



Habitat for Humanity Greater Boston, in partnership with Boston Food Forest Coalition, Artists for Humanity and United Housing Management is pleased to submit the following response.

Parker and Terrace Street Development Proposal

November 7th, 2022



TABLE OF CONTENTS

Introduction

- 05 [1. Statement of Interest](#)
- 08 [2. Organizational structure](#)
- 09 [3. Lawsuits](#)

Development Plan

- 11 [1. Vision & Development Approach](#)
- 13 [2. Development Timeline](#)
- 15 [3. OneStop Application Budget](#)
- 38 [4. Financing Letter of Interest](#)
- 39 **[5. Design Submission](#)**
 - 40 [5.1 Narrative](#)
 - 41 [5.2 Site Context & Site Design](#)
 - 46 [5.3 Overall Landscape Design and Site Plan](#)
 - 50 [5.4 Site One](#)
 - 59 [5.5 Site Two](#)
 - 77 [5.6 Green Building](#)
 - 78 [5.7 LEED for Homes checklist](#)

79 **[Diversity And Inclusion Plan](#)**

81 **[Operational Plan](#)**

- 83 [1. Artists for Humanity](#)
- 89 [2. Boston Food Forest Coalition](#)
- 91 [3. UHM Properties](#)

102 **[Qualifications, Experience, And References](#)**

- 103 [1. Qualifications and Experience](#)
- 105 [2. Resumes of Development Team](#)
- 140 [3. Permits/Licenses](#)

TABLE OF CONTENTS

147	<u>Financial Narrative</u>
151	<u>1. Audited Financial Statement</u>
173	<u>2. Annual Operating Budget for the community garden</u>
	Appendices
175	<u>Appendix 1 - Proposal Form</u>
179	<u>Appendix 2 - Project Summary</u>
180	<u>Appendix 3 - Statement of Proposer's Qualifications Form</u>
181	<u>Appendix 4: Construction Employment Statement Form</u>
182	<u>Appendix 5: Property Affidavit Form</u>
183	<u>Appendix 6: Affidavit of Eligibility Form</u>
185	<u>Appendix 7: Conflict of Interest Affidavit Form</u>
186	<u>Appendix 8: Chapter 803 Disclosure Statement Form</u>
187	<u>Appendix 9: Disclosure/Beneficial Interest Statement Form</u>
190	<u>Appendix 10: Beneficiary Affidavit Form</u>
191	<u>Appendix 11: Beneficiaries of Assistance Form</u>
192	<u>Appendix 12: Housing Development Budget Form</u>
194	<u>Appendix 13: Development Budget for community garden</u>
195	<u>VIII. Proposal Checklist</u>

1. Statement of Interest

Habitat for Humanity Greater Boston
434 Massachusetts Avenue, Suite 201
Boston, MA 02118

November 7, 2022

Sheila A. Dillon
Chief and Director
Mayor's Office of Housing
12 Channel Street, 9 th Floor
South Boston, MA 02210

Dear Director Dillon:

Habitat for Humanity Greater Boston (HFHGB) in partnership with Artists for Humanity, Boston Food Forest Coalition, and United Housing Management is pleased to submit this proposal for the development of City-owned parcels located at 778-796 Parker Street and 77 Terrace Street on Mission Hill, Boston, MA.

Habitat for Humanity Greater Boston is a 501(c)(3) charitable organization dedicated to providing affordable home ownership opportunities by using volunteer labor, generous donations, materials donated by businesses, and partnerships with low-income families in need of decent and affordable housing. We believe home-ownership is a much needed and vital step to help families break the cycle of poverty. Habitat for Humanity Greater Boston is an affiliate of Habitat for Humanity International and dedicated to helping families break the cycle of poverty through affordable housing throughout the world. For over thirty years, Habitat Greater Boston has been building affordable housing for homeownership in the Greater Boston area, totaling more than 130 units, and serving as many families.

At 778-796 Parker Street and 77 Terrace Street, we envision a vibrant, connected community of families and individuals living in affordable owner-occupied homes and artist housing built around sustainable community gardens, food-producing fruit orchards and green space, managed by the Boston Food Forest Coalition. This will be a community that celebrates the arts by hosting Artists for Humanity Artists Fellowship Program in the first level of the Terrace Street artists housing building. Our proposal will include 25 affordable home ownership units (including artists housing) for families earning 40% - 80% AMI. The homes will be integrated with the Boston Food Forest community garden, fruit orchards and open space designed to incorporate art elements and green space nodes for education, performance, gathering, and art installations along a public pathway from Parker Street down to Terrace Street.

Mission Hill is a vibrant and historic neighborhood located directly within our service area. We are very interested in working alongside the community to protect its natural landscape, as well as provide 25 affordable homeownership units to deserving families in need. Representatives from Habitat Greater Boston have met with neighbors and attended neighborhood meetings to learn more about what kind of housing and green space development will be welcomed by the neighborhood and surrounding community. We believe our proposal carefully considers these desires and will surpass many of the goals outlined by the Mayor's Office of Housing.

Habitat Greater Boston is pleased to join with the following partners to realize this vision at 778-796 Parker Street and 77 Terrace Street:

Artists for Humanity

Artists For Humanity (AFH) will launch the AFH Artists Fellowship Program in the Habitat Greater Boston affordable Artists Housing building community space on 77 Terrace Street. The Program, led by acclaimed Boston artist and AFH co-founder Rob “ProBlak” Gibbs, will engage and mentor local and national artists at the 778-796 Parker Street and 77 Terrace Street development. In alignment with current national movements in the public art landscape, the Program seeks to advance the careers of AFH alumni and other under-represented artists by using our experience, resources, and connections to amplify their voices on the public stage.

Artists for Humanity (AFH) provides under-resourced teens the keys to self-sufficiency through paid employment in art and design. AFH is built on the philosophy that engagement in the creative process is a powerful force for social change, and that creative entrepreneurship is a productive and life-changing opportunity for young people. Bridging economic, racial, and social divisions, AFH enriches urban communities by introducing young people’s creativity to the business community.

Boston Food Forest Park

The Boston Food Forest will establish and manage a community land trust as an integral part of the Habitat Greater Boston Parker Terrace development, which will include sustainable a community gardens with garden beds, food-producing fruit orchards and green space, managed by the Boston Food Forest Coalition (BFFC).

The Parker and Terrace Streets food forest will include a diverse arrangement of plants that attempts to mimic the ecosystems and patterns found in nature. Food forests are inspired by the style of land management known as permaculture, an approach that focuses on growing perennials: plants that return year after year. Rainwater harvesting and composting, in addition to the fruit trees, shrubs, and ADA-compliant pathways will be incorporated into the design of the Food Forest. The Boston Food Forest at the Parker and Terrace Streets will be a combination of perennial plantings and raised beds, some gardened by residents and others designated for communal use. It will be a place of peace where anyone is welcome to connect with nature, to have a picnic while their children play in the sandbox, and to grow their own food as well as food for others.

The Parker and Terrace Streets food forest will provide delicious seasonal foods for both Habitat for Humanity residents and the Mission Hill neighborhood, habitat for pollinators and songbirds, and vibrant local ecosystems that increase plant diversity, urban tree canopy, and carbon sequestration — to name a few benefits. On this site, BFFC will incorporate fruit and nut trees, perennial plants, annual crops, herbs and other edibles into their landscapes. Food forests are designed to address food access by providing habitat for low-maintenance, edible food-producing plants to which all stewards, volunteers and neighbors can eat. By growing food, fruit trees, and berry vines, and by creating a community gathering space, the Boston Food Forest at the Parker and Terrace Streets Development will strengthen the connection between people, food, and land---among both future Habitat for Humanity families and residents in the Mission Hill neighborhood. As the trees in our food forests grow, both neighbors and Habitat families will have access to more fresh fruit, berries, nuts, and other food sources right in their neighborhoods.

UHM Properties, LLC

UHM Properties, LLC (UHM) is a professional property management and development company with extensive managing affordable housing properties owned by local not-for-profits. In this capacity, UHM in partnership with Habitat Greater Boston will manage future the Parker and Terrace Streets condominium. As future homeowners, Habitat families will become trustees in their 25-unit condominium association at the Parker and Terrace Streets site.

UHM has a long-standing partnership with Habitat Greater Boston as the manager of the Blue Hill Place condominium, a 26-unit development built by Habitat. UHM currently manages 24 residential properties consisting of 1,640 units and approximately 360,000 sf of commercial space in greater Boston. UHM has the proven capacity and experience to manage both rental and homeownership affordable housing properties. UHM is a Certified MBE with the City of Boston and the Supplier Diversity Office with the Commonwealth of Massachusetts.

Net Zero Green Building

We hope to demonstrate that homes for low-income families can be designed and built using energy conservation measures designed to approach net zero/zero carbon. We believe that this approach not only aligns with the City's Green Building goals but provides significant benefits to lower-income homeowners in terms of ensuring a safe, healthy environment. Net zero/zero carbon measures will benefit future lower-income homeowners by ensuring minimal utility bills that will not burden the household budgets of low-income families, thus giving them the opportunity to save, build equity in their property and build wealth in their family.

Habitat Greater Boston is a Massachusetts nonprofit corporation governed by a Board of Directors with representatives from real estate businesses, construction firms, architectural firms, financial institutions, and law firms. There are currently 26 employees at the organization, as well as thousands of diverse volunteers who work with us throughout the year. Key staff members for this project are, Jim Kostaras, AIA, President & CEO; Gerry Patton, Director of Construction and Real Estate Development; Shannon McCormack, Associate Director of Homeowner Services; Cathy Kurczak, Manager of Construction Operations; Katie Theodoros, Manager of Construction Administration and Micaela Younger, Architecture & Sustainable Design Coordinator.



