housing Partnership – Member	2013-Current
Communities of Practice Working Group, DPH/ MMA – Member	2013-Current
Act Fresh Team Member – (www.mphaweb.org/actfresh.htm) <i>A collaboration of partners with Mass Public Health Association working on Statewide public health action, "building vibrant communities"</i>	2013-Current
Metropolitan Area Planning Council (MAPC) – VP 2010-2011, Executive Committee 2009-2012, Current - Legislative Committee, Officers Transportation Committee, Strategic Planning Committee, Assessment Committee	President 2011-2014
Mass Municipal Association (MMA) – Public Works & Transportation, Policy Committee	2011-Current
I-495 Metrowest Corridor Partnership - Board of Directors, Transportation & Legislative Committees	2009-Current
Lexington Planning Board (Elected Member) Board member liaison to: Transportation Advisory Committee, Energy Committee, Sidewalk Committee, & formerly Greenways Corridor Com, Mock Town Meeting volunteer	2011-Current
Middlesex County Community Transformation Grant Leadership Team - <i>a MA Department of Public Health, Mass in Motion (MiM) effort funded by Federal Centers for Disease Control, with project management from MAPC</i>	2011-2015
Metrowest Moves Steering Committee – (www.metrowestmoves.org) <i>a MiM public health collaboration between Hudson, Marlborough, & Framingham</i>	2011-2015
Lexington League of Women Voters	2011-Current
Estabrook School Access Ad-hoc Task Force (Lexington) – Chairman	2011-2012
MassDOT Transportation Advisory Committee – Member	2010-2012

Minuteman Advisory Group on Interlocal Coordination (MAGIC) – Chairman	2007-2011
Statewide Transportation Enhancement Program Review Advisory Committee – Member	2010
MAPC Transportation Enhancement Project Selection Committee – Chair	2007-2010
MetroFuture Steering Committee – “Creating a shared vision for the future of Metro Boston area”	2007-2009
Mass. Municipal Managers & Personnel Associations – Member	1995-2008
Metrowest Regional Transit Authority Study Advisory Group – Representative	2007
Freedom’s Way Heritage Commission – Gubernatorial Appointee	2008-2009
Freedom’s Way Heritage Association – Board of Directors	1999-2004
Lexington – DPW Facility Reuse Advisory Committee – Member	2003
Lexington Town Meeting Member - Elected to represent Precinct 9	1996-1999
Network for Women in Politics & Government - Board of Directors	1994-1996
Lexington Town Meeting Member - Elected to represent Precinct 4	1991-1993
Fund for the Arts in Newton - Clerk & Member of the Board of Directors	1992-1993

OTHER WORK EXPERIENCE

John W. McCormack Institute of Policy and Global Studies, UMass Boston

Faculty Instructor – Topics in Municipal Government, UMass

2007-2011

- Taught graduate level, 1 credit immersion course - annual weekend long seminar covering a wide range of topics pertaining to local government in Massachusetts.

Chelsea Office of Economic Development

Research and Program Development Associate

1994-1995

- Advised the City on how to implement a revolving loan pool and small business technical assistance development program, designed to enhance the availability of capital and expand opportunities for start-up companies
- Evaluated existing revolving loan fund models and capitalization methods • Updated the City's marketing brochure.

John W. McCormack Institute of Public Affairs, UMass Boston

Graduate Research Assistant

1993-1994

- Worked at the Center for Social Policy Research • Assisted with the design, distribution, collection, and analysis of tenant survey data for the Pilot Housing Project (analyzing the problems of mixed-use tenancies in public housing)
- Edited text and prepared graphics for Pilot Housing reports produced for the Governor's Inter-Agency Task Force.

Village Automotive Group, Boston, MA

Property Manager

1991-1993

- Coordinated several commercial development projects involving special permits, environmental clean-up, usage design, and neighborhood relations • Managed consultant contracts resulting in 21E environmental assessments, traffic studies, architectural renderings, site assessments, legal briefs and real estate closing documents
- Supervised 20 commercial and residential properties
- Prepared tenant leases and mortgage documents • Convened management meetings.

Office of U.S. Senator John F. Kerry, Boston, MA

Scheduler

1989-1990

- Responsible for arranging, updating, and managing the Senator's daily schedule
- Prepared and wrote briefing materials for events
- Facilitated constituent requests
- Assigned constituent follow-up requirements to staff
- Assisted with press releases

EDUCATION

John W. McCormack Institute of Public Affairs, UMass Boston

Master of Science in Public Affairs; Academic Excellence Award / Valedictorian

1995

GPA 3.89

Inducted as a member of Pi Alpha, National Honor Society for Public Affairs and Administration

Boston College, Newton, MA
Women in Politics and Government, 12 credit Graduate Level Certificate Program

1991

Villanova University, Villanova, PA
Bachelor of Arts; Majors: Psychology & Philosophy; Minor: French

1985-1989

PERSONAL

Married, 2 sons ages 14 & 17. Hobbies: vegetable gardening, landscaping, skiing, cooking, sailing, photography

Kerin Shea: Senior Consultant for Development & Project Management



BS, Skidmore College, 1993

*495/Metrowest Partnership Transportation Committee, Economic Development Committee, & Sustainability Committee, 2008 - present
 Massachusetts History Day Board of Directors, 2007 - present
 Massachusetts History Day State Coordinator, 2015 - present*

Completed two Open Space and Recreation Plans, including authoring the 2015 update.

Overhauled citizen participation process in Hudson which included the use of social media, electronic signs, and cable access channels.

