

Peregrine Urban Initiative, LLC

Real Estate and Economic Development Consulting

AKA Byer Gallo Associates, LLC

June 3, 2020

Sue Brown, Town Planner
Manchester Town Hall
10 Central Street
Manchester, MA 01944

RE: Proposal to Provide Housing Development Advisory Services.

Dear Ms. Brown:

It is with great pleasure that we submit this proposal for services to provide Real Estate Advisory and Affordable Housing Development Consulting Services to assist in the renovation and/or creation of public and mixed-income affordable housing units in the Town of Manchester-by-the-Sea, under contract with MHA and MAHT.

Collectively, our team brings decades of experience in the fields of affordable housing finance, design, development and construction management. In that time, we have been able to bring over 3,000 units of new and rehabilitated low-to-moderate income housing, including public housing. We also have experience with private mixed-income projects that provide rental housing opportunities for middle-income residents who earn too much to qualify for low-and-moderate income subsidized housing.

We are excited about the opportunity to explore the rehabilitation and creation of a meaningful affordable housing solution with the Town of Manchester-by-the-Sea!

Lead Consultant: Peregrine Urban Initiative, LLC, Beverly Gallo, Principal.

As described in more detail in this submission, Bev Gallo is an independent contractor and sole-proprietor, who will oversee and manage all of the services described herein. As Lead Consultant, Bev will work with the architects and engineers to carry out the work required to prepare the "deliverables" described in this submission. She will be the primary point of contact for the MHA and MAHT and will coordinate and communicate all correspondence.

In the role of financial advisor, Bev will develop project budgets and proformas based on the schematic work of the architect and develop a plan of finance to test financial feasibility through development and operations. These proformas will inform and facilitate the decision-making process at the town level as required. She will develop and manage conceptual project budgets and proformas that will be used to underwrite the preferred program. She will

ultimately be responsible for preparing the Summary Report (as a “deliverable” described in the RFP).

In addition, to the financial feasibility scope, Bev will work with the architectural sub-contractor to develop the housing program, including unit counts and schematic project siting, and will assist in the zoning and entitlement analysis. Once all of this information has been considered, we will present all findings and programming proposals back to the MHA and MAHT for comment and discussion. More information regarding our approach is provided in our submission.

Architectural Sub-Consultants: DHK Architects, Alberto Cardena, AIA

To address these scopes, I am pleased to be working with DHK Architects of Boston, MA. DHK Architects is an architecture and planning firm with 40 years of experience and an outstanding track record in affordable housing providing design services for not-for-profit and for-profit developers and local housing authorities throughout the Northeast, the Midwest and Puerto Rico. DHK brings a depth of experience in architectural and engineering services to over 100 affordable housing projects. Their portfolio of projects is extensive and ranges from developments with as few as eight units to as many as several hundred, covering all types of building and construction typologies including modular construction. DHK has won accolades for the superior quality of its design work.

DHK's services for this project include a due diligence phase to document existing conditions, collect documentation and prepare base plans. This will be followed by an analytical phase to evaluate existing conditions, zoning and other applicable regulations at the three residential sites and the DPW property. Subsequently DHK will assist in the development of a recommended scope of renovations for the existing buildings and an evaluation of the development potential for all of the sites and the preparation of diagrammatic site plans, design guidelines and build out calculations.

We look forward to exploring the development options with you with the goal of attracting interested and competent development partners that will be successful in assisting the Town in the creation of a meaningful affordable housing strategy. Please let us know if you require additional information.

Sincerely,

A handwritten signature in dark ink, appearing to read 'B Gallo', with a stylized, flowing script.

Beverly Gallo
Principal, Peregrine Urban Initiative, LLC

Peregrine Urban Initiative

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Proposal for Real Estate Advisory and Development Consulting Services Prepared for: Town of Manchester, Planning Office

Proposal for Services

We are pleased to submit this proposal for services to the Manchester Housing Authority (MHA) and the Manchester-by-the-Sea Affordable Housing Trust (MAHT), in accordance with the Request for Proposals dated April 8th, 2020. The scope of service detailed below generally includes the review and exploration of how best to maintain existing public housing units, as well as to create new affordable housing opportunities in the Town. As Advisors, our team will be tasked with developing a ‘concept plan’ approach that will provide a roadmap for assessing physical and financial feasibility, gauging public response and comments, seeking interest from developers, lenders and investors, as well as delivering a summary development strategy reflecting our findings and recommendations.

We are excited about the opportunity to apply our collective experiences in the field of affordable and public housing and to work with the MHA and MAHT to develop a strategy to meeting this goal.

Scope of Services and Project Approach

To address the objectives outlined in the RFP, we are prepared to provide all of the Scope of Service items as described in Section 4 of the RFP. Due diligence work will first be conducted to review the following broad topics that will advise and inform the final Summary Report outlining the development concept and programming options as described in the RFP (“the Deliverables”):

- (1) **Schematic site plans and design guidelines:** The conceptual design scope will begin with a due diligence phase that includes a kick-off meeting, confirmation of project schedule, and site visits to document existing conditions and collect documentation in advance of the preparation of base and schematic plans.

An analytical phase will follow with evaluations of the physical conditions of the existing buildings at the three residential sites and DPW site envisioned in the RFP. This phase will also incorporate the underlying zoning and other regulatory requirements, described below, that will further inform the development potential for all of the sites.

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The next task will include preparation of diagrammatic site plans and buildout calculations to illustrate potential development options that will be presented to, and reviewed by, the MHA and MAHT. With that input, we will develop the site plans and outline design guidelines for the preferred development options.

- (2) **Zoning and entitlement strategy:** Based on the Schematic Design work above, the team will review current zoning and entitlement requirements for the Town and assess issues of timing and likely required variances. In cooperation with the Town planning office, the MAHT and the MHA, we will consider how best to approach introducing a potential project to the local zoning and entitlement authorities, with a particular focus on how to introduce the potential project to the public in advance of developer solicitation/selection. From this campaign, we will better be able to anticipate public sentiment and concerns before a developer is selected and final plans and specifications are drafted for public review. We believe that this process will not only show a level of transparency of process, but will also provide some level of comfort in the development community that pursuing an affordable housing project in the Town will have a greater likelihood of success.

An important part of this concept development phase will be to identify and engage residents and/or organizations that might push back on the idea of bringing new low-and-moderate income units to the marketplace. This process will give the Town and potential developers a greater sense of how a 40B or 40R project might be received, and to what level of objection or concern. We will work with the Town to think about how best to engage this group in a way that is thoughtful and non-threatening. For example, in the spirit of transparency in the process, the MHA and MAHT might hold a series of community meetings to present the Town's desire to increase affordable housing and gauge how this concept might be received by the residents and the community at-large.

- (3) **Septic analysis and strategy:** As part of the schematic scope above ("Schematic Design"), we will work with our civil engineers, Samiotes Consultants, to review the current septic by-laws and requirements. This will assist us in reconciling the unit programming anticipated under the municipal guidelines and the existing storm and sanitary infrastructure at the three MHA sites. We will also consider how to address the "Due Diligence and Constraints Memorandum" with respect to the anticipated sewer infrastructure required at the DPW site. We will rely exclusively on existing documentation for this analysis; no new subsurface testing is included in our proposal.

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- (4) **Project Financing:** Reflecting the Schematic Design process above, a plan of finance will be established including development and operating proforma budgets, including subsidy resourcing and a detailed description of the potential ‘capital stack’. This plan will be built to include:
- (a) a development budget for hard and soft costs;
 - (b) an operating budget anticipating net operating income that will inform commercial debt sizing and investment needs;
 - (c) summary of the resulting sources and uses; and
 - (d) based on the information above, the DHCD One Stop proforma can be populated for initial review by all sources including DHCD, local resources, commercial lenders and LIHTC investors.

Sample models and summary sheets are included in Attachment A of this submission. These sample models are provided only to illustrate what the ‘working’ proforma model might look like and demonstrate the analytical nature of the model structure. This model will of course be revised to meet the specific scope and program of the Schematic Design process described above and will be revised and maintained as necessary to address any changes in program, costs or financing assumptions that result from the process above.

Note: It is important to note that the “sample LIHTC proforma model” submitted in Attachment A is a generic form based on a previous project and represents a much larger project in Boston that had extraordinary acquisition and hard costs. It is anticipated that a project in Manchester would not exceed \$400K per unit in order to maintain eligible for subsidy resources below.

- (5) **Subsidy Resourcing:** The process of identifying subsidies – both development and operating subsidies – will become evident as the modeling described above is advanced. As is almost always the case, the project costs will greatly outweigh the amount of commercial and LIHTC resources available to a project whose target market are households earning less than 60% (low-income) or 30% (extremely low-income) of the area median income (AMI). Once this ‘gap’ is estimated, we can begin to reach out to subsidy providers and quasi-public lenders to strategize about how best to address the gap.

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Once the “Deliverables” above are complete, we will present an overview of the findings and schematic plans to the MHA and MAHT for each of the items above. We will seek feedback and suggestions and solicit questions from MHA and MAHT to further develop the overall development analysis and concept proposed. From this, we will make further edits and/or adjustments to the development strategy and memorialize the findings in the “Summary Report” envisioned in the RFP.

At this time, when the initial development scope and framework are further solidified, we will work with the Town to consider how best to identify and (re)approach potential developers. This might include the solicitation of Requests for Information (RFI’s) from developers who have shown interest in the past, as well as reaching out to other development firms and non-profit developers. This would be an opportunity to merge the Town’s preferred plan with the ideas from interested developers and a more informed public. These procedures are never as straight forward or without conflict/protest, but getting as much information in advance as to how the public will respond will best inform the strategy and selection of developer partners.

Schedule: It is anticipated that the scope above will require 150 to 180 days as outlined below:

Task:	Timeframe*:
(1) Schematic site plans and design guidelines	60-90 days
(2) Septic analysis and strategy	Included in (1) above
(3) Zoning and entitlement strategy	30 days
(4) Project Financing	60 – 90 days
(5) Subsidy Resourcing	<u>Included in (4) above</u> 150 to 180 days

**** Includes meetings with the MHA and MAHT and revisions as reasonable and/or required.***

The schedule proposed assumes open access to the sites and relevant entitlement information required to undertake the due diligence process described in the Project Assumptions outlined below. This time would also allow for up to two meetings with the MHA and MAHT to provide feedback as the design strategy unfolds.

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In order to address current social distancing guidelines and work at home restrictions, the work proposed in this submission will be largely conducted remotely. All meetings will be conducted using video meeting platforms such as Go To Meeting or Zoom. In addition to providing a remote meeting space, these platforms will be used to present the architectural and schematic plans and sketches, as well as financial models and proforma budgets.