James Kostaras
Project Principal

Our design team for this project is:

Adaptiv Architecture and Planning- “community rooted planning and architecture” adaptiv.org. Lead architects and team coordinator. Adaptiv principals are:

- Managing Director: Rob Freni, AIA, LEED AP BD+C
- Director of Design: Abby Gordon, RA
- Architectural Designer: Angela Dominguez
- Architect: Bill Fitzpatrick
- Architectural Designer: Gillian Kazazz

Studio Luz - redefines traditional uses of space, materials, and technology to draw out the exceptional possibilities within each project, seeking remarkable, refreshing results through abstraction. Our work and client base is diverse, ranging from residential and commercial, to institutional projects and installations.

- Principal and Co-Founder Hansy Better Barraza
- Project Manager Sophie Nahrman
- Architectural Intern Pablo Rafael Herraiz García de Guadiana

- Civil Engineer: Oak Consulting Group
- Structural Engineer: Siegel Associates
- Landscape Architect: Bellalta 3 Design
- Sustainability Consultant: Andrew Steingiser

- Our legal team will be managed by Robert Fitzgerald, Esquire, of Goodwin Proctor, LLP.

2. Organizational Structure



James Kostaras

President & CEO, Habitat for Humanity Greater Boston (HFH)

Design & Engineering



Gerald E. Paton

Director of Construction & R. E. Development, HFH



Robert Freni (Adaptiv)

CEO and Founder



Hansi Better Barraza (Studio Luz)

Principal + Co-Founder

- Shannon McCormack, Associate Director Homeowner Services.
- Micki Younger, Architectural & Sustainable Design Coordinator.
- Cathy Kurczak, Manager of Construction Ops.
- Barry Weiss - Project Coordinator.
- Katie Theodoros, Manager of Construction Administration.

Engineering and Design Team including:

- Structural Engineers
- Landscape Architect
- MEP Engineers
- Civil Engineers

**Habitat For Humanity
Community and Family
Volunteers as Builders**

3. Lawsuits

Habitat for Humanity Greater Boston doesn't have any lawsuits in courts situated within MA within the past 5 years.

DEVELOPMENT PLAN



1. Development Plan

Development plan and how it coincides with the project requirements. Plan for accomplishing our goals.

Our proposal for 778-796 Parker Street and 77 Terrace Street will include 25 affordable home ownership units (including artists housing) for families earning 40% - 80% AMI. The homes will be integrated with the Boston Food Forest's community garden, fruit orchards and open space designed to incorporate art elements and green space nodes for education, performance, gathering, and art installations along a public pathway from Parker Street down to Terrace Street. In addition, Artists For Humanity (AFH) will launch the AFH Artists Fellowship Program in the Habitat Greater Boston affordable Artists Housing building on 77 Terrace Street at street level.

Our project at Parker and Terrace Streets will demonstrate the importance of preserving green community space and creating spaces that not only connect the community back to nature, but also create connections within the neighborhood.. This will be done through the revitalization of the existing park on the south side of the Parker Street site, the inclusion of a green corridor connecting the two sites, and with the focus on emphasizing the green spaces and not overdeveloping the site. As this and other neighborhoods throughout the city continue to be developed in the future, the preservation of these green spaces will be critical not only in preserving the sense of community but to increase the potential for families to live comfortably, and sustainably in these neighborhoods.

Our construction will also promote best practices in green building and sustainable design, and overall carbon reduction, utilizing Passive House standards as a baseline to determine the approach for sustainability. We will work with our team to keep Net Zero, and LEED guidelines as the primary goals for this project, utilizing electrical mechanical systems wherever possible and offsetting the energy usage with the installation of solar panels whenever practical. In addition to this all materials will be carefully screened, and selected to minimize the Carbon Footprint of the project.

Anticipated Timeline:

We are projecting that the design of the overall site including all M.O.H. & B.P.D.A. design reviews will take 6-8 months. Community Engagement is critical for our work to be successful, so we will develop an engagement plan that enables the community to continuously offer their inputs as the design develops. After receiving the Design and Engineering approvals, we will submit for the building permit within 4 weeks of completion and begin to work with the zoning board on approval of the site approach. We expect this permitting and approval process to take 6-9 months and expect the issuance of the building permit to be 10-14 months after tentative designation.

Development financing will be committed prior to issuance of the building permit. We plan to start construction within 4-6 weeks of building permit issuance and anticipate the completion of the project within 24 - 30 months. Key milestones are indicated in the Development timetable Form.

Proposed Development Uses:

Housing: 25 homeownership units that will be affordable to households earning between 40% - 80% AMI
Artists Housing: 4 homeownership units on Site 2 (included in the total of 25 homes) that will be afford-

able to artist households earning between 40% - 80% AMI

Artists for Humanity community studio space:
1,454 SF

Open Green Space: Boston Food Forest including a community garden and fruit tree orchards:
19,250 SF
Over 40% of the site remains open green space.

Green corridor providing public access from Parker Street to Terrace Street.

Distribution of Housing Units:

Site 1

- 9 Units on 778-796 Parker Street and 16 Units total at 77 Terrace Street.

Site 2

16 Units total at 77 Terrace Street distributed as follows:

- Building A: Street front residential building incorporating artist live/work apartments and Artists for Humanity art/community space.
- Building B: Southernmost residential building incorporating 6 4-bedroom townhouse-style units.
- Building C: Northernmost residential building incorporating 6 4-bedroom fully ADA accessible apartment-style units.

Learning from the neighborhood context:

While the RFP has requested the two sites be submitted as one project, the sites are very different in the context and adjacent uses. The Parker Street site is embedded into a two and three story triple decker residential setting with a residential feel. Parker Street is a one way street with a lot of foot traffic on a day to day basis from college students and Fenway High School students. The Terrace Street site is embedded into a commercial zone with many larger buildings with materials ranging from concrete and wood to brick and various metals. Terrace street is currently a two way street but very tight and typically lined with parked vehicles.

In response to the RFP requirements and our understanding of the neighborhood context, the proposed uses are as follows:

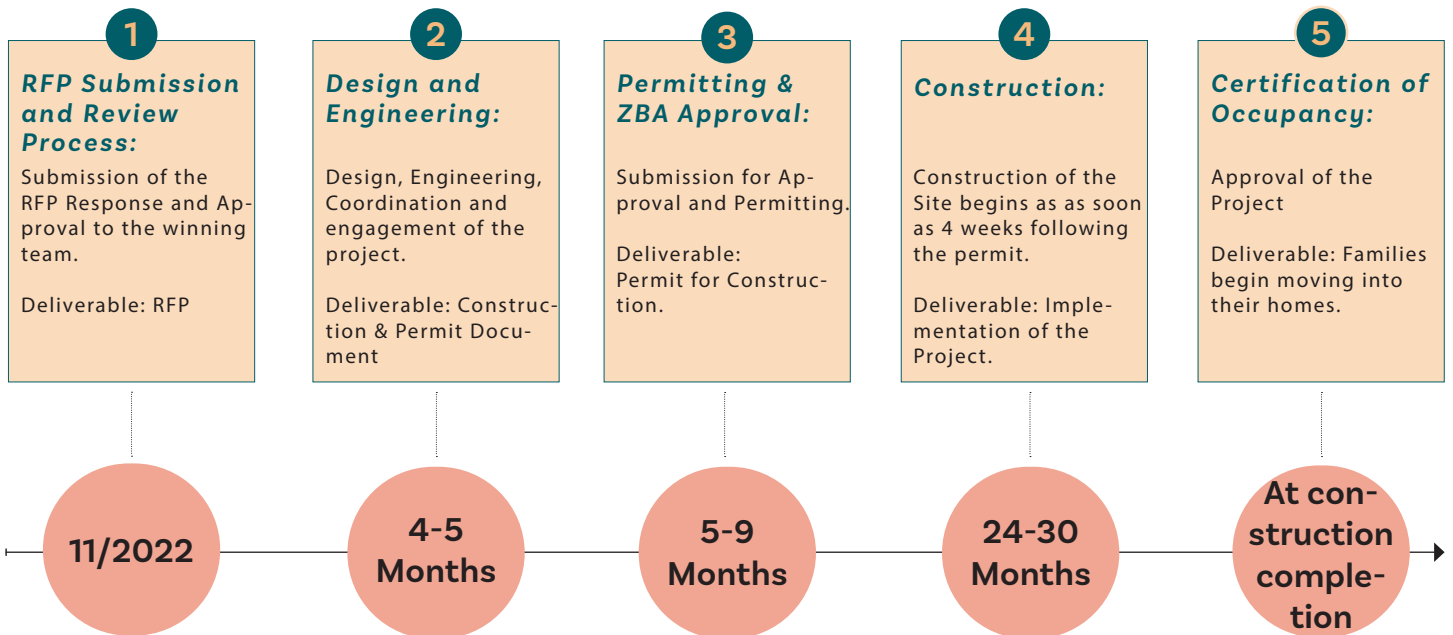
- Green Corridor - The existing Park along Parker Street will be revitalized and a new Vegetable Garden and fruit tree orchard will be created that meanders through the site connecting Parker and Terrace Street.
- Existing Park - Revitalization of the existing park to provide the community with a location to congregate.
- Affordable housing - All of the units on the site will be homeownership units.
- Artists Units - This project will partner with Artists for Humanity to identify the best fit for the Artists units.
- Commercial Space - This vision of the commercial space is to be utilized for the Artists and also the surrounding community.
- On Site Parking
- Bicycle Storage - For the promotion of sustainable living and lowering the carbon footprint of the development.

Our Development Approach:

Habitat For Humanity Great Boston improves the lives of hardworking families through access to affordable, low maintenance and sustainable homeownership. Our unique and empowering model brings together groups of dedicated volunteers and lower-income families to build affordable and environmentally sustainable homes while strengthening local communities.

Our work is community centric and focused on delivering high quality affordable housing that is also sustainable and energy efficient. Over our 35 year history we have learned many lessons and have constantly improved on creating high quality housing for the families that we partner with.

2. Development Timetable



DEVELOPMENT TIMETABLE FORM

PROPOSER'S NAME: Habitat for Humanity Greater Boston Inc.