Designed and analyzed Hudson's OSRP Survey, Master Plan Survey, and Blight Survey.

Kerin Shea has 25 years of professional experience in a project management capacity with a focus on public engagement. She is expert in project management, budget management, reporting, audit compliance, contracting, and procurement. Kerin has vast experience in monitoring payroll and has managed complex funding streams, especially when various grant funds are combined with Town appropriations to fund one project.

In her capacity as the Assistant Director of Community and Economic Development for the Town of Hudson, Kerin overhauled the Town's citizen participation plan to include a strong social media component. Over the past seven years, for all of the Town's planning initiatives, Kerin has been responsible for public outreach, project marketing, advertising and compliance with a robust citizen participation process.

While in Hudson, Kerin's strong writing skills led her to take over the regular updating of the Open Space and Recreation Plan, not only developing language and editing the presentation of text and visuals in the plan, but also formulating and positioning strategic open space initiatives. She served as editor of the 2011 Open Space and Recreation Plan, and authored Hudson's 2015 OSRP update.

Kerin served an extremely active role in creating Hudson's newly-adopted Master Plan. After clerking for the 19-person steering committee, Kerin was able to utilize her writing skills by editing the document in the final stretch to get the Plan adopted. In December 2014, Hudson's Master Plan won an Outstanding Planning Award from the Massachusetts Chapter of the American Planning Association (APA-MA). Kerin managed the entire citizen participation process, which included active resident participation in eight public forums.

She plays an integral role in the planning, writing, and execution of all grant applications and planning documents. When projects are funded, she participates actively in the implementation of those projects including the supervision of architects, engineers, rehabilitation specialists, general contractors, filed sub-bidders, and owner's project managers (OPMs). She

oversees the development of project strategies, interfacing with property owners, solicitation of bids, contracting, program design, oversight of construction and coordination with all local committees and state agencies responsible for permitting approvals.

Kerin prepares many necessary project documents such as Invitations to Bid, Requests for Proposals, contracts, change orders, extensions and all grant reporting. In addition to bid packages and contract documents, she is very skilled at preparing important informational packages, visual exhibits, power point presentations, grant applications, project proposals, important correspondence, reports and press releases. Kerin is also responsible for all public outreach, advertising and ensuring a robust citizen participation process. Throughout her extensive experience, Kerin has incorporated her graphics design background into her work. She takes pleasure in designing promotional materials – everything from standard forms, brochures, flyers and posters, to logos, stickers, and buttons.

Kerin is adept at facilitating public forums, speaking at Board of Selectmen Meetings, Town Meeting, and conferences. Kerin routinely deals with state and regional agencies, community groups and other public organizations. She is adept at making public oral remarks, performing power point presentations, hosting meetings, forums and public hearings, as well as performing in other high-stress situations engaging the public.

Kerin is currently employed full time by the Ciccolo Group.



Kerin Shea

Senior Consultant

PROFESSIONAL EMPLOYMENT

The Ciccolo Group, LLC

Senior Consultant for Project Management

2015-Current

Recruited to assist company transition from home-based business to brick and mortar firm concerned with sustainable real estate development and municipal consulting. Responsibilities include: project development, project management, contracting, bid solicitation, site master-planning, program design, contractor oversight, public outreach, advertising, press releases, social media, project visuals, proposals, presentations, & promotional materials.

- Wrote successful HUD funded Community Development Block Grant to restore historic 1882 Clinton Senior Center, complete with commercial kitchen;
- Assisted with state certification of Downtown Clinton Blight Target Area, subsequently certified by the Department of Housing & Community Development;
- Analyzed potential site selections for auto storage needs, with focus on zoning modifications, variances and potential income generation for Hyundai Danvers;
- Contracted by Village Automotive Group to maximize the financial potential of existing real estate holdings with an eye toward sustainable development and best practices in smart growth;

Town of Hudson, MA

Community & Economic Development Assistant

2008-2015

Hired to help launch newly created municipal department in charge of economic development, transportation/infrastructure, sustainability & natural/historic preservation and affordable housing. Responsibilities included: project management, budget management, reporting, audit compliance, accounts payable/receivable, contracting, bid solicitation, procurement, payroll monitoring, grant writing, long range planning, program design, contractor oversight, public outreach, advertising, press releases, social media, project visuals, proposals, presentations, & promotional materials.

- Managed several historic renovations - including the Downtown historic façade program, 1859 Senior Center renovation/addition, 1879 Town Hall assessment/renovation, and 1905 Public Library historic window replacement;
- Oversaw state transportation projects – including the \$11 million dollar upgrading of state highway Route 85 and a \$3.5 million dollar bridge project that included right-of-way acquisition;
- Managed the site assessment, cleanup and auction of a brownfields site - funded through a combination of state funds and local appropriations;
- Oversaw the 2014 Master Plan - including writing content, editing and imaging;
- Edited the 2011 Open Space and Recreation Plan and authored the 2015 OSRP update - including formulating and positioning of strategic open space initiatives;
- Overhauled the Citizen Participation Plan - including more outlets such as social media, web postings and cable access
- Wrote 5 Community Development Block Grants.
- Completed the 2010 Washington Street Slum/Blight certification, for DHCD's CDBG program.

