



PROPOSAL

Milton Town Farm Place

*Proposal for Milton Town Farm Place
Affordable Housing Development*

Affirmative Investments | 33 Union Street | Boston, MA

February 16, 2024

SUBMITTED TO

The Town of Milton
Attn: Nicholas Milano, Town Administrator
525 Milton Avenue
Milton, MA

SUBMITTED BY

Affirmative Investments, Inc.
33 Union Street
Floor 2
Boston, MA 02108



February 16, 2024

Dear Mr. Milano,

MILTON TOWN PLACE

165 Govenor Stoughton
Milton, MA 02186

Affirmative Investments, Inc. (“Affirmative”) is very excited about the prospect of collaborating with the Town of Milton to create an affordable community at the Town Farm site at 165 Governor Stoughton Lane.

Nicholas Milano
Town Administrator
Milton Town Hall, 2nd Floor
Select Board/Town Administrator's
Office
525 Milton Avenue
Milton, MA 02186

Our vision entails creating a family-centered village comprising 35 homes, all of which will be affordable to families and individuals with incomes at or below 80% of the Area Median Income. Embracing the original site plan and architectural style, we aim to reuse foundations and preserve ample green space. Our commitment extends to constructing highly sustainable buildings aligned with Passive House standards, complemented by thoughtfully designed gardens, walking paths, and play spaces.

Affirmative has built a number of award-winning affordable communities very similar to our plans for the Town Farm. We are partnering with our architects, Union Studio Architecture & Community Design (“Union”), our civil engineers, Horsley Witten Group, and our management partners, Wingate Management, with whom we have worked closely on several projects. We have an excellent relationship with the Executive Office of Housing and Living Communities and feel confident we can move quickly to develop our plans, meet with the community, move towards zoning approval and funding submission to the State.

Acknowledging the challenges inherent in the site, we are fully prepared to address issues in a responsive manner, working closely with the Town. We look forward to the opportunity to contribute to the transformation of Town Farm into a community where Milton residents can obtain a safe and affordable place to live.

Best Regards,
David Ennis
President



*Union designed affordable housing community,
Shannock Falls in Charlestown, RI*

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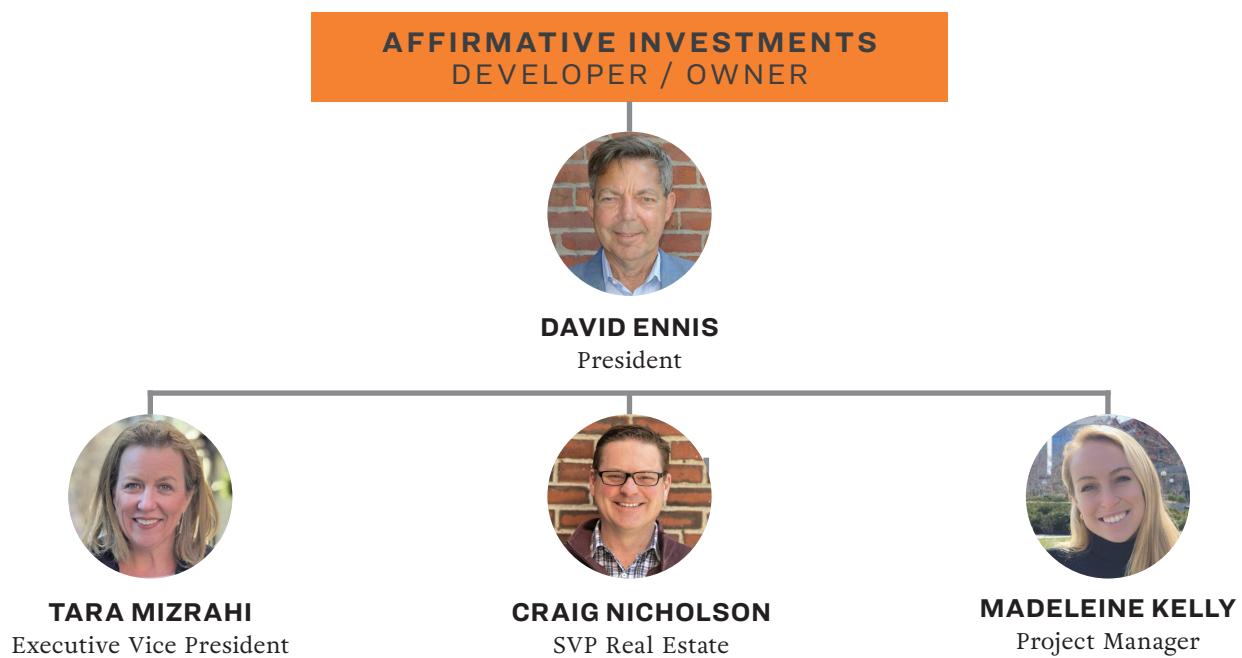
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SECTION 1

The Development Team

- Overview of Development Team
- Overview of Affirmative
- Organizational Chart
- AI Experience and Resumes
- AI Projects in Process and Planned
- AI Contact Information and References
- Union Project Experience and Resumes
- Horsley Witten Project Experience and Resumes
- Wingate Project Experience and Resumes
- Dellbrook JKS Project Experience

Overview of Development Team



MEP, STRUCTURAL AND CIVIL ENGINEERING,



CIVIL ENGINEER

Horsley Witten Group



GENERAL CONTRACTOR

Dellbrook JKS

UNION ARCHITECT



DOUGLAS KALLFELZ

Managing Partner



ALANNA JAWORSKI

Senior Associate



ARICA THORNTON

Designer

WINGATE PROPERTY MANAGER



GENE ZHITOMIRSKY

Senior Vice President



TERRY MACGUIRE

Vice President of Compliance



COURTNEY MATHIOWITZ

Director of Marketing

LANDSCAPE ARCHITECT, CONSULTANTS



LEGAL

Nolan Sheehan Patten, LLP



ENVIRONMENTAL

Green Seal Environmental

Overview of Affirmative

Affirmative Investments, Inc is a woman-owned for-profit corporation with 4 owners, all of whom are employees and/or on the Board of Directors. Formed in 1983, Affirmative is a mission-driven development and financing firm that works with not-for-profit agencies and partners, with municipalities and with mission-oriented for-profit developers to build meaningful projects that positively impact the lives of low and moderate income people. Based in Boston, Affirmative has worked throughout the country but its real estate development work is largely in Eastern Massachusetts. It is registered to do business in Massachusetts, Pennsylvania and Nevada.

RELATIONSHIP WITH LENDERS & INVESTORS:

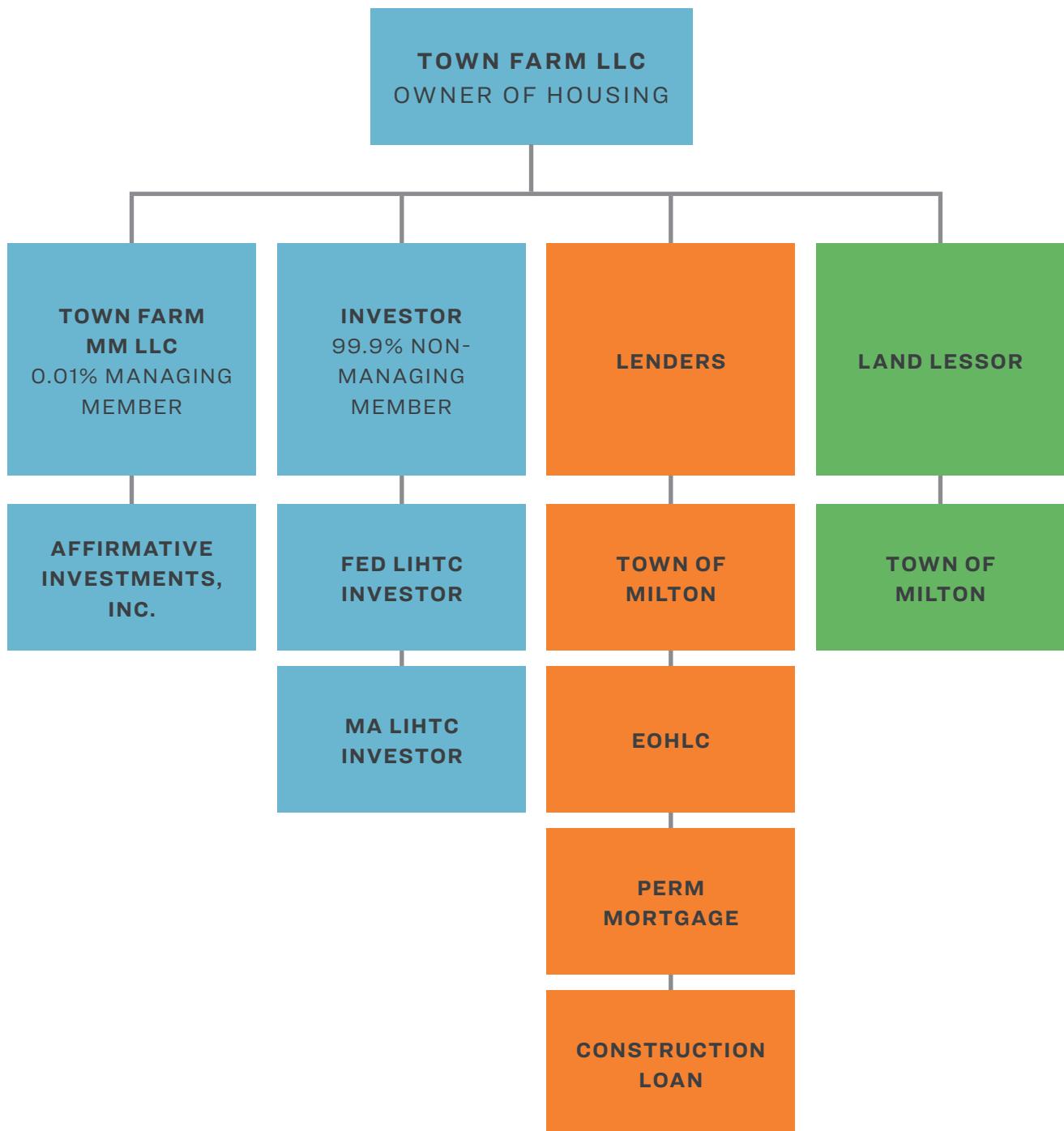
Affirmative has very strong relationships with:

- Executive Office of Housing and Community Development – the state agency that oversees State funding of affordable housing. Affirmative has consistently won State resources for its projects. It has never failed to succeed on a project submitted to HLC.
- MassHousing – State bond agency that also oversees Affordable Housing Trust Funds
- MassDevelopment – State economic development agency with which Affirmative has done many 4% tax credit deals and New Markets Tax Credit projects
- Mass Housing Partnership – quasi-public finance agency that provides long-term financing for affordable housing
- Eastern Bank – long-term relationship, key construction lender, were partners in a Community Development Entity that won several rounds of New Markets Tax Credits
- Several local banks including First Citizens Bank (aka Silicon Valley Bank), Citizens, Rockland Trust
- Non-bank finance groups – BlueHub Capital, The Life Initiative, The Property & Casualty Initiative
- Tax Credit Investors – National Equity Fund, Boston Financial, Redstone Equity Partners

PLAN FOR EFFECTIVE COMMUNICATION WITH THE TRUST:

We will plan to prepare a formal monthly report on development progress for the Trust during the predevelopment and design stages. Additionally, we propose to meet quarterly with the Trust during the design development and construction phases.

Organizational Chart





Waverley Woods

BELMONT, MA

Transforming a challenging site into an inclusive family neighborhood.

Waverley Woods is a 100% affordable development that transformed a challenging development site into multi-family housing that makes Belmont a more inclusive neighborhood. The 40 units were constructed in six 2.5 story townhouses that now offer Belmont's residents 36 units at or below 60% AMI and 4 at or below 30% AMI. This transit-oriented development also includes 3 fully accessible units, an accessible play area and numerous green-design elements that aim to conserve water, reduce energy use and educate the community about sustainable living.

Relevant to Milton Town Farm:

- Similar size and scale
- Site with a lot of ledge
- 40B
- Emphasis on green space

Waverley Woods

PROJECT TYPE Family Housing

STATUS Completion

TDC \$11,500,000

RES UNITS 36

PROJECTED COMPLETION DATE 2007

ACTUAL COMPLETION DATE 2007

AMI 4 @ 30%, 32 @ 60%





Little Pond Place

FALMOUTH, MA

Creating a family community in the heart of Falmouth with an emphasis on green space.

Little Pond Place is a 40-unit 100% affordable family housing development on Town-owned land in Falmouth, MA. Co-developed by Affirmative Investments and Falmouth Housing Corporation, the project is a mix of one, two, and three-bedroom units with a mix of incomes ranging from 30% to 80% AMI.

Relevant to Milton Town Farm:

- Similar size and scale
- Town RFP on Town Land (Town granted lease)
- 40B
- Enclosed community

Little Pond Place

PROJECT TYPE Family Housing

STATUS Completed

TDC \$14,750,000

RES UNITS 40

PROJECTED COMPLETION DATE 2020

ACTUAL COMPLETION DATE 2020

AMI 4 @ 30%, 34 @ 60%, 2 @ 80%





Harmon Apartments

BOSTON, MA

A housing community specifically designed to meet the needs of adults living with physical disabilities.

Harmon Apartments, located in the Ashmont/Peabody Square area of Boston, is 36 units of accessible housing. The community includes mixed-income one and two-bedroom apartments and serves adults living with physical disabilities, including those that are progressively degenerative.

Relevant to Milton Town Farm:

- Similar size and scale
- Development in a very dense residential neighborhood with intensive community process

- 2021 'The Vanguard Award', National Affordable Housing Management Association

Harmon Apartments

PROJECT TYPE Accessible Housing

STATUS Completed

TDC \$19,136,000

RES UNITS 36

PROJECTED COMPLETION DATE 2018

ACTUAL COMPLETION DATE 2018

AMI 4 @ 30%, 26 @ 60%, 26 6 @ 80%





Images by Union

Meshacket Commons

EDGARTOWN, MA

Bringing much needed
affordable housing
to one of the most
expensive communities
in Massachusetts.

Affirmative is the co-developer of Meshacket Commons, a 36-unit affordable rental project in Edgartown on Martha's Vineyard. The \$29 million will create a village targeting Island residents whose income ranges from 30% AMI to 80% AMI. In addition, 4 homeownership units will target families with incomes ranging from 80% to 110% AMI. Affirmative is partnering with Union Architecture and Horsley Witten on this project.

Relevant to Milton Town Farm:

- Similar size and scale
- Town RFP on Town Land (Town granted lease)
- 40B
- Multiple buildings in enclosed community

Meshacket Commons

PROJECT TYPE Family Housing **STATUS** In Closing **TDC** \$29,000,000 **# RES UNITS** 36 rental, 4 homeownership

PROJECTED COMPLETION DATE 2025 **ACTUAL COMPLETION DATE** N/A **AMI** 4 @ 30%, 34 @ 60%, 2 @ 80%



3-Unit Manor House (Rental)



David Ennis

President

Since 2001, David has led Affirmative's growth in direct real estate development, in partnerships with municipalities and non-profit agencies, its expansion in New England, Pennsylvania, and Nevada. Affirmative has been involved in the financing and development of over \$3.25 billion in private and public financing, which includes over 6,500 housing units and 5,000,000 square feet of commercial space.

EDUCATION

Boston University

Boston, MA

PhD in Social Theory

Brandeis University

Waltham, MA

Bachelor of Arts

New York University

New York, NY

Certificate: Business Administration

REGISTRATIONS & CERTIFICATIONS

Chartered Financial Analyst

COMMUNITY

Roxbury Youthworks, Inc.

Roxbury, MA

Board of Directors

Newton Community Development

Newton, MA

Foundation: Advisory Board

United Teen Equality Center

Lowell, MA

Advisory Board

RELEVANT EXPERIENCE

MESHACKET COMMONS

Edgartown, MA

Affirmative is the co-developer of Meshacket Commons, a 36-unit affordable rental project in Edgartown on Martha's Vineyard. The \$29million will create a village targeting Island residents whose income ranges from 30% AMI to 80% AMI. In addition, 4 homeownership units will target families with incomes ranging from 80% to 110% AMI.

KNIGHTS OF COLUMBUS APARTMENTS

Boston, MA

\$12million rehabilitation of Knights of Columbus in the North End of Boston that will create 23 new senior affordable units and new commercial space for the Knights. The project required intense due diligence review, negotiations with the community, the City, the State, and the Mass Historical Commission. Complex financing involving Linkage funds, 4% tax credits, and CPA funds.

VICENTES SUPERMARKET/BROCKTON NEIGHBORHOOD HEALTH CENTER

Brockton, MA

Affirmative was the developer of this two-phased integrated project involving the rehabilitation of a 32,000 square foot supermarket tied to a 14,000 square foot FQHC. This \$22million project, located in a food desert, used New Market Tax Credits and CDFI funding to provide



Tara Mizrahi

Executive Vice President

Tara is the Executive Vice President of Affirmative and has been with the company since 2000. She has been committed to improving low-income communities and increasing housing and economic opportunities in the Boston area since 1993. Tara's experience covers financial structuring, real estate development, and asset management, and she has worked on a full range of projects including urban grocery stores, health care centers, adaptive reuse, supportive housing, homeownership, and mixed-use.