Please see the detailed fee proposal included in Attachment B.

Additional Services

In addition to the deliverable scopes above, and as envisioned in the RFP, the team is prepared to address the following tasks as reasonable and appropriate. While items (a) – (d) are already anticipated in the scope above, items (e) – (h) would be provided as the Advisory Services budget allows:

- (a) Work with MHA and DHCD to resource the project(s) with state public housing resources
(Note: this scope is included in Task 5 above);
- (b) Advise MAHT and MHA on various financial strategies available to support the project(s)
(Note: this scope is included in Tasks 4 and 5 above);
- (c) Review and advise on DHCD requirements for financing **(Note: this scope is included in Task 5 above);**
- (d) Prepare, manage and present all financial proforma models including the DHCD One Stop proforma format **(Note: this scope is included in Tasks 4 and 5 above);**
- (e) It is assumed that the applications for the various project funding sources will be prepared by the selected developer, we will assist in the preparation of associated or ancillary funding documents as needed;
- (f) Review documents such as Regulatory Agreement, Operating Agreements, Developer Services Agreement, etc. Advise on the risks and potential impacts these agreements could have to the MHA's underlying public housing operations and commitments **(Note: it is assumed that this work would not be required until a developer(s) is selected);**

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- (g) Analysis and impact of the Pleasant Street DPW Due Diligence and Constraint Memorandum with recommendations given the schematic plans proposed (**Note: initial review work is included in Task 3 above**);
- (h) Other related tasks as deemed reasonable to complete the scope above.

Project Experience

Lead Consultant Experience

As the attached qualification statement demonstrates, I have practiced for over 25-years in the fields of affordable housing and economic development with specific experience is structuring mixed-financed projects including, but not limited to: 9% Low-Income Housing Tax Credits (LIHTC), 4% LIHTC projects with associated tax-exempt bonds, numerous public subsidies from DHCD and local public sources, including operating subsidies such as Project-Based Section 8s and the Massachusetts Rental Voucher Program. In addition, I have long standing relationships with private and quasi-public lending institutions including MassDevelopment, MassHousing, Massachusetts Housing Partnership, in addition to commercial lenders and LIHTC investors.

General experience is described below with sample projects illustrated in the Qualifications/Resume provided in Attachment C:

- **Housing Authority Experience**: I have particular experience working with housing authorities and HUD on projects throughout the Northeast, including those utilizing the former Hope VI, ARRA, NSP(2) and RAD programs. I also bring extensive experience in managing the physical development and construction processes in partnership with non-profits, for-profits, municipalities and public housing authorities. Pursuant to the RFP issued by the Town on April 8, 2020, I confirm that I have specific experience negotiating agreements between public housing authorities and their financial partners, including HUD and DHCD and public/private lenders and investors.

Previous Housing Authority work includes: The Cambridge Housing Authority, the Boston Housing Authority, the New Haven Housing Authority, the Taunton and Brockton Housing Authorities, as well as HAs in other Massachusetts towns including Sandwich, Chatham, Martha's Vineyard, and Hopkinton to structure and negotiate LIHTC mixed-income financing projects.

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- **Financial Consulting Experience:** The process of financial due diligence and initial feasibility is central to most of the projects I have worked on. This includes the creation of dynamic financial feasibility models that can be adjusted to address any unique design or construction realities and to determine the number and type of new housing units that could be added to the MHA's current portfolio.

To demonstrate my work, I have attached three sample "proforma" summary models:

- (1) **Sample 1:** Created for a non-profit affordable housing developer's portfolio of existing units and an existing building;
 - (2) **Sample 2:** A summary of four low-income developments in a non-profit affordable housing organization, assessing finance and subsidy resources in advance of soliciting developer's proposals;
 - (3) **Sample 3:** Valuation Analysis of an existing property for sale to assist a non-profit developer in preparing a bid for purchase.
- **Project Management Experience:** Throughout my 25 years of experience in the planning, finance and development of affordable housing and economic development, Project Management services are at the core of my practice. Thoughtful and organized management of resources, consultants, architects, attorney(s), and municipal processes is central to my work and is demonstrated through the portfolio of work and related professional references presented in this submission.

Quote: "Management is, above all, a practice where by art, science, and craft meet". – Henry Mintzberg, academic and management author.

- **Deal Structuring & Assembling the Lenders, Investors and Development Partners:** A key component of the consultant's work will include advising on potential partnerships between the Town, the MHA, the MAHT and private developer(s). Having worked as both a development consultant and a private developer, I am uniquely qualified to see the projects from all sides and interests, especially when it comes to meeting missions with the realities of private financing. As the MHA and MAHT develops its new "organizational and operational frameworks", this perspective will be important.

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- **Utilizing Public Private Partnerships:** In addition to my affordable housing experience, I have focused particularly on the creation and utilization of “Public-Private Partnership” deal structures (so-called “P3 projects”) that engage public, private and non-profit organizations and interests to maximize efficiency and value in the development and financial process. The P3 structure utilizes creative, non-traditional mixed-finance capital stacks through unique public and private funding mechanisms such as MassWorks, I-Cubed, Opportunity Zones, as well as Tax-Exempt Bonds and credit enhancement programs through MassDevelopment to support complex projects that require infrastructure and utility development that goes beyond the scope of the housing development itself. As a private developer, I have similar experience working with local Main Street entities whose Charter is to plan and oversee commercial urban neighborhoods in which we build.

While these programs may not be appropriate to support the direct scope of service described in the RFP, this experience will assist in considering proposals from developers who may suggest utilizing these non-traditional funding sources to support related infrastructure work that might be required.

- **Experience with Public Engagement and Communication:** Finally, my work in the public and private sectors has brought me to the forefront of public communications and transparency -- whether it's bringing a proposed project to the public for comment and input through the local zoning and entitlement processes, or presenting a project to neighborhood groups in advance of these procedures. Given your experience from the 2019 developer RFP release, the ability to anticipate and address how the Town and its residents will respond to the inclusion of a formal subsidized low-and-moderate income housing program will be an important first step to managing the concerns that were heard from interested developers. The ability to reconcile the Town's mission and core objectives will be critical to the success of any project and I look forward to sharing my many experiences in that arena.
- **Projects recently completed or underway:** As lead consultant, in addition to the projects described in Attachment C, Beverly Gallo is currently working with the Town of Brookline planning department, the Town of Provincetown and their “Year-Round Housing Trust” and the City of Quincy planning office and Affordable Housing Trust to support similar scopes of work.

DHK Relevant Experience

DHK's has successfully completed designs for public and affordable housing for which we provided feasibility studies, master planning, site analysis, community engagement, building design, permitting and construction administration services. Many of these designs were for low-rise, wood frame housing in traditional neighborhoods.

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New Construction Projects:

- **Washington Village Phase 3 Mixed income Housing, Norwalk, CT**
Client: Trinity Financial and Norwalk Housing Authority
Scope: 2 midrise buildings; 108 units
Cost: \$46m
- **Markham Gardens Revitalization – Staten Island, NY**
Client: The Domain Companies and New York City Housing Authority
Scope: townhouses; 290 units
Cost: \$44m
- **Franklin Hill Revitalization, Boston MA**
Client: Trinity Financial and Boston Housing Authority
Scope: townhouses and 2 midrise buildings; 254 units
Cost: \$75m
- **Orchard Gardens Revitalization, Boston, MA**
Client: Trinity Financial and Boston Housing Authority
Scope: townhouses and adaptive reuse of a school building; 205 units
Cost: \$30m

Rehab Projects:

- **Lyman Terrace Revitalization, Phase 1 - Holyoke, MA**
Client: The Community Builders and Holyoke Housing Authority
Cost: \$22m
Scope: Gut rehab and new additions; 88 units
- **Brighton Marine Veterans Housing – Boston, MA**
Client: Brighton Marine
Scope: Gut rehab; 25 units
Gut renovation; adaptive reuse
Cost: \$5.1m
- **North Canal Apartments – Lowell, MA**
Client: Coalition for a Better Acre
Scope: Comprehensive rehab; 267 units
Cost: \$14m

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- **Viviendas Apartments – Boston, MA**

Client: IBA

Scope: Comprehensive rehab; 108 townhouse units and 73 high-rise units

Cost: \$11m

Elderly/Senior Projects:

- **Ulin House Renovation - Brighton, MA**

Client: 2Life Communities (formerly JCHE)

Cost: \$20m

Scope: Comprehensive rehab; 239 units

- **Dayton Senior Housing - Dayton, OK**

Client: The Communities Group and Dayton Housing Authority

Scope: New 3-story elevator building; 30 units

Gut renovation; adaptive reuse

Cost: \$2.6m

Project References

Peregrine Urban Initiative: The references below represent projects that I am currently working with or with whom I've had relevant experience with respect to the scope proposed:

1. **Robert Charest:** SVP, Originations/Equity Production

Boston Financial Investment Management, LP

101 Arch Street, Boston, MA 02110

617-488-3530 (P)

Bob.Charest@bfim.com

2. **Brian Slater:** First Vice President/Group Head Corporate Banking Group

East Boston Savings Bank

10 Elm Street, Danvers, MA 01923

978-977-6014

bslater@ebsb.com

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3. **Nathan Robinson:** Department of Planning and Community Development, Housings Programs Manager
City of Quincy
34 Coddington Street, 3rd Floor, Quincy, MA 02169
774-313-0754 (C)
Nrobinson@quincyma.gov

4. **Joyce Hagland:** Executive Director
Rice Eventide Homes/Fairing Way
25 Stonehaven Drive
South Weymouth, MA 02190
(617) 549-2049 (c)
jhagland@comcast.net

5. **John Cissel:** President of Development
Core Investment, Inc.
699 Boylston Street, 10th floor
Boston, MA 02116
781-358-3960 (C)
jcissel@coreinvestmentsinc.com

DHK Architects:

1. **Steve Teasdale:** Executive Director
Main South CDC
874 Main Street
Worcester, MA 01603
steasdale@mscdc.org
508-752-6181

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2. **Kevin McCarthy:** Project Manager

Trinity Financial, Inc.

75 Federal Street

Boston, MA 02110

kmccarthy@trinityfinancial.com

617-720-8400

3. **Dominica Mann:** Director of Development

Codman Square NDC

587 Washington St.

Dorchester, MA 02124

dominica@csndc.com

617 825 4224 ext. 142

Fee for Service and Rate Schedule

As described in the attached Fee Schedules (attached in Attachment B), the total fee for the scopes described above is \$49,565. The Fees proposed are to be paid separately and directly to the following entities, as independent contractors, as the work is performed and invoices are submitted:

Lead Consultant: Peregrine Urban Initiative LLC

Architectural Consultant: DHK Architects

The entities above will submit separate IRS W-9 certificates for tax purposes.