CERTIFICATIONS, TRAININGS & AWARDS

MA-APA Outstanding Master Plan Award	2014
MADPH – Cultural Insight & Equity: Cross Cultural Training	2014
MassDOT – Complete Streets Workshop	2013
MOBD – Changes to the EDIP Program	2013
MassDevelopment - Site Selection: Positioning Your Community for Success	2013

EOEEA – Leading By Example Energy Efficiency Award	2011
MassDOT - Municipal Right-of-Way Workshop	2010
DHCD - Intelligrants CDBG Training	2009
DHCD - Davis-Bacon Wage Rate Boot Camp	2008

OTHER WORK EXPERIENCE

Marlboro Transportation Office Manager

2001-2006

Hired expressly to facilitate company through successful internal transition and restructuring of all core business processes. Responsibilities include: creating all administrative & reporting programs, customer service and correspondence, telephone support, database maintenance, scheduling estimates, moving & delivery work, accounts receivable/payable, reconciling accounts, tracking and organizing inventory, maintenance of all files and records, creating and designing forms and brochures.

- Created & implemented complete moving job history database, encompassing over 500 moving & delivery customers per year.
- Established extensive cooperative business gift certificate program. Created database sorted by specific key business categories, cross-linked with individual contact referral history.
- Generated intensive delivery service database involving major retail outlets such as Sears & Roebuck, Babies 'R Us, The United Way and The Boys and Girls Club of Central Massachusetts.
- Wrote & designed marketing brochure for public distribution, designed all intra-business documents, such as estimate forms, moving & delivery slips, advertising flyers, gift certificates and coupons.

Adopt-A-Video General Manager

1993-2001

Recruited specifically to turn around under-performing retail/rental store for \$1 million retailer with 6 locations state-wide. Responsibilities included business turnaround, growth & development, staffing & HR administration, operations, marketing and full profit & loss responsibility. Other hands-on responsibilities included: processing customer memberships, cataloguing and tracking inventory, accounts receivable/payable, database maintenance, customer service, interfacing with vendors, advertising & in-store promotions.

- Successfully maintained retail customer database of over 5,000 customers and inventory database of over 10,000 pieces.
- Effectively implemented account credit collections program. Repaired dead accounts and strengthened existing accounts with both customers and vendors.
- Recruited, trained & supervised sales staff of more than 10. By introducing performance incentives & benefit programs, maintained stable & dependable sales force in industry with high average turnaround.
- Recognized for outstanding performance in customer service, focusing on customer development, retention and growth.

As Time Goes By Auctions Senior Bookkeeper/Customer Service Representative

1997-2006

Hired to utilize over 20 years' experience in the retail antique and auction business. Responsibilities include: research of consignments, maintenance of customer and mailing database, registration and cash out of customers, recording customers and customer receipts, interfacing with consignors, organizing and tracking merchandise, composition of flyers and advertisements, photography, coordination of displays.

- Organized & maintained database for over 500 customers and consignors, as well as an inventory database for over 300 lots per auction.

- Successfully supervised staff of 6 while registering and tallying receipts for over 100 customers per night.
- Accountable for complete reconciliation of cash receipts, totaling \$10,000+ per auction.

EDUCATION

SKIDMORE COLLEGE, Saratoga Springs, New York

1993

Bachelor of Science – Major: Studio Art, Concentration in Graphic Design

Minor: Art History (Magna Cum Laude)

Alyssa Languth: Senior Consultant for Financial & GIS Analysis



Created and updated maps for the 2015 Hudson Open Space and Recreation Plan

Created the maps for Hudson's 2014 Master Plan

MBA, Clark University, 2015
MA, Community Development & Planning, Clark University, 2015
BA, Urban & Community Studies/Economics, 2009, Minor in GIS

International Development Community and Environment – Social Change Fellow

Alyssa Languth is a high level GIS analyst and finance professional with a background working in affordable housing and business applications. Alyssa graduated from Clark University in 2015 with dual Master's degrees including an MBA and an M.A. in Community Development and Planning. She has extensive experience in the community development and affordable housing fields, having worked for numerous agencies including the Town of Hudson, MA, Statewide Affordable Housing, Tigan Consulting & Development and the New London Homeless Hospitality Center.

As the administrative manager for Statewide Affordable Housing, Alyssa was responsible for all tax filings, monthly financial statements, and developing concept plans specifically focusing on the redevelopment of a closed primary school in Cranston, RI. She worked closely with property managers, legal council, and accounting professionals to ensure the success of five affordable developments throughout New England.

At the New London Homeless Hospitality Center, Alyssa oversaw all federal and state reporting for an eight unit veterans transitional house, managed a staff of 23, and interacted extensively with the Federal Department of Housing and Urban Development (HUD). Her substantial work with HUD programs included reporting and budgeting for new housing development and the advancement of a multi-million dollar homeless shelter.

For the Town of Hudson, MA, Alyssa wrote and managed grant applications in excess of \$100,000, winning funding for such various project topics as traffic/hazardous intersections, pedestrian/bicycle mobility, livable communities, energy efficiency and water management. She also worked on the economic assessment and build-out analysis for Hudson's historic downtown. Additionally, Alyssa developed Hudson's Community Development Block Grant (CDBG) downtown Blight Target Area certification.

Alyssa played a major role in the production of the Town of Hudson's award winning 2014 Master Plan, including content, editing, image preparation, and the creation of the Geographic Imaging System (GIS) maps for the plan. She also completed the maps for Hudson's 2015 Open Space and Recreation Plan.

Alyssa Languth is currently employed full time by the Ciccolo Group.



Alyssa Languth

Senior Consultant

EMPLOYMENT

The Ciccolo Group, LLC

Senior Consultant for Finance & GIS Analysis

2015-Current

- Performs all income/expense forecasting and pro-formas for residential and commercial developments.
- Completed the initial feasibility analysis for a 5-acre site in Boston, MA.
- Conducts housing market research, funding analysis and tax credit investigation.
- Wrote capital plans for two communities, and put processes in place.
- Manages development team.
- Prepares monthly status reports for clients.