EDUCATION

Tufts University

Medford, MA

Masters in Public Policy and
Planning

Boston College

Boston, MA

Bachelor of Arts

COMMUNITY

LexHab

Lexington, MA

Board of Directors

RELEVANT EXPERIENCE

UTEC, INC.

Lowell, MA

Managing partner leading all feasibility studies and development projects for UTEC, Inc. Development projects have include the reuse of 7 existing buildings involving historic tax credits and New Market Tax Credits.

HEBREW SENIORLIFE, INC.

Boston, MA

Managing partner leading all feasibility studies and affordable senior housing projects with supportive services with HSL. One project just completed and is working on permanent conversion, another is in construction, and a third is in feasibility.

FALMOUTH HOUSING CORPORATION

Falmouth, MA

Managing partner leading all feasibility studies and affordable housing development projects with FHC. One project currently under construction, with eight affordable housing projects closed to date.



Craig Nicholson

Senior Vice President

Craig is the Senior Vice President of Real Estate and has been with Affirmative since 2021. Craig brings over 20 years of development experience to the Affirmative Investments. Prior to joining Affirmative Investments, Craig spent 8 years at Cambridge, MA based Just A Start where he was the Director of Real Estate Acquisitions, where he built a development pipeline of over 250 new affordable homes. Previously, Craig served as President and Founder of Nicholson Development, Inc. where he managed all aspects of the company and projects that ranged from tenant improvements to master planned developments throughout the eastern United States.

EDUCATION

University of California, Los Angeles
Los Angeles, CA
Bachelor of Arts, Psychology and Sociology

RELEVANT EXPERIENCE

MESHACKET COMMONS

Edgartown, MA

Affirmative is the co-developer of Meshacket Commons, a 36-unit affordable rental project in Edgartown on Martha's Vineyard. The \$29 million will create a village targeting Island residents whose income ranges from 30% AMI to 80% AMI. In addition, 4 homeownership units will target families with incomes ranging from 80% to 110% AMI.

SOUTHERN TIER

Oak Bluffs, MA

Affirmative is developing 60 affordable rental homes in the town of Oak Bluffs on Martha's Vineyard. Southern Tier will create 52 homes serving families at various income levels up to 80% AMI and 8 apartments reserved for middle income households serving families between 80% -110% of AMI. The project team participated in multiple community meetings and presentations to the Oak Bluffs Affordable Housing Trust prior to submitting a 40B Comprehensive Permit to the Town's Zoning Board of Appeals.

SQUIRRELWOOD

Cambridge, MA

Squirrelwood is a development that preserved 65 affordable apartments and created 23 new Passive House apartments in Cambridge, MA. The preservation portion revitalized 10 historic structures including the former Squirrel Brand Candy manufacturing building. The project was approved through a 40B Comprehensive Permit and was financed through a combination of 4% Federal LIHTC, MA Historic Tax Credits, Cambridge Affordable Housing Trust and multiple EOHLIC sources.



Madeleine Kelly

Project Manager

Madeleine joined Affirmative in 2021 as a project manager for housing initiatives. She works on a variety of affordable projects that cover a range of target markets, scale, and complexity, including a 28-unit historic rehabilitation project in Gloucester for people at risk of homelessness and a 48-unit new construction project in Falmouth for seniors. Madeleine is dedicated to creating housing in communities that lack affordable options. Prior to joining Affirmative, Madeleine attended graduate school at Tufts University for Urban Planning and Policy.

EDUCATION

Tufts University

Medford, MA

Masters of Science in Urban and Environmental Policy and Planning

Connecticut College

New London, CT

Bachelor of Science, Environmental Studies and Botany

RELEVANT EXPERIENCE

MESHACKET COMMONS

Edgartown, MA

Affirmative is the co-developer of Meshacket Commons, a 36-unit affordable rental project in Edgartown on Martha's Vineyard. The \$29 million will create a village targeting Island residents whose income ranges from 30% AMI to 80% AMI. In addition, 4 homeownership units will target families with incomes ranging from 80% to 110% AMI.

SCRANTON MAIN SENIOR AFFORDABLE HOUSING

Falmouth, MA

Affirmative is co-developing a new mixed-use 48-unit 100% affordable senior property with approximately 1,983 square feet of retail space. The project site is located at 763 Main Street in Falmouth. The design of the building complements the Cape Cod style and the commercial/mixed-use surroundings of the project site, while also being highly energy-efficient (Passive House designed) and accessible for seniors, and provides attractive commercial space in an excellent location.

PATTILLO HOUSING

Gloucester, MA

The rehabilitation of the Pattillo Building, aimed at augmenting the housing capacity from its current configuration of 22 single-room occupancy units (SROs) to a more accommodating arrangement of 28 studio apartments. The rehabilitation will encompass the enhancement of the property's overall quality, thereby elevating the living standards for its occupants. A key transformation involves converting the existing SROs into self-contained studio units complete with private kitchens and bathrooms, fostering greater autonomy among the residents.

AI Projects Past & In Progress

COMPLETED DEVELOPMENTS IN THE LAST FIVE YEARS

YEAR	PROJECT NAME	LOCATION	# OF UNITS	TOTAL COST
2019	HARMON APARTMENTS	BOSTON, MA	36	\$18,165,000
2019	LANDFALL APARTMENTS	BOSTON, MA	111	\$23,096,000
2019	PARIS VILLAGE APARTMENTS	BOSTON, MA	32	\$12,540,000
2019	LINCOLN PARK SENIOR	DARTMOUTH, MA	48	\$12,972,000
2020	LITTLE POND PLACE	FALMOUTH, MA	40	\$14,750,000
2021	41 N MARGIN ST SENIOR APARTMENTS	BOSTON, MA	23	\$13,373,000
2021	GRACE APARTMENTS	BOSTON, MA	42	\$21,493,000
2021	GIFFORD WORKFORCE HOUSING II	FALMOUTH, MA	10	\$2,990,000
2023	UNION MILLS	ATTLEBORO, MA	59	\$31,000,000
2023	SIMON FIREMAN SENIOR HOUSING	RANDOLPH, MA	45	\$22,374,000

CURRENT PROJECTS IN DEVELOPMENT

PROJECT NAME	LOCATION	# OF UNITS	STATUS	COMPLETION
SCRANTON MAIN	FALMOUTH, MA	48	50% CONSTRUCTION COMPLETION	JULY 2024
OAKLAND PRIDE	PITTSBURGH, PA	48	CLOSING Q1 2024	SEPTEMBER 2025
MESHACKET COMMONS	EDGARTOWN, MA	40	CLOSING Q1 2024	SEPTEMBER 2025
SOUTHERN TIER	OAK BLUFFS, MA	60	CLOSING Q4 2024	MARCH 2026
COLONY ON GROVE	WORCESTER, MA	45	SUBMITTED TO EOHLC	JUNE 2026
FORBES	JAMAICA PLAIN, MA	147	SUBMITTED TO EOHLC	MARCH 2027
PATTILLO	GLOUCESTER, MA	29	SUBMITTED TO EOHLC	OCTOBER 2025
WOMEN'S LUNCH PLACE	BOSTON, MA	36	IN PLANNING	JUNE 2026

AI Contact Information & References

DAVID ENNIS: PRESIDENT, AFFIRMATIVE INVESTMENTS

Email: [REDACTED]
Address: 33 Union Street, Boston, MA 02108
Phone: [REDACTED]

REFERENCE 1: LINDA CLARK

Organization: Falmouth Housing Corporation
Relationship: Partner and co-developer on current and past projects
Email: [REDACTED]
Address: 704 Main Street, Falmouth, MA 02540
Phone: [REDACTED]

REFERENCE 2: JAMES PIEFFER

Organization: Presbyterian SeniorCare Network
Relationship: Partner and co-developer on current project
Email: [REDACTED]
Address: 1215 Hulton Road, Oakmont, PA 15139
Phone: [REDACTED]

REFERENCE 3: TANYA HAHNEL

Organization: East Boston CDC
Relationship: Partner and co-developer on past projects
Email: [REDACTED]
Address: 80 Border Street, East Boston, MA
Phone: [REDACTED]

The development team, or any constituent thereof, does not have any delinquent or outstanding local, state, or federal taxes. Additionally, the development team does not have any legal or administrative actions past, pending, or threatened that could relate to the conduct of the Proposer, its principals, or any affiliates.





*Union designed affordable housing community,
Palmer Pointe in Barrington, RI*

Union Profile, and Relevant Project Experience

Union is an award-winning architecture and design firm based in Providence, Rhode Island with a national presence. We recognize the power of design to connect people to place and cultivate community. We build places that deliver long-term value for clients and communities. We bring a comprehensive approach to the design of buildings. We bring unity to the entire process from design to building. We infuse our work with rigorous technical detail and pull from a breadth of design experience to integrate a broad understanding and respect for key building trades into our architectural practice. We are driven by values, including good growth – where people, communities and markets all thrive together. We create beautiful, inspiring, and sustainable buildings and spaces that are designed to stand for generations and are grounded in market realities. Our unique approach has attracted clients – and awards – from across the United States and Canada.



Southside Community Land Trust Headquarters, Providence, RI
As Architect of Record, Union led the design, rehabilitation and renovation of this 12,000 square foot, 1850s livery building to serve as the headquarters for Southside Community Land Trust, a well-established urban agriculture organization. The ground floor includes a USDA produce packing center and commercial kitchen for use by the organization's farmers. There are also three rental spaces for locally owned food production businesses and a fresh food market facing Broad Street. The entire second-floor houses offices, meetings, and classroom space for the organization.

“We’ve had the privilege of working with the Union team for more than a decade and they continue to deliver to the highest standard on all of our development projects. Their expertise spans all aspects of the design and development process from large scale master planning to meaningful and contextual building design. From the leadership team and staff, we have seen a comprehensive approach to the design process from initial concept through entitlements, budgeting and construction administration. The attention to detail and passion they place in every aspect of a project is second to none.”

— **Sam Bradner**

Managing Partner, Peregrine Group Developer

“We’ve had the good fortune of working with Union on some of the largest projects here on the island. The professionalism, the follow through and the thoughtfulness is really exceptional. We feel very fortunate.”

— **Philippe Jordi**

Executive Director, Island Housing Trust



Hanover House, Vineyard Haven, MA

This renovation of the iconic Hanover House Inn in Vineyard Haven provides much needed year-round housing for local employees of the island. The 4,300 square-foot main building was transformed into 12 bedrooms with private bathrooms, and a secondary building with 3 one-bedroom apartments.





Images by Union

Pine View Apartments

EXETER, RI

A new development provides attractive and affordable housing in a rural community.

Pine View Apartments is a new 40-unit affordable residential housing development located on a 8.17-acre parcel of land situated off South County Trail (Route 2) in Exeter, RI. The site is nestled on two sides by preserved wooded wetlands and is situated immediately adjacent to the Oak Harbor Village commercial center.

The project consists of approx. 35,460 square feet of total living area spread across ten two-story wood-framed buildings. Each of the ten buildings consists of four residential living units, with the living units being a combination of 5 one-bedroom and 35 two-bedroom units ranging from 615 to 760 square feet in area.

Additionally, a small freestanding Management Office building is situated in a centralized location and houses centralized mail and package facilities. Site amenities include common green space, a walking trail, shared laundry facilities, off-street parking, Energy Star appliances, air conditioning, site security surveillance, private patios at the first-floor apartments and private balconies at the second-floor apartments.

Pine View Apartments

DATE 2023

SIZE 8.17 acres, 35,460 sf

COST \$8.5 million

CLIENT Non-Profit Community Development Corporation



Color gives these apartments their own distinctive character.



Management office building



Images by Union



Images by Union

Shannock Falls

(Shannock Village Cottages & Richmond Ridge)

CHARLESTOWN & RICHMOND, RI

A distinctive, attractive neighborhood of affordable housing on 11 acres adjacent to conservation land.

Shannock Falls consists of two, new neighborhoods with townhouse-style affordable housing, Shannock Village Cottages and Richmond Ridge.

Shannock Village Cottages has five buildings – one of which is a rehabilitated historic building – with 11 units of affordable housing. This is located in the core of a mill village and is on the National Registry of Historic Places.

Richmond Ridge includes eight buildings with 32 residences and a community building that provides a common function room, laundry facility, management office, and maintenance garage for the site.

The community is designed as a distinctive, attractive neighborhood with a strong sense of place. A common green for recreation is the central organizing feature onto which front porches are oriented. Sidewalks throughout the site encourage neighbor interaction, while the more private rear patios look out to the wooded lot.

Of the 69 total acres between the two sites, only 11 acres were developed. The remainder of the site was designated as conservation land and serves as a passive recreation area for the community.

Shannock Falls

DATE 2020

SIZE 54,750 sf

COST \$11.5 million

CLIENT Non-Profit Community Development Corporation



Richmond Ridge's townhouse-style affordable housing



Shannock Village Cottages rehabilitated historic building



Photography: Nat Rea

Sea Captain's Row

HYANNIS, MA

“The Missing Middle”—
creating multi-family,
workforce housing in an
historic neighborhood.

Sea Captains' Row is an historic street in Hyannis that maintains an important link from downtown to the inner harbor. Union worked with CapeBuilt Homes to redevelop a large section of the neighborhood which now provides condominium ownership and rental opportunities within a collection of new apartment buildings. This new housing supports a growing community on Cape Cod who want to live near their places of employment and within walking distance of commercial and recreational amenities. Sponsored by the Cape Cod Young Professionals organization, the project included gathering direct feedback from the community.

The new buildings succeed in capturing the character and details of the adjacent historic row of houses that originally belonged to mid-1800s sea captains. This is especially noteworthy considering most of the new buildings were constructed using modular building systems in order to meet project requirements.

2023, Congress for the New Urbanism, NE Chapter, Urbanism Award

Sea Captains' Row

DATE 2023

SIZE 73,000 sf

COST Undisclosed

CLIENT CapeBuilt Development



Meandering paths and green common areas



Front porches on ground floor units



Sea Captains' Row site plan



Pleasant Street Elevation



Images by Union

Spring Rock Village

BREWSTER, MA

The classic Cape – modest, small and unadorned, is an excellent template for missing middle housing where right-sizing by design creates affordability.

Spring Rock Village, a new affordable housing community on Cape Cod is designed to blend in with its local Cape Cod vernacular. All buildings are carefully designed with understated facades and simple structure, and all proportions, details, materials, and colors are in keeping with the historic character of Brewster. The classic Cape — modest, small and unadorned, is an excellent template for missing middle housing where right-sizing

by design creates affordability while meeting the needs of a broader array of residents.

The backbone of the proposed plan is the versatile “Manor House” which echoes classic Cape house character while accommodating multiple dwelling units per structure.

The natural focal point of the site is the wooded green and community building, located in the center of the neighborhood. The central island of existing trees provides a multi-function greenspace that increases the perceived residential open space while maintaining existing mature trees.

Multiple pocket parks are tucked between structures and create intimate gathering spaces for residents while supporting a pedestrian- friendly design that encourages placemaking and community conversation. This compact site plan conserves land, preserves natural resources, and maintains existing landscape buffers.

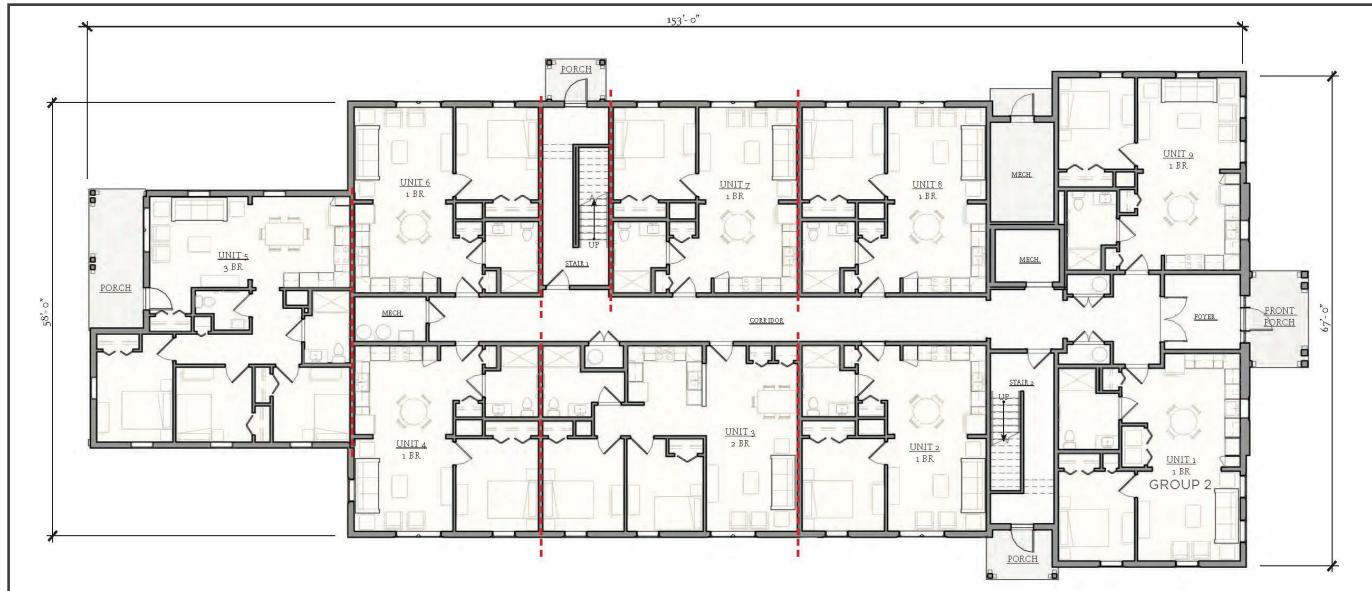
Spring Rock Village

DATE In Design

SIZE 30 units, 63,635 sq ft

COST TBD

CLIENT Preservation of Affordable Housing (POAH)





photography: Northland Residential

Wolcott Woods

MILTON, MA

A timely response to a demand for high end, mixed-income, 'active adult,' living in the Boston suburbs.

