

PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA
President and CEO

August 2010 – Present

- Lead and oversee all aspects of managing innovative, high-quality senior supportive housing organization with 1200 units in 8 buildings
- Launched agency-wide culture change process to modernize management systems and infuse spirit of empowerment into all operations, based on concept of mutual respect, mutual accountability.
- Restructured reporting relationships to lodge decision-making in staff closest to the residents— increasing authority and accountability in site staff.
- Initiated and conducted strategic planning process to define 2Life’s direction for the future, including bringing in outside speakers from other cities and countries to educate board and staff on innovations elsewhere.
- Re-financed Ulin House to allow our oldest property to be modernized.
- Opened Shillman House, JCHE’s first mixed-income community.
- Presented 2Life’s “aging in community” model at several national conferences and The White House.

MA Department of Housing and Community Development | Boston, MA
Associate Director for Public Housing and Rental Assistance

2007 – 2010

- Managed 90-person, \$300 million division overseeing 242 local housing authorities with 50,000 units and 9 regional agencies providing 25,000 rental vouchers and homelessness prevention.
- Transformed division from bureaucratic regulator to forward-thinking, pro-active partner:
 - **Restructured** the way Division works to promote entrepreneurial behavior and innovation, efficiencies in service delivery, collaborations across prior division silos and skills development to enhance performance.
 - **Restored partnership** between the state and local housing agencies-- renewing honest communication, unleashing local creativity and generating enthusiastic support for gubernatorial priorities.
 - **Engaged a blue ribbon panel** of private, nonprofit and public sector experts to determine the true cost of operating and preserving the public housing portfolio.
 - **Revolutionized capital planning** with comprehensive web-based system to target funding and measure the effectiveness of capital projects.
- Leveraged state and federal resources to maximize housing for extremely low-income households:
 - Utilized state capital funds to **preserve** 23,013 public housing units and restore more than 1,000 vacant units to occupancy.
 - **Maximized** federal funds to place low-income households in private housing by achieving 100% utilization of 19,000+ Section 8 vouchers.
 - Extended Family Self-Sufficiency (FSS) and Moving-to-Work (MTW) programs to help families improve their economic positions, and **obtained 200 new vouchers** for veterans and family unifications.
 - **Reformed** state rental voucher program to achieve 100% utilization (1st time in 5 years), restore rents to contract levels (making good on prior broken promises to landlords) and establish administrative infrastructure.
 - Launched creative initiatives to save money, attract private investment and make housing greener:

- **Created sustainability program** to install renewable and high efficiency energy systems and launched first phase of major water conservation effort expected to save the state \$1 million/year by 2011.
- **Crafted new mixed-finance** housing redevelopment program to attract private equity into public housing. Attracted \$38M in private equity.
- **Drew in private philanthropic dollars** to launch pilots of housing-based economic support/employment programs in public housing.

Hebrew SeniorLife | Boston, MA

2004 –2007

Vice President, Real Estate Development

- Shaped and permitted a one million square foot multi-generational senior campus.
- Successfully managed four highly contested permitting processes: MEPA and DON at state level; Conservation Commission and Planning Board at local level;
- Led process to develop goals for each campus component and campus as whole;
- Directed design process by involving direct care givers and administrators from various organizational service lines, including defining a new framework for long-term care on the campus;
- Managed relationship-building with group of 700 potential clients for the campus, including ongoing written communications, events and personal contact;
- Negotiated partnership agreement with K-8 school co-locating on site;
- Coordinated value management efforts for post-schematics round of design;
- Contributed critical elements to raising \$24 million of charitable equity for campus.

Town of Brookline | Brookline, MA

1995 –2004

Economic Development Officer

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

Sabbatical, Amsterdam, the Netherlands 2002 – 2003

- Attended semi-weekly seminar on comparative urban planning strategies at University of Amsterdam.
- Independently explored social housing, commercial development and urban planning of Dutch cities.