Town of Hudson, MA

Community & Economic Development Intern

2013-2015

- Completed the 2014 CDBG Slum/Blight Application, documenting and mapping over 200 properties and physical infrastructure.
- Wrote and managed over \$120,000 in grant funding, including a \$60,000 grant from the Department of Energy Resources.
- Created an economic development build-out assessment of Hudson's downtown corridor.
- Edited, updated and created the maps for Hudson's award winning 2014 Master Plan. Maps include Commercial/Residential/Industrial Suitability and Transportation Needs.
- Edited, updated and created the maps for Hudson' 2015 Open Space Plan update.
- Authored the Tax Increment Financing (TIF) Agreement between the Town of Hudson and Hudson Lock, LLC.
- Authored various memos to the Board of Selectmen.

OTHER WORK EXPERIENCE

Community Development Training Institute

Consultant, Secretary/Treasurer – Board of Directors

2013-2015

- Collaborated with other consultants to consolidate resources to develop an extensive HUD Section 108 Loan Guarantee Program Resource Library.
- Analyzed two years of progress assessments for 150 youths
- Collaborated with a team of four to design a custom social return on investment metric and utilized the metric to evaluate a non-clinical mental health model which resulted in additional funding award for the program of \$21,000.
- Managed financial and operational administration.
- Managed receivables, payables and all annual reports and tax filings.
- Evaluated and establish financial and organizational policies and procedures.
- Collaborate with Board Chair and Executive Director to develop annual budgets.

Statewide Affordable Housing

Administrative Manager

2013-2015

- Analyzed monthly financial statements and project payables/receivables to ensure project profitability and compare to previous quarter and year benchmarks.
- Coordinated with accountants and property managers to complete all financial reporting, annual reports, and partnership agreements.

- Chaired quarterly Board of Director Meetings.
- Developed concept plan for the redevelopment of a closed primary school to create a new, 20 unit, Veteran affordable housing project in Cranston, Rhode Island that was approved by the Board of Directors.

New London Homeless Hospitality Center

Administrative Manager

2011-2012

- Managed all federal and state reporting for an eight-unit Veteran Transitional House and a scattered-site Supportive Housing Program using HUD's LOCCS and eSnaps program as well as the Homeless Management Information System (HMIS).
- Provided support services for individuals experiencing homelessness needing a wide variety of assistance.
- Managed the fundraising and volunteer departments
- Managed human resources for a staff of 23.
- Authored and managed over \$50,000 in private foundation grants.

New London Homeless Hospitality Center

Volunteer Coordinator (through AmeriCorps VISTA)

2010-2011

- Developed and administered volunteer program resulting in increased quantity and quality of volunteers as well as improved staff performance and productivity through volunteers
- Contributed to the development of volunteer manuals and resources.
- Improved outreach and community relationships through public speaking engagements, developing and disseminating published materials including a quarterly newsletter and weekly blog, social networking including Facebook and Twitter.
- Organized the Annual Walk for the Homeless and increased profits by 50 percent.

CERTIFICATIONS, TRAININGS & AWARDS

What's New in Municipal Law - Municipal Modernization Act, Local Funds and Finances	2016
LOCUS Summit – public/private partnerships, financing, neighborhood sensitive design	2016
MA – APA 2014 Comprehensive Master Plan Award	2014
Economic Development Incentive Program Forum, MA Office of Business Development	2014
MA- APA Inclusionary Zoning Solutions Training	2014
APA – National Planning Conference	2014
National Development Council's Advanced Low-Income Housing Tax Credit	2014
Community Development Block Grant (CDBG) Training University Module	2013
Foundation Center's Grant Seeker Training Institute	2011

EDUCATION

CLARK UNIVERSITY, Worcester, MA

2015

Master of Business Administration

Masters of Arts, Community Development and Planning

Social Change Fellow - International Development Community and Environment

UNIVERSITY OF CONNECTICUT, Storrs, CT

2009

Bachelor of Arts - Majors: Economics & Urban and Community Studies;

Minor: Geographic Information Systems (GIS)

**CITY OF NEWTON
PURCHASING DEPARTMENT**

***RESIDENTIAL PROPERTY MANAGEMENT SERVICES FOR RENTAL
HOUSING DEVELOPMENT
OWNED BY THE CITY OF NEWTON***

REQUEST FOR PROPOSAL:

**Residential Property Management Services for Rental Housing Development
at 70 Crescent Street, Newton, Massachusetts**

REQUEST FOR PROPOSAL #18-49

Proposal Opening Date: January 11, 2018 at 10:00a.m.