Assuming that you are designated on _____ *, indicate below your target dates for achieving these key development milestones.*

MILESTONE	DATE
Designs Complete	10/07/2023
Apply for Permit(s) Trigger Zoning	11/07/2023
Zoning Relief Anticipated?	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
All Development Financing Committed	N/A
Permit(s) Issued	04/07/2024
Financing Closed	N/A
Construction Begins	05/07/2024
Construction Complete	12/07/2027

3. OneStop Application Development Budget

Section 1 PROJECT DESCRIPTION

Name and Address of Project			
1 . Project Name:	<input type="text" value="Parker and Terrace Street Development"/>		
1a . Application Completed By:	<input type="text" value="Gerald Patton"/>		
1b . Original Application Date:	<input type="text" value="11/7/2022"/>	Application Revision Date:	<input type="text"/>
2 . Project Address:	<input type="text" value="See Attached Site Info Sheet 'Parcel Address List - Exhibit 1'"/>		
3 . Neighborhood	<input type="text" value="Mission Hill"/>		
4 . City/ Town	<input type="text" value="Boston"/>	MA	<input type="text" value="02120"/>
		<small>(state)</small>	<small>(zip code)</small>
5 . County	<input type="text" value="SUFFOLK"/>		
6 . Scattered Sites?	<input type="text" value="No"/>		
7 . Is this a qualified census tract?	<input type="text" value="Yes"/>	Enter a census tract	<input type="text" value="0814.00"/>
8 . Difficult to develop area	<input type="text" value="No"/>	QCT information last updated on:	<input type="text" value="1/29/2015"/>
Development Plan			
9 . Development Type (Please check all that apply.)			
<input type="checkbox"/> Yes	New construction		
<input type="checkbox"/> No	Acquisition, substantial rehab of existing housing		
<input type="checkbox"/> No	Acquisition, moderate rehab of existing housing		
<input type="checkbox"/> No	Acquisition, minimal or no rehab of existing housing		
<input type="checkbox"/> No	Adaptive re-use of non-residential structure		
10 . Proposed Housing Type	<input type="text" value="Multi Family Affordable Homeownership"/>		
11 . Project Description:	Number of buildings: <input type="text" value="6"/>		
	<p>This development consists of erecting 6 3-story buildings of affordable homeownership on land that is currently vacant. The Parker Street site (778-796 Parker) will comprise Three 3-family units. Each unit will have one off-street parking spot. The Terrace Street Site will comprise 3 buildings. The Southwest building will will have Six 4-bedroom Townhouses, each with one designated parking space. The Northwest building will have Six 4-bedroom flats, each with one designated parking space. The Northeast building will have Two 2-</p>		
12 . Development Schedule:	<i>Original</i>	<i>Revised</i>	<i>Optional user comments</i>
Application Date	<input type="text" value="11/7/2022"/>		
Construction Loan Closing			
Initial Loan Closing (MHFA only)			
Construction Start	<input type="text" value="5/7/2024"/>		
50% Construction Completion	<input type="text" value="3/7/2026"/>		
Construction Completion	<input type="text" value="12/7/2027"/>		
First Certificate of Occupancy	<input type="text" value="2/7/2028"/>		
Final Certificate of Occupancy	<input type="text" value="3/7/2028"/>		
Sustained Occupancy	<input type="text" value="3/14/2028"/>		
Permanent Loan Closing			

Parker and Terrace Street Development

Application Date: 11/7/2022

#VALUE!

13 . Unit Mix:	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income (User-defined) 40-80% AMI	Market Rate	Total Units
SRO						0
0 bedroom						0
1 bedroom						0
2 bedrooms				5		5
3 bedrooms				8		8
4 bedrooms				12		12
Total Units	0	0	0	25	0	25
Home Units*						0

*HOME units included in the above totals. Other Income=Below of median income

14 . Unit Size in square feet:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income (User-defined) 40-80% AMI	Market Rate	Average All Incomes
SRO						N/A
0 bedroom						N/A
1 bedroom						N/A
2 bedrooms				1010.0		1,010
3 bedrooms				1300.0		1,300
4 bedrooms				1640.0		1,640

15 . Number of bathrooms in each unit:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income (User-defined)	Market Rate	Average All Incomes
SRO						N/A
0 bedroom						N/A
1 bedroom						N/A
2 bedrooms				1.0		1.0
3 bedrooms				2.0		2.0
4 bedrooms				2.5		2.5

16 . Funding Applied For:

Please check all the funding that is being applied for at this time, with this application:

DHCD Tax Credit Allocation	No
Category	Not Applicable
Category	Not Applicable
HOME Funding through DHCD	No
Massachusetts Housing Finance Agency (select all that apply):	
Official Action Status	No
Construction Financing/Bridge Financing.....	No
Permanent Financing	No
Massachusetts Housing Partnership (MHP) Fund:	
Permanent Rental Financing Program	No
Massachusetts Housing Investment Corporation (select all that apply):	
Debt Financing	No
Tax Credit Equity Investment	No
Boston Department of Neighborhood Development (DND):	No
Other	No
Other.....	N/A
Other.....	N/A
Other.....	N/A
Financing from MassDevelopment	No

	Total	New Construction	Rehabilitation
17 . Number of buildings planned:			
a. Single-Family	0		
b. 2-4 Family	0		
c. Townhouse	5	5	
d. Low/Mid rise	0		
e. High-rise	0		
f. Other	1	1	
TOTAL	6	6	0
18 . Number of units:	25	25	
19 . Gross Square Footage			
a. Residential	32,250	32,250	
b. Commercial	1,450	1,450	
20 . Net Rentable Square Footage:	Total		Percent of Gross
a. Residential		s.f.	0%
b. Commercial	1,450	s.f.	100%
21 . Number of handicapped accessible units	3	Percent of total	12%
22 . Fire Code Type	Mixed construction materials, sprinklered		
23 . Will building(s) include elevators?	Yes		
24 . Are the following provided with the housing units:			
a. Range?	Yes		
b. Refrigerator?	Yes		
c. Microwave?	No		
d. Dishwasher?	No		
e. Disposal?	Yes		
f. Washer/Dryer Hookup?	Yes		
g. Washer & Dryer?	No		
h. Wall-to-wall Carpet?	No		
i. Window Air Conditioner?	No		
j. Central Air Conditioning?	No		
25 . Are the following included in the rent:			
a. Heat?	N/A		
b. Domestic Electricity?	N/A		
c. Cooking Fuel?	N/A		
d. Hot Water?	N/A		
e. Central A/C, if any?	N/A		
26 . Type of heating fuel:	Natural Gas or Electric		
27 . Total no. of parking spaces:	0	Outdoor:	Enclosed:
28 . Number of parking spaces exclusively for the use of tenants:			
a. Residential	Total: 23	Outdoor: 9	Enclosed: 14
b. Commercial	Total: 2	Outdoor: 2	Enclosed:

Optional user comments

No rental units

29 . Will rehabilitation require the relocation of existing tenants? Not applicable

30 . Scope of rehabilitation: Please describe the following (or type N/A).

a. Major systems to be replaced:

Not applicable

b. Substandard conditions and structural deficiencies to be repaired:

Not applicable

c. Special features/adaptations for special needs clients to be housed:

Not applicable

31 . Are energy conservation materials in excess of the Building Code?

a. Insulation Yes

b. Windows Yes

c. Heating system Yes

R-Value or type?

All will be above code

Information On Site And Existing Buildings

	<i>Square Feet</i>	<i>Acres</i>
32 . Size of Site:	57,757	1.33
33 . Wetlands area:		
34 . Buildable area:	50,000	1.15

Existing Conditions:

35 . What is the present use of the property? Vacant Land

36 . Number of existing structures: -

37 . Gross s.f. of existing structures: -

38 . If rehabilitation:

	number of units	num. of bedrooms
a. Number of existing residential units/bedrooms:		
b. Number of units/bedrooms currently occupied:		

39 . If site includes commercial space:

a. Square footage of existing commercial space:		square feet
b. Square footage currently occupied:		square feet

40 . What are the surrounding land uses? Commercial and Residential

Utilities:

41 . Are the following utilities available on the site:

a. Sanitary sewer?	Yes	Distance from site (ft.)	20
b. Storm sewer?	Yes	Distance from site (ft.)	20
c. Public water?	Yes	Distance from site (ft.)	20
d. Electricity?	Yes	Distance from site (ft.)	20
e. Gas?	Yes	Distance from site (ft.)	20

If any of the above are not available, is plan attached explaining how such service will be extended to the site?

Zoning:

Please include information on the property zoning in Exhibit 3. This should include a zoning map, highlighting any special use or dimensional restrictions on the property. If the present zoning does not allow for the proposed use, please explain current status and how approvals will be obtained.

42 . Does the present zoning allow the proposed development?

43 . Have you applied for a zoning variance, change, special permit or subdivision?

44 . Do you anticipate applying for a comprehensive permit under Chapter 774

Site Control:

45 . What form of site control do you have?

Include copies of the appropriate site control documents as part of Exhibit 4.

46 . Please provide details about your site control agreement.

- a. Name of Seller:
- b. Principals of seller corporation:
- c. Type of Agreement:
- d. Agreement Date:
- e. Expiration Date:
- f. Purchase price if under agreement:
- g. Is there any identity of interest between buyer and seller?

47 . In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?

48 . Are there any outstanding liens on the property?

Amenities and Services:

49 . Please indicate distance from site and locate on city/town map (Exhibit 1).

	<i>Distance</i>	
a. Shopping facilities	<5	miles
b. Schools	<5	miles
c. Hospitals	<5	miles
d. Parks and recreational facilities	<5	miles
e. Police station	<5	miles
f. Fire station	<5	miles
g. Public transportation	<5	miles
h. Houses of worship	<5	miles
i. City/Town Hall	<5	miles

Environmental Information

- 50 . Is there any evidence of underground storage tanks or releases of oil or hazardous materials, including hazardous wastes, on the site or within close proximity to the site?

- 51 . Has a Chapter 21E assessment been performed?

- 52 . Does the project consist of either: (a) new construction of more than 100 units; or (b) substantial rehabilitation of more than 200 units, or where more than 10% new floor space is added?

- An Environmental Notification Form (ENF) will most likely be required.
Has an ENF been filed?