Boston Housing Authority | Boston, MA

1992 –1995

Director of Program and Administration

- Responsible for administration of \$100 million modernization program for 71 public housing developments, planning and capital budgeting, grant writing, communications with funding and regulatory agencies, and coordination of inter-departmental programs and planning efforts. Supervised staff of 14.
- Secured \$50 million Urban Revitalization Demonstration Grant for Mission Main Public Housing Development by developing and managing intra-agency program team. Ranked #1 in national competition of 31 housing authorities. Renovations have since been completed successfully.
- Secured \$30 million HOPE VI+ grant for Orchard Park Housing Development. Proposal incorporated community-based organizations, private developers, social and community service providers to create a neighborhood revitalization strategy that redefined the relationship between public housing and its neighbors. Redevelopment plan has now been successfully completed.
- Established capital budgeting systems for federal and state capital programs that helped restore confidence in BHA.
- Developed comprehensive vacancy reduction program and secured federal grant of \$7 million for implementation.
- Built coalitions with social service providers to increase educational and economic opportunities for BHA residents.

Massachusetts Institute of Technology, Department of Urban Studies and Planning

1987 - 1992

Lecturer and Special Assistant to Department Head

- Initiated and managed Professional Development Institute to provide continuing education to alumni/ae and offer students opportunities to develop professional skills
- Developed and coordinated a large-scale internship program (still active today)
- Conducted departmental long-range planning process to help link professional aspirations of students with course and other departmental offerings.

Division of Capital Planning and Operations, Commonwealth of Massachusetts

1983-1987

Director, Office of Capital Planning/Budgeting

- First director of office which was responsible for preparation of Governor's annual capital budget, development and implementation of capital spending initiatives, and guidance to state agencies in formulating long-range facilities development plans. Supervised professional staff of 16.
- Developed new budget process to tie capital spending proposals to clearly articulated policy objectives and long-range planning goals.
- Initiated pilot project to test applicability of new contracting procedures to finance and install energy conservation improvements in public buildings. Program is still in effect and had saved the Commonwealth over \$8 million by 1995.
- Coordinated Administration efforts (at staff level) to address prison overcrowding, lack of adequate services for chronically mentally ill persons, and inadequate coordination of state higher education programs—culminating in comprehensive program initiatives and legislation filed by the Governor.
- Developed inter-agency program to address the problem of asbestos in state-owned buildings.
- Developed new statewide systems to correct effects of deferred maintenance.
- Received 1985 Commonwealth Citation for Outstanding Performance

Cambridge Housing Authority | Cambridge, MA

1982 –1983

Modernization and Energy Planning Consultant

Responsible for full range of planning tasks related to modernization and energy conservation in CHA-owned developments.

CURRENT PROFESSIONAL AFFILIATIONS

Governor Charlie Baker's Council to Address Aging in Massachusetts

Mayor Walsh's Housing Task Force

Massachusetts Healthy Aging Collaborative

Citizens Housing and Planning Association, Board of Directors

The Community Builders, Board of Directors

Massachusetts Housing Investment Corporation, Board of Directors

Association of Jewish Aging Services, Board of Directors

Metrowest Jewish Day School, Board of Directors

EDUCATION

Massachusetts Institute of Technology | Cambridge, MA

Master in City Planning, 1982

Johns Hopkins University

Bachelor of Arts, Political Science, 1978

Graduated with University Honors, Departmental Honors, and Thesis Award

Dean's List, all semesters

Lizbeth Heyer
Chief of Real Estate Development



PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA March 2014 – Present
Chief of Real Estate Development

- Create and manage an innovative and highly skilled real estate team
- Lead refinance and modernization to stabilize existing properties and leverage equity for expansion
- Secure and oversee new development opportunities that support 2Life’s “Aging in Community” model
- Leverage creative development partnerships to expand and enhance JCHE’s mission to allow seniors to age in vibrant communities in their own homes for as long as possible.