**CPC staff note: On staff recommendation, only selected pages
from this RFP are included in the funding proposal to the CPC.**

**DECEMBER 2017
Setti D. Warren, Mayor**

PURCHASING DEPARTMENT

REQUEST FOR PROPOSAL No. 18-49

**RESIDENTIAL PROPERTY MANAGEMENT SERVICES FOR
AN EIGHT-UNIT MIXED-INCOME RENTAL HOUSING DEVELOPMENT
OWNED BY THE CITY OF NEWTON,
LOCATED AT 70 CRESCENT STREET, NEWTON, MASSACHUSETTS**

I. DECISION TO USE COMPETITIVE SEALED PROPOSALS

The Chief Procurement Officer has determined that in order to select the most advantageous proposal for Residential Property Management Services (“Services”) related to the City-owned rental housing development located at 70 Crescent Street, Newton, Massachusetts, comparative judgments of technical factors, in addition to price, will be necessary for the following reasons:

1. 70 Crescent Street is the first housing project that the City has solely developed and retained ownership of, and therefore, represents the first time the City has sought to hire a residential Property Management firm to oversee the daily management and maintenance of such a project.
2. The Scope of Services is complex and requires experience not only with standard rental apartment property management, but also the marketing, leasing, and monitoring of affordable housing units, in compliance with the Massachusetts Department of Housing and Community Development requirements.
3. Given the scope and scale of this important project, the City’s robust investment in the project, and the City’s lack of experience in managing such a project and residential property management firm, we believe it is critical to hire a firm based more on its qualifications and experience rather than its price proposal, and therefore, request the opportunity to do such through the RFP process.

The City believes that the individual(s)/firm serving in this capacity must have a broad range of experience in residential property management services for mixed-income rental housing. The City’s evaluation committee shall review, evaluate and rate each proposer’s technical information. After this rating has been reviewed and accepted, the City will open price proposals. The City will award a contract, if at all, to the proposer the City determines most advantageous based on the technical and price proposals.

II. INTRODUCTION

Currently the City is developing an eight (8) unit, mixed-income rental housing project on City-owned land, located at 70 Crescent Street, Newton, Massachusetts (“City”). As part of housing project, the City is also expanding an existing small community park, the Reverend Ford Playground, adjacent to the new housing development. Services requested for this contract are solely for the property associated with the housing portion of the project (“Housing Project”), not the City’s park.

Construction of the Housing Project is expected to begin in the fall of 2018 and will last for approximately twelve to fifteen months. The housing units are expected to be ready for occupancy in the spring of 2019.

The City, as owner of the property, is seeking a qualified residential property manager, hereafter the “Contractor,” to provide property management services for the Housing Project, an eight (8) unit, mixed-income rental housing development, including both affordable and market-rate units. At least four (4) of the units will be affordable to households with annual incomes less than 80% AMI; however, at this time, the City is looking at the following affordability mix of the units: two (2) units at 60% AMI, two (2) units at 80% AMI, two (2) units at 120% AMI, and two (2) market-rate units.

The term of the Housing Project contract (“Contract”) shall extend for one year from the date of execution and renewable for two, one-year extensions. The renewal period will be subject to approval at the City’s discretion. It is the City’s intention to solicit proposals, invite oral presentations (if desired) and award the Contract to the responsive and responsible firm whose proposal is deemed most advantageous to the City based on the proposer’s price and non-price proposals.

The City shall be named as additional insured on all policies obtained by the consultant firm.

All policies shall be obtained from companies licensed to conduct business in the Commonwealth of Massachusetts.

10. **Force Majeure.** Neither the City nor the Contractor shall be deemed in breach of any contract which may result from this proposal submission if it is prevented from performing any of the obligations hereunder by reason of Acts of God, acts of the public enemy, acts of superior governmental authority, strikes or labor disputes, floods, riots, rebellion, sabotage, or any similar other circumstances not within its reasonable control.
11. **Termination.** Contractor shall peaceably and immediately give up and surrender to the City the premises and every part thereof at the termination of the agreement in the same condition that they were received.
12. **Non-discrimination/Equal Opportunity.** Contractor shall comply with all local, state and federal laws and regulations pertaining to non-discrimination and equal opportunity in the areas of employment, subcontracting, and use of City facilities.
13. **Assignment.** Contractor shall not assign or subcontract any portion of the operation without prior written approval from the City.
14. **Independent Contractor.** Contractor and its employees will operate as an independent contractor and are not considered to be City employees.

IV. SCOPE OF SERVICES

Currently the City is developing an eight (8) unit, mixed-income rental housing project on City-owned land, located at 70 Crescent Street, Newton, MA. As part of this project, the City is also expanding an existing small community park, the Reverend Ford Playground, adjacent to the new housing development. Services requested for this contract are solely for the property associated with the residential building, not the City's park. Construction is expected to begin in the fall of 2018 and will last for approximately twelve to fifteen months. The housing units are expected to be ready for occupancy in the spring of 2019.

The City, as owner of the property, is seeking a qualified residential property manager to provide property management services for 70 Crescent Street, an eight (8) unit, mixed-income rental housing development, including both affordable and market-rate units. Four (4) of the units will be 2-bedroom, 2-bath (ranging from 1,152 sq. ft. to 2,844 sq. ft.); and four (4) will be 3-bedroom, 2-bath (ranging from 1,217 sq. ft. to 3,200 sq. ft.). At least four (4) of the units will be affordable to households with annual incomes less than 80% AMI; however, at this time, the City is looking at the following affordability mix of the units: two (2) units at 60% AMI, two (2) units at 80% AMI, two (2) units at 120% AMI, and two (2) market-rate units.

The term of the contract shall extend for one year from the date of execution and renewable for two, one-year extensions. The renewal period will be subject to the City's approval of such.

The Property Management Services will include, but are not limited to the following duties and responsibilities:

1. Proactive daily maintenance and operations of property.
2. Development of marketing materials (print and digital) to promote tenant interest in the property.
3. Creation and execution of an affirmative marketing plan and tenant selection plan for affordable units that are consistent with the City of Newton and Massachusetts Dept. of Housing and Community Development (DHCD) requirements.
4. Setting rents for conventional market-rate multifamily units according to market demand, as well as maximum affordable rents for affordable units; and preparing a market analysis for the property, establishing fair market rental value during each rental period.
5. Management of all new tenant intake including: initial lease-up (to include DHCD approved lottery for affordable units) activities, applicant-screening and eligibility, tenant selection, and establishing and maintaining a waiting list.
6. Compliance with appropriate DHCD or other state agency regulations related to the management of affordable housing units.
7. Drafting of all tenant rules and regulations (to be reviewed and approved by the City).
8. Development of lease (to be reviewed and approved by the City) and lease execution, including explaining the lease and all attachments.
9. Collection of rent and charges in addition to rent.