- 53 . Does the building require lead paint abatement?

- 54 . Does the building require asbestos abatement?

- 55 . Do radon tests show radon levels exceeding four picocuries/liter?

- 56 . Is there any evidence that the premises are insulated with urea formaldehyde foam (UFFI)?

- 57 . Is the site located in an historic district, or contain buildings listed or eligible for listing in the State Register of Historic Places?

- 58 . Are there any above ground storage containers with flammable or explosive petroleum products or chemicals within 1/2 mile of the site?

- 59 . Is the site located in a floodplain or wetlands area?

- 60 . Does the site contain endangered animal or plant species?

- 61 . Is the site subject to noise impact from jet airports within five miles, major highways within 1,000 feet, or rail traffic within 3,000 feet?

Section 2 DEVELOPMENT TEAM SUMMARY

<p>62 . Developer/Sponsor Type</p>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="text-align: center;">Non Profit Corporation (Chapter 180)</td> </tr> </table>	Non Profit Corporation (Chapter 180)																	
Non Profit Corporation (Chapter 180)																			
<p>63 . Developer/Sponsor:</p> <p style="margin-left: 20px;">Form of Legal Entity</p> <p style="margin-left: 20px;">Legal Name</p> <p style="margin-left: 20px;">Address</p> <p style="margin-left: 40px;">Contact Person</p> <p style="margin-left: 40px;">E-mail</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Corporation/Non-Profit 501-C3</td></tr> <tr><td style="text-align: center;">Habitat for Humanity Greater Boston, Inc.</td></tr> <tr><td style="text-align: center;">434 Massachusetts Ave Suite 201 Boston MA 02118</td></tr> <tr><td style="text-align: center;">James Kostaras</td></tr> <tr><td style="text-align: center;">Gerald Patton</td></tr> <tr> <td style="text-align: center;">jameskostaras@habitatboston.org</td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;">gerrypatton@habitatboston.org</td> <td></td> </tr> </table>	Corporation/Non-Profit 501-C3	Habitat for Humanity Greater Boston, Inc.	434 Massachusetts Ave Suite 201 Boston MA 02118	James Kostaras	Gerald Patton	jameskostaras@habitatboston.org		gerrypatton@habitatboston.org										
Corporation/Non-Profit 501-C3																			
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James Kostaras																			
Gerald Patton																			
jameskostaras@habitatboston.org																			
gerrypatton@habitatboston.org																			
<p>64 . Owner/Mortgagor:</p> <p style="margin-left: 20px;">Legal Name</p> <p style="margin-left: 20px;">Address</p> <p style="margin-left: 40px;">Has this entity already been formed?</p> <p style="margin-left: 40px;">Principals</p> <p style="margin-left: 40px;">Principals</p> <p style="margin-left: 40px;">Contact Person</p> <p style="margin-left: 40px;">Telephone No. / Fax. No.</p> <p style="margin-left: 40px;">E-mail</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td style="width: 10%;"></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> </table>				No					No					No				
No																			
No																			
No																			
<p>65 . General Partner:</p> <p style="margin-left: 20px;">Legal Name</p> <p style="margin-left: 20px;">Address</p> <p style="margin-left: 40px;">Has this entity already been formed?</p> <p style="margin-left: 40px;">Principal (if corporate)</p> <p style="margin-left: 40px;">Contact Person</p> <p style="margin-left: 40px;">% of Ownership</p> <p style="margin-left: 40px;">Telephone No. / Fax. No.</p> <p style="margin-left: 40px;">E-mail</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td style="width: 10%;"></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> </table>				No					No					No				
No																			
No																			
No																			
<p>66 . General Partner:</p> <p style="margin-left: 20px;">Legal Name</p> <p style="margin-left: 20px;">Address</p> <p style="margin-left: 40px;">Has this entity already been formed?</p> <p style="margin-left: 40px;">Principal (if corporate)</p> <p style="margin-left: 40px;">Contact Person</p> <p style="margin-left: 40px;">% of Ownership</p> <p style="margin-left: 40px;">Telephone No. / Fax. No.</p> <p style="margin-left: 40px;">E-mail</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td style="width: 10%;"></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr> <td style="text-align: center;">No</td> <td></td> </tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> <tr><td style="height: 20px;"></td></tr> </table>				No					No					No				
No																			
No																			
No																			

67 . Development Consultant:

Legal Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

68 . Contractor:

Name
 Address

 Fed Tax ID #
 Contact Person
 Telephone No. / Fax. No.
 E-mail

Habitat for Humanity Greater Boston
434 Massachusetts Ave Suite 201 Boston MA 02118
04-2994233
Gerald Patton
774-218-4323
774-218-4323
gerrypatton@habitatboston.org

69 . Architect:

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

Adaptiv Architecture
Killion Mokwete & Robert Freni
978-701-5477/508-932-9706

70 . Management Agent:

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

71 . Attorney (Real Estate):

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

Goodwin Proctor
Robert Fitzgerald
617-570-1343
rfitzgerald@goodwinlaw.com

72 . Attorney (Tax):

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

73 . Syndicator:

Name
 Address

 Contact Person
 Telephone No. / Fax. No.
 E-mail

74 . **Guarantor:**

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

75 . **Service Provider or Coordinator:**

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

76 . **Marketing Agent:**

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

77 .

Other role

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

78 .

Other role

Name
Address

Contact Person
Telephone No. / Fax. No.
E-mail

79 . Is there any identity of interest between any members of the development team?

n/a

80 . Please describe the relationship of the development entity to sponsoring organizations. Is the entity newly-formed or to-be-formed? Is it a single-purpose corporation? How will the parent corporation provide support to this entity? Include an organizational chart showing other affiliates of the parent corporation, as appropriate, and principals of each.

n/a

Section 3 SOURCES AND USES OF FUNDS

Sources of Funds										
Private Equity:				<i>Optional user calculations</i>						
81 .	Developer's Cash Equity	\$4,500,000								
82 .	Tax Credit Equity (net amount) <small>(See line 360, Section 5, page 18.)</small>	\$								
83 .	Developer's Fee/Overhead, Contributed or Loaned	\$500,000								
84 .	Other Source: Philanthropic Funding	\$500,000								
Public Equity:										
85 .	HOME Funds, as Grant	\$								
86 .	Grant: Haz Mat Remediation Funding	\$650,000								
87 .	Grant: MOH funding	\$3,750,000								
88 .	Total Public Equity	\$4,400,000								
Subordinate Debt (see definition):				<i>Amount</i>	<i>Rate</i>	<i>Amortiz.</i>	<i>Term</i>			
89 .	Home Funds-DHCD, as Subordinate Debt	\$0	%	yrs.	yrs.					
	Source:									
90 .	Home Funds-Local, as Subordinate Debt	\$0	%	yrs.	yrs.					
	Source:									
91 .	Subordinate Debt	\$0	%	yrs.	yrs.					
	Source:									
92 .	Subordinate Debt	\$0	%	yrs.	yrs.					
	Source:									
93 .	Subordinate Debt	\$0	%	yrs.	yrs.					
	Source:									
94 .	Total Subordinate Debt	\$0								
Permanent Debt (Senior):				<i>Amount</i>	<i>Rate</i>	<i>Override</i>	<i>Amortiz.</i>	<i>Term</i>	<i>MIP</i>	
95 .	MHFA	MHFA Program 1	\$	%	%	yrs.	yrs.	%		
96 .	MHFA	MHFA Program 2	\$	%	%	yrs.	yrs.	%		
97 .	MHP Fund Permanent Loan		\$	%		yrs.	yrs.	%		
98 .	Other Permanent Senior Mortgage		\$	%		yrs.	yrs.	%		
	Source:									
99 .	Other Permanent Senior Mortgage		\$	%		yrs.	yrs.	%		
	Source:									
100 .	Total Permanent Senior Debt		\$0							
101 .	Total Permanent Sources		\$9,900,000							
Construction Period Financing:				<i>Amount</i>	<i>Rate</i>	<i>Term</i>				
102 .	Construction Loan		\$0	%	mos.					
	Source:									
	Repaid at:			(event)						
103 .	Other Interim Loan		\$0	%	mos.					
	Source:									
	Repaid at:			(event)						
104 .	Syndication Bridge Loan		\$0	%	mos.					
	Source:									
	Repaid at:			(event)						

Uses of Funds

The Contractor certifies that, to the best of their knowledge, the construction estimates, and trade-item breakdown on this page are complete and accurate.

Direct Construction:

105 . Who prepared the estimates?

Gerald E Patton	Gerald E Patton
Name	Signature

106 . Basis for estimates?