MA Department of Housing and Community Development Aug. 2010 – March 2014
Associate Director, Division of Public Housing and Rental Assistance

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

MA Department of Housing and Community Development Nov. 2007 – Aug. 2010
Director of Program Development, Division of Public Housing and Rental Assistance

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

Jamaica Plain Neighborhood Development Corporation | Boston, MA April 1993 – Oct. 2007
Associate Director of Real Estate (2002-2007)

- Planned and developed affordable housing and mixed-use projects totaling over \$80M
- Built and maintained relationships with community stakeholders, lenders and development partners

- Acquired, planned, permitted and funded 3.5 acre Blessed Sacrament property resulting in \$50M project with 118 mixed-income housing units, 7,500 square feet of retail space, redevelopment of historic church building, two school buildings and a one acre public plaza and green space.
- Supervised staff of 3 that developed a prominent \$20M TOD parcel resulting in 30 affordable housing units and 6,000 square feet of retail and non-profit office space, refinanced and converted a 60 unit building into mixed-income condominiums, and sold 23 homes for first-time homebuyers.

Senior Project Manager (1995-2002)

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

Project Manager (1993-1995)

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

Castle Square Tenants Organization | Boston, MA

Oct. 1992 – March 1993

Interim Executive Director

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

Massachusetts Tenants Organization, Boston, MA

Oct. 1986 – Aug. 1990

Tenant Organizer and Legislative Director

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

AWARDS AND RELATED EXPERIENCE

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

Federal Home Loan Bank Affordable Housing Competition, 2007

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

Jamaica Plain Neighborhood Council Community Development Committee, 1998-2005

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

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

Massachusetts Association of Community Development Corporations

Housing and Investment Committee, 1993-2000

EDUCATION

Massachusetts Institute of Technology | Cambridge, MA

M.A. in City Planning, 1992

University of New Hampshire | Durham, NH

B.A. in Anthropology/Psychology, 1986

PROFESSIONAL EXPERIENCE

- 2Life Communities** | Boston, MA 2012 – Present
Chief Financial and Administrative Officer
- Responsible for finance and accounting, human resources, information technology and the administrative functions of 2Life.
 - Responsible for budgeting, planning and financial reporting of existing 1,200 unit portfolio of affordable housing, as well as financing of new developments, refinancing of existing projects and compliance with regulatory requirements of HUD, Mass Housing, the Department of Housing and Community Development and the Section 42 LIHTC program.
 - In November 2013, successfully refinanced a 242-unit 100% affordable senior project with \$42 million HUD-insured 221(d)(4) loan.
- TCAM Real Estate, LLC** | Boston, MA 2011
Financial Consultant
- Wholly-owned subsidiary of R.J. Finlay & Co providing asset management, workout and advisory services to institutional owners of real estate debt and equity investments
 - Provide high level financial analysis of tax credit portfolios, including analysis of cash flow and financial strength of underlying projects and funds.
- International Housing Solutions, S.à r.l.** | Boston, MA 2007 – 2010
Chief Financial Officer and Managing Director
- Luxembourg-based global private equity real estate investment firm specializing in affordable housing investment opportunities in emerging markets.
 - Reporting to the CEO, established finance, administration and risk management function for newly formed joint venture with operations in Johannesburg, London, Dublin and the U.S.
 - Created financial reporting function including budgeting, planning and cash flow forecasting for start up operations.
 - Spearheaded structuring, legal formation, financing and regulatory approval for \$240 million private equity South African real estate fund.
 - Implemented tax-efficient cross-border cash management for fund and operating entities in five countries.
- Leggat McCall Properties** | Boston, MA 2006 – 2007
Senior Vice President and Chief Financial Officer
- Reporting to the CEO, managed finance, accounting and human resource functions, including budget & planning, risk management and investor relations.
 - Negotiated and administered debt and joint venture agreements for acquisitions, including non-recourse financing, interest rate hedging and tax strategy.
 - Created cash flow, project costing systems and other metrics for analyzing profitability of company's project and development management business.
- MMA Financial** | Boston, MA 1996 – 2006
Senior Vice President of Finance, Housing and Community Investing (1998-2006)
- Reporting to business unit EVP, responsible for budgeting, capital planning, investment fund financing and structuring, and performance metrics for MMA Financial's largest business unit, which grew from \$25 million to over \$80 million in revenues in seven years.