The 47 acres that make up Wolcott Woods in Milton, Massachusetts harken back to 19th century summer home estate living—when families would head to this Boston suburb to get back to nature. This new 55+ community sits adjacent to the Blue Hills Reservation and offers a serene escape into the country—while being conveniently situated for ease of travel to Cape Cod, Boston, New York and Washington DC.

Union's architectural design work included re-imagining the "Manor House Cluster" (which are the two units adjacent to an existing house on the property) in order to form a community gathering space/garden which is an arrival point for the neighborhood.

The architecture draws from the character of the three historic properties on the site - Devens House, Wolcott House, and the Manor House. Each "cluster" of homes reflects the historic house that inspired it. At Devens, the homes are carriage houses behind the big house, at Manor they form the entry gateway, and at Wolcott they transition to stucco.

- 2022 Prism Awards Gold Winner, Builders and Remodelers Association of Greater Boston (BRAGB)

Wolcott Woods

DATE Under construction **SIZE** 54 units including 6 deeded affordable, 15 single family, 17 duplexes **COST** TBD **CLIENT** Northland Residential



Front perspective rendering of Building Type CD1



Front perspective rendering of Building Type C1



The road in to Wolcott Woods



Aerial rendering of the Manor House Clusters



Image by Rupert Whiteley

Sweetbriar

BARRINGTON, RI

Affordable housing in an affluent town that met fierce public opposition, but has been embraced by the community since its completion.

The neighborhood plan for Sweetbriar is based on the principles of Traditional Neighborhood Development (TND). The plan articulates the locations of affordable homes and public spaces, forming several distinct neighborhoods within the overall community.

The neighborhood plan emphasizes the community aspects of the neighborhood and provides not just the image, but the function, of a traditional street. Duplex units are combined under single roof lines in a variety of configurations to suggest the scale and detail of the single-family homes typical in the adjacent neighborhoods. Open space was purposefully designed to provide a setting for community life. Many of the adjacent neighborhoods in Barrington, which objected strongly to the project in the initial stages, have come to embrace Sweetbriar as an extension of their community.

- *GrowSmartRI, Smart Growth Award Outstanding Smart Growth Project, 2013*



Sweetbriar

DATE 2010

SIZE 47 units, 23 buildings on 8 acres

COST \$7.91 million

CLIENT East Bay Community Development Corp.



Exterior front view of duplex



Aerial perspective rendering



Every unit has a front porch



Images by Nat Rea

Community is built around a large, common green space



Douglas Kallfelz

AIA, LEED AP, CNU

Managing Partner

As managing partner at Union, Douglas works directly with client leaders on a wide range of residential, institutional, and civic projects. With more than 25 years of experience across a broad range of client and project types, Douglas brings a unique blend of business acumen, technical expertise, and design skill to those he serves. He has been the primary architect and Principal-in-Charge for many of the firm's award winning affordable housing projects, sustainable communities, civic buildings, student housing, and residences. Douglas blends his project leadership and design responsibilities with overall management and strategic planning for Union. His work embodies a commitment to contextually inspired design and enduring quality as the foundation of lasting value for communities and clients alike.

EDUCATION

**Harvard University,
Graduate School of Design**
Cambridge, MA
Master in Design Studies

Syracuse University
Syracuse, NY
Bachelor of Architecture
Cum laude with Honors

REGISTRATIONS & CERTIFICATIONS

Registered Architect
Licensed in: RI, MA, ME, NH, VT, OR

LEED Accredited Professional

RELEVANT EXPERIENCE



ISLAND AUTISM CENTER AT CHILD FARM

West Tisbury, MA

Principal in Charge: Masterplan and complete building design for a supportive community of affordable residences for adults with autism. The campus includes a working farm and farmstand, a common house with kitchen, community space, supportive common homes, cottages, a farm caretaker's apt and visitor suites.

“Meaningful design begins with having a deep respect for the cultural values of the people and communities we serve. Listening first gives the greatest chance of creating buildings and places that enrich lives and strengthen connections.”





SANDYWOODS FARM ARTS COMMUNITY

Tiverton, RI

Principal in Charge: Masterplanning and architectural design. Sandywoods farm is a unique arts and agricultural community designed to combine affordable rental and market-rate housing with a working farm, mixed-use retail, and a studio, gallery, and performance space for artists.



FORWARD AT THE ROCK

South Dennis, MA

Principal in charge: An eight-bedroom, supportive housing community for adults with autism spectrum disorder (ASD) on Cape Cod.



SEA CAPTAINS' ROW

Hyannis, MA

Principal in Charge: New market-rate workforce housing on 2-acre infill site in the heart of the Hyannis, Massachusetts historic district.

PROFESSIONAL AFFILIATIONS

American Institute of Architects (AIA)

Member, *Current*

RI Chapter, President, 2013

Congress for the New Urbanism (CNU)

Member, *Current*

Harvard Alumni Real Estate Board

Board Member, *Current*

SPEAKING ENGAGEMENTS

Crafting Resilient Communities:

Lessons learned over 20 years of designing attainable housing in New England
AIA New Jersey, 2023

East Coast Rising: Shifting Resilience Planning from Guidelines to Implementation CNU National Conference, 2022

Finding the “Missing Middle” in Housing
International Builder’s Show, 2018

Intentional Communities: History & New Applications for Clustered Development
Architecture Boston Expo, 2012

Sustainable Opportunities Across the Transect
CNU New England, 2011

Cottages on Greene: An Alternative Residential Development for the New Economy
GrowSmartRI, 2009

Smart Streets for Smart Growth: Rethinking Green Infrastructure in Cities and Towns
EcoBuild, 2009

COMMUNITY ENGAGEMENT

ACE RI Mentorship Program

Advisory Board Member

Leadership Rhode Island

Member, *ETA II Class*

AIA Rhode Island

Past President, 2013



Alanna Jaworski AIA, SARA

Senior Associate

A whip-smart problem-solver, Alanna joined Union in 2021 and quickly rose to Associate. Committed to the pursuit of architectural work that gives everyone the opportunity to thrive, Alanna brought several years' experience designing New York City pre-K schools and has since demonstrated expertise in the design of affordable housing neighborhoods with high sustainability and energy goals.

Alanna currently manages the execution of Union's masterplan for a supportive housing project designed for adults with autism on Martha's Vineyard. The robust masterplan includes a common house and affordable housing buildings on an operating micro-farm.

EDUCATION

Pratt Institute
Brooklyn, NY
Bachelor of Architecture
Honors: *Summa Cum laude*

REGISTRATIONS & CERTIFICATIONS

Registered Architect
Licensed in: NY

RELEVANT EXPERIENCE



SEA CAPTAINS' ROW

Hyannis, MA

New market-rate workforce housing on 2-acre infill site in Hyannis historic district. The new construction succeeds in capturing the character and details of the adjacent historic row of houses that originally belonged to mid-1800s sea captains- noteworthy considering most of the new buildings were constructed using modular building systems to meet project requirements.



ISLAND AUTISM CENTER AT CHILD FARM

West Tisbury, MA

Masterplan for micro-farm including affordable residences for adults with autism, a common house with kitchen, community space, farm caretaker's apt and visitor suites.

MESHACKET COMMONS

Edgartown, MA

36 units of affordable rental housing and 4 units of affordable homeownership housing on 6.75 acre town-owned parcel.



NEW BEDFORD RESEARCH & ROBOTICS(NBBR)

New Bedford, MA

Conversion of approx. 12,500 sf commercial space into an innovation and education space for technology.

ADE BETHUNE HOUSE & PORTSMOUTH SENIOR CENTER

Portsmouth, RI

54 unit affordable senior housing with 9,000 SF senior amenity space on town-owned parcel.

PROFESSIONAL AFFILIATIONS

American Institute of Architects (AIA)

Member, *Current*

Society of American Registered Architects (SARA)

Director, *Current*

COMMUNITY ENGAGEMENT

The Rotch-Jones-Duff House & Garden Museum

Board Member, Chair of Buildings & Grounds

Committee, *September 2022 - Present*

The Spring of Hope School

Board Member, *September 2016 - Present*

“Design profoundly influences how people perceive a place beyond simply its function. In our work, we consider rich histories, context, and a sense of place, and balance those layers of value and experience with a knowledge of the current environmental factors we must consider.”



Arica Thornton NCARB, CNU

Designer

Since joining Union in 2019, Arica brings her passion for creating spaces that are healthy and sustainable places for people to live. She loves that architecture and planning projects enable her to work at different scales from one site to a regional area. She is especially excited when these projects are based in providing more equitable or resilient development for the community they are in. On a daily basis you can find Arica focusing on site planning and neighborhood scale projects, as well as town planning research-based projects, also providing support for creating renderings and construction documentation.

EDUCATION

University of Maryland
College Park, MD
Master of Architecture; Master
of Community Planning

Catholic University
Washington, DC
Bachelor of Arts in Studio Art;
Minor in Psychology

REGISTRATIONS & CERTIFICATIONS

NCARB Certified

RELEVANT EXPERIENCE



ISLAND AUTISM CENTER AT CHILD FARM

West Tisbury, MA

Masterplan for micro-farm including affordable residences for adults with autism, a common house with kitchen, community space, farm caretaker's apt and visitor suites.



CARMELITE MONASTERY

Barrington, RI

Masterplanning. Helping stitch an underutilized property back into its surrounding community.



STAFFORD STREET COTTAGES

Worcester, MA

A supportive tiny house community with 21 units and a community center for residents experiencing chronic homelessness.

PROFESSIONAL AFFILIATIONS

American Planning Association (APA)
Member, *Current*

Congress for the New Urbanism
Member, *Current*

SPEAKING ENGAGEMENTS

Principles of Community Design
Institute of Classical Architecture & Art
(ICAA), Gindroz Award Studio
Presentation, 2023 *Providence, RI*



*Union designed 'missing middle' housing,
Sea Captains' Row in Hyannis, MA*

Horsley Witten Project Experience

HW's site design and remediation professionals collaborate with financial experts, architects, and developers to build high-quality affordable housing projects in MA and RI. We have worked with municipalities and housing authorities on 100's of units for public, private, and non-profit clients, guiding projects through permitting and construction. We are proud to collaborate with partners like the Mashpee Housing Authority and Affordable Housing Trust, Nantucket Housing Authority, Bourne Housing Authority, the Housing Assistance Corporation of Cape Cod, (HAC) the Preservation for Affordable Housing, (POAH), the Archdiocese Planning Office of Urban Affairs, (POUA), Community Builders, E.A. Fish, Pennrose Properties, and Peabody Properties.



Mashpee Commons, Mashpee, MA

Mashpee Commons is an award winning development, built in a traditional New England town center style. HW provided engineering and design services for the next phase of development — a pedestrian-oriented affordable housing neighborhood. The stormwater management design emphasizes low maintenance, native plantings for better water quality treatment.



Sachem's Path, Nantucket, MA

HW collaborated with HAC and the Nantucket Housing Authority to develop a Chapter 40B affordable housing subdivision named Sachem's Path. The design emphasizes compacted development, a reduction in paved surfaces, the use of low maintenance native plantings and integrates the proposed development's needs into the site's delicate surrounding environment.



Barbara Jordan Apartments, Providence, RI

DBVW Architects, Omni Development, and Wingate Companies are reimagining a design vision for the existing Barbara Jordan II Apartments. The team's goal was to create a transformative development of new, safe, affordable, spacious, fun, and equitable dwelling units. HW provided site design and engineering services.



Melpet Farms, Dennis, MA

HW collaborated with partners on a proposed affordable housing development in Dennis, MA. The project features twenty-seven affordable housing units located in eight LEED building clustered around a common open area. The site design incorporates natural Low Impact Development practices and a state-of-the-art advanced de-nitrifying wastewater system.



Jon Ford PE, NCI

Senior Project Manager: Community Design

Jon has over 24 years of experience as a civil engineering and neighborhood planning innovator and is a recognized leader in the area of New Urbanist planning and engineering. Jon is a 2006 Knight Fellow in Community Building at the University of Miami's School of Architecture, a co-founder of the New England Chapter of the Congress for the New Urbanism, and on the faculty of the Form-Based Codes Institute. Jon's project designs have won numerous local and national awards, multiple CNU Charter Awards, the Rudy Bruner Award for Urban Excellence, and the Boston Society of Landscape Architects Honor Award.

EDUCATION

University of Notre Dame

Boston, MA

Bachelor of Science, Civil Engineering

REGISTRATIONS & CERTIFICATIONS

Professional Engineer: MA, RI, CT, FL

Co-Founder, Current Vice President: New England Chapter of the Congress of New Urbanism

Board of Directors: Seekonk River Alliance

Board of Directors: Blackstone Parks Conservancy

Knight Fellow in Community Building, University of Miami School of Architecture

RELEVANT EXPERIENCE

GREENBUSH TRANSIT-ORIENTED DEVELOPMENT

Scituate, MA

Led site planning, civil engineering, and landscape architecture design for redevelopment of portions of the MBTA commuter rail parking lot to build a new village center consisting of 78 residential units and 10,000 sq. ft. of commercial space in six buildings.

WOONASQUATUCKET VISION PLAN AND GREENWAY

Providence, RI

\$1 Led infrastructure and placemaking design for Providence's Woonasquatucket Vision Plan and Woonasquatucket Greenway. Designed concepts for the area along the Woonasquatucket River from Providence's Olneyville neighborhood to the Providence Place Mall – including parts of three City neighborhoods that have historically faced disinvestment and a disproportionate level of environmental impacts. Focused concepts on providing a separated urban trail to connect Providence Place Mall to Eagle Square, multiple new pocket parks, green infrastructure, trees, and a kayak launch.



Ellen Biegert RLA

Senior Landscape Architect

Ellen Biegert has ten years of professional experience in Landscape Architecture and is driven to strengthen the connection between the natural and built environment. Ellen works on projects that integrate open space and green infrastructure into neighborhood and urban context to create green networks for surrounding communities and natural systems. She provides landscape design services to a variety of private and public entities including master planning, planting and botanical design, graphics, permitting, construction documentation and administration. Her past worked includes public recreation areas such as parks and trails, botanical gardens, family gardens, university campuses, stormwater planning, and streetscape design.

EDUCATION

Temple University

Philadelphia, PA

Bachelor of Science in Landscape Architecture

REGISTRATIONS & CERTIFICATIONS

Registered Landscape Architect, PA

Member, American Society of Landscape Architects (ASLA), Rhode Island

Member, Congress for New Urbanism (CNU), Rhode Island Chapter

RELEVANT EXPERIENCE

WOONASQUATUCKET RIVER GREENWAY BIKE PATH

Providence, RI

Served as a primary designer for an urban street bike path that connects users to the tidally influenced Woonasquatucket River and links EJ communities to downtown Providence while incorporating green infrastructure, kayak launches, and small gathering spaces. Contributed to all phases of the project including site analysis, public engagement, conceptual design, permitting and construction documents.

PANAMA CITY DOWNTOWN AND NEIGHBORHOODS MASTER PLANS

Panama City, FL

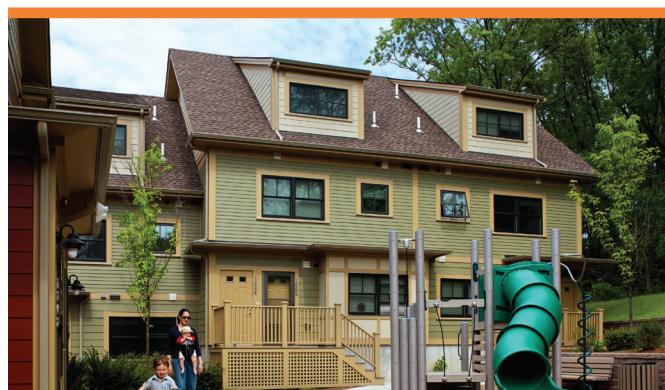
Provided creative and technical support for the re-visioning of Downtown Panama City and surrounding neighborhoods as they were recovering from the damage of Hurricane Michael, which hit the area in 2018. Focused on weaving green space planning, coastal resilience and water management practices with the built environment while balancing community needs to create sustainable and vibrant neighborhoods. Contributed to the open space network design, stormwater analysis, streetscape design, conceptual green infrastructure approach, and graphics.

Wingate Project Experience

Over the last 60 years, Wingate Management Company (“WMC”) has been recognized as one the country’s most distinguished property management companies by creating a feeling of home at every property. The company applies a management approach to maximize opportunity and value for each owner and investor. WMC has caring, experienced professionals that know how to balance a focus on financial and overall objectives for each owner and investor, while enhancing the lives of residents. Wingate is the property management agent for 4 of Affirmative’s projects, listed below.



Twelve Summer Street, Manchester-by-the-Sea, MA



Waverley Woods, Belmont, MA



Feldman Seaside Apartments, Winthrop, MA



Union Mills, Attleboro, MA



Gene Zhitomirsky

Senior Vice President

Gene has over 20 years of property management experience with a specialized focus in affordable housing and commercial management. In addition to corporate responsibilities, he oversees a large, mixed-use and affordable housing portfolio in Massachusetts, New York, and Michigan and all of Wingate's commercial portfolio. His expertise spans throughout numerous areas of property management including annual budgeting, cost control, financial planning, and recommendations for capital improvements. Gene strives to obtain peak property performances by maximizing income and reducing operating costs to meet the financial objectives of the owner.