The cost estimate is based on a review of the plans and specifications
--

DV	Trade Item	Amount	Description
107 .	3	Concrete	\$344,000
108 .	4	Masonry	\$120,000
109 .	5	Metals	\$262,000
110 .	6	Rough Carpentry	\$965,500
111 .	6	Finish Carpentry	\$253,000
112 .	7	Waterproofing	\$112,000
113 .	7	Insulation	\$208,000
114 .	7	Roofing	\$299,000
115 .	7	Sheet Metal and Flashing	
116 .	7	Exterior Siding	\$103,750
117 .	8	Doors	\$71,000
118 .	8	Windows	\$113,000
119 .	8	Glass	
120 .	9	Lath & Plaster	\$212,500
121 .	9	Drywall	\$72,500
122 .	9	Tile Work	\$63,000
123 .	9	Acoustical	
124 .	9	Wood Flooring	\$45,000
125 .	9	Resilient Flooring	\$37,500
126 .	9	Carpet	
127 .	9	Paint & Decorating	\$12,000
128 .	10	Specialties	\$70,000
129 .	11	Special Equipment	
130 .	11	Cabinets	\$225,000
131 .	11	Appliances	\$32,500
132 .	12	Blinds & Shades	
133 .	13	Modular/Manufactured	
134 .	13	Special Construction	
135 .	14	Elevators or Conveying Syst.	\$75,000
136 .	15	Plumbing & Hot Water	\$275,000
137 .	15	Heat & Ventilation	\$225,000
138 .	15	Air Conditioning	
139 .	15	Fire Protection	\$250,000
140 .	16	Electrical	\$562,000
141 .		Accessory Buildings	
142 .		Other/misc	
143 .		Subtotal Structural	\$5,008,250
144 .	2	Earth Work	\$599,250
145 .	2	Site Utilities	\$283,820
146 .	2	Roads & Walks	\$163,000
147 .	2	Site Improvement	\$290,000
148 .	2	Lawns & Planting	\$48,000
149 .	2	Geotechnical Conditions	\$18,000
150 .	2	Environmental Remediation	\$650,000
151 .	2	Demolition	
152 .	2	Unusual Site Cond	
153 .		Subtotal Site Work	\$2,052,070
154 .		Total Improvements	\$7,060,320
155 .	1	General Conditions	\$0
156 .		Subtotal	\$7,060,320
157 .	1	Builders Overhead	\$1,012,000
158 .	1	Builders Profit	
159 .		TOTAL	\$8,072,320

160 Total Cost/square foot:

\$239.53

 Residential Cost/s.f.:

\$250.30

Development Budget:

	Total	Residential	Commercial	Comments
161 . Acquisition: Land	\$1,100	\$1,100		
162 . Acquisition: Building	\$0			
163 . Acquisition Subtotal	\$1,100	\$1,100	\$0	
164 . Direct Construction Budget	\$8,072,320	\$8,072,320		(from line 159)
165 . Construction Contingency	\$403,616	\$403,616		5.0% of construction
166 . Subtotal: Construction	\$8,475,936	\$8,475,936	\$0	

General Development Costs:

167 . Architecture & Engineering	\$315,000	\$315,000		
168 . Survey and Permits	\$638,000	\$638,000		
169 . Clerk of the Works	\$0			
170 . Environmental Engineer	\$0			
171 . Bond Premium	\$0			
172 . Legal	\$10,000	\$10,000		
173 . Title and Recording	\$0			
174 . Accounting & Cost Cert.	\$0			
175 . Marketing and Rent Up	\$10,000	\$10,000		
176 . Real Estate Taxes	\$0			
177 . Insurance	\$0			
178 . Relocation	\$0			
179 . Appraisal	\$0			
180 . Security	\$0			
181 . Construction Loan Interest	\$0			
182 . Inspecting Engineer	\$0			
183 . Fees to:	\$0			
184 . Fees to:	\$0			
185 . MIP	\$0			
186 . Credit Enhancement Fees	\$0			
187 . Letter of Credit Fees	\$0			
188 . Other Financing Fees	\$0			
189 . Development Consultant	\$150,000	\$150,000		
190 . Other:	\$0			
191 . Other:	\$0			
192 . Soft Cost Contingency	\$0			0.0% of soft costs
193 . Subtotal: Gen. Dev.	\$1,123,000	\$1,123,000	\$0	

194 . Subtotal: Acquis., Const., and Gen. Dev.	\$9,600,036	\$9,600,036	\$0	
---	-------------	-------------	-----	--

195 . Capitalized Reserves	\$0			
196 . Developer Overhead	\$0			
197 . Developer Fee	\$0			

198 . Total Development Cost	\$9,600,036	\$9,600,036	\$0	TDC per unit	\$384,001
-------------------------------------	-------------	-------------	-----	---------------------	-----------

199 . TDC, Net	\$9,100,036	\$9,100,036	\$0	TDC, Net per unit	\$364,001
-----------------------	-------------	-------------	-----	--------------------------	-----------

Additional Detail on Development Pro-Forma:

200 . Gross Syndication Investment	<input type="text"/>
Off-Budget Costs:	
Syndication Costs:	
201 . Syndication Legal	<input type="text"/>
202 . Syndication Fees	<input type="text"/>
203 . Syndication Consultants	<input type="text"/>
204 . Bridge Financing Costs	<input type="text"/>
205 . Investor Servicing (capitalized)	<input type="text"/>
206 . Other Syndication Expenses	<input type="text"/>
207 . Total Syndication Expense	<input type="text" value="\$0"/>
208 . Current Reserve Balance	
Reserves (capitalized):	
209 . Development Reserves	<input type="text"/>
210 . Initial Rent-Up Reserves	<input type="text"/>
211 . Operating Reserves	<input type="text"/>
212 . Net Worth Account	<input type="text"/>
213 . Other Capitalized Reserves	<input type="text"/>
214 . Subtotal: Capitalized Reserves	<input type="text" value="\$0"/>
215 . Letter of Credit Requirements	<input type="text"/>
216 . Total of the Above	<input type="text" value="\$0"/>

Check: Line 214 is the same as line 195.

Please Answer The Following	Dev. Reserves	Initial Rent-Up	Op. Reserves	Net Worth	Other	Letter of Credit
Who requires the reserves?						
Who administers the reserves?						
When and how are they used?						
Under what circumstances can they be released?						

Unit Sales (For Sale Projects Only):

217 . Gross Sales From Units	<input type="text" value="\$"/>
218 . Cost of Sales (Commissions, etc.)	<input type="text" value="\$"/>
219 . Net Receipt from Sales	<input type="text" value="\$0"/>

Debt Service Requirements:

220 . Minimum Debt Service Coverage	<input type="text"/>
221 . Is this Project subject to HUD Subsidy Layering Review?	<input type="text" value="No"/>

Optional user comments

Section 4 OPERATING PRO-FORMA

Operating Income				
Rent Schedule:	<i>Contract</i>	<i>Utility</i>	<i>Total</i>	<i>No. of</i>
	<i>Rent</i>	<i>Allowance</i>	<i>Gross Rent</i>	<i>Units</i>
222 . Low-Income (Rental Assisted):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
223 . Low-Income (below 50%):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
224 . Low-Income (below 60%):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
225 . Other Income (User-defined)				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	5
3 bedrooms			\$0	8
4 bedrooms			\$0	12
226 . Market Rate (unrestricted occupancy):				
SRO				0
0 bedroom				0
1 bedroom				0
2 bedrooms				0
3 bedrooms				0
4 bedrooms				0
Commercial Income:				
227 . Square Feet:	1,450	@	(average) /square foot =	\$0
Parking Income:				
228 . Spaces:	0	@	(average) /month x 12 =	\$0

Other Operating Income Assumptions:

229 . Laundry Income (annual):

230 . Other Income:a.

b.

c.

d.

e.

f.

Optional user calculations

Vacancy Allowance:

231 . Low-Income (Rental Assistance)

232 . Low-Income (below 50%)

233 . Low-Income (below 60%)

234 . Other Income (User-defined)

235 . Market Rate

236 . Commercial

Trending Assumptions for Rents:

	Year 2	Year 3	Years 4-5	Years 6-20
237 . Low-Income (Rental Assistance)	%	%	%	%
238 . Low-Income (below 50%)	%	%	%	%
239 . Low-Income (below 60%)	%	%	%	%
240 . Other Income (User-defined)	%	%	%	%
241 . Market Rate	%	%	%	%
242 . Commercial Space Rental	%	%	%	%
243 . Laundry Income	%	%	%	%
244 a Other Income	%	%	%	%
b Other Income	%	%	%	%
c Other Income	%	%	%	%
d Other Income	%	%	%	%
e Other Income	%	%	%	%
f Other Income	%	%	%	%

Operating Subsidy and Capitalized Operating Reserves:

245 . Subsidy Source I

246 . Subsidy Source II

247 . Capitalized Operating Reserve Amount: \$ Source:

248 . Yearly Draws on Subsidies and Reserves:

	Subsidy Source I	Subsidy Source II	Draw on Oper. Reserve
Year 1	\$	\$	\$
Year 2	\$	\$	\$
Year 3	\$	\$	\$
Year 4	\$	\$	\$
Year 5	\$	\$	\$
Year 6	\$	\$	\$
Year 7	\$	\$	\$
Year 8	\$	\$	\$
Year 9	\$	\$	\$
Year 10	\$	\$	\$
Year 11	\$	\$	\$
Year 12	\$	\$	\$
Year 13	\$	\$	\$
Year 14	\$	\$	\$
Year 15	\$	\$	\$
Year 16	\$	\$	\$
Year 17	\$	\$	\$
Year 18	\$	\$	\$
Year 19	\$	\$	\$
Year 20	\$	\$	\$
Year 21	\$	\$	\$

249 . Annual Operating Income (year 1) \$0

Operating Expenses				
Annual Operating Exp.:	<i>Total</i>	<i>Residential</i>	<i>Commercial</i>	<i>Comments</i>
250 . Management Fee	\$0			
251 . Payroll, Administrative	\$0			
252 . Payroll Taxes & Benefits, Admin.	\$0			
253 . Legal	\$0			
254 . Audit	\$0			
255 . Marketing	\$0			
256 . Telephone	\$0			
257 . Office Supplies	\$0			
258 . Accounting & Data Processing	\$0			
259 . Investor Servicing	\$0			
260 . DHCD Monitoring Fee	\$0			
261 . Other:	\$0			
262 . Other:	\$0			
263 . Subtotal: Administrative	\$0	\$0	\$0	
264 . Payroll, Maintenance	\$0			
265 . Payroll Taxes & Benefits, Admin.	\$0			
266 . Janitorial Materials	\$0			
267 . Landscaping	\$0			
268 . Decorating (inter. only)	\$0			
269 . Repairs (inter. & ext.)	\$0			
270 . Elevator Maintenance	\$0			
271 . Trash Removal	\$0			
272 . Snow Removal	\$0			
273 . Extermination	\$0			
274 . Recreation	\$0			
275 . Other:	\$0			
276 . Subtotal: Maintenance	\$0	\$0	\$0	
277 . Resident Services	\$0			
278 . Security	\$0			
279 . Electricity	\$0			
280 . Natural Gas	\$0			
281 . Oil	\$0			
282 . Water & Sewer	\$0			
283 . Subtotal: Utilities	\$0	\$0	\$0	
284 . Replacement Reserve	\$0			
285 . Operating Reserve	\$0			
286 . Real Estate Taxes	\$0			
287 . Other Taxes	\$0			
288 . Insurance	\$0			
289 . MIP	\$0	\$0		
290 . Other:	\$0			
291 . Subtotal: Taxes, Insurance	\$0	\$0	\$0	
292 . TOTAL EXPENSES	\$0	\$0	\$0	