- Established and managed financing and treasury operations center to support business funding and financing requirements.
- Co-chair of developer loan committee and member of capital transactions committee overseeing workouts, sales and refinancings.
- Structured and closed joint venture agreement to finance affordable housing outside of the U.S.
- Developed procedures and responsible for oversight of internal control initiatives for Sarbanes Oxley and GAAP requirements.

Vice President & Treasurer, Boston Financial Group (1996-1998)

- Negotiated company's corporate credit facilities and directed company's treasury operations, including treasury automation project to facilitate cash sweep and controlled disbursements of 200+ property management operations.
- Elected partner in 1998.

M/A-COM, Inc. | Lowell, MA

1991 – 1996

Vice President & Treasurer

Domestic and international treasury responsibilities, including cash and risk management, portfolio investment, foreign exchange hedging, leasing, letters of credit, and real estate financing and divestitures.

Dennison Manufacturing Company | Framingham, MA

1986-1991

Corporate Finance Manager

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

Howard Development Company | Wilmington, MA

1985 – 1986

Assistant Controller

Stewart Systems Corporation, | Boston, MA

1983 – 1985

Accounting Manager

AFFILIATIONS/ACCREDITATIONS

President, Financial Executives International, Boston

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

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

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

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

Board member, Rollins Square Association

Former Board member, Rutland Square Association

Past Treasurer, Friends of Hiscock Park

Member, Treasurer's Club of Boston

Private Equity CFO Association

EDUCATION

Boston College

Master of Science, Finance, 1990

Middlebury College

Bachelor of Arts, magna cum laude, Economics and French, 1983

PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA July 2018 – Present

Chief of Operations

- Responsible for all operations at 2Life's four nonsectarian senior independent living campuses
- Direct supervision of Executive Directors of each site, Director of Facilities, Director of Programs, Director of the 2Life Training Institute, Director of Dining Services, and Director of Compliance

Elder Services of Berkshire County | Pittsfield, MA Jan. 2013 – June 2018

Executive Director

- Community-based, multi-faceted nonprofit state and federally designated elder services agency serving the 32 cities and towns of Berkshire County
- Guided agency through leadership transition under adverse circumstances and (re) developed internal and external relationships, partnerships and collaborations that contribute to the sustainability of the agency

Highland Valley Elder Services | Northampton, MA Oct. 2005 – Jan. 2013

Executive Director

- Community-based, multi-faceted nonprofit state and federally designated elder services agency serving 24 cities and towns in Western Massachusetts
- Guided agency through first leadership transition in 32 years

Associate Director for Community Development

- Member of four person management team
- Managed daily operations of: Elder Nutrition, Money Management, Supportive Housing, Protective Services, Caring Community Build and Long Term Care Ombudsman program(s)

Tapestry Health | Northampton, MA Feb. 2004 – Sept. 2005

Regional Health Services Director

Managed operation of seven women's health clinics in Western Massachusetts

Director of Interns and Volunteers

Oversaw agency sponsored "Exploring Public Health" summer internship program

Union Mission | Savannah, GA Aug. 2000 – Nov. 2003

Chief Operating Officer

- Managed daily operations of comprehensive homeless agency
- Direct supervision of Healthcare, Behavioral Health, Housing, HIV/AIDS Services, Children's Services, Employment/Training, Community Education, Food Service Operations and Maintenance programs

Telfair Museum of Art | Savannah, GA April 1999 – July 2000

Deputy Director

- Managed administrative aspects of multi-site art and historic house museum
- Community liaison for approval of museum expansion in historic district

Parent & Child Development Services | Savannah, GA

June 1995 – April 1999

President & CEO

- Managed a multi-disciplinary nonprofit human service agency
- Guided agency through reassessment and restructuring of programs and priorities after departure of long time chief executive