10. Enforcement of lease terms.
11. Lease renewals and evictions.
12. Annual re-examinations of income and household size for the affordable and middle-income units, and provide annual reports to the City detailing this information.
13. Development of annual unit inspections report and execution of annual unit inspections.
14. Unit turnover responsibilities, including preparing vacated units for re-leasing.
15. Development of maintenance schedule and full maintenance repair of the property, including addressing tenant issues and ability to immediately address health and safety concerns.
16. Routine maintenance of property including common area (inside and outside), trash removal, landscaping, pest control, and snow removal for sidewalks, outdoor stairways, roadway and parking, to be completed in-house or by an outside vendor.
17. Monitoring and coordination of necessary inspections of property's systems and infrastructure.
18. Providing tenants with 24 hour emergency telephone contact numbers for emergency repairs.
19. Ordering and purchase of all required supplies and services.
20. Yearly inspection of property, including a capital asset assessment and the development of an annual management plan and recommendations for maintenance needed.
21. Full fiscal management responsibilities including preparing annual operating budgets, monthly financial reporting and adhering to approved and authorized (by City) budget amounts. The City reserves the right to request further information from Contractor.
22. Provide information and reports to the City as necessary.
23. From the date of the execution of the contract provide advice and assistance to the City, as needed, with respect to the design and construction of the Housing Project.

V. TECHNICAL PROPOSAL - MINIMUM & COMPARATIVE CRITERIA

For the Technical Proposal, Minimum Criteria have been created to determine a proposer's eligibility for consideration, and Comparative Criteria will be used rank eligible proposers. Technical Proposals will be evaluated by an appointed Evaluation Committee.

Technical Proposals that do not meet the Minimum Criteria will not receive further consideration. Proposals that meet the Minimum Threshold Criteria will be reviewed according to the Comparative Criteria.

The selection process for proposals will be conducted in four phases:

1. All Technical Proposals will be reviewed by the Evaluation Committee to determine if they meet the Minimum Criteria. All proposers will be notified of proposal status identifying any missing items or deficiencies in proposals. To the extent permitted by law, proposers will be given 7 days to respond and to provide the required information. An incomplete proposal will be considered non-responsive and will be eliminated from consideration.
2. Proposals that meet the Minimum Criteria will be reviewed and scored by the Evaluation Committee according to the Comparative Criteria. Interviews may be scheduled at this time.
3. When he receives the evaluations from all Evaluation Committee members, the Chief Procurement Officer shall open the Price Proposals, and on the basis of the price and non-price proposals recommend the most advantageous proposer(s). The Department of Planning and Development may revise any recommendation if its decision is documented in writing
4. The winning proposer will be notified of the project scoring upon the City's award decision(s).

VI. MINIMUM CRITERIA

All Technical Proposals must satisfy the following Minimum Criteria to be considered:

1. The Technical Proposal must include all Proposal Submission Requirements as defined in Part VIII below.
2. Resume(s) of all personnel who may be assigned to perform services under this contract.
3. Evidence of contractor's qualifications and experience in providing residential property management services, as detailed

in Section IV. Scope of Services.

4. List of services provided in-house by contractor, as well as those provided by outside vendors.
5. A **minimum of three** references from current or prior (within past five years) clients for whom the Contractor has performed services similar to those required under this contract, including contact names, telephone numbers, and email addresses.
6. Overview of contractor's property management philosophy, methods, and practices, including detail on how communication and reporting would occur between the Contractor, the tenants, and the City.
7. Overview of contractor's experience in setting rents for conventional market-rate multifamily units, as well as maximum affordable rents for affordable units, including a minimum of two samples of each of the following: 1) Market analysis of property; 2) Maximum rental calculations for affordable units
8. Overview of contractor's experience in conducting annual re-examinations of income and household size for the affordable units, including a minimum of one example of internal policies and procedures for conducting such reviews.
9. Overview of contractor's experience in maintaining low vacancy rates in rental properties.
10. A minimum of one sample of each of the following: 1) Lease agreement; 2) Tenant rules and regulations; 3) Operational report for client; 4) Financial report for client
11. A minimum of two samples of each of the following: 1) Marketing plan and corresponding print and digital materials to promote tenant interest in the property; 2) DHCD-approved affirmative marketing plan and tenant selection plan for affordable units
12. Year-end financial statements for the past three completed fiscal years for the Contractor
13. City of Newton Technical Proposal Form (Attachment B)
14. City of Newton Bidder's Qualifications and References Form (Attachment C)
15. Certificate of Non-Collusion (Attachment D)
16. Certificate of Tax Compliance (Attachment E)
17. Debarment Letter (Attachment F)
18. IRS Form W-9

Proposer's Technical Proposal shall be signed by a duly authorized representative of the proposer and submitted on **Attachment B** and shall include all other required Minimum Criteria and Comparative Criteria and Standards, contained in Section VI.

VII. COMPARATIVE CRITERIA

Proposals from contractors who meet or exceed the Minimum Criteria will be evaluated and rated on the basis of the following Comparative Criteria. The City reserves the right to ask any respondent to provide additional supporting documentation in order to verify its response.