The proposed fee arrangement is based on the estimated time and representation required by the Advisors for each phase of the project as described above. As illustrated in the attached Fee Schedules, this represents an hourly rate of \$175/hour for the Lead Consultant and an average of \$173/hour for the Architectural Consultant.

This rate includes cost of travel to and around the Manchester-by-the-Sea area and parking fees (if required) but *excludes* the cost of all long-distance travel/accommodations, bulk copying, printing and mail services if required. Any extraordinary expenses will be subject to prior approval of the Town and billed as mutually agreed.

Services will be provided on an hourly basis as required to support project objectives and as directed by authorized staff at MHA and MAHT, commencing upon receipt of a notice to proceed, and

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extending to the Term proposed below. Additional services beyond the scopes outlined above will be billed as needed/as approved on a time and materials basis. Monthly fees are due and paid upon invoicing on the first day of each month for work performed in the previous 30-day period.

Beverly Gallo (Peregrine Urban Initiative) will serve as the Principal Advisor to manage the scope of services outlined above. As a third-party consultant, the Architectural Consultant will be billed accordingly and separately.

Term

It is assumed that the services described in this proposal will be made available to Town of Manchester for a period up to 12 months and may be extended upon mutual agreement. It is further assumed that tasks proposed herein are estimated for completion within, or before, that time.

General Project Assumptions

- Official correspondence rendered on behalf of Town of Manchester (including but not limited to financial obligations, guarantees, mortgages, notes, reports and certifications) for the above referenced project(s) shall be executed by appropriate and authorized staff on behalf of Town of Manchester or the MHA. The undersigned Advisor shall assume no financial or corporate responsibility of any kind on behalf of the project or its sponsor(s). The Advisor shall assist in these matters only as mutually agreed upon by Town of Manchester and the Advisors in a formal contract.
- All legal matters and decisions related to the project shall be the sole responsibility of Town of Manchester's legal staff or its assigns. The Advisor shall assist in the delivery and enforcement of such matters as necessary to support the scope of services described herein.
- All necessary members of the development team, including representatives of Town of Manchester and its partners, third party consultants/contractors and service providers, are accessible and available as necessary to carry out the scope of services described herein. All members of the Town's staff are participatory in project meetings, are responsive to written and/or verbal correspondence (including e-mail) and have completed all tasks and activities as necessary to support this scope of service and the project in general.
- Access to information from Town of Manchester staff members, third party consultants/contractors and services providers as needed to support the tasks and activities

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listed above, including but not limited to current corporate and design standards and policies, financial reporting requirements and relevant legal statutes as appropriate.

Attachments

To support the scope of services outlined above, please note the following Attachments:

Attachment A: Sample Financial Proforma models

Attachment B: Detailed Fee Structures for: (1) Peregrine Urban Initiative; and (2) DHK.

Attachment C: Experience, Qualifications and Resumes

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**Proposal for Real Estate Advisory and Development Consulting Services
Prepared for: Town of Manchester, Planning Office**

ATTACHMENT A

Sample Financial Proforma Models

Sample LIHTC proforma

DRAFT - FOR DISCUSSION PURPOSES ONLY

Project Type	Mix-use rental: LIHTC + market
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Project Summary:	Square Footage (gross): Units:
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- Residential Rental	90,257	84
- Residential Condominium	TBD	
- Retail (incl. common)	NA	
- Amenity/Common	TBD	
- Circulation	Approx. 20%	
- Mechanical (including rooftop)	TBD	
- Garage	TBD	30
Total	90,257	1,074

Average per unit gross s.f.

Architectural Assumptions:

- Residential net rentable s.f.	
1 Bedroom	700
2 Bedroom	950
3 Bedroom	1,200

Reconcile to final program/unit count

Parking Summary (total on site, both phases):

- Residential Rental Garage Parking (garage)	30
- Residential Rental Parking (surface)	TBD
- Residential Condominium Garage Parking	TBD
- Church	TBD
	30

Total per zoning - reconcile to final program/unit count

Ownership Structure

- Project Owner	Single Purpose LLC - TBD
- Project Sponsor	TBD
- 21% partner (if needed)	If needed

Financing Assumptions

- Interest Rate (blended constr to perm)	6.0%
- Amortization	40 Yrs
- Max Loan-to-Value	85%
- Parking space (rental rate)	\$125.00
- Valuation Cap Rate	6.0%
- Debt Service Coverage requirement	1.15
- Debt Leverage	TBD
- Rental inflation factor Phase I (years)	3
- Rental inflation (annual %)	1.03
- Construction discount (1:1)	1.00

For discussion

Project Schedule:	TBD
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Sources of Funds:	Sample LIHTC proforma	Per G.S.F.	Per Unit
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Total Equity	\$	-
Senior Debt		
Total Subsidies/Credits	\$	-
Total Loan/Credit Proceeds	\$	-
Total Sources	\$	-

Uses of Funds:	Sample LIHTC proforma	Per G.S.F.	Per Unit
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Acquisition (open market estimate)				
Direct Construction: New Construction				
Direct Construction: Site Work/Garage				
Direct Construction: GC/GMP				
Direct Construction: Demo (NIC)				
Construction Contingency (owners)				
Soft Costs				
Financing Costs				
Reserves				
Developer Fee/Overhead				
Total Uses	\$	-	\$	-

Valuation Summary:	Net Income	5.5% Cap Rate
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Rental Product	Per s.f.
Net Operating Income	
Condo Component (Net sales)	
Retail/Commercial	
Net Operating Income	
Park Rental	
Net Operating Income	

	\$	-
Project Cost	\$	-
Return on Cost	#DIV/0!	Before Tax

Sample LIHTC proforma

Date:

Sources & Uses Summary

Project Sources

Equity - \$\$	\$ -
Equity - land loan, seller's note	\$ 10,800,000
Def Fee -deferred	\$ 972,742
Perm Debt -- assumes S8 rental vouchers for ELI units	\$ 29,198,758
LIHTC Equity	\$ 3,979,632
DND - IDP	\$ 2,000,000
Add'l City/State TBD	\$ -
DHCD HOME/AHT	\$ 2,000,000
	\$ 48,951,132

0% Private equity required.

To be reconciled to final program breakdown and updated valuation

Est. 25% of total developer fee

Constrained by LIHTC rents

Est. per calc.

IDP contribution \$ 23,810

Pending Per unit

TBD \$ 23,810

Construction Loan \$ 25,349,064

Est. 60% of total loan amount

(less financing costs/reserves, 1/2 dev fee)

Uses

Acquisition	\$ -
Direct Construction: New Construction	\$ 35,397,417
	\$ -
Soft Costs:	\$ 4,905,538
Financing Costs/debt repayment:	\$ 3,385,875
Reserves	\$ 1,371,333
Developer Fee	\$ 3,890,968
	\$ 48,951,132

Per unit

Based on FAR land value

\$ 421,398

(including owner's contingency)

Per unit

Per unit less acq.

Surplus/(gap) \$ -

Under construction

Tax Credit Calc

	4% LIHTC	
Total eligible basis	\$	47,800,906
(Less: Basis reductions)	\$	(4,000,000)
	\$	33,516,000
		130%
Adjusted basis	\$	43,570,800
Appl. Fraction		29%
Tax Credit Rate		3.20%
Total Qualified Basis (cap)	\$	398,362
Credit Raise		1.00

See basis assumptions in Dev Budget - assumes acq credits blended

Excludes State and local funds

Max at per unit basis cap \$ 399,000

QCT \$ 192,000 Max at per unit cap - 9%

Max =

\$ 1,000,000

\$ 398,362

Qualified - contrained by unit cap, will require DHCD waiver.

Totals:

Units	84
S.F.	84,000
% afford/app fraction	50%
Cost per unit (mrkt)	\$ 350,000
LIHTC (50% permium)	\$ 475,000

Optimal # of LIHTC units 50

State LIHTC Calc

Total eligible basis	\$	-
(Less: Basis reductions)		
Appl. fraction		
Total Qualified Basis (cap)	\$	-
Credit Raise		

Permanent Debt Calc (Res)

Res Debt

Debt Service	\$	1,927,867
Min. Debt Serv Coverage		1.15
LTV		85%
	\$	31,408,160
Interest Rate		6.00%
Amort Term		40
Total Debt Available		\$29,198,758
Max. Total Allowed LTV contrained	\$	31,408,160

\$ 160,656

Actual DSCF

Max debt service by LTV

Per LTV

Sample LIHTC proforma

Date:

Program Summary - Mixed-use LIHTC rental

Income Guidelines (statistical MSA) 2018 Boston, MA

Household Size	0	1	2	3	4	5	6	7	8
Market									
100% AMI est.		\$ 75,500	\$ 86,300	\$ 97,100	\$ 107,800	\$ 116,500	\$ 125,100	\$ 133,700	\$ 142,300
80% AMI		\$ 56,800	\$ 64,900	\$ 73,000	\$ 81,100	\$ 87,600	\$ 94,100	\$ 100,600	\$ 107,100
60% AMI	\$ -	\$ 45,300	\$ 51,780	\$ 58,260	\$ 64,680	\$ 69,900	\$ 75,060	\$ 80,220	\$ 85,380
50% AMI		\$ 37,750	\$ 43,150	\$ 48,550	\$ 53,900	\$ 58,250	\$ 62,550	\$ 66,850	\$ 71,150
30% AMI		\$ 22,650	\$ 25,900	\$ 29,150	\$ 32,350	\$ 34,950	\$ 37,550	\$ 40,150	\$ 42,750
	Efficiency	1 BR	2 BR	3 BR	4 BR				
Fair Market Rent 2019	\$ 1,394	\$ 1,561	\$ 1,902	\$ 2,383	\$ 2,571				

Program: Net Rent Structure

	Income Tier:	0%	33%	33%	33%	0%	
Program Units		Studio	1 BR	2 BR	3 BR	4 BR	
LIHTC S8s <30%	Very-Low Income (ELI)	-	-	-	-	-	-
	Net Rent	-	1	1	1	-	4%
LIHTC 4%	Low Income	-	7	7	7	-	25%
	Net Rent	-	101,934	115,542	129,087	-	
Market	Moderate	-	20	20	20	-	71%
	Net Rent	-	696,000	840,000	960,000	-	
		-				-	
		\$ -	\$ 812,496	\$ 972,048	\$ 1,107,528	\$ -	
						\$ 2,892,072	Gross Income (Annual) 2018 rents
		2357220	2,563,455	2,693,799	2,845,581	\$ 3,160,245	Gross Income (Annual) @ 3% inflation to 2021
						84	Total Units

Program: Gross Rent Structure

	Net Rent by Tier	Studio	1 BR	2 BR	3 BR	4 BR	
<30%	Very-Low Income (S8-FMR)	1	1.5	2.5	3.5	4.5	FMR
<60%	Low Income/LIHTC	\$ -	\$ 1,561	\$ 1,902	\$ 2,383	\$ 2,571	60% AMI
61%-80%	Moderate - Restrictred	\$ -	\$ 1,214	\$ 1,376	\$ 1,537	\$ 1,682	80% AMI
	Market	\$ -	\$ -	\$ -	\$ -	\$ -	
		\$ 2,400	\$ 2,900	\$ 3,500	\$ 4,000	\$ -	
		0	0	0	0	0	

Utility Allowances

TBD - for now assume tenant pays nothing.