City of Savannah | Savannah, GA

Sept. 1990 – June 1995

Director, Vehicle Maintenance

- Accepted responsibility for managing department experiencing organizational duress due to ongoing internal review and management level personnel actions

Director, Savannah Civic Center

- Promoted into position in aftermath of management termination and criminal investigation
- Directed efforts to re-establish multi-use facility as viable entertainment venue and community resource

Assistant Director, Revenue Department

- Supervised Treasury Division which included property tax, business license, customer service and regulatory functions

City of San Antonio | San Antonio, Texas

May 1989 – Aug. 1990

Budget and Management Analyst

- Multi-faceted position serving as financial liaison between city departments (Police, Fire, Municipal Courts) and city administration

Proctor and Gamble | Cincinnati, OH

Jan. 1984 – Aug. 1987

Group Manager

Directed nationwide order and shipment control of health care products

Supervisor

Managed accounts receivable and company sponsored promotions

EDUCATION

Carnegie Mellon University – Heinz College

Master of Science, Public Policy and Management

University of Auckland

Graduate Diploma, Business and Industrial Administration

Wittenberg University

Bachelor of Arts, Economics, Business Administration

PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA August 2017 – Present
Housing Finance Specialist

- Manage the finance closing, construction process and operational ramp-up of 2Life’s Weinberg House project, an \$18 million new construction project including 61 apartments financed with 9% LIHTC equity
- Manage financial components of 2Life’s Kurlat House, a \$76 million preservation and renovation project including 209 units financed with tax-exempt bonds and 4% LIHTC equity
- Manage all financial aspects of 2Life’s moderate income project initiative

Pinck & Company, Inc. | Boston, MA January – August 2017
Finance Project Manager

- Responsible for all financial aspects of 16 new construction and renovation projects, including structuring complex affordable housing transactions using Federal and State LIHTC, Federal and State Historic Tax Credits, New Market Tax Credits, Section 8, VASH, Federal Home Loan Bank and Brownfields funding
- Responsible for feasibility analyses, financing applications, construction requisitions, cost certifications, loan closings and conversions

Women’s Institute of Housing and Economic Development | Boston, MA June 2013 – December 2016
Managing Director of Real Estate

- Supervised real estate development team activities in Massachusetts and Connecticut
- Managed organizational relationships with lenders, public agencies, partners and clients
- Worked with Executive Director to develop pipeline of consulting and direct development projects

Senior Project Manager September 2010 – May 2013

- Responsible for site evaluation and financial feasibility studies, financial structuring and finance application, selection and coordination of development team, finance closing, oversight of construction process, loan conversion and lease-up process
- Projects included acquisition/preservation, new construction and extensive rehabilitation

Housing Investments Inc./Preservation of Affordable Housing | Boston, MA April 2008 – August 2010
Acquisitions Manager

- Managed feasibility assessment process of 80+ affordable housing preservation acquisition opportunities nationally per year
- Structured potential acquisition projects with LIHTC, tax-exempt bond financing, HUD Mark-to-Market and HUD Mark –up-to Market

Project Manager June 2004 – March 2008

- Responsible for the acquisition and redevelopment of affordable housing project in MA, CT, MD, DC and IL, including predevelopment assessment and budgeting, financial structuring and project oversight
- Activities resulted in preservation of 600+ units of affordable housing

City of Cambridge Community Development Department | Cambridge, MA Feb 2003 – Jun 2004

Project Planner

- Managed underwriting process for the City's affordable housing funds
- Evaluated potential sites for new development projects (zoning and financial feasibility analyses)

Women's Institute for Housing and Economic Development | Boston, MA December 1999 – Jan 2003

Associate Project Manager

- Coordinated site feasibility assessment, finance applications, finance closings, development team selection and oversight on new construction and extensive renovation projects

John Stewart Company | San Francisco, CA August 1998 – October 1999

Property Manager

- Part of 3-person team managing start-up of marketing/leasing office for a portfolio of 1,000+ residential units on former military base