EDUCATION

Boston University
Boston, MA
Bachelor of Arts, Psychology

REGISTRATIONS & CERTIFICATIONS

Licensed Real Estate Broker, MA
Registered Cooperative Manager, National Association of Housing Cooperatives
Rural Development 515 Shining STAR
National Affordable Housing Professional Executive (NAHP-e)
Certified Credit Compliance Professional
Tax Credit Specialist (TCS)





Terry Maguire

Vice President of Compliance & Training

Terry has more than 26 years of property management experience, primarily in the areas of operations, regulatory compliance, and training. She is responsible for providing leadership and oversight to the Compliance Committee, as well as developing regulatory policies and procedures for Wingate's affordable housing portfolio. In addition, Terry is responsible for the development, coordination, implementation, and oversight of all corporate training programs and initiatives. Terry also manages all property transitions, coordinating the responsibilities and deadlines of the project managers and transition teams throughout the onboarding process, resulting in smooth, on-schedule, and well organized property transitions.

EDUCATION

Bentley College
Boston, MA
AS, Accounting

Bentley College
Boston, MA
Bachelor of Arts, Communications

REGISTRATIONS & CERTIFICATIONS

Certified Property Manager (CMP)
National Affordable Housing Professional Executive
Specialist in Housing Credit Management
Certified Professional of Occupancy
Fair Housing Compliance
Certified Credit Compliance Professional for Low Income Housing Tax Credit
Certified Occupancy Specialist
Low Income Tax Credit Compliance Specialist





Courtney Mathiowitz

Director of Marketing

Courtney has more than 10 years of marketing and property management industry experience. She is responsible for overseeing and enhancing marketing initiatives at the properties to ensure maximized property performance. From lease-ups to stabilized properties, Courtney enters each task with a winning positive attitude and interpersonal skills to create success. She strives to create improved experiences for both prospective and current residents living in Wingate communities, while also leading the innovation and marketing strategy for the company brand.

Prior to joining Wingate, Courtney served a tenure as Director of Marketing for HallKeen Management, where she gained a well-rounded experience in affordable housing and market-rate property management. Most notably, Courtney participated in IREM's inaugural Next-Gen CPM Leaders Program – a CPM fast track talent management initiative.

EDUCATION

Hofstra University
Hempstead, NY
Bachelor of Arts, English

REGISTRATIONS & CERTIFICATIONS

Certified Property Manager (CMP)
Certified Apartment Leasing Professional (CALP)
Certified Credit Compliance Professional (C3P)



Dellbrook JKS Project Experience

Dellbrook JKS provides a full range of construction services throughout the New England region. Our firm has over three decades of experience and a team of more than 250 exceptionally talented professionals with expertise to provide services across a variety of market sectors, building types and construction methods. Our portfolio of projects include many affordable housing projects, mixed use and multifamily residential construction, senior housing, healthcare facilities, educational institutions and commercial projects serving the needs of our clients.



Navigator Homes, Edgartown, MA

Navigator Homes is new construction of five “Green House” style skilled elder care residences on a 26-acre site. The project will include 66 skilled nursing beds in five homes clustered around an outdoor garden and a mix of 48 workforce housing units in two apartment buildings, one townhouse, and four duplexes.



Helena Crocker Residences, Westford, MA

The Helena Crocker Residences project featured the new construction of an 18 unit, senior affordable housing development with supportive services. The building is a 13,380 SF, 3-story, wood-framed building with concrete foundation. Construction included new utilities, parking, an exterior patio, and other various amenities.



Madison Park IV, Roxbury, RI

The Madison Park Village IV development included the occupied renovations to a total of 143 living units in 15 low-rise buildings with a mix of 126-2 bedroom and 17-3 bedroom living units. The work executed by Dellbrook JKS included exterior envelope work including replacing siding, trim/millwork, windows, doors and roofing.



Terrapin Ridge, Sandwich, MA

The Terrapin Ridge Project is 35,525 SF of new wood frame construction consisting of 30 units in eight buildings plus a community building. To obtain higher energy efficiency the project includes triple pane windows and blown-in insulation in the wall cavity with rigid insulation outboard of the exterior wall framing. The compact site includes protection of Natural Heritage Wildlife Habitat. Amenities include a community building, maintenance shed, fenced-in children's playground, community gardens and a bike shelter.

SECTION 2

Development Concept

- Development Concept Narrative
- Site Analysis
- Site Plan
- Floor Plans
- Elevations
- Unit Plans
- Renderings
- Construction Staging Plan: Preliminary Logistics
- Construction: Neighbor Communication
- Financing Narrative
- Proforma
- Projected 20-Year Operating Budget
- Construction Loan LOI
- Permanent Loan LOI
- Equity Investor LOI

Development Concept Narrative

Affirmative's vision for the Milton Town Farm Place is to create a neighborhood and village that provides a range of affordable opportunities for Milton residents that is respectful of the land, the history of the site, and the neighbors that surround us. Land that was once set aside for "the poor" at the edge of Town will now become a home that will treat its residents with dignity and give them the security of affordable housing that will allow them to flourish.

All 35 of the units will be affordable, with a range of income tiers from 30% of Area Median Income to 80% of Area Median Income. For a family of four, that is an income range from \$44,500 to \$118,400. The unit configuration will be 7 one-bedroom units, 24 two-bedroom units, and 4 three-bedroom units. The goal is to provide housing for families. Most of Milton's affordable units are for seniors and there is a pressing need for affordable family units in the Town of Milton, as outlined in the Housing Production Plan.

Affirmative Investments, Inc. was founded in 1983 with a goal of channeling capital into investments that positively impact the lives of low-income persons. The firm has evolved over 40 years and is now an active developer of affordable housing and financier of economic development projects like charter schools, urban supermarkets, health clinics. Affirmative has worked on over 100 housing projects totaling more than 6,500 units, most of which are affordable. Its housing and economic development projects total over \$3 billion in financing.

Affirmative has developed a range of housing types, but has specialized in small projects that create new neighborhoods. Projects similar to Town Farm include the 41-unit Summer Street Apartments in Manchester-by-the-Sea that was named one of the country's top 10 projects in the U.S. by the Sierra Club, the 40-unit Waverley Woods project in Belmont, MA that won The Charles Edson Green award for its innovative resiliency program, and the 36-unit Harmon Apartments in Dorchester, MA that recently won the Vanguard award for the best new affordable project under 100 units by NAHMA, a trade organization.

Affirmative will be working with a team of professionals with which it has worked on many projects over the years. The architects are Union Studio Architecture & Community Design of Providence, RI with whom Affirmative has worked on three projects of similar size, including two on Martha's Vineyard, along with the civil engineers, Horsley Witten Group. The Management Company is Wingate Management which manages four other properties that Affirmative has developed in Manchester-by-the-Sea, Winthrop, Belmont, and Attleboro. Affirmative's legal team is Nolan Sheehan Patten with whom it has worked for 20 years. Finally, Affirmative will be working with Dellbook JKS through design development and cost estimating.

The vision is to utilize the site the way it was used as a Poor Farm years ago by working from the existing foundations of the two larger buildings (the almshouses) that sit across from each other on the roadway as well as the smaller building (the current Animal Shelter) at the end of the driveway. This serves three purposes – it limits the amount of digging on the site, it organizes the site the way it was historically and it preserves the existing field for outdoor communal recreation, play and gathering space. We realize that the site is now surrounded by neighbors and our priority during construction, and after, will be to limit noise and intrusions. We are also concerned about the potential for ledge throughout the site, so the less digging the better.

It is our understanding from review of the drainage design materials for Pulte's Milton Woods project that the existing infiltration basin on the Town Farm property is sized to accommodate runoff from the majority of the Town Farm site in its current condition as well as drainage from a portion of Milton Woods.

The proposed drainage design for Milton Town Farm Place will utilize innovative green stormwater infrastructure and low impact development practices to filter for water quality and mitigate runoff rate and volume for the new impervious area as required by the Town and DEP. Stormwater management practices will be artfully woven into the site design to reinforce the placemaking context. Practices to be considered may include pavement reduction, pervious pavement, bioretention and bioswales, additional tree planting, and underground infiltration systems. Soil test pits will be a key step as early in the process as possible to better understand the composition of site soils, potential ledge/boulders, and seasonal high groundwater elevation to inform design.

The Pest House will remain in its current location on the site at the entrance to the neighborhood and become the management office, mail room, and have a small community space. Two new buildings will be built where the two larger buildings now sit. The two buildings will be demolished, although the proposed architecture utilizes the existing footprint width at the gable ends in the proposed layout, as well as the existing porch detailing and latticework on the proposed as reference to the historic architecture of the almshouses. We will construct a 12-unit stick built house on the north side of the drive and an 11-unit stick built house on the south side where closest to the southern neighbors. With one fewer dwelling unit, the building has a two-story portion closest to the south neighbors. The other 12-unit building will be built where the Milton Animal League building is located at the west end of the existing driveway. Architecturally, we plan to build in the Colonial style that currently exists and draw from some of the interesting historic detail. We expect to use Hardiplank clapboard siding with painted composite trim for the exterior of the buildings.

All three buildings will be 3 stories, but appear as 2 ½ stories by accentuating the gable rake and eave trim and highlighting the third floor to look like dormers. The buildings will be built around and connect via pathways the large open field area with opportunities for recreation, outdoor play space and social interaction. All units will have access to outside space, both at the ground level of the buildings where each has a small shared open courtyard as well as unit porches and balconies. We will create parking in three basic lots adjacent to each building with 1.5 parking spots per unit plus 2 extra spots near the Pest House, for a total of 55 parking spaces. Electric vehicle charging will be provided and evenly distributed at multiple locations on the site. Bike racks will also be provided at multiple locations on the site to encourage biking and capitalize on the extensive bike lane network in Milton.

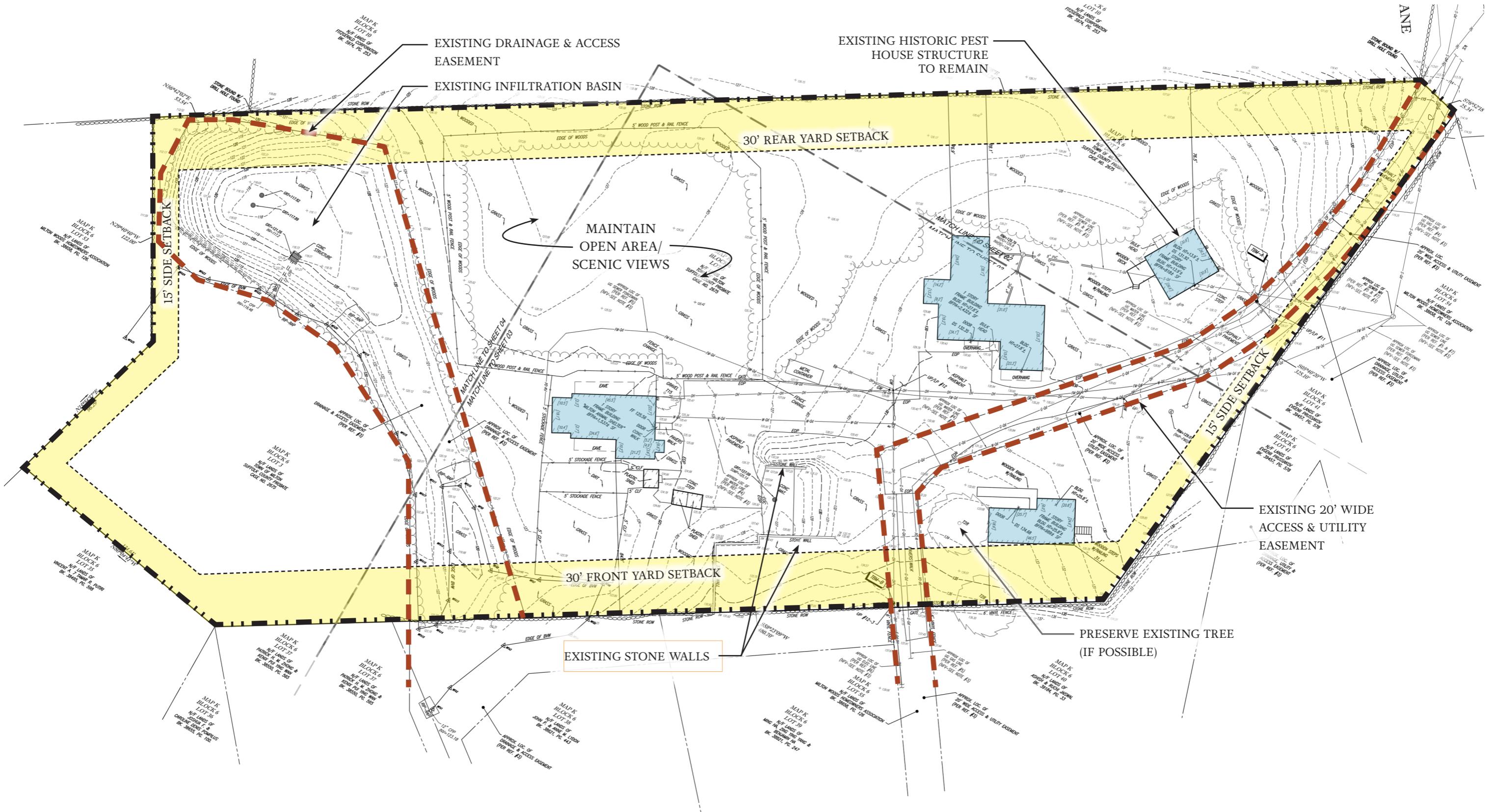
Common laundry as well as individual unit storage cages are proposed to be located in a partial basement of the central 12-unit building. All fully accessible units will be provided with in-unit side by side washers and dryers as well as exterior storage sheds located along an accessible route. Adaptable ground floor units will be provided with in-unit laundry hookups. Further investigation of the existing basement of the almshouses is needed to determine feasibility.

We are committed to making the development as sustainable and resilient as possible. Our goal will be to achieve Passive House standards and to be all-electric for all building systems. We are planning on installing solar panels to provide the majority of the project's electricity and will orient the roofs to maximize the power of the panels. We will tie in the drainage system that currently serves the Pulte Homes at the west end of the site and expand the system if necessary.

We will work on the site to create vegetative separation from the surrounding housing, work to maintain as many of the important trees as possible, build above-ground garden space in the flat area between the pest house and the first residential building where we have great southern exposure and build a play area for the children of the neighborhood on a portion of the existing field.

We will work closely with the Town, the Affordable Housing Trust, and the neighbors to address issues that may arise and allay concerns about noise, privacy, destruction of green spaces. We will establish regular communication with the Trust and be open to input from the Town and neighbors.