	1 BR	2 BR	3 BR	4 BR
Heat				
Cooking Fuel				
Electricity				
Refrig.				
Other				
Water Heating				
Water & Sewer				
	0	0		

Sample LIHTC proforma

Date: 1/0/1900

Development Budget

		Total		Deprec.	Other:	
		Budget	4% LIHTC	Basis	Middle Income units	Notes:
Acquisition	Land/Building	\$ 10,800,000				
				\$ -		
	Total Acquisition Cost	\$ 10,800,000		\$ -		

Direct Construction: New Construction		* Does not assume Davis-Bacon/Prev. Wage			
	General Construction (housing) - @\$425/sf	\$ 35,397,417		\$ 35,397,417	100%
	General Construction (Worship space)	\$ -		\$ -	0%
	Community Space	\$ -		\$ -	0%
	Construction Contingency 10%			\$ -	6%
				\$ -	
				\$ -	
	Total Improvements.	\$ 35,397,417		\$ 35,397,417	

Subtotal Direct Construction NEW IMPROVEMENTS and REHAB:		\$ 35,397,417		\$ 35,397,417	
--	--	---------------	--	---------------	--

Soft Costs:					
Architect - @4.5% of hard costs	Design	\$ 1,592,884		\$ 1,592,884	8%
	Inspection	\$ 300,000		\$ 300,000	
Engineering				\$ -	
	Other design consultants			\$ -	
	Civil	\$ 175,000		\$ 175,000	
	Environmental	\$ 100,000		\$ 100,000	
	GC Bond - @ .85%	\$ 300,878		\$ 300,878	
	Owner's Rep	\$ 200,000		\$ 200,000	
	Clerk of the works	\$ 100,000		\$ 100,000	
	Testing/Inspections	\$ 100,000		\$ 100,000	
	Bank Inspector fee	\$ 100,000		\$ 100,000	
	Surveys (ALTA)	\$ 35,000		\$ 35,000	
	Permits	\$ 283,179		\$ 283,179	1%
	Legal	\$ 200,000		\$ -	
	Gen Counsel - LIHTC deal	\$ 50,000			
	Lender Counsel	\$ 100,000		\$ -	
	Tax Credit investor legal	\$ 100,000			
	Bond Counsel	\$ 50,000		\$ 50,000	
	Title/Rec.	\$ 45,000		\$ 45,000	
	Audit Cost Cert.	\$ 15,000		\$ 15,000	
	Appraisal/Market Study	\$ -		\$ -	See Op Ex -- units will be rehab'd in place.
	RE Taxes	\$ 300,000		\$ 300,000	1%
	Insurance	\$ 50,000		\$ 50,000	See Op Ex -- units will be rehab'd in place.
	Insurance	\$ 100,000		\$ 100,000	
	Utilities	\$ 25,000		\$ 25,000	
	Security	\$ -		\$ -	
	Relocation	\$ 200,000		\$ -	
	Furniture/Equip.	\$ 250,000			
	Marketing and Rent Up	\$ -		\$ -	
	Consultants	\$ -		\$ -	
	Soft Cost Contingency 5%	\$ 233,597		\$ -	
	Total Soft Costs	\$ 4,905,538	\$ -	\$ 3,771,941	(cont. next page)

Financing Costs/debt repayment:					
Bridge Debt	Fees				
	Interest				
Constr. & Perm	Fees	\$ 291,988		\$ -	1%
	Interest @ 6%	\$ 3,041,888		\$ -	
Constr. Debt	Neg Arbitrage				
	Soft debt repayment	above		\$ -	
Perm Debt					
LIHTC Fees	App. Fee	\$ 52,000		\$ -	4.5%
	Res Fee			\$ -	0.3%
Other:	MIP			\$ -	0.25%
Other:	MassDev Issuance Fee				1%
Other:	Repay Existing Debt			\$ -	
	Pre Development Loan Interest Fee				
	Repay Existing Debt				
	Total Financing Fees	\$ 3,385,875	\$ -	\$ -	

Reserves					
Replacement Reserve		\$ 29,400			
Operating Reserves	6 mos. op ex + debt service	\$ 1,341,933			
Initial Oper. Deficit Res	TBD by lender				
Other					
Other	S8 overhang reserves			Assume \$0	
Tax Escrow					
Insurance Escrow				\$ -	
				\$ -	
	Total Reserves	1,371,333	\$ -	\$ -	

Developer Fee					
Developer Fee Earned		\$ 1,945,484		\$ 1,945,484	3.26%
Developer Overhead		\$ 1,945,484		\$ 1,945,484	
	Total Developer Fee	\$ 3,890,968	\$ -	\$ 3,890,968	

Total Development Cost		\$ 59,751,132	\$ -	\$ 43,060,327	\$ -
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Sample LIHTC proforma

Date:

Operating Summary

Gross Residential Income

84

	Total	PUPY
Leased Units	\$ 3,160,245	\$ 37,622
PBS8/MRVP vouchers (@FMR)	Incl. above	
Parking Income	\$ 3,125	\$ 37
Other Income (Laundry)	\$ 4,200	\$ 50
Total Gross Residential Income	\$ 3,167,570	\$ 37,709

Vacancy

Residential		\$ -	\$ -
5% LIHTC Low		\$ (2,475)	\$ (29.47)
5% LIHTC		\$ (17,328)	\$ (206.29)
7% Middle		\$ (174,720)	\$ (2,080.00)
Parking Income		\$ -	\$ -
Other Income	10%	\$ -	\$ -
Total Vacancy		\$ (194,524)	\$ (2,316)

Gross Income (Annual)

\$ 2,973,047	\$ 35,393
--------------	-----------

Operating Expense Budget

Admin. Expenses

	Total	PUPY
Office Staff Payrol	\$ -	
Employee Fringe/Benefits	\$ -	
Marketing	\$ -	
Audit	\$ -	
Management Fee	\$ -	
Legal/Evictions	\$ -	
Acctg Serv	\$ -	
Office supplies	\$ -	
Office Exp	\$ -	
Support Staff	\$ -	
Telephone	\$ -	
DHCD monitoring fee	\$ -	
Misc	\$ -	
	\$ -	\$ -

% of income: 0%

Utilities

Electric	\$ -	
Heat/HW	\$ -	
Water/Sewer	\$ -	
	\$ -	\$ -

Operating and Maint.

	Total	PUPY
Op Maint. Staff Payrol		
Benefits		
Janitorial		
Landcaping		
Unit Turnover Supplies (Decorating, Int)		
Repairs		
Elevator Maintenance		
Trash Handling/Remvoal		
Snow Removal		
Extermination		
Misc./other		
Security		
	\$ -	\$ -

Resident Services

\$ -	\$ -

Taxes and Insurance

	Total	PUPY
Real Estate Taxes		
Payroll Taxes		
Property Insurance		
	\$ -	\$ -

Finance Costs/Reserves

	Total	PUPY
LIHTC Annual Fee		
MIP (bond fees)		
Investor Fee (annual AM)		\$ -
Reserves		
	\$ -	\$ -

Total Expense (Annual)

\$ 756,000	\$ 9,000
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NOI

\$ 2,217,047

Amount Remaining for Debt

\$ 1,927,867

1.15
DSCF Min

Remaining Cash Flow projected

\$ 289,180

ABC Portfolio - LIHTC Properties: Max TDC Analysis

By Property:

4% LIHTC + subsidies (operating and capital)

ABC Commons	City
-------------	------

Project Sources		12
Equity - Cash		
Equity - land loan, seller's note	\$	270,000
Def Fee -deferred	\$	41,400
Perm Debt -- S8 rental vouchers ELI units	\$	243,512
LIHTC Equity	\$	735,521
Add'l City/State TBD	\$	382,500
DHCD HOME/AHT	\$	382,500
LISC and/or MHP green funds	\$	15,000
	\$	2,070,433

Uses	
Acquisition	TBD
Direct Construction: New Construction	TBD
Soft Costs:	TBD
Financing Cost/debt repayment	TBD
Reserves	TBD
Developer Fee	TBD
	\$ 2,070,000
	\$ 172,500

Surplus/(gap)	\$ 433
---------------	--------

Project Summary

Rental Income (per current rents. 2 yrs inflated):	\$	149,761
Annual Rent Per Unit rent	\$	12,480
Operating Expense (current Op Ex - PUPY):	\$	10,573
Property Value (based on 6% cap rate):	\$	270,000
Developer fee (based on 8% est.):	\$	208,000
Redevelopment Cost (est.):	\$	2,600,000
Per Unit TDC (less land):	\$	150,000
Total public subsidies required:	\$	765,000

ABC Apartments	City
----------------	------

Project Sources		17
Equity - \$\$		
Equity - land loan, seller's note	\$	234,000
Def Fee -deferred	\$	38,680
Perm Debt -- S8 rental vouchers ELI units	\$	211,035
LIHTC Equity	\$	687,197
Historic Tax Credits	\$	300,000
Add'l City/State TBD	\$	224,000
DHCD HOME/AHT	\$	224,000
LISC and/or MHP green funds	\$	15,000
	\$	1,933,912

Uses	
Acquisition	TBD
Direct Construction: New Construction	TBD
Soft Costs:	TBD
Financing Cost/debt repayment	TBD
Reserves	TBD
Developer Fee	TBD
	\$ 1,934,000
	\$ 113,765

Surplus/(gap)	\$ (88)
---------------	---------

Project Summary

Rental Income (per current rents. 2 yrs inflated):	\$	177,726
Annual Rent Per Unit rent	\$	10,454
Operating Expense (current Op Ex - PUPY):	\$	9,193
Property Value (based on 6% cap rate):	\$	234,000
Developer fee (based on 8% est.):	\$	200,000
Redevelopment Cost (est.):	\$	2,500,000
Per Unit TDC (less land):	\$	100,000
Total public subsidies required:	\$	448,000