Other Operating Expense Assumptions

Trending Assumptions for Expenses

	Year 2	Year 3	Years 4-5	Years 6-20
293 . Sewer & Water	%	%	%	%
294 . Real Estate Taxes	%	%	%	%
295 . All Other Operating Expenses	%	%	%	%

Reserve Requirements:

296 . Replacement Reserve Requirement	<input type="text"/>	per unit per year
297 . Operating Reserve Requirement	<input type="text"/>	per unit per year

Debt Service:

		Annual Payment
298 . MHFA	MHFA Program 1	N/A
299 . MHFA	MHFA Program 2	N/A
300 . MHP Fund Permanent Loan		N/A
301 . Other Permanent Senior Mortgage		N/A
Source:	N/A	
302 . Other Permanent Senior Mortgage		N/A
Source:	N/A	
303 . Total Debt Service (Annual)		\$0
304 . Net Operating Income		\$0 (in year one)
305 . Debt Service Coverage		N/A (in year one)

Affordability: Income Limits and Maximum Allowable Rents

306 . County	<input type="text" value="SUFFOLK"/>	MSA	<input type="text" value="Boston-Cambridge-Quincy, MA-NH"/>
This MSA does not match the county you have chosen			
307 . Maximum Allowed Rents, by Income, by Unit Size:	Income Limits last updated on <input type="text" value="1/29/2015"/>		

	Maximum Income			Maximum Rent (calculated from HUD income data)		
	50%	60%	0%	50%	60%	0%
SRO	\$32,950	\$39,500	\$0	\$824	\$988	\$0
0 bedroom	\$32,950	\$39,500	\$0	\$824	\$988	\$0
1 bedroom	\$35,300	\$42,350	\$0	\$883	\$1,059	\$0
2 bedrooms	\$42,350	\$50,800	\$0	\$1,059	\$1,270	\$0
3 bedrooms	\$48,950	\$58,700	\$0	\$1,224	\$1,468	\$0
4 bedrooms	\$54,600	\$65,500	\$0	\$1,365	\$1,638	\$0
Area median income for a family of	<input type="text" value="\$94,100"/>					

308 . H.U.D. "Fair Market Rents" (Maximum):	
0 bedroom	<input type="text" value="\$1,071"/>
1 bedroom	<input type="text" value="\$1,196"/>
2 bedrooms	<input type="text" value="\$1,494"/>
3 bedrooms	<input type="text" value="\$1,861"/>
4 bedrooms	<input type="text" value="\$2,023"/>
5 bedrooms	<input type="text" value="\$2,326"/>

FMR Information last updated on

Operations before this transaction:				Operations after:		
Type	Number	Current Rent	Annualized Income	Number	Future Rents	Market Rent GPR
309 . SRO	0	0	0	0	0	0
310 . 0 bedroom	0	0	0	0	0	0
311 . 1 bedroom	0	0	0	0	0	0
312 . 2 bedrooms	5	0	0	5	0	0
313 . 3 bedrooms	8	0	0	8	0	0
314 . 4 bedrooms	12	0	0	12	0	0
315 . Gross Potential Rental Income			0			0
316 . Vacancy		0%	0	Vacancy	%	0
317 . Other Income			0	Other Income		0
318 . Effective Gross Income			0	Effective Gross Income		0
Operating Expenses			Year	Reason	% Change	Year
319 . Management fee			0			0
320 . Administration			0			0
321 . Maintance/Operations			0			0
322 . Resident Services			0			0
323 . Security			0			0
324 . Utilities			0			0
325 . Replacement Reserve			0			0
326 . Operating Reserve			0			0
327 . Real Esate Taxes			0			0
328 . Insurance			0			0
329 . Total Expenses			0			0
330 . Net Operating Income			0	Net Operating Income		0
331 . Transaction Description:						
<i>Optional user calculations</i>						

Section 5 LOW INCOME HOUSING TAX CREDITS

Percent of Project Which Qualifies for Tax Credit

332 . Low-Income Units	0		Total Units:	25
333 . Percent of Units	0.0%			
334 . Low-Income Square Feet	-	s.f.	Total Area:	35,130 s.f.
335 . Percent of Area	0.0%			
336 . Applicable Percentage	0.0%	<i>(This is the lower of lines 333 and 335 above.)</i>		
337 . Is the project utilizing tax-exempt financing?	No			
338 . Does the project qualify for an acquisition credit?	No			
339 . Does the rehabilitation qualify for a 9% rather than 4% credit?	No			
340 . How much financing is nonqualified (federally subsidized?)	\$			
341 . What grant funds must be subtracted from acquisition basis?	\$			
342 . What grant funds must be subtracted from rehabilitation basis?	\$			
343 . Will the project have a minimum of 20% of units for households earning less than 50% of median, or 40% for less than 60% of median?	40% Of Units			

Historic Tax Credit:

344 . Does the project qualify for historic tax credits?	No
345 . What are the rehabilitation costs which are not qualified for historic credits?	Not Applicable

Project Qualification for 130%:

346 . Is the project located in a "qualified census tract" or in a "difficult to develop" area?	No
---	----

Calculation of Maximum Tax Credit Amount

	Acquisition Credit	Rehabilitation Credit
347 . Total Eligible Development Costs	\$0	\$11,028,776
348 . Less: Portion of Grants Allocated to Basis	\$0	\$0
349 . Less: 20% Historic Rehab Credit Basis Reduction	\$0	\$0
350 . Less: Nonqualified source of financing	\$0	\$0
351 . Subtotal: Eligible Basis	\$0	\$11,028,776
352 . "Hard to develop" area	100%	100%
353 . Percent Low-Income	0.0%	0.0%
354 . Applicable Rate	3.66%	8.53%
355 . <i>Maximum Annual Tax Credit Amount</i>	\$0	\$0
356 . <i>Total Annual Tax Credit Amount</i>		\$0
357 . Estimated Net LIHTC Syndication Yield	\$ -	rate per \$
358 . Est. Net Historic Tax Credit Syndication Yield	\$ -	rate per \$
359 . Total Estimated Net Tax Credit Syndication Yield (based on above)		\$0
360 . Applicant's Estimate of Net Tax Credit Equity.		\$ (from line 82)

[Note: This page represents a rough estimate of low income credits for which this project may be eligible. It does not represent a final determination.]

	Total Residential	Percentage of Costs Not in Depreciable Basis	Acquisition Credit Basis	Rehabilitation Credit Basis	Not In Basis
361 . Acquisition: Land	\$1,100				\$1,100
362 . Acquisition: Building	\$0		\$0	\$0	\$0
363 . Acquisition Subtotal	\$1,100		\$0	\$0	\$1,100
364 . Direct Construction Budget	\$8,072,320		\$0	\$8,072,320	
365 . Construction Contingency	\$403,616		\$0	\$403,616	
366 . Subtotal: Construction	\$8,475,936		\$0	\$8,475,936	\$0
General Development Costs:					
367 . Architecture & Engineering	\$315,000	0%		\$315,000	\$0
368 . Survey and Permits	\$638,000	0%		\$638,000	\$0
369 . Clerk of the Works	\$0	0%		\$0	\$0
370 . Environmental Engineer	\$0	0%		\$0	\$0
371 . Bond Premium	\$0	0%		\$0	\$0
372 . Legal*	\$10,000	0%	\$0	\$10,000	\$0
373 . Title and Recording	\$0	0%	\$0	\$0	\$0
374 . Accounting & Cost Certificat.	\$0	0%	\$0	\$0	\$0
375 . Marketing and Rent Up*	\$10,000	100%			\$10,000
376 . Real Estate Taxes*	\$0	0%	\$0	\$0	\$0
377 . Insurance	\$0	0%	\$0	\$0	\$0
378 . Relocation	\$0	0%	\$0	\$0	\$0
379 . Appraisal	\$0	0%	\$0	\$0	\$0
380 . Security	\$0	0%	\$0	\$0	\$0
381 . Construction Loan Interest*	\$0	0%	\$0	\$0	\$0
382 . Inspecting Engineer	\$0	0%	\$0	\$0	\$0
383 . Financing Fees*	\$0	0%	\$0	\$0	\$0
384 . Financing Fees*	\$0	0%	\$0	\$0	\$0
385 . MIP	\$0	0%	\$0	\$0	\$0
386 . Credit Enhancement Fees	\$0	0%	\$0	\$0	\$0
387 . Letter of Credit Fees*	\$0	0%	\$0	\$0	\$0
388 . Other Financing Fees*	\$0	0%	\$0	\$0	\$0
389 . Development Consultant	\$150,000	0%	\$0	\$150,000	\$0
390 . Other*	\$0	0%	\$0	\$0	\$0
391 . Other*	\$0	0%	\$0	\$0	\$0
392 . Soft Cost Contingency*	\$0	0%	\$0	\$0	\$0
393 . Subtotal: Gen. Dev.	\$1,123,000		\$0	\$1,113,000	\$10,000
394 . Subtotal: Acquis., Const., and Gen. Dev.	\$9,600,036		\$0	\$9,588,936	\$11,100
395 . Developer Overhead	\$0		\$0	\$0	\$0
396 . Developer Fee/Profit	\$1,439,840		\$0	\$1,439,840	\$0
397 . Capitalized Reserves	\$0		\$0	\$0	\$0
398 . Total Development Cost	\$9,600,036				
399 . Total Net Development Cost	\$9,100,036				
400 . Total Eligible Tax Credit Basis	\$11,028,776		\$0	\$11,028,776	

* Some or all of these costs will typically be allocated to intangible assets or expensed.

Section 6 CHECKLIST FOR EXHIBITS

Please indicate whether the following Exhibits are included with this application.