Ratings of Highly Advantageous (HA); Advantageous (A); Not Advantageous (NA); or Unacceptable (U) will be given to each of the following criteria for each respondent. A composite rating will then be determined. A composite rating of Highly Advantageous or Advantageous may be assigned only if a proposal has received at least one such rating among the criteria listed below.

To the extent that an Evaluation Criterion requires the certification of fact, the proposer's certification as to that fact shall be an adequate response provided, however, that on request the proposer shall provide to the City such evidence as the City may request to support that fact.

Proposals shall be evaluated based on the following four (4) Comparative Criteria:

- 1. Extent of qualifications and experience in providing residential property management services for conventional multifamily rental properties and affordable multifamily rental properties, detailed in Section IV Scope of Services.**

Highly Advantageous –The Proposer has at least 7 years of experience in providing significant residential property management services for conventional multifamily rental properties and affordable multifamily rental properties in the Greater Boston region, including services detailed in Section IV "Scope of Services" above. The Proposer has a highly qualified firm and/or team and has demonstrated an excellent understanding with respect to managing such mixed-income rental properties. A minimum of three client references from organizations or institutions for which the Proposer has performed services similar to those required under this contract.

Advantageous - The Proposer has less than 7 but at least 5 years of experience in providing significant residential property management services for conventional multifamily rental properties and affordable multifamily rental properties in the Greater Boston region, including services detailed in Section IV "Scope of Services" above. The Proposer has a qualified firm and/or team and has demonstrated adequate or sufficient understanding with respect to

managing such mixed-income rental properties. Three client references from organizations or institutions for which the Proposer has performed services similar to those required under this contract.

Unacceptable - The Consultant has fewer than 5 years of experience in providing significant residential property management services for conventional multifamily rental properties and affordable multifamily rental properties in the Greater Boston region, including services detailed in Section IV “Scope of Services” above. The Proposer has an unqualified firm and/or team and has demonstrated inadequate or insufficient understanding with respect to managing such mixed-income rental properties. Less than three client references from organizations or institutions for which the Proposer has performed services which may not represent services similar to those required under this contract.

2. Clear demonstration of proposer’s property management philosophy, methods, and practices, including detail on how communication and reporting would occur between the Contractor, the tenants, and the City.

Highly Advantageous –The Proposer has strongly demonstrated its property management philosophy, methods, and practices, including clear and robust detail on how communication and reporting would occur between the Proposer, the tenants, and the City. The Proposer has provided strong examples of tenant communications, including sample lease agreements and tenant rules and regulations, as well as examples of operational and financial reports prepared for clients, all of which are of outstanding quality in content and presentation.

Advantageous – The Proposer has demonstrated its property management philosophy, methods, and practices, including adequate detail on how communication and reporting would occur between the Proposer, the tenants, and the City. The Proposer has provided adequate examples of tenant communications, including sample lease agreements and tenant rules and regulations, as well as examples of operational and financial reports prepared for clients, all of which are of good quality in content and presentation.

Unacceptable – The Proposer has insufficiently demonstrated its property management philosophy, methods, and practices, and has not provided adequate detail on how communication and reporting would occur between the Proposer, the tenants, and the City. The Proposer has not provided adequate examples of tenant communications, including sample lease agreements and tenant rules and regulations, as well as examples of operational and financial reports prepared for clients, and samples provided are unsatisfactory in terms of content and presentation.

3. Extent of experience in maintaining low vacancy rates in rental properties and in developing marketing materials to promote tenant interest, with particular experience in creating and successfully executing affirmative marketing plans and tenant selection plans for affordable units that are consistent with the City of Newton and Massachusetts Department of Housing and Community Development (DHCD) requirements.

Highly Advantageous –The Proposer has strongly demonstrated its experience in maintaining low vacancy rates in rental properties, and has provided examples of marketing plans and materials (print and digital) that promote tenant interest, which are of outstanding quality in content and presentation. The Proposer has demonstrated robust experience in creating and successfully executing affirmative marketing plans and tenant selection plans for affordable units that are consistent with the City of Newton and Massachusetts Department of Housing and Urban Development (DHCD) requirements, and has provided examples of such plans, which are of outstanding quality in content and presentation.

Advantageous – The Proposer has adequately demonstrated its experience in maintaining low vacancy rates in rental properties, and has provided examples of marketing plans and materials (print and digital) that promote tenant interest, which are of good quality in content and presentation. The Proposer has demonstrated sufficient experience in creating and successfully executing affirmative marketing plans and tenant selection plans for affordable units that are consistent with the City of Newton and Massachusetts Department of Housing and Urban Development (DHCD) requirements, and has provided examples of such plans, which are of good quality in content and presentation.

Unacceptable – The Proposer has inadequately demonstrated its experience in maintaining low vacancy rates in rental properties, and has provided examples of marketing plans and materials (print and digital) that promote tenant interest, which are of poor quality in content and presentation. The Proposer has demonstrated insufficient experience in creating and successfully executing affirmative marketing plans and tenant selection plans for affordable units that are consistent with the City of Newton and Massachusetts Department of Housing and Urban Development (DHCD) requirements, and has provided examples of such plans, which are of poor quality in content and presentation.

4. Extent of experience in setting rents for conventional market-rate multifamily units, as well as maximum affordable rents for affordable units; and conducting annual re-examinations of income and household size for the affordable and middle-income units.