ABC Gardens	City
-------------	------

Project Sources		19
Equity - \$\$		
Equity - land loan, seller's note		
Def Fee -deferred	\$	28,500
Perm Debt -- S8 rental vouchers ELI units	\$	689,056
LIHTC Equity	\$	506,337
Add'l City/State TBD	\$	93,000
DHCD HOME/AHT	\$	93,000
LISC and/or MHP green funds	\$	15,000
	\$	1,424,893

Uses	
Acquisition	TBD
Direct Construction: New Construction	TBD
Soft Costs:	TBD
Financing Cost/debt repayment	TBD
Reserves	TBD
Developer Fee	TBD
	\$ 1,425,000
	\$ 75,000

Surplus/(gap)	\$ (107)
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Project Summary

Rental Income (per current rents. 2 yrs inflated):	\$	299,057
Annual Rent Per Unit rent	\$	15,740
Operating Expense (current Op Ex - PUPY):	\$	12,574
Property Value (based on 6% cap rate):	\$	945,966
Developer fee (based on 8% est.):	\$	114,000
Redevelopment Cost (est.):	\$	1,425,000
Per Unit TDC (less land):	\$	75,000
Total public subsidies required:	\$	186,000
Total - Public Ask	\$	1,399,000
Per unit	\$	29,146

ABC Place	City
-----------	------

Project Sources		25
Equity - \$\$		
Equity - land loan, seller's note	\$	1,361,000
Def Fee -deferred	\$	397,563
Perm Debt -- S8 rental vouchers ELI units	\$	1,227,356
LIHTC Equity	\$	2,260,218
Add'l City/State TBD	\$	550,000
DHCD HOME/AHT	\$	550,000
LISC and/or MHP green funds	\$	15,000
	\$	6,361,137

Uses	
Acquisition	TBD
Direct Construction: New Construction	TBD
Soft Costs:	TBD
Financing Cost/debt repayment	TBD
Reserves	TBD
Developer Fee	TBD
	\$ 6,361,000
	\$ 254,440

Surplus/(gap)	\$ 137
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Project Summary

Rental Income (per current rents. 2 yrs inflated):	\$	273,927
Annual Rent Per Unit rent	\$	10,957
Operating Expense (current Op Ex - PUPY):	\$	7,228
Property Value (based on 6% cap rate):	\$	1,361,202
Developer fee (based on 8% est.):	\$	1,450,000
Redevelopment Cost (est.):	\$	5,800,000
Per Unit TDC (less land):	\$	200,000
Total public subsidies required:	\$	1,100,000
Total -- Public Ask	\$	1,100,000
Per unit	\$	44,000

Property Valuation Analysis

The Project Sponsor is evaluating the purchase of the _____ s.f. building located at _____
The subject property is currently not on the market but is anticipated for release in the Fall of 20___.
The information below were collected from a variety of sources, formal and information, and are intended to estimate a projected operating income supporting a valuation of the asset to EMPath, Inc.

BASE ASSET DATA - ASSUMPTIONS

Valuation:

Income Potential - Housing + Commercial/Educational/Theatre uses/Antennae			
	Est. s.f./program for bid	Est. Rent potential/NOI	Per s.f.
- Commercial/retail/theatre/educational/antennae	61,150	\$ 1,535,837	\$ 25
Less Operating Expense		\$ (796,460)	\$ (13)
- Hotel	NA	See Housing	\$ -
- Housing			
SRO	51,363	\$ 594,487	\$ 12
Apartment (market + afford)	43,800	\$ 509,082	\$ 12
NOI	156,313	\$ 1,842,947	\$ 12
Capitalized Value	6.00%	\$ 30,715,781	\$ 197

Income Potential - Housing + Commercial uses			
	Est. s.f./program for bid	Est. Rent potential/NOI	Per s.f.
- Commercial/retail	61,150	\$ 1,535,837	\$ 25
Less Operating Expense		\$ (796,460)	\$ (13)
- Hotel	28,338	\$ 4,343,200	\$ 153
Less Operating Expense		\$ (2,725,992)	\$ (96)
- Housing			
SRO (market + afford)	23,025	\$ 243,367	\$ 11
Apartment (market + afford)	43,800	\$ 509,082	\$ 12
NOI	156,313	3,109,035	\$ 20
Capitalized Value	6.00%	\$ 51,817,256	\$ 331

Income Potential - Speculative private bid			
	Est. s.f./program	Est. Rent potential/NOI	Per s.f.
- Commercial/retail/theatre/educational	61,150	\$ 1,535,837	\$ 25
Less Operating Expense		\$ (796,460)	\$ (13)
- Hotel	28,338	\$ 5,253,440	\$ 185
Less Operating Expense		\$ (2,725,992)	\$ (96)
- Housing			
SRO (market + afford)	23,025	\$ 243,367	\$ 11
Apartment (market + afford)	43,800	\$ 509,082	\$ 12
NOI	156,313	4,019,275	\$ 26
Capitalized Value	6.00%	\$ 66,987,922	\$ 429

Other Information:

Year Built:	###
Current Ownership Entity:	###
Affordable Housing Restriction:	30 years remaining
Broker:	###
Management Agent:	###
Target Price:	###
Historic Designation:	National Register of Historic Places
Adjacent Properties:	
Square foot est.	
Net	\$ 156,313
Gross	\$ 174,000 Per broker
	\$ 17,687 10% Reflects light-well inefficiencies

Peregrine Urban Initiative

Real Estate and Economic Development Consulting (a.k.a. Byer Gallo Associates, LLC)

**Proposal for Real Estate Advisory and Development Consulting Services
Prepared for: Town of Manchester, Planning Office**

ATTACHMENT B

Fee Structure

MANCHESTER RFP - PUI FEE

Labor Estimate 5/20/20

Task Description	\$175/hour		Total Fee
	Lead Consultant	Hours	
Schematic site plans and design guidelines		8	1400
Septic analysis and strategy		6	1050
Zoning and entitlement strategy		18	3150
Project Financing		60	10500
Subsidy resourcing		24	4200
Overall project mangement of all scopes		36	6300
		152	\$26,600

MANCHESTER RFP - DHK FEE

Labor Estimate Revised 5/13/20

Task Description	225 PIC Hours	150 PM/Arch. Hours	105 Designer Hours	175 Civil Eng. Hours	Fee
3 Existing Housing Sites					
Inspect existing conditions	6				\$ 1,350
Evaluate existing conditions	6				\$ 1,350
Prepare base plans	3		8		\$ 1,515
Evaluate development potential	10				\$ 2,250
Develop Schematic Site Plans	12		30		\$ 5,850
Prepare sewer assessment				6	\$ 1,050
Prepare development guidelines	6				\$ 1,350
DPW Site					
Review civil engineers report	2			2	\$ 800
Prepare base plans	1		3		\$ 540
Evaluate development potential	4				\$ 900
Develop Schematic Site Plans	3		10		\$ 1,725
Prepare sewer assessment				3	\$ 525
Prepare development guidelines	2			2	\$ 800
Coordinate final report	6		12	2	\$ 2,960
	55	-	63	15	\$ 22,965
Fee	\$ 12,375	\$ -	\$ 6,615	\$ 2,625	
Total hours	133				
Avg. hourly rate	172.7				

Peregrine Urban Initiative

Real Estate and Economic Development Consulting (a.k.a. Byer Gallo Associates, LLC)

**Proposal for Real Estate Advisory and Development Consulting Services
Prepared for: Town of Manchester, Planning Office**

ATTACHMENT C

Qualifications and Professional Resumes

Beverly Byer Gallo

Principal – Peregrine Urban Initiative and Byer Gallo Associates, LLC



Fairing Way, Weymouth, MA
Closed July 2014

Peregrine Urban Initiative and Byer Gallo Associates LLC are independent real estate development and advisory firms (respectively) that specializes in the planning, development and financing of affordable housing and related urban development initiatives. In a consultative role, we provide a wide range of project management services to assist developers, lenders, investors, municipalities, housing authorities and community-based non-profits to advance projects that promote smart growth, affordable housing and economic development opportunities in established and transitional urban neighborhoods. As developers/owners, we plan, design, entitle, construct, finance and manage our own portfolio of investments in emerging urban neighborhoods with a focus on long-term positions.

With a particular focus on urban projects, we have extensive experience structuring debt, equity and subsidized capital for complicated mixed-use/mixed income and public-private-partnership (P3) projects including but not limited to:

- Low income tax credits (federal and state) – allocation and syndication.
- Historic Tax Credits (state and federal).
- Tax exempt bond financing.
- Gap finance sources (state and local) – including DND (Boston) and DHCD (MA.) sources.
- New Market Tax Credits.
- Section 108 loan guarantee program.
- Section 8, VASH and MRVP (Mass.) operating subsidies.
- Mark-to-Market underwriting.
- Senior Housing Entry-Fee model strategies.
- Public-Private-Partnership (P-3) and traditional Private investment sources.

We also have extensive experience in zoning and permitting including under M.G.L. Ch 40B and City of Boston Article 80 and Planned Development Area (PDA) overlay zoning.

Current and recent projects are listed below. The attached cut sheets provide additional information regarding specific completed projects.