Exhibit 1. Site Information:

Detailed site map	Included
Photographs of the site	Included
Directions to the site	
Site location map	Included

Exhibit 2. Environmental Information:

Chapter 21E Assessment	
Environmental Notification Form	
Lead paint inspection	
Lead paint abatement plan	
Asbestos inspection report	
Asbestos abatement plan	
Letter from local or Mass. Historical Commission	
Map of wetlands or floodplain areas	
Determination by Local Conservation Commission and/or Dept. of Environmental Protection	
Other environmental information	

Exhibit 3. Evidence of Zoning Included

Exhibit 4. Evidence of Site Control

Exhibit 5. Evidence of Local Support

Exhibit 6. Market Information and Acquisition Value Included

Exhibit 7. Marketing Plan

Exhibit 8. Affirmative Fair Marketing Plan

Exhibit 9. Equal Opportunity Questionnaire Not Included

Exhibit 10. Sales Prices and Affordability

Exhibit 11. Construction Period Sources and Uses Included

Exhibit 12. Tax-Exempt Project Information Included

Exhibit 13. Relocation Plan

Exhibit 14. Special Needs Service Plan

Exhibit 15. Required Tax Credit Certifications

Exhibit 16. Preliminary Plans and Specifications Sent Under Separate Cover

Exhibit 16A. Accessibility Information Not Included

Exhibit 17. Commitment Drawings and Specifications

Exhibit 18. Soil and/or Structural Report

Please indicate whether the following Exhibits are included with this application.

- Exhibit 19. Energy Budget
- Exhibit 20. Construction Financing
- Exhibit 21. Permanent Financing
- Exhibit 22. Equity Financing Commitment
- Exhibit 23. Other Funding Commitments
- Exhibit 24. Rental Subsidies
- Exhibit 25. Developer Profile
- Exhibit 26. Mortgagor's Other Real Estate
- Exhibit 27. Architect's Resume
- Exhibit 28. Management Agent Profile
- Exhibit 29. General Contractor's Profile
- Exhibit 30. Developer Financial Statement and
Credit Release
- Exhibit 31. Mortgagor Personal Financial Statement
- Exhibit 32. Individual Financial Profile
- Exhibit 33. General Contractor's Financial Capacity

Additional Exhibits:

- Exhibit No. Title:
- Exhibit No. Title:
- Exhibit No. Title:
- Exhibit No. Title:

Section 7 SIGNATURE PAGE

Project Name


Parker and Terrace Street Development

Date:

11	7	2022
<i>(month)</i>	<i>(day)</i>	<i>(year)</i>

The applicant certifies that this application is complete and accurate, to the best of his/her knowledge, and that there are no material misrepresentations.

Mortgagor:


James Kostaras
President and CEO, Habitat for Humanity Greater Boston, Inc.

4. Financing Letter of Interest



November 1, 2022

James Kostaras, AIA
President & CEO
Habitat for Humanity Greater Boston
434 Massachusetts Avenue, Suite 201
Boston, MA 02118

Re: Letter of Interest – Habitat for Humanity Greater Boston

- 778-796 Parker Street, Boston, MA
- 77 Terrace Street Boston, MA

Dear Mr. Kostaras,

Please accept this Letter of Interest in potentially financing up to Five Hundred Thousand Dollars (\$500,000) to support proposed projects with the City of Boston Department of Neighborhood Development at locations referenced above.

We appreciate your confidence in Dedham Institution for Savings and have been very pleased with our existing lending relationship including a Line of Credit. We look forward to the opportunity of expanding our relationship by further reviewing a loan request for these upcoming projects.

This Letter of Interest does not constitute a formal offer or commitment to lend and is subject to satisfactory completion of due diligence, credit approval and other terms and conditions determined by Dedham Institution for Savings.

If I can be of further assistance, please contact me at (781) 320-1190 or anthony.brown@dedhamsavings.com.

Very truly yours,

**Anthony
Brown** Digitally signed by
Anthony Brown
Date: 2022.11.01
09:08:59 -04'00'

Anthony C. Brown
Assistant Vice President
Dedham Savings Bank

55 Elm Street, Dedham, MA 02026

781-329-6700

www.dedhamsavings.com

5. DESIGN SUBMISSION



5.1 Narrative

This submission for the development and purchase of 778-796 Parker Street and 77 Terrace Street proposes a total of 9 Units on 778-796 Parker Street and 16 Units total at 77 Terrace Street. All units will be affordable homeownership units of various sizes in the 80% or less AMI income range. On the Terrace side of the site, four of the units will be Artist Live/Work units to support the artist community in the area.

The proposed development also reflects Habitat for Humanity’s core values and long held belief that everyone deserves a quality place to live and to grow as a family. Habitat believes homeownership is a vital step to help families break the cycle of poverty that contributes to generational wealth building, increased equity and stronger communities.

Habitat’s core values are:

BUILDING STRENGTH, STABILITY, AND SELF RELIANCE THROUGH SHELTER.



TOTAL RESIDENTIAL SPACE:

25 TOTAL UNITS
33,550 SF
INCLUDING 4 ARTISTS
LIVE/WORK UNITS



ARTISTS FOR HUMANITY COMMUNITY SPACE:

ARTISTS FOR HUMANITY (AFH) ARTISTS FELLOWSHIP PROGRAM
STUDIOS
1, 454 SF



OPEN GREEN SPACE: : BOSTON FOOD FOREST PARK

19,250 SF
OVER 40% OF THE SITE
REMAINS OPEN GREEN
SPACE INCLUDING A
COMMUNITY GARDEN,
REHABILITATION OF AN
EXISTING PARK, AND
FRUIT TREE ORCHARDS

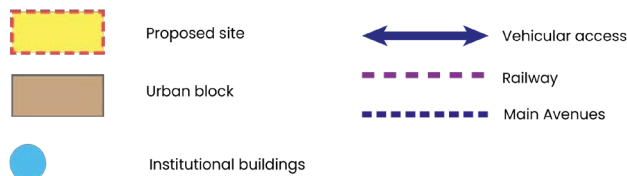
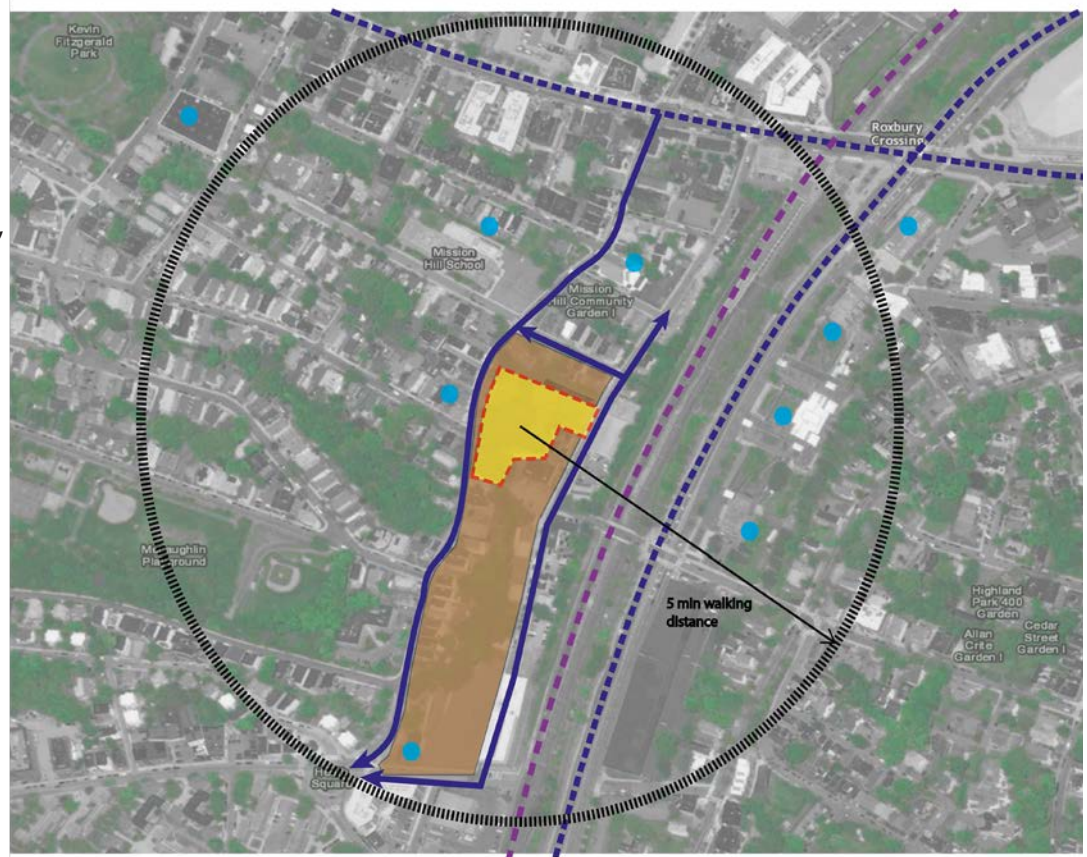
A GREEN CORRIDOR MEANDERING THROUGH THE SITE FROM PARKER TO TERRACE.

5.2 Site Context & Site Design

The proposed site design is based on the contextual aspects of the existing neighborhood character and assets as the basis for the design framework. The Key context considerations that influenced the basis of the site design are: the existing Residential Context along Parker, the Commercial context along Terrace, and the importance of green space for the community as the neighborhood begins to develop.

The Residential Context:

The Residential district along Parker Street is a densely populated residential neighborhood consisting of a mixture of historic triple decker units, many displaying the bay windows that are often found in the Boston area. Parker Street is a one way street promoting slower traffic patterns and the existing homes have very little setback from the street. Aside from designated parks in the area, there is not currently much greenscape at the front of the typical home. Many of the homes along Parker are multi-family residents and from our site investigations it looks like many of the residents in the area are young college students and families likely leaving much of this area very active for specific times of the year and slowing down at times as well.