Highly Advantageous –The Proposer has strongly demonstrated its experience in setting rents for conventional market-rate multifamily units, as well as maximum affordable rents for affordable units, and has provided strong examples of market analyses and rental calculations, which are of outstanding quality in content and presentation. The Proposer has demonstrated concrete experience in conducting annual re-examinations of income and household size for the affordable and middle-income units, and has provided strong examples of internal policies and procedures for conducting such reviews, which are of outstanding quality and presentation.

Advantageous – The Proposer has adequately demonstrated its experience in setting rents for conventional market-rate multifamily units, as well as maximum affordable rents for affordable units, and has provided strong examples of market analyses and rental calculations, which are of good quality in content and presentation. The Proposer has demonstrated sufficient experience in conducting annual re-examinations of income and household size for the affordable and middle-income units, and has provided adequate examples of internal policies and procedures for conducting such reviews, which are of good quality and presentation.

Unacceptable – The Proposer has inadequately demonstrated its experience in setting rents for conventional market-rate multifamily units, as well as maximum affordable rents for affordable units, and has provided insufficient examples of market analyses and rental calculations, which are of poor quality in content and presentation. The Proposer has demonstrated insufficient experience in conducting annual re-examinations of income and household size for the affordable and middle-income units, and has provided inadequate examples of internal policies and procedures for conducting such reviews, which are of poor quality and presentation.

5. Presentation Interviews

The City may, at its discretion, interview all proposers meeting the Minimum Criteria. Each proposer selected for an interview will be asked to make a maximum 20 minute presentation of its proposal.

Highly advantageous: Presentation is visually attractive, informative and demonstrates excellent communication skills. The presentation reflects that the proposer is able to perform in a superior manner acceptable to the City. Evaluation team is completely convinced about the proposer’s ability to provide the level of services as required by the City.

Advantageous: Presentation is good, informative, and demonstrates acceptable communication skills. Evaluation team finds that the presentation reflects that proposer is able to perform in an adequate manner acceptable to the City.

Not Advantageous: Presentation lacks a comprehensive approach, but demonstrates adequate communications skills. Evaluation team finds that the presentation reflects that the proposer may be able to perform in a manner acceptable to the City.

Unacceptable: Presentation does not demonstrate adequate communication skills.

VIII. EVALUATION OF PROPOSALS AND AWARD OF CONTRACT

The contract will be awarded to the proposer offering the most advantageous proposal, taking into consideration all evaluation criteria as well as price. Any proposals, which submit a price that is abnormally low or high, as determined by the City, may be rejected as unrealistic. All proposals shall remain firm for ninety (90) calendar days after the proposal opening.

In evaluating Proposals, the City will consider the qualifications of only those proposers whose proposals are in compliance with the prescribed requirements. The City reserves the right to reject any proposal if the evidence submitted by, or the subsequent investigation of such proposer fails to satisfy the City that the proposer is properly qualified to carry out the responsibilities set forth in the Scope of Work.

VIII. RULE FOR AWARD

1. The contract shall be awarded to the responsible and responsive proposer submitting the most advantageous proposal, taking into consideration price and the evaluation criteria set forth in the RFP.
2. The contract will be awarded within ninety (90) days after the proposal opening. The time for award may be extended for up to 45 additional days by mutual agreement between the City and the apparent most advantageous responsive and responsible offeror.

ATTACHMENT A

**RESIDENTIAL PROPERTY MANAGEMENT SERVICES FOR RENTAL HOUSING
DEVELOPMENT OWNED BY THE CITY OF NEWTON,
AT 70 CRESCENT STREET, NEWTON, MASSACHUSETTS**

PRICE PROPOSAL

(1) Annual Management Fee: _____

➤ To include fees associated with:

- Daily management of property
- Marketing and affirmative marketing of units
- Establishing market-rate and affordable rents
- Tenant selection for market-rate and affordable units
- New tenant intake
- Affordable housing compliance
- Tenant policy development and enforcement
- Lease development, execution, enforcement, renewals, and evictions
- Development of management plan, maintenance schedule and inspection reports
- Development of operating budgets and other financial reports

➤ Please indicate how fee is determined: a percent of anticipated net rental income; a flat fee per unit; a flat fee per month; etc. (for informational purposes only):

(2) Estimated Annual Operating Budget:¹ _____

TOTAL CONTRACT PRICE (Sum of Items (1) and (2) above): \$ _____

(Price in words)

The bidder is responsible for providing own workspace, equipment, and tools, and covering all routine travel and other expenses. No reimbursable expenses will be paid unless specifically agreed in advance. No employee benefits are provided.

¹ The proposer's computation of its Annual Operating Budget shall be based, at a minimum, on the following:

1. A line item budget, including all proposed costs of materials and labor associated with routine maintenance and repairs of individual units, common areas (inside and outside), including trash removal, pest control, landscaping, and snow removal for sidewalks, outdoor stairways, roadway and parking.
2. The cost of materials and labor associated with annual maintenance and repairs based on yearly inspection of property.
3. The cost of materials and labor associated with unit turnover.
4. Any additional line items not mentioned above.

This form must be completed and placed in a **separate** sealed envelope marked “**RFP #18-49 Residential Property Management Services for Rental Housing Development at 70 Crescent Street, Newton, MA – PRICE PROPOSAL**”

Price Proposal – **Residential Property Management Services for Rental Housing Development at 70 Crescent Street, Newton, MA**

Name of Firm or Individual Submitting Bid: _____

Address: _____

Telephone: _____

Fax: _____

Signature of Proposer _____

Name of Proposer: _____

Address: _____

Date: _____