- **Women's Institute for Housing and Economic Development, Scattered-Site redevelopment**: New Bedford, Mass. Development consultant with a focus on the redevelopment and financial repositioning of 3 historic affordable housing developments. *Project is on-going.*
- **Atlantic Gardens, Karsten Companies**: South Weymouth, Mass. Re-financing of a challenging 32-unit expiring-use development in North Quincy. *Project is on-going.*
- **Blessed Sacrament Church, Hyde Square Task Force**: Jamaica Plain, Mass. Development consultant to the community-based youth programming organization to strategize and implement the re-positioning and redevelopment of the Blessed Sacrament Church to a mixed-use facility with a focus on community use and youth programming as well as housing and commercial development. *Project is on-going.*
- **MassChallenge Boston, HQ, Core Investments, Inc.**: Working as an advisor to Core Investments, the HQ relocation project is focused on design, financial strategies including innovative P3 initiatives, partnership negotiations and related due diligence to support this new 20,000 s.f. Boston headquarters for this high-tech incubator non-profit with a global presence. *Project on hold.*
- **Washington Village, Core Investments, Inc.**: South Boston, Mass. 656-unit+ mixed use/mixed income development with 100,000 s.f. of new retail space; project is privately finance. *Construction slated to begin 2020.*
- **1943 Dorchester Avenue, In partnership with the Peregrine Group LLC, as owner**: Dorchester, Mass. 64-unit market rate/middle income housing product with IDP affordable units; *Construction is complete, currently leasing up.*
- **AO Flats at Forrest Hills, The Community Builders, Inc.**: Jamaica Plain, Mass. 78-units mixed-income affordable housing community; LIHTCs, City of Boston subsidy sources and MassHousing Workforce Housing Program. *Construction is underway.*
- **Fairing Way, Eventide Homes**: Southfield, Weymouth, Mass. (Phase I): 104-unit independent living (IL) senior housing and long-term care facility; 'entry-fee' model financing structure. *Completed 2016.*
- **Genesis House (aka Kurlat House), 2Life Communities (formerly, Jewish Community Housing for the Elderly)**: Brighton, Mass. Campus: 209-unit substantial rehab of the Genesis House senior independent living housing with services; Low-Income Housing Tax Credit (LIHTC) financing with tax-exempt bonds and a Section 8 contract extended under HUD 'Mark-to-Market' program. *Completed 2018.*
- **Parkside on Adams, In partnership with the Peregrine Group LLC, as owner**: Roslindale, Mass. 43-unit market rate/middle income housing product with IDP affordable units. *Project completed 2015.*
- **Sankofa Apartments, West Elmwood Housing Development Corp.**: Providence, RI. 50-unit Low-Income Housing Tax Credit (LIHTC) financing with City and State subsidies. *Project completed 2015.*

- **Jackson Commons, Urban Edge:** Roxbury, Mass. 37-unit LEED Certified, affordable housing development with 12,000 s.f. of retail; LIHTCs, City of Boston subsidy funds, New Market Tax Credits. *Projected completed 2015.*



BEVERLY GALLO, *Principal, Byer Gallo Associates LLC*

Beverly Gallo formed the Peregrine Urban Initiative in 2012 as the lead Principal in the new business line focused on the pursuit of development opportunities in emerging, transitional and underdeveloped urban neighborhoods as a way to bring private investment to traditionally underrepresented communities. Beverly remains as the Principal of Byer Gallo Associates LLC (BGA), an independent advisory firm focused on assistance to private, not-for-profit and public sector clients in the planning, finance and development/preservation of distinctive affordable housing and economic development initiatives. She brings over 25 years of experience in the design, construction and (*often creative*) finance of mixed-use/mixed-income real estate development. Her unique combination of business and community-based development skills have served to complete challenging (re)development projects in urban communities large and small.

Prior to launching BGA, Beverly worked as the Director of Development for the South Boston Neighborhood Development Corporation and as Senior Project Manager for Robinson Mills + Williams Architects in the San Francisco Bay Area. She also served as a Project Manager for The Flatley Company in Braintree, MA. She holds a Master Degree in Urban Studies and Planning and a Master of Science in Real Estate Development from the Massachusetts Institute of Technology.

Beverly Gallo – Principal

Previous Experience

- **South Boston Neighborhood Development Corporation**, *South Boston, MA*
Director of Development [1994-1997]
- **Robinson, Mills + Williams Architects**, *San Francisco, CA*
Project Manager, Design and Construction Services [1989-1992]
- **The Flatley Company**, *Braintree, MA*
Project Manager, Real Estate Development Division [1987-1989]

Education

- **Massachusetts Institute of Technology**
Master of City Planning, December 1994: Concentration in Housing and Economic Development.
Master of Science in Real Estate Development, June 1995: Concentration in Real Estate Finance.
- **University of Massachusetts/Amherst**
Bachelor Degree with Individual Concentration in Architecture and Business, 1987.

Professional Affiliations and Awards

- Recipient of the Public Sector Fellowship award, MIT's Center for Real Estate.
 - Schools for Children, Board Member [2006-2009].
 - Housing Corporation of Arlington, Board Member [1998-2000].
 - National Congress for Community Economic Development, Member [1994-1998].
 - MACDC: Economic Development Advisory Committee, Council Member [1994-1997].
 - MACDC: Small Business Development Committee, Council Member [1994-1997].
 - Massachusetts Micro-Enterprise Coalition, Council Member [1994-1998].
 - Mid-Peninsula Housing Coalition, Redwood City, CA, Pro bono Development Consultant [1989-1992].
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Jackson Commons

Roxbury, Massachusetts



DETAILS

TYPE

*New Construction/Adaptive
Reuse, Mixed-Use, Income
Rental Housing*

SQUARE FEET

49,000

PROJECT VALUE

\$26 Million (est.)

PROJECT TEAM

*Architect:
Prellwitz/Chilinski Associates*

REFERENCE

*Chystal Kornegay, Executive
Director
MassHousing
(617) 854-1000*

Jackson Commons is a mixed-use, mixed-income, transit-oriented component of a 14-building, \$250M redevelopment efforts in the Jackson Square community of Boston's Roxbury and Jamaica Plain neighborhoods. The project includes 37 rental apartments, including the historic rehabilitation of the Webb Building and a new construction component. Approximately 12,000 square feet on the ground floor currently functions as a neighborhood learning center and retail/office space and is the home of Urban Edge, a national leader in the fields of community development and affordable housing.



Fairing Way Weymouth (Southfield), Massachusetts

DETAILS

TYPE

*New Construction, Senior
Housing/Long-Term Care
Facility*

SQUARE FEET

360,000 (4 Acre Campus)

PROJECT VALUE

\$63 Million

PROJECT TEAM

*Architect:
Shesky Associates
Construction Mgr:
Dellbrook Construction*

REFERENCE

*Joyce Hagland, Executive Dir.
William B. Rice Eventide Home
(617) 472-8600*

Byer Gallo Associates LLC acted as the Owners Representative, Development Consultant responsible for managing all phases of design, financing and pre-construction activities for this 104 unit independent living complex and 46-bed long-term care facility at the former Weymouth Naval Air Station. Eventide Home is relocating to accommodate its expansion as an independent living community with access to a full range of services allowing seniors to ‘age in place’ including access to a full-service skilled nursing facility. The project utilizing the “entry-fee” model for non-subsidized affordable senior housing. Construction is slated for completion in late 2016, with occupancy at over 90% in pre-sales.

1943 Dorchester Avenue

Dorchester, Massachusetts



RENDERING COURTESY OF CUBE DESIGN + RESEARCH

DETAILS

TYPE

*New Construction, Mixed-Use,
Income Rental Housing*

SQUARE FEET

49,000

PROJECT VALUE

\$18 Million (est.)

PROJECT TEAM

Architect:

Cube Design + Research

REFERENCE

*Philippe Saad, President
Greater Ashmont Main Street
(617) 327-4065*

As the principal owner and developer, in partnership with the Peregrine Group LLC, the new residential rental community at the Ashmont T-Station in Dorchester, MA. The development will create 64 new units of housing affordable to middle-income renters in Boston earning between 70% and 120% of the Area Median Income. The development will also create 1,500 s.f. of new commercial space along the Dorchester Avenue corridor and secured parking. In July of 2016, the TOD project received full approval under the City of Boston's Article 80 review process. Construction was completion in 2018.



Parkside On Adams & Historic Substation Roslindale, Massachusetts

DETAILS

TYPE

*New Construction & Historic
Renovation/Mixed-Income*

SQUARE FEET

45,000

PROJECT VALUE

\$15 Million (est.)

PROJECT TEAM

*Architects:
Prelwitz/Chilinski
Construction Mgr:
H.V. Collins Company*

REFERENCE

*Steven Gag, President
Roslindale Village Main Street
(617) 327-4065*

This public-private partnership includes Historic Boston Inc., Roslindale Village Main Streets and the Boston Redevelopment Authority with Beverly Gallo acting as both Principal Owner and Project Manager.

The project involved converting a former funeral home and historic MBTA electric substation into 43 units of rental housing and 7,000 s.f. of commercial/retail/restaurant space at this Transportation Oriented mixed-use site located immediately adjacent to Adams Park in the heart of Roslindale Village. Parkside on Adam is currently open and accepting reservations for the newly constructed apartments.

Client Services

Byer Gallo Associates LLC/Project Profiles

Charlesview

Allston/Brighton, Massachusetts

Type Of Project: Mixed Use, Mixed Income, Mixed Finance New Construction & Relocation of (Section 8 Contract)

Scope : 25,000 sq.Ft - Commercial/Retail Ground Floor
340 Residential Housing Units
Subsurface Parking Structure

Project Value: \$143 Million

Architect: CBT Architects, Boston

Reference: Beverly Bates
Senior Vice President, The Community Builders
(857) 221-8600



Project Management Consultant to the relocation, financing and reconstruction of Charlesview Apartments, a 213 unit low-income housing development in Allston MA, into a new 340-unit mixed-income, mixed-use complex.



Client Services

Byer Gallo Associates LLC/Project Profiles

225 Centre Street

Jamaica Plain/Boston, Massachusetts

Type Of Project:	Mixed Use, Mixed Income, Mixed Finance New Construction (Transportation Oriented Development)
Scope	16,200 sq.Ft - Commercial/Retail Ground Floor 103 Residential Housing Units Subsurface Parking Structure
Project Value:	\$53 Million
Architect:	ADD Inc. Architects, Boston
Reference:	Bart Mitchell President, Mitchell Properties (617) 542-6500



Owners Representative/Project Management Consultant responsible for all phases of the planning/design, financing and pre-construction activities for the 103 unit mixed-use property currently under construction in the Jackson Square neighborhood of Boston; (2.5 acres urban site, affordable and market rate housing, 16,200 s.f. commercial/retail space and parking structure, Article 80 Zoning).



Client Services

Byer Gallo Associates LLC/Project Profiles

Morgan Woods/Pennywise Path

Edgartown, Massachusetts

Type Of Project: New Construction, Mixed Finance, 40B
Low-Income Housing Tax Credit (LIHTC)
Tax Exemp Bond Finance

Scope: 60 Units, 21 Buildings, 12 Acres

Project Value: \$15.5 Million

Architect: Winslow Architects

Reference: Beverly Bates, Senior Vice President,
The Community Builders (857) 221-8600



Owner's Representative/Project Management Consultant responsible for all phases of development including project procurement, zoning, site planning and design, financial structuring and construction management. Project was the winner of the 2008 ULI Terwilliger Award for Workforce Housing Models of Excellence. (60-unit, 21-building, 12-acre subdivision; federal and state tax credits and tax-exempt financing; state HOME & MassHousing funds; 40B zoning; modular construction)



CLIENT SERVICES

PEREGRINE URBAN INITIATIVE EXPERIENCE/PROJECT PROFILES

PROVINCE LANDING

Provincetown, Massachusetts

Type Of Project: New Construction, 40B;
Mixed Use, Mixed Income,
Mixed Finance

Scope: 50 Units; 6 Buildings

Project Value: \$12 Million

Architect: Durkee, Brown, Viveiros &
Werenfels Architects

Reference: Beverly Bates, Senior Vice President
The Community Builders
(857) 221-8600

Jan Brodie (TCB)



Project Management Consultant to the 50-unit mixed income development located near Provincetown Center; (six buildings on 2 acre site, commercial space, infrastructure, parking and roadways).