Tenants and Owners Development Corporation | San Francisco, CA September 1997 – August 1999

Affordable Housing Development Intern

- Part of 3-person team managing start-up of marketing/leasing office for a portfolio of 1,000+ residential units on former military base

AFFILIATIONS

Somerville Community Corporation, Board of Directors (2019)

VOLUNTEER

Big Brother, Big Sister, Boston MA (2006 - 2009)

EDUCATION

Smith College | Northampton, MA

BA - American Studies, 1997

Harvard University Extension School | Cambridge, MA

Real Estate Finance and Investment Fundamentals Course, 2000

Elizabeth (Elise) Selinger
Real Estate Innovation Manager



PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA Sept. 2016 – Present
Real Estate Innovation Manager

- Project Manager for \$30M, 62-unit new construction mixed-use, affordable senior housing in Brookline, MA
- Project team member for proposed 150+ unit independent living property for moderate income seniors
- Assisting Chief of Real Estate in research on innovative home care and health insurance payment and service models in senior housing

Placeful Technologies, Inc. | Boston, MA Jan. 2017 – Oct. 2018
Co-Founder and COO

- Developed an online educational tool for the City of Boston Housing Innovation Lab that enables residents to discover various scenarios for housing development. Through a series of lessons and interactive exercises, residents can visualize different planning options and their effects on affordability, building massing, parking ratios and financial feasibility.

MIT AgeLab | Cambridge, MA Jan. 2016 – May 2016
Research Assistant for Director Dr. Joseph Coughlin

- Conducted thesis research forecasting demand and supply in the senior housing real estate market in Metro Boston through 2030 using original research for supply data and American Community Survey Census data for demand forecasting
- AgeLab “Lifestyle Leaders” 85+ Focus Group: created and administered a qualitative survey as well as led an afternoon program for the focus group on the senior housing market and LTSS services in Metro Boston

Jewish Community Housing for the Elderly | Boston, MA July 2015 – May 2016
Real Estate Intern

- Created, analyzed and presented the results of an original market database of 100+ age-restricted housing properties in the Greater Boston to the JCHE Board of Directors Real Estate committee
- Conducted research on existing senior housing and Long Term Support Service (LTSS) models including analyzing residency agreements and the alignment of housing and LTSS public program eligibility in Massachusetts in “Options Charts”
- Created an entry-fee financial model to test the feasibility of developing JCHE’s innovative “Apartments for Life” concept at a potential site in Greater Boston, including modeling the long-term affordability of the project for future moderate-income residents

Massachusetts Institute of Technology | Cambridge, MA Aug. 2014 – May 2015
Research Assistant for Prof. Karl Seidman, Dept. of Urban Studies and Planning

- Co-authored a white paper on the political history and housing production of Community Development Corporations in Boston (<http://tinyurl.com/hxvrzfn>)

Urban Homesteading Assistance Board | New York

Aug. 2012 – July 2014

Co-op Preservation Associate

- Completed four NYS-Article 8A major capital improvement loans from conception to closing (including J-51 tax abatement applications) totaling \$2.5M for four limited-equity residential co-ops representing 98 housing units in New York City.
- Secured an assessed value property tax cap (NYS-Article XI) for a 19 unit sweat-equity co-op in the Lower East Side resulting in \$775,000 property tax forgiveness and a 50% reduction on future property tax bills, the highest single building tax savings achieved by UHAB.
- Oversaw credit and lending review and closing for five limited equity co-op unit transfers to new owners totaling (\$300,000) in FY2013-2014.

Bilingual (Spanish/English) Project Associate

Aug. 2010 – Aug. 2012

- Provided technical assistance to 40+ limited-equity co-ops (i.e. preparation of annual operating budgets, maintenance and repair plans, resale policies, settling estates and certifying annual elections) in coordination with their property managers and attorneys.