Site Analysis



Milton Town Farm Place

SITE ANALYSIS

SCALE: 1"=50'-0"



UNION

Proposed Site Plan

Program

TOTAL UNITS: 35

Buildings 1 & 2 (12 units each)
(2) 3 BD units each
(10) 2 BD units each

Building 3 (11 units)
(4) 2 BD units
(7) 1 BD units

TOTAL PARKING: 55 SPACES
53 spaces (1.5 per unit)
2 visitor spaces

*20% of parking will be EV-Ready



Milton Town Farm Place

PROPOSED SITE PLAN

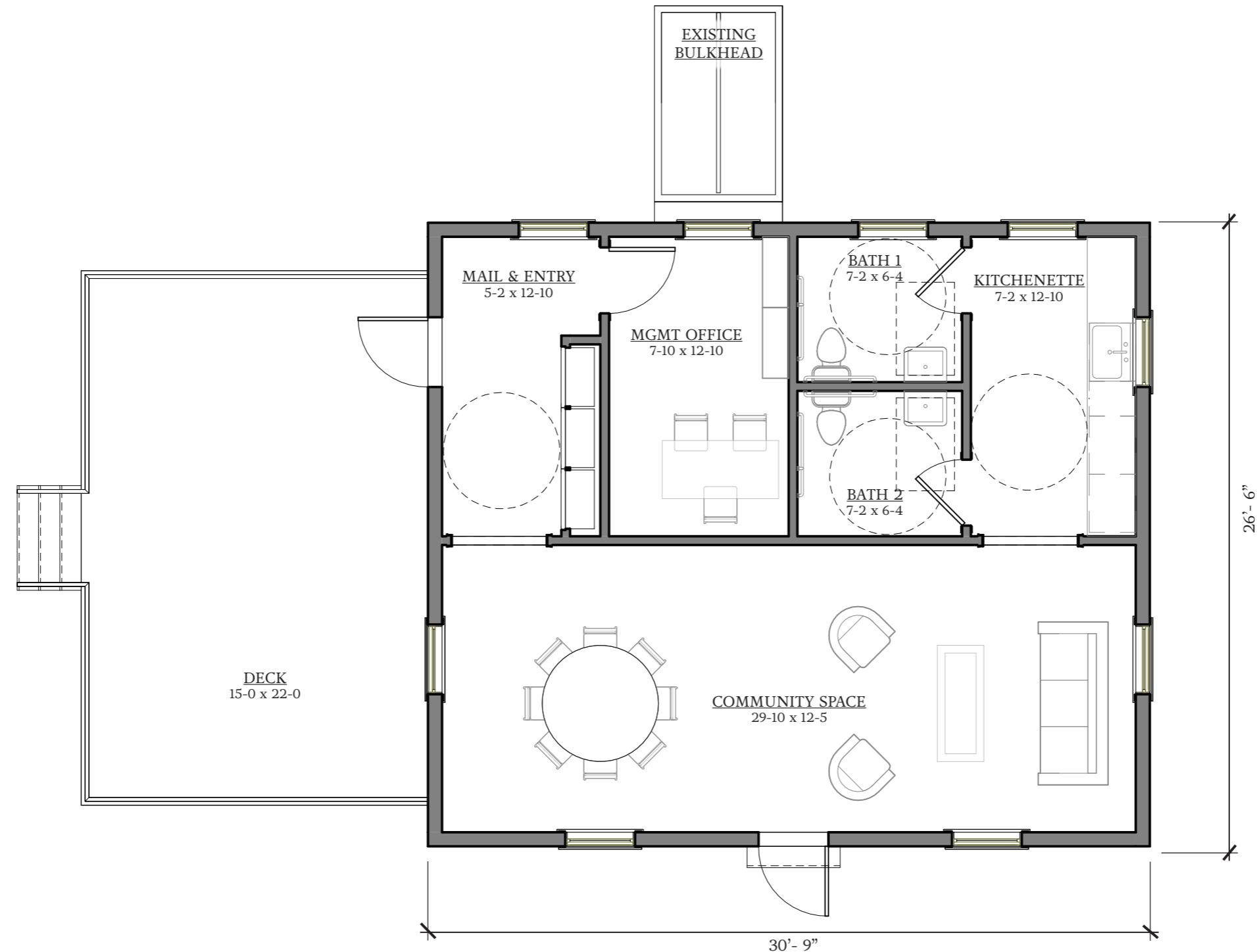
SCALE: 1"=50'-0"

0 25' 50' 75' 100'



UNION

Community Space Floor Plan (Historic Pest House)



Milton Town Farm Place

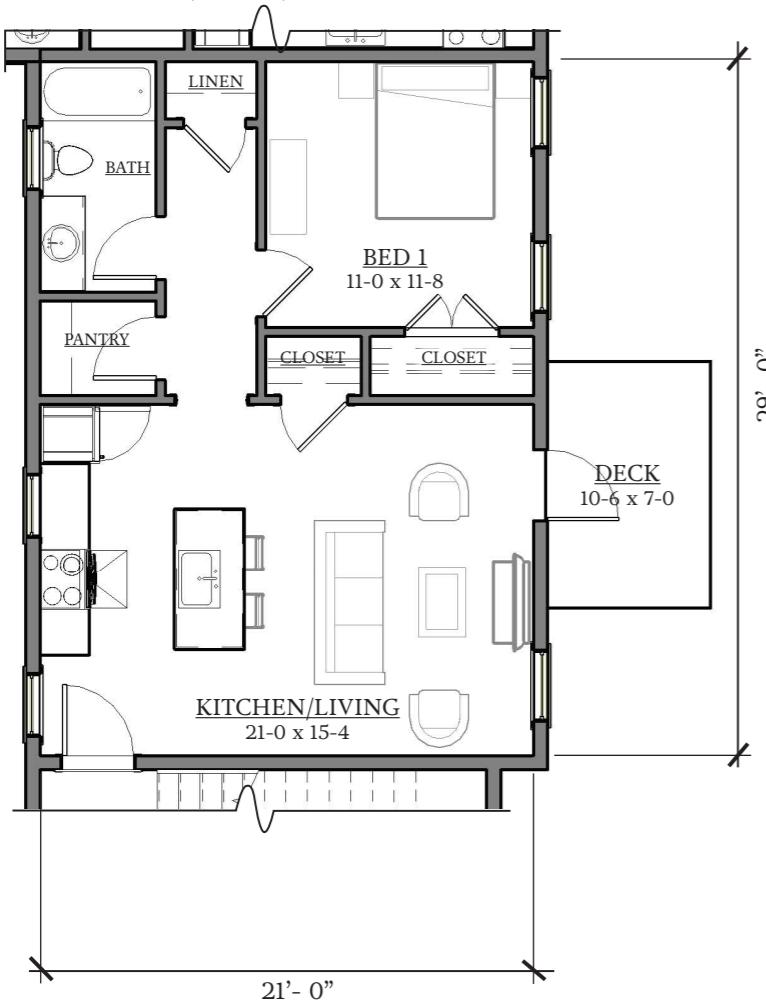
COMMUNITY SPACE FLOOR PLAN (HISTORIC PEST HOUSE)

SCALE: 3/16"=1'-0"



Typical Unit Floor Plans

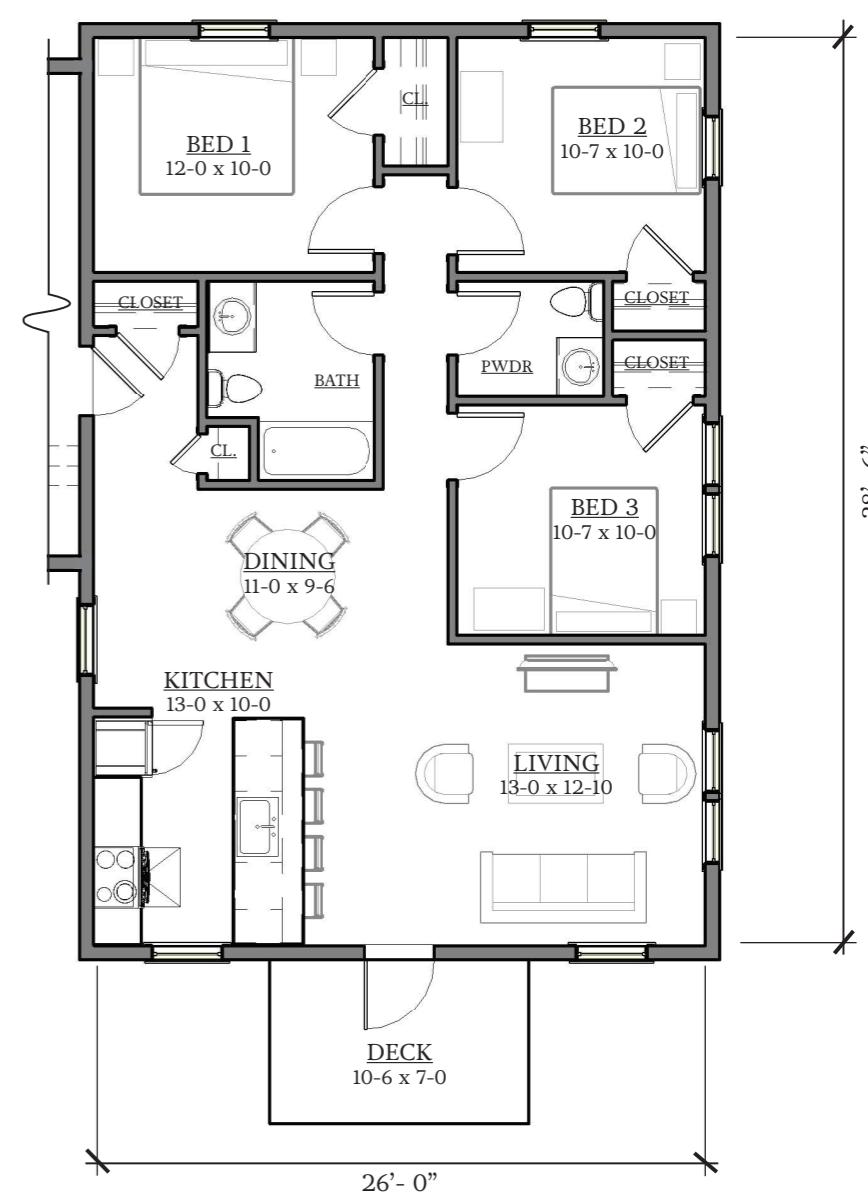
TYPICAL 1 BEDROOM:
609 SF (NET)



TYPICAL 2 BEDROOM:
762 SF (NET)



TYPICAL 3 BEDROOM:
1,001 SF (NET)



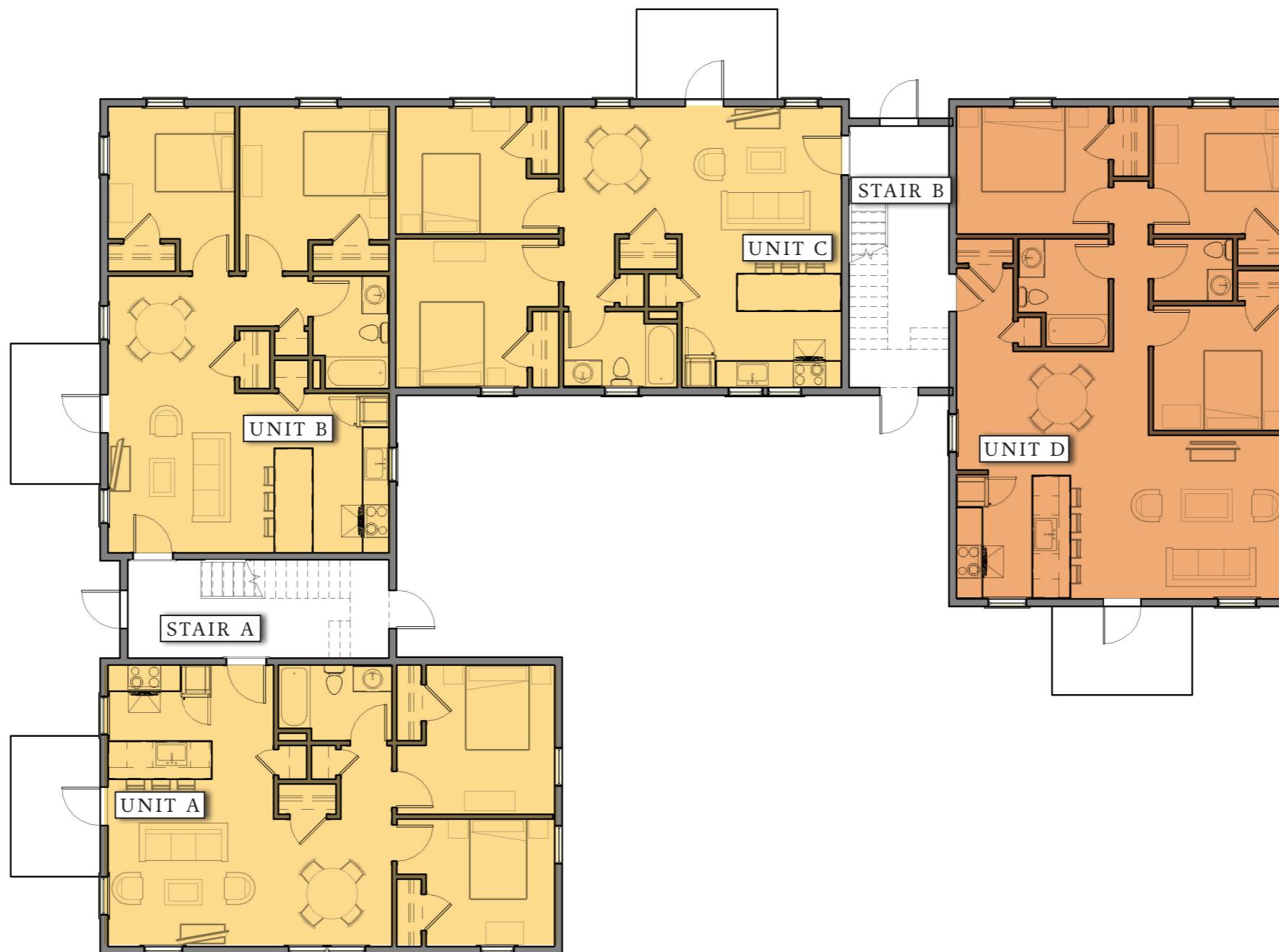
Milton Town Farm Place

TYPICAL UNIT FLOOR PLANS

SCALE: 1/8"=1'-0"



Building 1 & 2: First & Second Floor Plan



NOTES:

- WINDOWS IN LIEU OF DOORS IN STAIRS ON SECOND FLOOR
- NOT SHOWN: RAILINGS STANDARD ON SECOND FLOOR BALCONIES

LEGEND	
	3 Bedroom unit
	2 Bedroom unit
	1 Bedroom unit

Milton Town Farm Place

BUILDING 1 & 2: FIRST & SECOND FLOOR PLAN

SCALE: 3/32"=1'-0"



Building 1 & 2: Third Floor Plan



NOTES:

- WINDOWS IN LIEU OF DOORS IN STAIRS ON SECOND FLOOR
- NOT SHOWN: RAILINGS STANDARD ON SECOND FLOOR BALCONIES

LEGEND	
	3 Bedroom unit
	2 Bedroom unit
	1 Bedroom unit

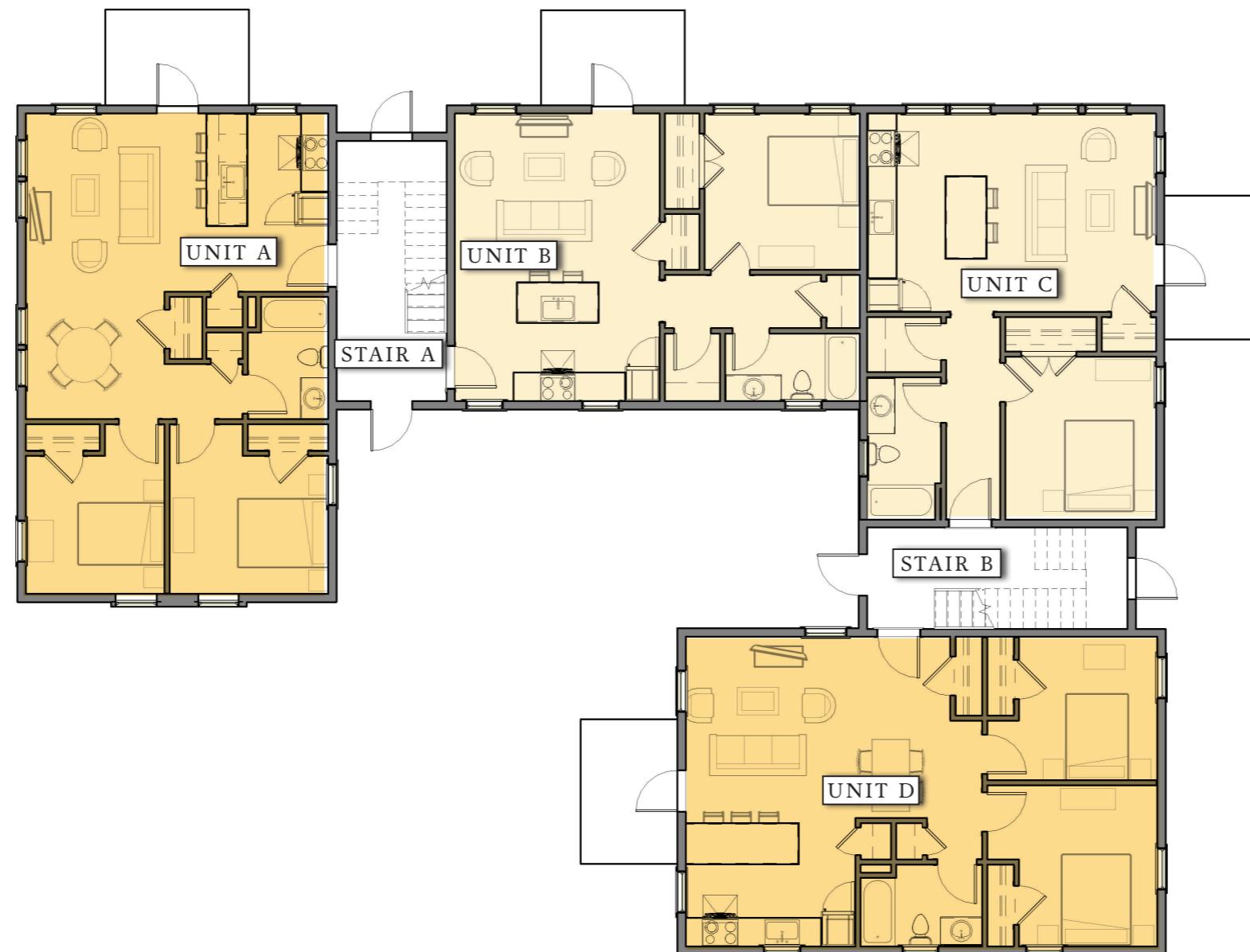
Milton Town Farm Place

BUILDING 1 & 2: THIRD FLOOR PLAN

SCALE: 3/32"=1'-0"



Building 3: First & Second Floor Plan



NOTES:

- WINDOWS IN LIEU OF DOORS IN STAIRS ON SECOND FLOOR
- NOT SHOWN: RAILINGS STANDARD ON SECOND FLOOR BALCONIES

<u>LEGEND</u>	
	3 Bedroom unit
	2 Bedroom unit
	1 Bedroom unit

Milton Town Farm Place

BUILDING 3: FIRST & SECOND FLOOR PLAN

SCALE: 3/32"=1'-0"



Building 3: Third Floor Plan



<u>LEGEND</u>	
	3 Bedroom unit
	2 Bedroom unit
	1 Bedroom unit

Milton Town Farm Place

BUILDING 3: THIRD FLOOR PLAN

SCALE: 3/32"=1'-0"



Proposed Elevation



Milton Town Farm Place

PROPOSED ELEVATION

SCALE: 1/8"=1'-0"