Client Services

Byer Gallo Associates LLC/Project Profiles

Park DuValle HOPE VI

Louisville, Kentucky

Type Of Project: New Construction / Master Planning
Hope VI, Mix Use, Mixed Income, Mixed Finance

Scope: 1063 Housing Units;
Town Center / Medical Center

Project Value: \$300 Million over 5+ Years

Developer: The Community Boulders, Louisville, KY

Reference: Willie Jones, Sr. Vice President (retired)
The Community Builders
Boston, MA 02116
(857) 221-8600



Owners Representative/Project Manager responsible for master planning and infrastructure redevelopment, financial structuring, design and construction management (1063 unit community redevelopment and town center; HOPE VI and tax credit financing; homeownership and commercial components including a new community health center)



Client Services

Byer Gallo Associates LLC/Project Profiles

Cambridge Affordable Housing Corporation

Cambridge, Massachusetts

Type Of Project:	Scattered Site, Mixed Finance, Low-Income Housing Tax Credit (LIHTC)
Scope:	106 Residential Housing Units; 3 Scattered Sites, Adaptive Re-Use
Project Value:	\$30 Million, Combined Value
Architect:	Baker-Wohl, Boston Winslow Architects, Arlington Mostue Associates (<i>now Davis Square Architects</i>), Somerville
Reference:	Terri Dumas Director of Planning and Development, Cambridge Housing Authority (617) 520-6263



Project Management Consultant responsible for all phases of redevelopment for three scattered site projects low income housing (tax credit financing; state HOME/HIF, FHLB, local CDBG; publicly bid construction with filed subcontracts under MGL 30B).



Client Services

Byer Gallo Associates LLC/Project Profiles

Village at Hospital Hill, Phase I

Former Northampton State Hospital
Northampton, Massachusetts

Type Of Project: Adaptive Re-Use of Former State Hospital;
Mixed Income, Mixed Finance

Project Value: \$25 Million

Developers: The Community Builders
Mass Development

Reference: Willie Jones, Sr. Vice President (retired)
The Community Builders
(857) 221-8600

Beverly Bates, Senior Vice President The
Community Builders
(857) 221-8600

Owners Representative/Project Management Consultant responsible for project finance, architectural and construction management of the first phase of redevelopment (Rehabilitation of two former State Hospital Buildings; tax credit financing and Facilities Consolidation Funds (FCF) through the Dept. of Mental Health)MGL 30B)



Byer Gallo Associates LLC - Past Client List & Scope of Services

PROJECT/CLIENT	SCOPE OF SERVICES
Lincoln Court, HOPE VI (Cincinnati, OH) Sponsor: City of Cincinnati/ Cincinnati Housing Authority Developer: The Community Builders, OH	Owners Representative for master planning and design (500 unit public housing redevelopment; HOPE VI and tax credit financing; homeownership component).
Massachusetts Housing Partnership; (Boston, MA)	Consultant to MHP to provide redevelopment planning services to PHAs with aging State public housing properties.
Taunton Housing Authority; (Taunton, MA)	Assisted mid-sized housing authority in the “federalization” of 232 state public housing units at three sites pursuant to federal ARRA legislation and funding.
Brockton Housing Authority; (Brockton, MA)	Financial structuring and physical rehabilitation analysis for the 50-unit Washburn Heights property including the development of 12 new units to be built on the currently underutilized site.
Hopkinton Housing Authority; (Hopkinton, MA)	Consultant to HHA to assist small suburban housing authority to develop an adjacent vacant site owned by the PHA creating 12 new affordable housing units. Procurement of development team.
Osprey Lane: (Sandwich, MA) Sponsor: Sandwich Housing Authority Developer: The Community Builders, Boston, MA	Owners Representative/Project Manager responsible for all phases of development (10 acre, 36 unit subdivision; tax credit financing; state and local HOME and FHLB financing; modular construction).
Lake Street Terrace; (Chatham, MA) Sponsor: Chatham Housing Authority Developer: The Community Builders, Boston, MA	Project Management Consultant responsible for all phases of development (10 acre, 47 unit subdivision; federal and state tax credit financing; state HOME, FHLB & MassHousing funds; 40B zoning).
Quadel Consulting Corporation: Elm Haven, HOPE VI; (New Haven, CT) Sponsor: HUD and the New Haven Housing Authority Developer: Beacon Residential Properties	Representative to the Alternate Administrator appointed by HUD, Project and Construction Management, Workforce Development (455 unit redevelopment and family supportive service program; HOPE VI and tax credit financing).
Recapitalization Advisors; (Boston, MA)	Real Estate Development Services (Assisted in the creation of a national affordable housing finance intermediary).
Boston Edison/NSTAR: Boston Technology Venture Center; (South Boston, MA)	Small Business Development, Financial Planning, Real Estate Development (200,000 s.f. high-tech incubator).

Alberto Cárdenas, AIA

Vice President / Principal

Years Experience

52 years; 32 years with DHK

Background

2004 - Present
Principal
DHK Architects

1987 - 2004
Senior Associate
DHK Architects

1974 - 1976
Assistant Director
Bogotá City Planning Department

1966 - 1984
Private Practice
Bogotá, Colombia

Education

1966 B.S. and B. Architecture,
Rensselaer Polytechnic Institute
1987 M. Architecture, Urban
Design, Harvard University

Registration

MA

Professional Affiliations

American Institute of Architects
Boston Society of Architects
NCARB

Alberto Cárdenas is an architect and urban designer with over forty years of experience including architecture, planning and teaching in the United States and Colombia. He holds B.S. and B. Arch. degrees from Rensselaer Polytechnic Institute and an M. Arch. in Urban Design from Harvard. He is a registered architect in Massachusetts and Colombia.

Since joining DHK in 1987, Mr. Cárdenas has concentrated on the revitalization of residential areas and the design of affordable housing within Boston's neighborhoods. As a principal of the firm and project manager, he has led master planning projects for both existing and new neighborhoods and has designed a broad range of housing types for both new and rehabilitated construction.

A major concern in all of the housing that he has designed with DHK has been to reestablish viable urban streets in residential neighborhoods through a community-based planning and design process in which the end users and abutters play a major role. Through this process Mr. Cárdenas has gained extensive experience in working closely with community groups, resident associations and public agencies. Examples of this work include Mission Hill Main and Orchard Gardens Master Plans for the Boston Housing Authority and the award-winning Stafford Heights Cooperative within the Dudley Neighborhood Initiative, and Davenport Commons, an innovative project with Northeastern University that comprises 125 units of student apartments and 75 affordable family units in Boston.

Prior to joining DHK, Mr. Cárdenas practiced in Bogotá, Colombia. His housing experience there includes the development, design and construction of individual and multi-family housing. He also has experience in the public sector where, as Assistant Director of the Bogotá City Planning Department, his responsibilities included design review and permitting for all residential subdivisions, drafting new zoning regulations and presiding over the Zoning Board.

His project experience includes:

Master Planning for Housing and Mixed Use Developments

Devine School Redevelopment – Randolph, MA
Camfield Gardens – Boston, MA
Kilby/Gardner/Hammond Master Plan – Worcester, MA
Jackson Square Mixed Use – Site 3 Master Plan – Boston, MA
Markham Gardens Master Plan – Staten Island, NY
Mission Hill Main Master Plan – Boston, MA (HOPE VI Grant Application)
Orchard Gardens HOPE VI (off-site) – Boston, MA
Orchard Gardens On Site HOPE VI Master Plan – Roxbury, MA
Orchard Gardens Off-Site Phases 1 and 2 Master Plan – Roxbury, MA
Parcel 10 Mixed Use Development – Roxbury, MA
Woodbridge Estates HOPE VI – Detroit, MI
Boston State Hospital Residential Village – Boston, MA

Housing Design

1 Kilby Street – Worcester, MA
Devine School Redevelopment – Randolph, MA
92 Grand Street – Worcester, MA
Four Corners (10-22 Bowdoin Street) – Boston, MA
Lyman Terrace Revitalization – Holyoke, MA
Alexam Pembroke Woods – Pembroke, MA
Beacon Street Housing – Worcester, MA
Beacon/Oread Housing – Worcester, MA
Camfield Gardens – Boston, MA
Cambridge/Hacker Street Apartments – Worcester, MA

Alberto Cárdenas, AIA

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Davenport Commons, Northeastern University – Boston, MA
Dover Lofts Condominiums – Boston, MA
Hollis Street Housing Rehabilitation – Worcester, MA
Jamaica Plain Cohousing – Jamaica Plain, MA
Jamaica Plain Cooperative Housing – Boston, MA
KGH Phase IV Affordable Housing – Worcester, MA
Kilby/Gardner/Hammond Housing – Worcester, MA
Lucerne Gardens Housing Rehabilitation – Mattapan, MA
Markham Gardens – Staten Island, NY
North Canal Revitalization – Lowell, MA
Orchard Gardens HOPE VI – Roxbury, MA
Phillips Brooks School Housing – Boston, MA
Randolph Houses Public Housing – New York City, NY
Ulin House Elderly Housing Rehabilitation – Boston, MA
Viviendas Apartments Comprehensive Rehabilitation – Boston, MA
St. Mary's School Housing – Windsor Locks, CT
St. Joseph's Housing – Everett, MA
Hyde Square Cooperative Initiative – Jamaica Plain, MA
Washington Village – Norwalk CT
Westover AFB Family Housing Rehab – Chicopee, MA
Virgin Island Housing Authority Hurricane Damage Assessments – Virgin Islands

Transportation Projects

Andrew Station, MBTA Red Line Modernization – Boston, MA
Courthouse Station – Boston, MA
Dudley Station Rehabilitation – Boston, MA
Quincy Adams MBTA Garage Extension – Quincy, MA

Institutional & Public Facilities

Work for institutional and private clients has included feasibility studies, programming, site planning, adaptive reuse and new construction for a variety of uses and building types.
Boston Public Facilities Department EMS Training Academy Study – Boston, MA
Boston Public Facilities Department Seaport Station Study – Boston, MA
Boston Public Facilities Department Archives Study – Boston, MA
Boston Police Station C-11, Various Repairs & Modernization – Dorchester, MA
Boston Water and Sewer Commission Headquarters – Boston MA
Casa de Cultura, Jorge Hernandez Cultural Center – Boston, MA
Davenport Commons – Northeastern University – Boston, MA
Leventhal Community Building Renovations – Brighton, MA
Lyman Terrace Community Center – Holyoke, MA
Massachusetts Convention Center Authority – Boston and Springfield, MA
MWRA Adaptive Reuse of the ICCF Building – Southborough, MA
Whittier Street Community Health Center – Roxbury, MA

Derek R. Mueller, Associate

Job Captain

Years Experience

6 years /5 years with DHK

Background

Current
Designer
DHK Architects

2012-2015

Construction Worker
M&L Home Improvement LLC

Education

2014, Master of Architecture, Wentworth Institute of Technology

2012, Bachelor of Science of Architecture, Wentworth Institute of Technology

Mr. Mueller received both his Master of Architecture and Bachelor of Science in Architecture from Wentworth Institute of Technology in 2014 and 2012 respectively. Since then, he has worked as a designer on a variety of residential and facility projects. He is highly skilled at the production of project documents using various software programs including Revit, AutoCAD, and Photoshop. Mr. Mueller is gaining experience with Construction Administration procedures and practices as well as interior finish coordination including interior design and interior finish selections.