EDUCATION

Massachusetts Institute of Technology | Cambridge, MA

Master of City Planning, 2016

Concentration in Housing and Community Development

Thesis: "Forecasting Service-Enriched Senior Housing in Metropolitan Boston: Housing + Services Innovation"

Bowdoin College | Brunswick, ME

Bachelor of Arts in Sociology and a minor in Economics, 2010

Miss Porter's School | Farmington, CT

Class of 2006

Joseph J. O'Toole III, CFM
Director of Facilities



PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA

2017 – Present

Director of Facilities

- Develop standards of operation for facility operation and maintenance across locations.
- Oversee regular property inspections, both internally and with outside agencies
- Responsible for the management of the Capital Improvement plan with the Director of Capital Projects as a direct report
- Establish facility service contracts through competitive bidding processes for cross facility wide benefit.
- Meet regularly with Maintenance Supervisors to ensure consistent and successful approach to repairs and preventative maintenance.
- Work in conjunction with the Real Estate Department to develop plans for new construction as well as major renovation of existing assets, to ensure the efficient maintainability of the final product.
- Work alongside the Project Manager during construction and renovation projects to ensure construction work is done according to contract, schedule and quality level.
- Review and provide comment on changes in work to ensure maintainability and level of quality.

Royal Sonesta Hotel | Cambridge, MA

Director of Engineering

2006-2017

Responsibilities included but were not limited to:

- Responsible for assigning work and supervising all of the maintenance and repair work of all of the employees in the Engineering Department with and including the Assistant Director of Engineering
- Developing and maintaining operational and capital budgets.
- Coordination and oversight of multi-million dollar capital improvement projects.
- Contracting and purchasing electricity and natural gas for the hotel on the open market for the best price available.
- Working closely with design team and hotel rooms division staff to plan and schedule capital improvement projects.
- Confer with vendors to obtain product and service information such as price, availability and delivery schedule
- Approve all purchase requests for items needed by the Engineering Department
- Supervise work of outside contractors and ensure work was properly performed on time and within budget.
- Supervise Mechanical, Public Area, and Guest Room preventative maintenance per standards and schedules
- Attend scheduled operational meetings and executive committee meetings
- Department staffing and personnel management

Engineering Manager

2004-2006

Responsibilities included but were not limited to:

- Assigning work and supervising all of the maintenance and repair work of the following employees in the Engineering Department: General Maintenance, Carpenter, Painter, and Mechanic

- Confer with vendors to obtain product and service information such as price, availability and delivery schedule
- Process purchase requests for items needed by the Engineering Department
- Supervise work of outside contractors as needed and make sure work was properly performed and the job site left clean
- Supervise Mechanical, Public Area, and Guest Room preventative maintenance per standards and schedule
- Attend scheduled meetings as required.

2003-2004

Engineering Supervisor

Responsibilities included but were not limited to:

- Operating, programming and maintaining DDC building control systems
- Installation and repair of HVAC equipment and controls
- Preventative maintenance Plumbing, carpentry and electrical
- Pool sanitation system maintenance
- Scheduling tasks and supervising the completion of those tasks
- Communicating with other departments on maintenance issues.

1999-2003

Engineering Systems Specialist

Responsibilities included but were not limited to:

- Operating, programming and maintaining DDC building control systems
- Installation and repair of HVAC equipment and controls
- Preventative maintenance
- Plumbing, carpentry and electrical
- Pool sanitation system maintenance.

AFFILIATIONS/ACCREDITATIONS

Certified Facility Manager, International Facility Management Association

EDUCATION

Wentworth Institute of Technology | Boston, MA
Facilities Management Certificate Program

Peterson School
High Pressure Boiler Technician Course

Jill Ouellette, CPM®
Director of Compliance and Operations Support



PROFESSIONAL EXPERIENCE

2Life Communities | Boston, MA

August 2017 – Present

Director of Compliance and Operations Support

- Providing managerial oversight to ensure timely and accurate compliance with all regulations for IRS Section 42 LIHTC and HUD programs for entire portfolio of nine properties
- Provide on-going guidance, support, and industry training while monitoring and assuring adherence to housing laws for nine staffers directly, and all site staff indirectly
- Responsible for recommending and updating Tenant Selection Plans, Affirmative Fair Housing Marketing Plans, Leases and Addendums, House Rules, and 504 Policy. Meeting agency inspection requirements. Portfolio EIV Coordinator and maintainer of the records. Submission of agency contract renewals, OCAF rent increases.
- Corporate liaison for insurance claims reporting; as well as providing support for tenant legal action
- Responsible for marketing, and timely lease-up of affordable new construction LIHTC properties