0 1' 2' 4' 8' 16' 32'

TYPICAL EXTERIOR

- 25 YR ASPHALT SHINGLE ROOF
- PNTD HARDI-PLANK (OR EQ.) LAP SIDING W/
- PNTD COMPOSITE RUNNING TRIM,
- CORNERBOARDS, WATERTABLE & AND WIN-
- DOW TRIM.
- INSULATED FIBERGLASS WINDOWS
- PNTD, INSULATED FIBERGLASS DOORS
- ALUMINUM GUTTERS AND DOWNSPOUTS

TYPICAL PORCH / BALCONY

- PNTD COMPOSITE FASCIA AND FRIEZE BOARD
- PNTD COMPOSITE COLUMNS AND TRIM
- WD DECKING WITH PNTD COMPOSITE SKIRT



Unit Matrix

Buildings				Instances			Footprint	Flr 1 + Flr 2	Flr 3	Basement	Community
	1 bed	2 bed	3 bed	Number Bldgs	1 bed	2 bed	3 bed				
12-unit Manor House		850	1100	Number Bldgs 2				4,290	8,580	4,040	1,170
Floor 01	0	3	1		0	6	2				
Floor 02	0	3	1		0	6	2				
Floor 03	0	4	0		0	8	0	17,160	8,080	1,170	
11-unit Manor House	686	850		Number Bldgs 1				3,712	7,424	2,698	-
Floor 01	2	2	0		2	2	0				
Floor 02	2	2	0		2	2	0				
Floor 03	3	0	0		3	0	0	7,424	2,698	-	
Community (Existing Pest House)	0	0	0	Number Bldgs 1				815			815
					7	24	4	Gross SF	24,584	10,778	1,170
											815

20% 69% 11%

Total Units:	35	Gross Residential	35,362
Total Beds:	67	Gross Basement	1,170
ADA units:	2	Gross Community	815
		Total Gross SF	37,347

5%

PARKING 53 Resident Spaces (1.5 SPACES / DU)
2 Visitor Spaces
55 TOTAL SPACES

Milton Town Farm Place

UNIT MATRIX



Perspective Rendering - Entry



Perspective Rendering - Courtyard



Construction Staging Plan: Preliminary Logistics



KEY / NOTES

Field Office

Dumpster

Material Storage

Wheel Wash

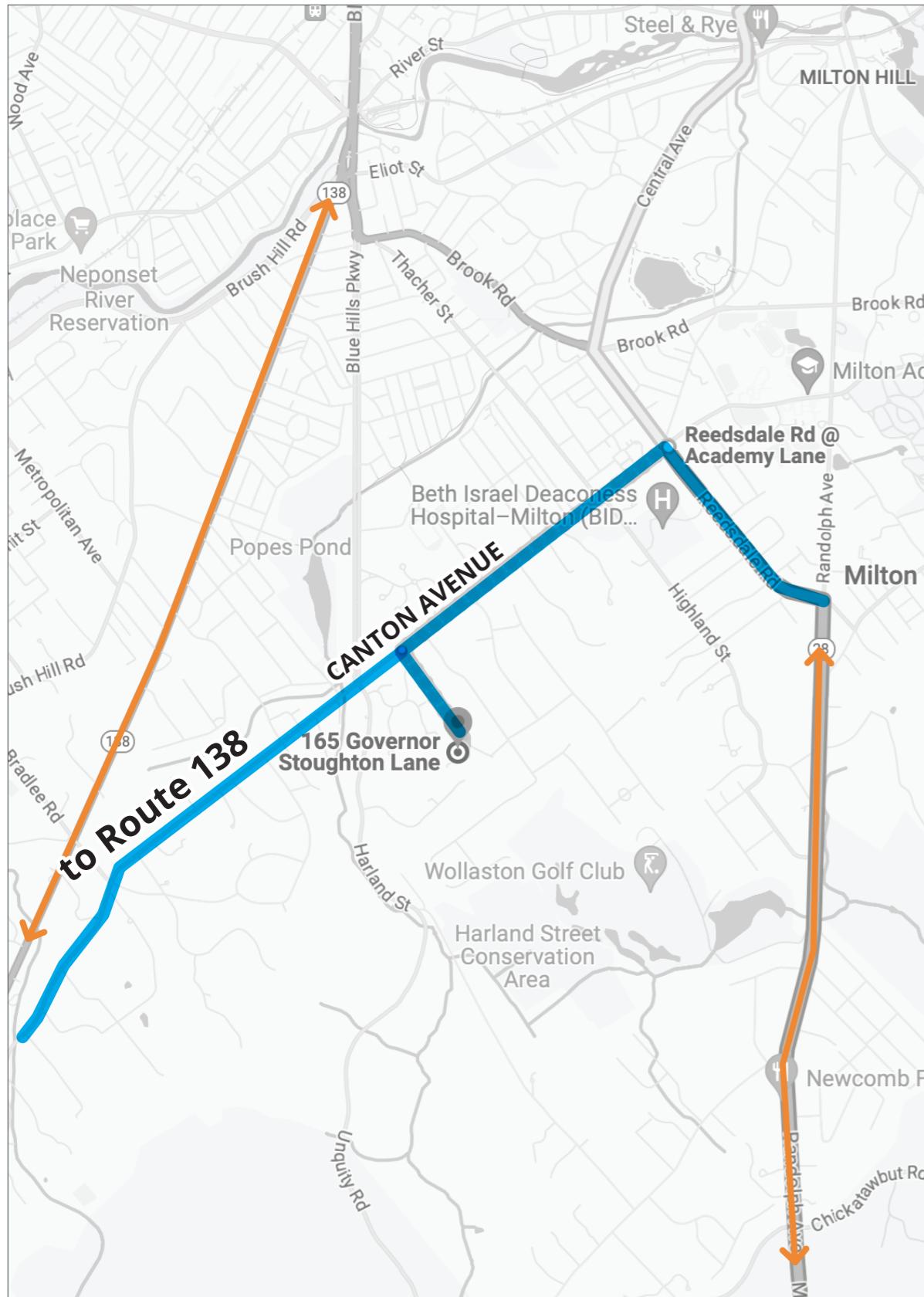
Subcontractor Parking

Material Storage

Construction Traffic

Temporary Construction Fence

Construction Staging Plan: Preliminary Logistics



GOVERNOR STOUGHTON LANE



Construction: Neighbor Communication

Recognizing the potential impact on Governor Stoughton Lane and the surrounding neighborhood, DellbrookJKS will place a strong emphasis on logistics and communication for a smooth project execution. Our team ensures that all neighbors are kept informed about upcoming construction activities that may affect their daily lives. We have found that establishing a dedicated project website, regularly updated with progress reports and notifications of upcoming work, facilitates seamless interaction with the community and fosters a sense of transparency.

We acknowledge the unique challenge of constructing in suburban environments, and can inform the abutting neighbors about the scheduled start of construction and provide regular updates throughout the construction process. Additionally, we will coordinate our construction activities with the City of Milton and other ongoing projects in the area, aiming to minimize any disruptions to the community. We are happy to participate in neighborhood meetings prior to the start of construction to inform and educate the neighbors on our upcoming project.

Dust control measures, including the use of water trucks and enclosures, are essential to mitigate air quality concerns and minimize debris dispersion. Careful planning of trucking routes helps reduce congestion and disturbance, while noise management strategies, such as quiet hours and noise-reducing equipment, mitigate disruptions. Ensuring pedestrian and traffic safety, further contribute to successful operations in suburban settings. By addressing these considerations thoughtfully, DellbrookJKS will navigate the complexities of suburban construction while fostering community goodwill and achieving project goals.

PRIMARY CONSIDERATIONS

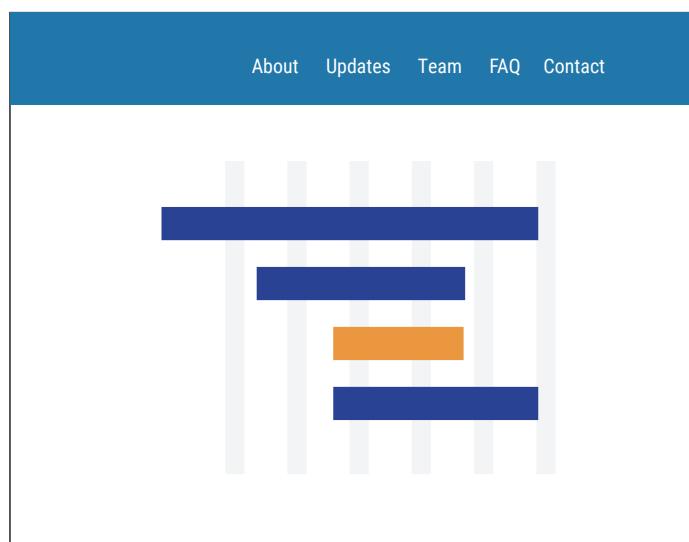
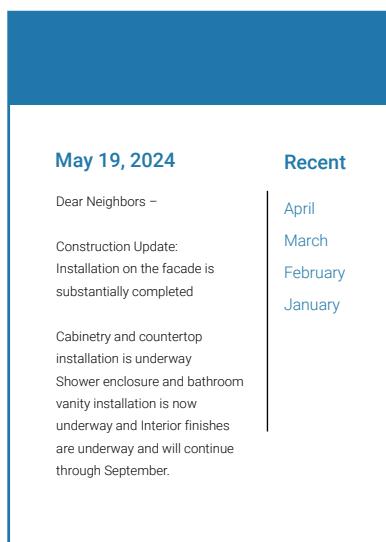
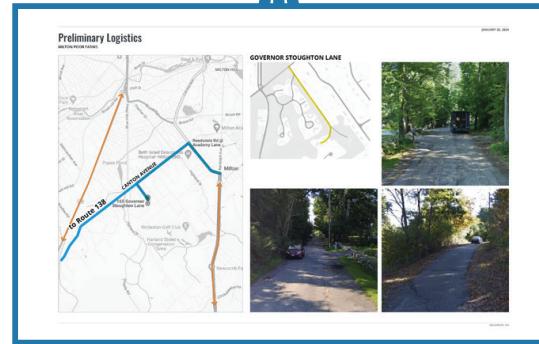
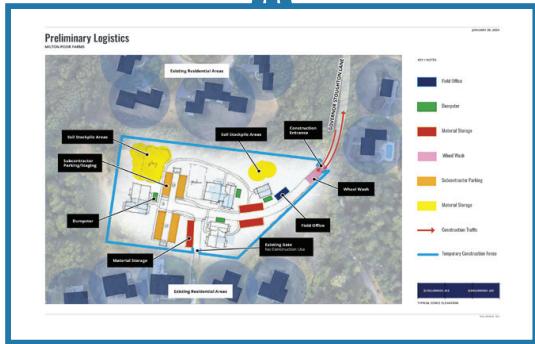
- » Trucking routes
- » Work hours
- » Dust control
- » Safety

NEIGHBORHOOD MEETINGS

- » In-person Q&A
- » Feedback
- » Review planned phases

WEBSITE & EMAIL

- » Monthly email updates
- » Upcoming activities
- » Contact information



Sample Update Flyers

Financing Narrative

DEVELOPMENT SOURCES & USES

All 35 of the units of Milton Town Farm Place will be affordable, with rents targeted to tenants at 30% to 80% Area Median Income. Since this restricts the rents, we are looking to utilize the State's affordable housing toolkit to build the capital stack.

Total development costs are \$25,381,290 which is \$725,180 per unit. Sources of funds are comprised of \$9,599,040 from the sale of Federal Tax Credits (LIHTC). We will be seeking \$1,000,000 of Federal LIHTC from the Executive Office of Housing and Community Development (HLC). This is the maximum amount that HLC likes to give any one project. It is above the basis limits that HLC has set per unit, but in preliminary conversations with HLC, they have indicated a willingness to go to this level. In addition, we will be seeking \$35,500 of State LIHTC that will generate an additional \$5,094,250 of tax credit equity. From HLC we will also be seeking \$3,500,000 from 4 different programs – multiple programs including HOME, Affordable Housing Trust, and Community Based Housing (CBH). The CBH funds are for two units adapted for the disabled who will also have services by the State. Lastly from the State we will be seeking 8 project-based Section 8 vouchers to support residents at 30% and 50% of AMI.

Debt will be provided by Rockland Trust Bank. Construction financing will be in the amount of \$16,300,000 and today's pricing is 6.91%. Permanent financing in the amount of \$5,450,000 from Massachusetts Housing Partnership will be priced at 6.37%. We are currently working with Rockland Trust on a project in Edgartown. Tax Credit equity will be provided by Boston Financial syndicators, with whom we have done many deals. See attached letters from Rockland Trust, Boston Financial and Massachusetts Housing Partnership.

In order to access the State funds, we will need local support from the Town of Milton. We are proposing the lease of land for \$1 per year, with an upfront lease payment to the Town of \$25,000 to help defray legal expenses. In addition, we will seek \$1,000,000 of Town Affordable Housing Trust Funds or CPA funds. This funding is critical to leveraging State funding. We also plan to seek \$250,000 from the South Shore Home Consortium, if possible.

We have \$288,000 from the sale of solar tax credits and rebates from EnergyStar appliances. Lastly, the Developer will defer \$200,000 of its HLC approved fee to help support the project.

Affirmative works with the Executive Office of Housing and Community Development on a regular basis and has been very successful in securing funding on the first and second rounds of funding. It just secured funding for a 60-unit project in Oak Bluffs, on the funding round last spring it secured funding for a 40-unit project in Edgartown, the round before that it secured funding for a 40 units project in Gloucester.

On the Uses side, our costs are \$25,000 upfront payment for the lease of 99 years. Hard construction costs total \$19,251,300, which is \$550,037 per unit or \$439 per square foot. Soft costs and financing costs total \$3,435,192, with the two largest costs as Architecture & Engineering at \$918,500 and Construction Loan Interest at \$1,092,904.

Reserves are set at \$392,061, which is 6 months of Operating Expenses and 6 months of Debt Service. Developer Overhead and Developer Fee are both at \$1,138,868, which is the State's formula for allowable Developer Fee in affordable housing projects.

OPERATIONS

Revenues are shaped by the LIHTC rents which are well below market. For those who are Very Low Income, we will have 8 Section 8 rental vouchers which generate higher rents for the project although the tenant only pays 30% of their income. Total revenues are anticipated at \$939,775.

On the expense side, costs have been built upon the multiple projects that Affirmative and Wingate operate and manage. Annual per unit costs are \$416,073 or \$11,888 per unit per year, including annual Replacement Reserve funding. Net Operating Income is \$454,646.

SCHEDULE

The timeline of the delivery of the project is shaped by the funding. The Commonwealth awards funding for projects that are ready to go, meaning they have zoning in place, design drawings at construction level, a budget that works. In order to enter a funding round, a project must have zoning in place and drawings at a 50% readiness. Funding rounds are held twice a year, in February and in September, but in order to be in the September round, you must be in the February round first. And to be in the February round you must be approved in the pre-application round in November.

If an award is made for the developer of the Milton Town Farm Place project in the first quarter of 2024, it might be possible to get the project ready for the pre-application in November 2024. This would take a lot of effort to make good progress on the comprehensive permit and on the development of the design. It is doable and a challenge that we would welcome. It is possible that the project will not be ready to get pre-application approval in November 2024, in which case it might have to wait until November 2025.