His project experience includes:

Brighton Marine Supportive Housing, Brighton, MA

Designer for project that consists of the rehabilitation and conversion of Building 9 into 25 studio apartments, specifically designed for male Veterans to move out of homelessness into safe, affordable, permanent housing. The project involves the efforts of Brighton Marine, US Department of Urban Development, the Veterans Administration and the Boston Housing Authority. The Veterans' programs will be managed by Soldier On, a private nonprofit organization committed to ending veteran homelessness.

Home for Little Wanderers, Roslindale, MA

Designer for a 120 unit development consisting of two buildings. One building, with 96 units, contains one level of parking at grade and covered by a structured deck. The other building, contains 24 units for clients of the Home for Little Wanderers, plus 40,000 square feet of clinical and office space.

Harvard Club, Boston, MA

Design services for a 135 unit mixed-use apartment building on land currently occupied by the Harvard Club of Boston's on-site parking lot. The lower floors of the new building will serve as a new annex to the Harvard Club and will contain the Club's new athletic facilities. These include a fitness center, squash courts, multi-purpose rooms, member lounges, lockers and spa facilities.

31 Stratford Building Restoration, Boston, MA

The 31 Stratford Building project included complete restoration from fire and water damage, building code upgrades and improving energy performance. This condominium building was originally constructed in the 1890s. The 7 story highrise includes 7 stories including a penthouse, 30 residential units and 1 office unit. The 31 Massachusetts Ave., address located it in the jurisdiction of the Back Bay Historic Commission which the project required review and approval for the replacement of the metal clad bay and some windows.

24 Drydock - Boston, MA

DHK was selected to design this project for Cronin Development that recently received tentative designation from the BPDA for its development. The building is located in the South Boston Seaport District on a ¾ acre site. It will house marine-related uses including the Boston Ship Repair Company, research and development labs as well as educational and operational space for marine-related non-profits. The Cronin Group headquarters and its commissary operations will be housed in the building. The five-story structure will have 125,000 SF of space and structured parking. Project goals include a high level of resiliency, achievement of LEED Gold standards and a signature, cutting edge design that translates historic precedents into iconic imagery through the use of advanced construction technology.

Renovation of Camp Edwards Transient Barracks 5234 building, Bourne, MA

Job Captain for the project is for the design services for the renovation of the 16,800 SF, three story, slab on grade, concrete masonry structure with brick veneer exterior barracks originally built in the 1950s. The project was to investigate and evaluate the hot water heating system, fire alarm system, HVAC, electrical, latrines interior finishes, existing windows and doors, masonry, roof and ABA compliance for the first floor and any hazardous material abatement required.

Dayton Senior Village - Hope VI

Dayton, OH

This 30-unit elderly apartment building is part of a larger effort to revitalize an underserved neighborhood under the HOPE VI public housing program. DHK developed a master plan for an 11-acre community that transformed the urban context into an inviting network of tree-lined residential streets with new detached single and two-family buildings. The elderly building occupies a prominent location within the new development. It provides a state-of-the-art residential environment that is fully integrated with the surrounding community and allows residents to age in place gracefully with a host of services that are included in the HOPE VI program.

DHK's design for the building features a beautiful two-story lobby that provides access to social services spaces on the ground floor, including a meeting/events room with a commercial kitchen, offices for social service providers and building management. An outdoor patio extends the meeting room for outdoor functions and connects the building to its surrounding landscaped green space. All of the units meet contemporary standards for elderly housing and there are fully accessible units in compliance with Section 504. The apartments feature ample windows for enhanced natural daylighting and balconies that offer views and a sense of connection to the neighborhood.

Client: The TCG Development Services & Oberer Companies
Project Cost: \$2.6 million
Complete: 2004



Franklin Hill Housing - Phase I & 2

Boston, MA

The Franklin Hill development sets a new standard of excellence for public housing. In urban design concept, architectural design, housing quality standards and amenities, the new Franklin Hill challenges the notion that public housing is somehow inferior. This 10-acre development replaced an outdated, problem-plagued public housing complex in Boston. It brings a revitalized sense of community, pride of place and the joy of living to 254 low-income households. The community-based design puts people first by creating beautiful, pedestrian friendly public streets and green spaces. It features a community park at its center and a variety of apartment options that range from several townhouse designs in two and three story buildings to flats in three midrise buildings. The non-residential program includes a Boys & Girls club, offices for the resident organization and a management office. Excellence in design is evidenced by the wonderful variety and richness achieved with simple, traditional building forms and materials: gables, bays, clapboard siding, shingles and brick combined with metal panels in the midrise buildings. The creative use of color in the buildings brings a sense of individuality to each unit and a new sense of vitality and cohesion to the entire community. This project is LEED Silver certifiable.

Client: Trinity Financial for Boston Housing Authority

Date Completed: 2010

Project Cost: \$75 million



Markham Gardens

Staten Island , NY



Thirteen acres of green residential design define the 290 units of Markham Gardens Homes. This complete revitalization of the existing Markham Gardens housing project sets a new standard for sustainability in affordable housing. This redevelopment plan is one of the first in the Northeast to garner full approval from the U.S. Green Building Council. This is the organization that monitors Leadership in Energy and Environmental Design, granting Markham with LEED silver status. The project consists of the demolition of a two story building dating from World War II and new construction of three story townhouses that are well integrated with the existing Port Richmond residential neighborhood's character. The buildings feature rear yards, front yards, porches and utilizes up to date technology for sustainability and durability.



Client: The Domain Companies
Project Cost: \$44 million
Date Complete: 2009

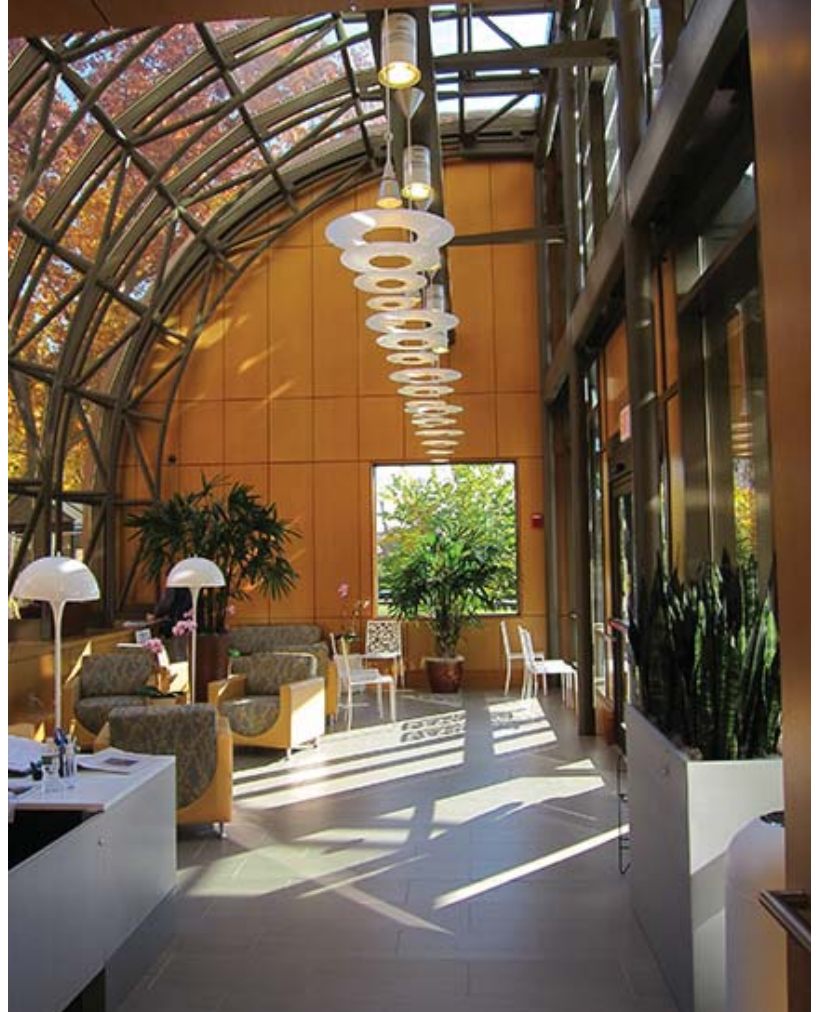


Ulin House Renovation

Brighton, MA

DHK was engaged to design the comprehensive rehabilitation of a 239-unit high-rise building located within a large elderly housing development in Boston. The project encompassed interior renovations to the staff offices and common areas on the ground floor and the design of a building addition to house a new lobby that serves as a gateway to the entire residential development. The unit renovation work included new kitchens and bathrooms and the creation of 6 new fully accessible units as well as MEP upgrades to bring the systems up to code and to incorporate sustainable features.

Client: 2Life Communities (formerly Jewish Community Housing for the Elderly)
Complete: 2015
Project Cost: \$20 million



Ulin House Renovation

Brighton, MA

Selective rehabilitation of an existing multi-story building located within the Jewish Community Housing for the Elderly campus. The project encompasses interior renovations to the common areas and extension of office space on the first floor. Renovations include kitchen and bathroom upgrades for 240 units, creating 4 new fully accessible units as well as MEP upgrades to bring the systems up to code and to incorporate sustainable features. A cogeneration system will provide electricity and heat the building.

Client: Jewish Community Housing for the Elderly
Project Cost: \$20 million
Date Completed: 2015