FHRC Management Corp | Somerville, MA

2009 – 2017

Property Manager

- Providing managerial oversight of a MassHousing-regulated 501-unit diverse family apartment community in Somerville, federally subsidized under Section 8 with LIHTC program
- Responsible for all hiring and firing decisions, direct supervision of an office staff of seven, and maintenance staff of thirteen, with contracted security guard services
- Covering all administrative duties during an LIHTC initial acquisition rehab of \$23 million construction plan including extensive relocation for asbestos abatement
- Final responsibility for leasing and unit turnover, rent collections/lease enforcement and evictions, accounts receivable and payable, budget preparation and adherence, capital expenditures, recertifications with EIV, HAP processing, LIHTC Tics, meeting M/WBE goals, and successfully passing MOR/PMR/Spectrum and REAC inspections
- Final responsibility of meeting daily property maintenance needs including meeting preventive maintenance schedule, no backlog of work orders, reducing liability risk, maintaining a highly successful bed bug prevention program, successful coordination with vendors to enforce contract obligations, all while maintaining an optimum curb appeal
- Successful Resident Services program meeting case management needs while also providing resident retention activities and events, including oversight of MassHousing's YouthRAP grant
- Successful interaction with active and organized tenant association

Wingate Management Co. Inc. | Lowell, MA

2006 –2009

Property Manager

- Providing managerial oversight of four properties in Lowell and Lynn, encompassing 3 commercial units and 242 residential units in Elderly and Family Sections 8 and 236 properties
- Direct supervision over staff of six
- Covering administrative duties and oversight of maintenance responsibilities

Cornerstone Corporation | Holyoke, MA

1993 –2005

Sr. Property Manager

- Managerial supervision of Western Mass region including 4 commercial and 405 residential units of elderly and family communities under Sections 8, 236 and 13A programs, including Low Income Housing Tax Credits
- Direct supervision over twelve employees
- Developed 3 annual budgets, 3 annual rent increase packages and MassHousing’s biannual YouthRAP grants over 6 years
- Successfully passed REACs, MassHousing PMRs and Spectrum’s LIHTC audits
- “504 / ADA Coordinator” responsible for deciding Reasonable Accommodation requests from disabled residents; and new employee training of the same

Wingate Management Co. Inc. | Lowell, MA

1986 –1993

Property Manager

- Overall managerial responsibilities for 3 sites in Lowell, as listed above.

EDUCATION

University of Massachusetts at Amherst

Bachelor of Arts, 1985

TRAININGS AND ACCREDITATIONS

Fair Housing Compliance designation, NAHMA, Oct 2018 and Mar 2016

HUD/ EIV Updates by Ross Business Development, May 2018

Cybersecurity and Risk Management, CohnReznick, May 2018

Spectrum’s Comprehensive BIT Training, Aug 2017

Working with Residents in Culturally Competent Ways, MassHousing, May 2016

Illegal Drug Awareness, NEAHMA, Dec 2015

Reasonable Accommodations – Screening/Tenant Selection by MassHousing, Oct 2015

ServSafe certified, Jun 2013

Housing Credit Compliance Professional designation by TheoPro, Mar 2011

Asbestos Awareness Training, Oct 2009, Mar 2010

Certified Property Manager®, designation from IREM, Jun 2000

C9P designation: Spectrum’s Continuing Certified Credit Compliance Professional since Jun 1998

Previous: Certified Manager of Housing, Certified Maintenance Manager, Certified Occupancy Specialist from NCHM