Proforma

PROJECT SOURCES

<u>SOURCES</u>	<u>Rental Unit</u>	<u>Rate</u>	<u>Notes</u>
Permanent Mortgage- Residential	\$5,450,000	6.37%	
EOHLC Soft	\$3,500,000		
Milton Affordable Housing Trust	\$1,000,000	0%	
South Shore Home Consortium	\$250,000	0%	
Fed LIHTC	\$9,599,040	\$0.96	\$1,000,000 allocation
State LIHTC	\$5,094,250	\$0.82	\$35,500/unit
Solar Credits/Rebates	\$288,000	\$0.96	Price per Credit
Deferred Developer Fee	\$200,000	0%	
Total Permanent Sources	\$25,381,290		

PROJECT USES

	35			
		Per Unit Costs		Per SF Costs
		Rental	Rental	Rental
Acquisition				
Land	25,000	714	0.57	
Building	-			
	25,000			
Direct Construction				
Contractor Fees	2,467,640	70,504	56.00	
Site Work	1,250,000	35,714	28.37	
Vertical Construction	13,908,360	397,382	315.63	
Solar Panels	600,000	17,143	13.62	
Permits	144,000	4,114	3.27	
Hard Cost Contingency (5%)	881,300	25,180	20.00	
	19,251,300	550,037	436.88	
General Development Costs				
Architecture and Engineering	918,500	26,243	20.84	
Survey	13,500	386	0.31	
Civil/Geotech	171,500	4,900	3.89	
Owner's Rep/Clerk of the Works	120,000	3,429	2.72	
Environmental Engineer	12,000	343	0.27	
FF&E	40,000	1,143	0.91	
Bond Premium	-	0	-	
Legal	175,000	5,000	3.97	
Title and Recording	45,000	1,286	1.02	
Accounting & Cost Cert.	40,000	1,143	0.91	
Marketing & Rent Up	75,000	2,143	1.70	
Real Estate Taxes	-	0	-	
Insurance	135,000	3,857	3.06	
Relocation	-	0	-	
Appraisal	7,000	200	0.16	
Market Study	7,500	214	0.17	
Security	-	0	-	
Construction Loan Interest	1,092,904	31,226	24.80	
Predevelopment Loan Interest & Fees	34,000	971	0.77	
Inspecting Engineer	45,000	1,286	1.02	
MIP Year 1	11,250	321	0.26	
Construction Bank Fee	81,500	2,329	1.85	
Permanent Bank Fee	54,500	1,557	1.24	
Application Fees	11,450	327	0.26	
LIHTC Fees	107,770	3,079	2.45	
Other Consulting Fees: Commissioning	17,000	486	0.39	
Other Consulting Fees: Testing	56,200	1,606	1.28	
Other Consulting Fees: Traffic	-	0	-	
Other Non-Consulting Fees: Utility Backcharges	-	0	-	
Development Consultant	-	0	-	
Soft Contingency (5%)	163,618	4,675	3.71	
	3,435,192	98,148	77.96	
Cap Reserves, Fees & Overhead				
Capitalized Reserves	392,061	11,202	8.90	
Developer Overhead	1,138,868	32,539	25.85	
Developer Fee	1,138,868	32,539	25.85	
	2,669,798	76,280	60.59	
Sum USES	25,381,290	725,180	576.00	

Projected 20-Year Operating Budget

Projected 20-Year Operating Budget

	<u>Rental Revenue</u>	<u>Rental Vacancy</u>	<u>Other Income</u>	<u>Net Income</u>	<u>Operating Expenses</u>	<u>Net Operating Income</u>	<u>Replacement Reserves</u>	<u>Debt Service</u>	<u>Cash Flow</u>	<u>DSCR incl. Reserves</u>
Connected to S+U page										
Year 1	939,775	(65,784)	3,500	877,491	(422,846)	454,646	(17,500)	(379,238)	57,907	1.15
Year 2	958,571	(67,100)	3,570	895,041	(435,531)	459,510	(18,025)	(379,238)	62,247	1.16
Year 3	977,742	(68,442)	3,641	912,942	(448,597)	464,345	(18,566)	(379,238)	66,541	1.18
Year 4	997,297	(69,811)	3,714	931,201	(462,055)	469,146	(19,123)	(379,238)	70,785	1.19
Year 5	1,017,243	(71,207)	3,789	949,825	(475,916)	473,908	(19,696)	(379,238)	74,973	1.20
Year 6	1,037,588	(72,631)	3,864	968,821	(490,194)	478,627	(20,287)	(379,238)	79,101	1.21
Year 7	1,058,340	(74,084)	3,942	988,198	(504,900)	483,298	(20,896)	(379,238)	83,163	1.22
Year 8	1,079,507	(75,565)	4,020	1,007,962	(520,047)	487,915	(21,523)	(379,238)	87,153	1.23
Year 9	1,101,097	(77,077)	4,101	1,028,121	(535,648)	492,473	(22,168)	(379,238)	91,066	1.24
Year 10	1,123,119	(78,618)	4,183	1,048,683	(551,718)	496,966	(22,834)	(379,238)	94,894	1.25
Year 11	1,145,581	(80,191)	4,266	1,069,657	(568,269)	501,388	(23,519)	(379,238)	98,631	1.26
Year 12	1,168,493	(81,794)	4,352	1,091,050	(585,317)	505,733	(24,224)	(379,238)	102,270	1.27
Year 13	1,191,862	(83,430)	4,439	1,112,871	(602,877)	509,994	(24,951)	(379,238)	105,805	1.28
Year 14	1,215,700	(85,099)	4,528	1,135,128	(620,963)	514,165	(25,699)	(379,238)	109,228	1.29
Year 15	1,240,014	(86,801)	4,618	1,157,831	(639,592)	518,239	(26,470)	(379,238)	112,530	1.30
Year 16	1,264,814	(88,537)	4,711	1,180,988	(658,780)	522,208	(27,264)	(379,238)	115,705	1.31
Year 17	1,290,110	(90,308)	4,805	1,204,607	(678,543)	526,064	(28,082)	(379,238)	118,743	1.31
Year 18	1,315,912	(92,114)	4,901	1,228,699	(698,899)	529,800	(28,925)	(379,238)	121,637	1.32
Year 19	1,342,231	(93,956)	4,999	1,253,273	(719,866)	533,407	(29,793)	(379,238)	124,376	1.33
Year 20	1,369,075	(95,835)	5,099	1,278,339	(741,462)	536,877	(30,686)	(379,238)	126,952	1.33

RENTAL REVENUE

INCOME TIERS					MONTHLY RENTS (2024 Rent Level)						
Units	PBV	PBV	30% AMI	50% AMI	60% AMI	80% AMI	Units	60% AMI	80% AMI	PBV	TOTAL
One-bed	7	2	1	3	1		One-bed	\$1,476	\$2,005	\$2,527	\$14,011
Two-bed	24	2	2	16	4		Two-bed	\$1,757	\$2,391	\$3,015	\$49,734
Three-bed	4	1	0	2	1		Three-bed	\$2,022	\$2,756	\$3,671	\$10,472
Total	35	5	3	21	6		Total	\$5,255	\$7,152	\$9,213	\$74,217

Mr. Craig Nicholson
Affirmative Investments, Inc.
By email: [REDACTED]

January 30, 2024

Dear Mr. Nicholson:-

This letter confirms the interest of Rockland Trust in providing construction loan financing to Affirmative Investments Inc. (or an affiliate) in connection with the proposed development of a project known as Milton Town Farm. The project consists of the construction of 35 units of affordable rental housing on an approximate 4 acre site located at 165 Governor Stoughton Lane, Milton, MA.

Rockland Trust has reviewed materials provided by Affirmative Investments, Inc. that shows a proposed total development cost of approximately \$25.1 million and subject to Rockland Trust's standard loan underwriting and approval processes, would be capable of providing up to \$16.3 million of construction loan financing at competitive rates using one of our multi-family financing programs.

For a project of this size, Rockland Trust generally provides a 30-month term loan with a 24-month draw period and fixed rate pricing pegged to FHLB, plus a credit spread of 225 basis points. The indicative fixed interest rate today is 6.70%, based on 30-month FHLB (4.45%) plus the aforementioned credit spread. Rockland Trust would also charge a 50 bps loan commitment fee, payable at closing.

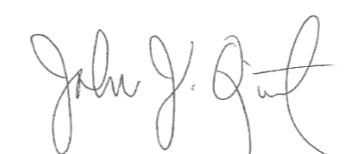
Rockland Trust has financed the construction of many multi-family housing developments of similar size and complexity and is familiar with the interplay between multiple financing sources such as public lenders and equity investors that are likely to participate in the financing structure for the proposed project.

This letter is not a formal commitment to lend, but represents Rockland Trust's strong expression of interest in providing construction loan financing if you are the successful developer and awarded the necessary tax credits and other sources of project financing.

Sincerely,

ROCKLAND TRUST COMPANY

By:-



John J. Quintal, Senior Vice President

Rockland Trust Company
101 Arch Street, Suite 2020
Boston, MA 02110



Massachusetts
Housing
Partnership

February 1, 2024

Nicholas Milano, Town Administrator
Milton Town Hall, 2nd Floor
525 Milton Avenue
Milton, MA 02186

160 Federal Street
Boston, Massachusetts 02110
Tel: 617-330-9955
Fax: 617-330-1919
www.mhp.net

RE: Town Farm Development, Milton

Dear Mr. Milano:

I am writing to express my strong support for the Affirmative Investments application to the Town of Milton, to develop affordable multifamily rental housing at the Town Farm site located at 165 Governor Stoughton Lane in Milton.

I understand the development will contain newly constructed sustainable buildings, aligned with Passive House standards, to create 35 units of rental housing for individuals and families that will be affordable to households in the range of 30% up to 80% of the area median income.

After a preliminary review of both your development and operating projections for the project, I have determined that a first mortgage loan of \$5,265,000 with a term of 20 years (amortizing over 35 years) at an interest rate of 7.17% (which provides for a 30-month rate lock as well as a cushion to hedge against interest rate increases) would be feasible for the project.

Over the past 20 years, I've been impressed by Affirmative Investments highly qualified team of industry experts who understand the importance of developing mixed income housing in communities throughout Massachusetts.

Based on their proven track record as an owner and developer as well as their ability to assemble a strong team of hard working, experienced and dedicated affordable housing real estate professionals, I am confident Affirmative Investments will develop a successful project that meets the vision of the Town of Milton.

We would be pleased to expand our relationship with Affirmative Investments on this exciting opportunity to meet the growing local need for affordable rental housing for working families who are facing displacement due to escalating home costs and rents.

Please feel free to give me a call any time for additional information.

Sincerely,

A handwritten signature in blue ink that reads "Nancy McCafferty".

Nancy McCafferty
Director of Business Development

January 24, 2024

Mr. David Ennis & Craig Nicholson
Affirmative Investments, Inc.
33 Union Street
Boston, MA 02108

RE: Milton Town Farm
Milton, MA

Dear David & Craig:

Thank you for giving us the opportunity to present an initial proposal for an equity placement for Milton Town Farm (the “Property”). The Property will consist of 35 units for family tenants located in Milton, Massachusetts. Financing is projected to come from Federal Low Income Housing Tax Credit equity, Massachusetts State Low Income Housing Tax Credit equity, a permanent mortgage, and various public and private subordinate lenders. We understand that you are in the process of obtaining financing commitments and a tax credit allocation for the Property. Given the history of our successful investment in affordable housing in Massachusetts over the last 25 years and your familiarity with us, I expect that we will be able to quickly close a transaction that works for everybody in accordance with EOHLA regulations.

Based on the information you have provided to us, this letter will outline the principal terms on which a limited partnership sponsored by Boston Financial (“BFLP”) would acquire an interest in the partnership owning the Property (the “Partnership”) for an institutional fund of ours.

We will not begin our due diligence review until we have evidence that you have received a tax credit reservation and we have an executed proposal letter in hand. We have reviewed the application, modeled this transaction and are prepared to issue a formal proposal upon confirmation that you have been awarded tax credits. Assuming no issues arise, our due diligence review should be completed within 60 days of receipt of all due diligence materials.

1. Price.

We are assuming an equity raise of \$0.96 per credit dollar for 99.99% of the federal tax credits, and \$0.82 per credit dollar of the state tax credits that would be contributed directly to the project. BFLP will pay for its own legal expenses and there will be a due diligence charge of \$25,000.

We are prepared to fund the capital contributions in multiple installments under a negotiated pay-in schedule. Prior to closing, we will confirm your equity needs to ensure that they meet your lender’s requirements.

2. Operating Benefits and Residuals

The profits, losses and tax credits of the Partnership will be shared among the partners as follows: 99.99% to BFLP and .01% to a to-be formed entity (the “General Partner”). The General Partner will be a corporation in which the manager is expected to be an affiliate of Affirmative Investments, Inc. After BFLP receives a priority distribution, 90% of the remaining cash flow will go to the General Partner. A portion of the General Partner’s share may be distributed as an incentive management fee.

Upon sale or refinancing of the Property, 90% of the residuals will go to the General Partner after the satisfaction of any outstanding General Partner obligations.

3. Guarantees

In addition, the General Partner and the developers will be required to complete construction and accomplish a final loan closing at their cost. Additionally, for a negotiated period of time the General Partner will be required to fund deficits without reimbursement. Subsequently, the General Partner will be required to lend funds, up to a maximum negotiated amount, if the project continues to run at a deficit. These loans can be repaid from cash flow or residuals.

Boston Financial is a nationally recognized expert in low-income housing. We have the largest affordable housing portfolio in the industry with a total cost in excess of \$10 billion under management. Based upon a long history of conservative structuring and economic evaluation of properties, we have an outstanding record of success for investments which we have sponsored over the past 40 years.

Sincerely,



Rob Charest
Senior Vice President



*Union designed affordable housing community,
Park Holm in Newport, RI*

SECTION 3

Management Plan

- Property Management Overview
- Targeting
- About Wingate Management Company
- Wingate's Scope of Services
- Management Plan
- Marketing/Tenant Selection/Occupancy

Property Management Overview

Our lease-up agent and property manager is Wingate Management Company of Needham, MA. Affirmative currently partners with Wingate on four properties in Massachusetts, which Affirmative has developed. They include:

1. **Twelve Summer Street, Manchester-by-the-Sea, MA**
23 units, mixed income, LIHTC since 2003, Section 8 HAP contract, Spectrum compliance
2. **Waverley Woods, Belmont, MA**
40 units, 100% affordable, LIHTC since 2009, Spectrum compliance
3. **Winthrop Apartments, Winthrop, MA**
40 units, mixed income, Section 8 HAP contract Spectrum compliance
4. **Union Apartments, Attleboro, MA**
59 units, low-income and Workforce Housing, MRVP contract, Section 8 Hap contract, Spectrum compliance

Wingate is a highly experienced and respected Manager. They:

- » Manage over 2,300 units nationwide in 274 properties
- » 110 of the Wingate properties are Low-Income Housing Tax Credit (LIHTC) properties
- » 105 of the properties have Section 8 contracts
- » Excellent relationship with Executive Office of Housing and Living Communities
- » Highly experienced in LIHTC compliance, income certification, file requirements, Spectrum reviews
- » Experienced and knowledgeable about all aspects of Affirmative Fair Housing – goals, guidelines, practical implications
- » Work closely with State MRVP rental voucher program
- » Conduct 6-7 lotteries a year for Massachusetts properties following clear State guidelines for Affirmative Fair Housing Marketing Plans
- » Works closely with Affirmative during the design development phase to think through the best workable layouts and needs of the property from a management perspective
- » Works closely with Affirmative on operating budget preparation

There are several key documents that Wingate is responsible for, including:

THE MANAGEMENT PLAN, which includes:

1. The Management Structure
2. Responsibilities of Owner and Manager
3. Staffing Needs and Policies
4. Security Measures
5. Marketing
6. Occupancy Terms
7. Financial Reporting
8. Tenant Files
9. Maintenance Procedures

THE AFFIRMATIVE FAIR HOUSING MARKETING PLAN, which includes:

1. Informational materials for applicants including a general description of the overall project that provides key information
2. A description of the eligibility requirements
3. A description of the rules for applying and the order in which applications will be processed
4. Lottery and resident selection procedures
5. A clear description of the preference system being used
6. A description of the measures that will be used to ensure affirmative fair marketing will be achieved including a description of the affirmative fair marketing and outreach methods that will be used, sample advertisements to be used, and a list of publications where ads will be placed
7. Application materials

THE TENANT SELECTION PLAN, which includes:

1. Statement of Non-Discrimination
2. Eligibility and Selection Criteria
3. Applications
4. Preferences, Priorities, and Targeting
5. Initial Rent-Up/Lottery
6. Waiting Lists
7. Vacancies
8. Additional Policies Regarding Special Use Units
9. Miscellaneous Provisions

Targeting

The unit mix of 7 one-bedroom, 24 two-bedroom and 4 three-bedroom units is driven by two factors – the Milton Housing Production Plan statement of the need in Milton for affordable family housing and the Commonwealth's push to build new production family units. 28 of the 35 units are two or three bedroom, targeted to families. The 7 one-bedroom units are appropriate for seniors, individuals and couples.

The Tenant Selection Plan will have a clear statement that up to 70% of the units will be reserved for Milton residents, following the HLC guidelines. We will work with the Milton Housing Authority and market to its waiting list of appropriate residents. We will advertise in the following newspapers to reach potential residents in Milton and surrounding communities:

1. The Milton Times
2. The Dorchester Reporter
3. Bay State Banner
4. Thang Lang Newspaper

The marketing effort will begin 4 months before construction completion, with the lottery held 2 months before completion, giving us time to do income certifications for potential tenants.

About Wingate Management Company



**MANAGE HOMES FOR EVERYONE:
INDIVIDUALS, FAMILIES, AND SENIORS**



**20,300+ UNITS
88% AFFORDABLE, 10% CONVENTIONAL**



**274 PROPERTIES
110 LIHTC & 105 PBV**

- » We manage in multiple locations from urban to suburban.
- » Experience in managing diverse building and property types such as high-rise, low-rise, garden style apartments, and town homes; from scattered site portfolios to single-site locations.
- » Deep relationships with state and federal agencies such as MassHousing, Georgia Department of Community Affairs, Rhode Island Housing, and HUD.
- » Affordable program experience includes, and is not limited to Project Based Section 8, Section 8 Vouchers (enhanced), Project Based Vouchers, Section 236, Home Funds, Section 13-A, NSP, Section 42 LIHTC, MRVP, Section 202, SHARP, 40B, 40R and Workforce Housing Properties.
- » Specifically designed management plan to meet each owner's objectives.
- » Reduce operating expenses through effective bidding processes, energy purchasing and efficient personnel management.
- » Compliant with the Low-Income Housing Tax Credit Program.
- » Accounting systems that leverage technology to maximize property efficiencies and reporting.



Wingate's Scope of Services

RESIDENT SERVICES:

- » Customized programs to best meet the needs of each property's individual resident population
- » Resident Service Coordinators – Either paid through grants or through operations, Wingate has employed several experienced resident service coordinators who are skilled in providing or finding services ranging from assistance with finances, health and wellness, child services, and food access. Wingate recognizes the vital role that RSCs play in serving the direct needs of residents, but also in building a community of trust and internal support.
- » Family Self Sufficiency – Wingate is currently in partnership with Compass Working Capital on a pilot FSS program for Monte Vista Apartments in Philadelphia. We intend on using the successful aspects of this model as the foundation for future FSS programs within our portfolio.

MARKETING:

- » Successful market-rate and affordable lease-ups
- » Identify occupancy challenges and review competitive market landscape
- » Curated and customized marketing plans
- » Creative advertising programs
- » Advanced technologies and in tune with industry trends

QUALITY CONTROL:

- » Exceptional on-site management policies and procedures including compliance, routine and preventive maintenance programs
- » Quality accounting practices with internal controls
- » Proactive REAC procedures to ensure optimum scores
- » Energy efficient auditing and mechanical system enhancements
- » Extensive compliance controls at the site and corporate levels, and with the help of third-party compliance monitoring firms



Wingate's Scope of Services Continued

TAILORED & DETAILED PLANNING:

- » An understanding of the owner's objectives, which are then reflected in the budget process and on site operations
- » Development of specifications for capital improvements, property renovation and construction
- » Strategic marketing programs designed to attract qualified residents and increase occupancy levels
- » Efficiencies in purchasing supplies, utilities and insurances
- » Tailored reporting packages for owners, agencies and lenders

MANAGING KEY RELATIONSHIPS:

- » Strong relationships with state and federal housing authorities
- » Resident Service Programs
- » Resident retention and engagement programs
- » Active participation and leadership with industry organizations
- » Decades worth of experience, contacts and networks in all facets of real estate management



Management Plan

As the Managing Agent for the Property, Wingate Management Company (“Wingate”) will be responsible for the following tasks: marketing and rentals, daily operations, maintenance and repairs, budgeting and planning, accounting, community, and resident relations. Michael Martin, President of Wingate, is responsible for all of Wingate’s management activities. Gene Zhitomirsky, Senior Vice President, reporting to Michael Martin, will be the senior staff assigned to the property. The Regional Vice President/Regional Property Manager will report directly to Gene, and will supervise the dedicated Property Manager who will have direct responsibility for oversight of the property, including, but not limited to:

- » Hiring, training and supervision of maintenance personnel and other staff members, if any;
- » Preparing and enforcing all rental procedures and reports;
- » Coordinating all community and resident relations including resident organization meetings;
- » Supervising all repairs, redecoration, and maintenance projects;
- » Preparing all accounting, occupancy, marketing, equal opportunity and operational reports and;
- » Preparing the annual budget.

All of the above functions will be performed in accordance with generally accepted professional standards, federal, state and local agency guidelines, and the Management Agreement.



Marketing/Tenant Selection/Occupancy

The Agent will implement the Project's approved Tenant Selection. The Managing Agent will follow federal, state, and local laws prohibiting discrimination as described in the Management Agreement.

The Agent will follow the Affirmative Fair Housing Marketing Plan (AFHMP) requirements for filling vacancies to ensure the units are made available to prospective tenants in compliance with all state and federal Fair Housing requirements. Waitlists requirements will be strictly followed to ensure equal opportunity for all eligible applicants.

Tenant selection and screening will provide the project with qualified residents. To accomplish this, the Property Manager will conduct interviews with applicants, review qualifying criteria and verify information from third party sources. The Property Manager will also explain procedures and answer questions on operational features of the units and property. Topics covered will include rent and maintenance policies, as well as planned activity programs and services. The lease and rules and regulations will be explained in detail. Whenever necessary, a translator will be provided.

Upon selection, each resident will receive an explanatory Resident Handbook reviewing all of the Property's policies. The property manager will inspect the apartment with the resident utilizing a checklist which both will initial. Care of the unit, operation of appliances and emergency situations will be discussed.

The Property Manager will be trained in and follow all regulations related to the CDBG program, CPA, HOME, or Somerville Affordable Housing Trust. S/he will make an initial determination of the household income eligibility based on a preliminary application and interview.

The Manager will then have the applicant sign the necessary consent forms to secure third party verification of income, credit, and landlord information. Once information has been verified, the appropriate Certification form will be completed. If the applicant is income eligible and has acceptable credit and landlord references, s/he will be accepted for tenancy.

WAITLIST MAINTENANCE & ADVERTISING On an annual basis, applicants on the waitlist will be contacted by mail to determine their continued interest in the Property. Waitlists will then be updated accordingly. When it is determined that the size of the waitlist is inadequate to support anticipated turnover, the Manager will place advertisements in the area and local newspapers, Government and non-profit organizations will be contacted, and mailings will be sent to interest parties, local senior centers, and councils on aging.



ANNUAL & ONGOING FUNCTIONS (E.G. RECERTIFICATION)

The Property Manager will be responsible for the annual recertification process. The Property Manager will be trained in regulations regarding recertifications and will assure that the process is carried out in accordance with HUD regulations. The property manager will lease, manage, and operate the property in a manner that complies with the affordable programs and all associated regulatory agreements. The Property Manager shall send notices to residents 120, 90, 60, and 30 days prior to the recertification date. The Property Manager will work with each resident to recertify the household.

INSPECTIONS

Unit inspections will be performed by the Property Manager and the tenant at initial occupancy, and at least once annually in accordance with the building inspection schedule (or more frequently if required) and prior to move out. The Unit Inspection Form will be used to record the results of the inspection. The Property Manager and the tenant will sign and date the Inspection Report, indicating their agreement of the condition described.

The Property Manager will inspect the public areas of the building monthly. On an annual basis, a third-party contractor will be hired to inspect all fire and safety equipment.

EVICTION PROCEDURES

Evictions will be initiated only for non-payment of rent or for repeated or substantial violations of the lease, including any approved Rules and Regulations, which may be attached as an addendum to the lease. The property's collection policy will be strictly enforced.



SECTION 4

Implementation Plan & Timeline

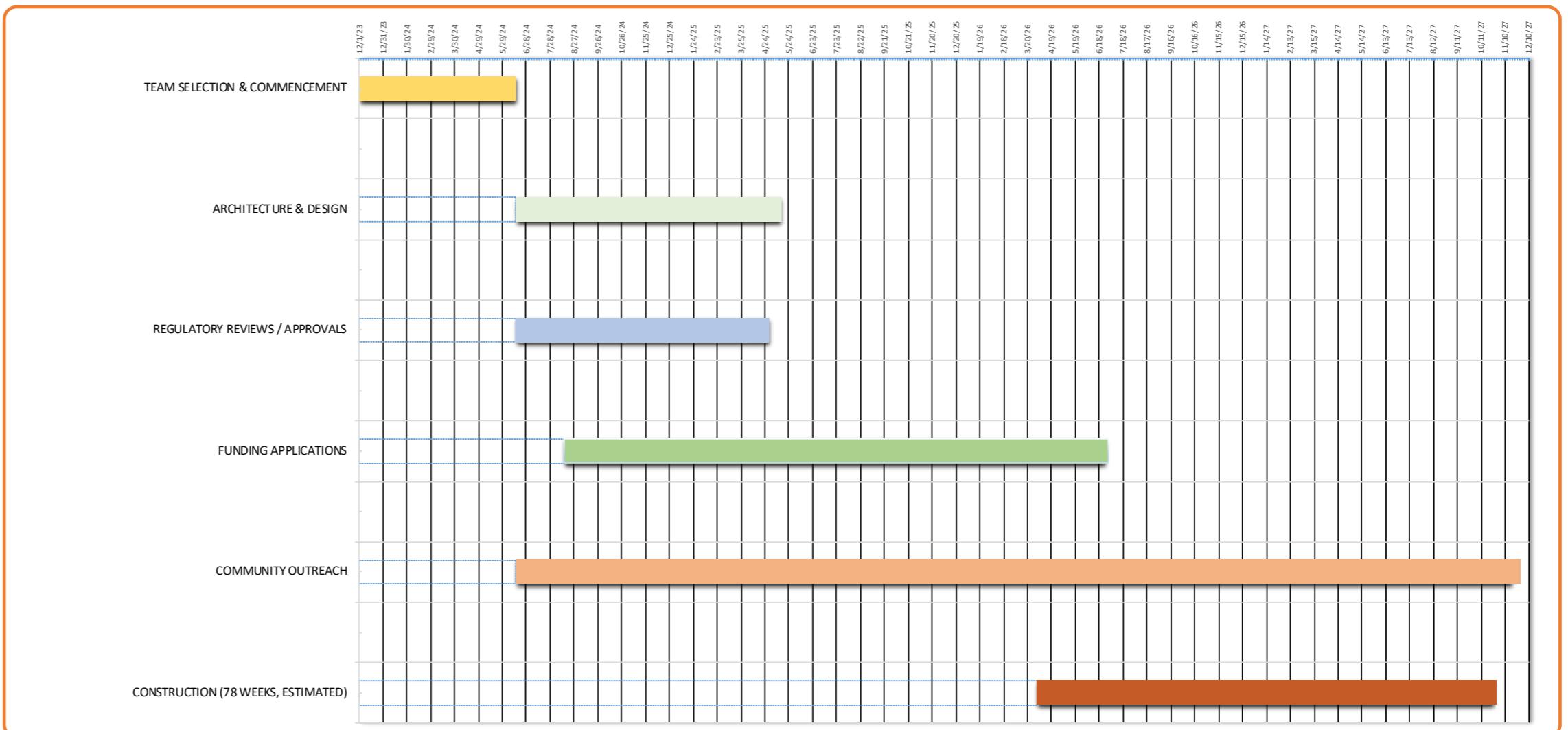
- Development Schedule
- Required Regulatory Approvals

Development Schedule

Development Schedule

MILTON TOWN PLACE

PROPOSED PROJECT SCHEDULE		
TASK NAME	START	END
TEAM SELECTION & COMMENCEMENT	12/1/23	6/15/24
RFP Development	12/1/23	2/16/24
RFP Award	6/1/24	6/7/24
Project Kickoff	6/7/24	6/15/24
ARCHITECTURE & DESIGN	6/15/24	5/15/25
Schematic Design	6/15/24	7/31/24
Design Development	8/1/24	10/31/24
Construction Documents	11/1/24	5/15/25
REGULATORY REVIEWS / APPROVALS	6/15/24	4/30/25
Enter into LDA with Town of Milton	6/15/24	8/15/24
Project Eligibility Application	6/15/24	10/15/24
40B Comprehensive Permit Application	10/15/24	4/30/25
FUNDING APPLICATIONS	8/15/24	6/30/26
Town of Milton	8/15/24	11/15/24
EOHLC Applications / Financial Closings	11/15/24	6/30/26
Equity Investor Selection	6/15/25	10/15/25
COMMUNITY OUTREACH	6/15/24	11/30/27
Affordable Housing Trust (Quarterly Updates)		
Select Board (Semi-Annual Updates)		
Community Meetings (Quarterly)		
CONSTRUCTION (78 WEEKS, ESTIMATED)	4/1/26	10/31/27
Building Permit Application	4/1/26	5/31/26
Contract Administration, Special Inspections, Closeout	7/1/26	10/31/27



**It is important to note that this schedule assumes that the development team will have to go through two rounds of OneStop State funding applications due to the time needed to obtain zoning approvals. If zoning is obtained earlier than anticipated, then the development schedule would be moved up accordingly.

Required Regulatory Approvals

Affirmative Investments plans to seek the necessary zoning relief with a Comprehensive Permit through M.G.L. Chapter 40B. This process has two distinct steps which are outlined in our project timeline. The first is the Project Eligibility designation granted by the Executive Office of Housing and Livable Communities. This application would be within 60 days from the announcement of the RFP award. Project Eligibility allows for 90 days from application, through public comment from the Town of Milton to official designation. The second step is the application to the Town's Zoning Board of Appeals for the Comprehensive Permit. The ZBA process allows for up to 180 days in order for the Town to properly review the application, receive peer reviews of the submittal, and allow for adequate public comment. Throughout these two processes, Affirmative will be conducting quarterly community meetings where we will present current versions of our plans, updated schedules and receive public comments on how to better the project.

The waivers to be requested may change through the design and review process, but key components will include:

1. Use waiver to allow multi-family buildings
2. Permanent sign for the development
3. Minimum frontage per dwelling unit
4. Minimum lot size per dwelling unit
5. Parking (2 spaces per unit)



SECTION 5

Attachments

- H – Trust Lease of the Town Farm
- J – Certificate of Tax Compliance
- L – Disclosure Statement for Transaction with a Public Agency
- M – Certificate of Vote
- N – Conflict of Interest Certification

Attachment H

**GOVERNOR STOUGHTON TRUST
LEASE OF THE TOWN FARM**

PRICE PROPOSAL

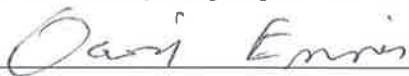
A. The undersigned submits the following price Proposal:

Annual Lease Payment	\$ <u>25,000 up front and \$1 per year</u>
Total Lease Period:	\$ <u>99 years</u>

C. The undersigned certifies that he or she is familiar with the property and its condition and has thoroughly reviewed the Request for Proposals.

D. The undersigned certifies under the penalties of perjury that this Proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certified, the word "person" shall mean any natural person, business, partnership, corporation, club, or other organization, entity, or group of individuals.

Signature



PRINTED NAME: David Ennis

PRINTED TITLE: President, Affirmative Investments, Inc.

ADDRESS: 33 Union St, Boston MA 02108

TELEPHONE: ██████████

DATE: February 15, 2024

The Governor Stoughton Trust reserves the right to reject all Proposals submitted, should it be deemed by the Trust to be in its best interests.

Attachment J

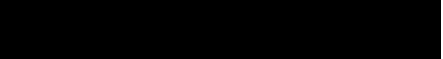
CERTIFICATE OF TAX COMPLIANCE

Pursuant to Chapter 62C, Section 49A of the Massachusetts General Laws, I certify under the penalties of perjury that the Proposer named below has complied with all laws of the Commonwealth of Massachusetts pertaining to the payment of taxes, to the reporting of employees and contractors, and to the withholding and remitting of child support.

Affirmative Investments, Inc.
Name of Proposer

33 Union St.
Address of Proposer

Boston MA 02108

Telephone Number 

By: David Ennis
(Signature)

David Ennis
Printed Name

President
Printed Title

February 15, 2004
Date

Attachment L

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

INSTRUCTION SHEET

NOTE: The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

Section (1): Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

Section (2): Identify the type of transaction to which this Disclosure Statement pertains --such as a sale, purchase, lease, etc.

Section (3): Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

Section (4): Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

Section (5): Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

Section (6): List the names and addresses of **every** legal entity and **every** natural person that has or will have a **direct or indirect** beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

Section (7): Write "none" in the blank if none of the persons mentioned in Section 6 is employed by DCAMM. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM.

Section (8): The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

Section (9): Make sure that this Disclosure Statement is signed by the correct person. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate
Division of Capital Asset Management and Maintenance
One Ashburton Place, 15th Floor, Boston, MA 02108

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

(1) REAL PROPERTY:

(2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT:

Leasing of Town Owned Property

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

(4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):

(5) ROLE OF DISCLOSING PARTY (Check appropriate role):

Lessor/Landlord Lessee/Tenant

Seller/Grantor Buyer/Grantee

Other (Please describe):

(6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

NAME

RESIDENCE

(7) None of the above- named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (insert "none" if none):

(8) The individual signing this statement on behalf of the above-named party acknowledges that he/she has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the Securities and Exchange Commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and timeshares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arm's length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.

The commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.

(9) This Disclosure Statement is hereby signed under penalties of perjury.

PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

David Ennis 02/15/2024
AUTHORIZED SIGNATURE of DISCLOSING PARTY DATE (MM/DD/YYYY)

David Ennis, President
PRINT NAME & TITLE of AUTHORIZED SIGNER

Attachment M

CERTIFICATE OF VOTE

I, _____, hereby certify
(Clerk/Secretary)

that I am the duly qualified and acting _____ of _____

(Title) (Corporation Name)

and I further certify that at a meeting of the Directors of said Corporation duly called and held on
_____, 20 ___, at which meeting all Directors were present and voting, the following
vote was unanimously passed:

VOTED: To authorize and empower either

_____, _____;
(Name) (Title)
_____, _____; or
(Name) (Title)
_____, _____
(Name) (Title),

any one acting singly, to execute all contracts and bonds on behalf of the Corporation.

I, further certify that the above vote is still in effect on this the _____ day of _____, 20 ___,
and has not been changed or modified in any respect.

Signature

Printed Name

Printed Title

Date

The certification contained here above shall be executed on behalf of the Proposer or a copy of
current "certification of authority to sign for the Corporation" shall be attached.)

Attachment N

CONFLICT OF INTEREST CERTIFICATION

The Proposer hereby certifies that:

1. The Proposer has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of a Contract pursuant to this RFP.
2. No consultant to, or subcontractor for, the Proposer has given, offered, or agreed to give any gift, contribution, or offer of employment to the Proposer, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a Contract by the Proposer.
3. No person, corporation, or other entity, other than a bona fide full time employee of the Proposer has been retained or hired to solicit for or in any way assist the Proposer in obtaining a Contract pursuant to this RFP upon an agreement or understanding that such person, corporation or entity be paid a fee or other compensation contingent upon the award of a Contract to the Proposer.
4. The Proposer understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws, applies to the Proposer and its officers, employees, agents, subcontractors, and affiliated entities with respect to the transaction outlined in the Request for Proposals.
5. The Proposer understands that the Proposer and its officers, employees, agents, subcontractors, and affiliated entities, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

Affirmative Investments, Inc.

Name of Proposer

33 Union St.

Address of Proposer

Boston MA 02108

Telephone Number

By: David Ennis

(Signature)

David Ennis

Printed Name

President

Printed Title

02/15/24

Date



Affirmative Investments, Inc.
33 Union Street
Floor 2
Boston, MA 02108