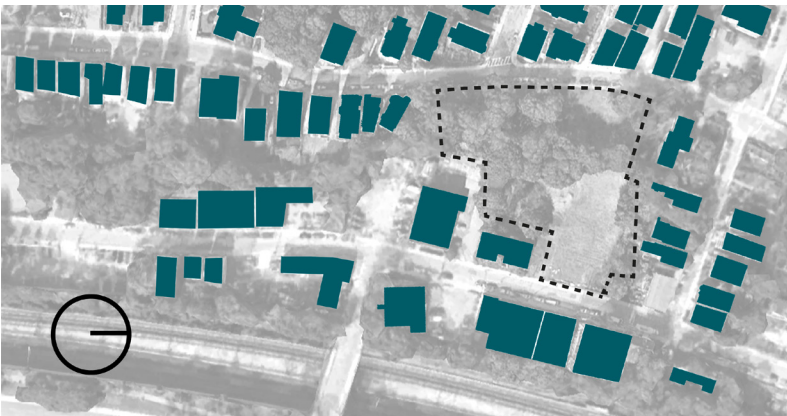
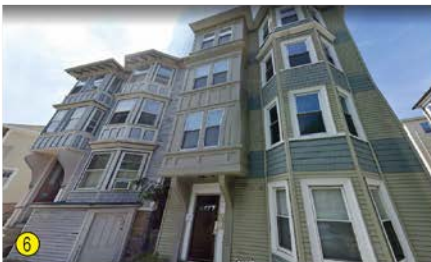
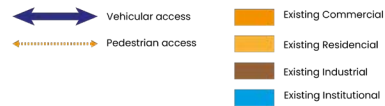


The Commercial Context:

The Terrace Street portion of the site is more active with vehicular traffic as it is a two way street with direct connection down to Roxbury Crossing and the business of Tremont Street. Terrace Street is zoned as an industrial and commercial designation and is seemingly on a fast track of development. Adjacent to the site is a brick building with a large mural done by a local artist that provided inspiration for the approach of the Terrace Street property.

Green Space:

As the neighborhood continues to develop it will be important to balance the development of inhabitable spaces with the preservation and creation of new green spaces for the community. Even though the site is currently fenced off, the site provides a large patch of green space for the neighborhood that helps soften all of the hard scape. Our approach respects the value of the green space in dense neighborhoods and works to create a site that both the future residents of the site and the surrounding community can enjoy.



The diagram to the left highlights the existing density of the context and scales of the buildings. Note along Parker Street the smaller scale residential areas densely packed along the street but also the amount of green space in between streets. Also note along Terrace the increase in scale and the footprints taking up more of the overall sites. Both of these greatly impact the design approach and scale of the proposed buildings as our goal was to design the site to fit well within the existing context.

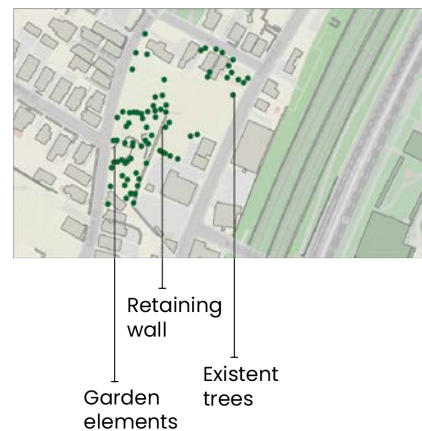
Site Context Observations and Key Site Elements



B TRIPLE DECKER TYPOLOGY



A EXISTENT GREEN AREAS



The site rises in grade from the Terrace Street side to the Parker Street side with significant grade changes align Terrace Street. The areas noted as A above identify quality green space on the site that as a team we have taken the approach of preserving and integrating as a component of the design. One of the typical triple deckers on the Parker Street side is shown in B, note the height, entrance procession, and overhangs as well as the difference in the depth along the facade from the bay window to the primary facade. We worked with this style of architecture to inspire our approach on the proposed design.

GREEN AREA A.1

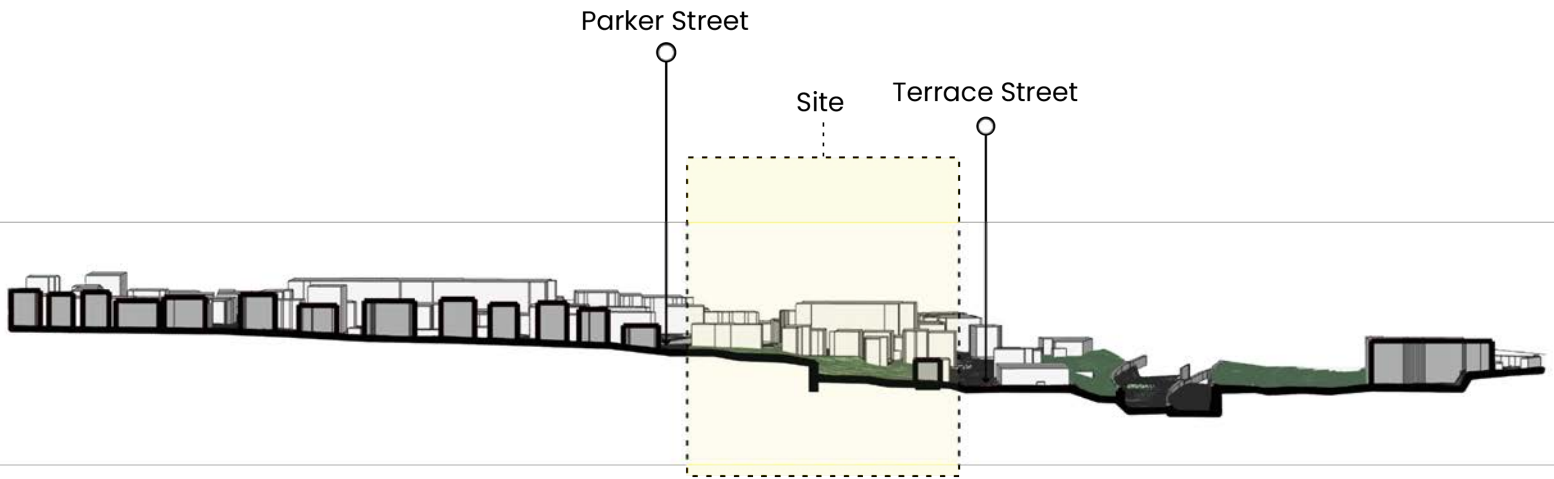


GREEN AREA A.2



GREEN AREA A.3

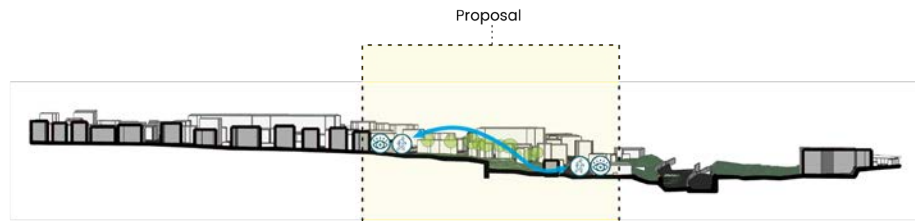
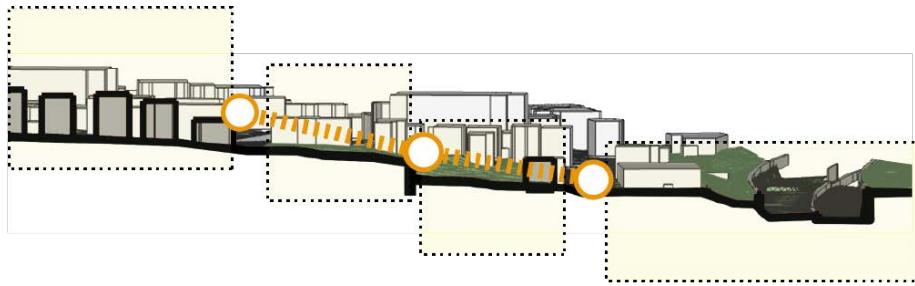




With the substantial difference in the neighborhood from the Parker Street side to the Terrace Street side, our design team made the decision based off the site observations to take the following approaches;

1. The site lends itself to be two separate designs, with a more residential inspired and less dense on the Parker Street side and a more commercial inspired building on the Terrace Street side.
2. While the buildings may be separate designs, the landscaping and green space is what unites the site and connects the site from the Parker Street side to the Terrace Street side. This naturally became the concept to the entire design approach, the Green Corridor. Our goal is for the landscaping and green space to be a critical part of the overall site and to extend from one side of the site to the other. This concept also inspired us to preserve the existing park along Parker Street with the intent to rehabilitate it and make it a resource for the community.

Design Concept: The Green Corridor



Creation of connection between Parker St and Terrace Street



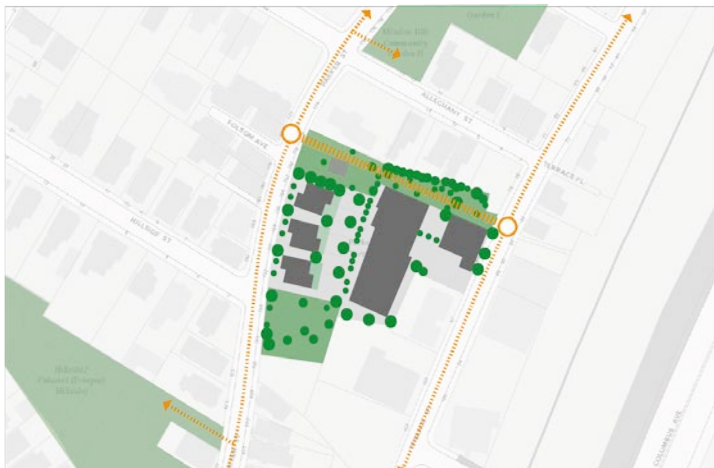
Growth of green mass around the connector



Reservation of existent park area and placement of the potential solid masses



Break of the solid masses and growth of green areas in the interstitial spaces



The north portion of the site gets the highest amount of direct sunlight and the RFP called for the Community Garden to be located on the Parker side of the North half of the site. Identifying the location for the Community Garden and the importance of connecting the community to green space created the concept of the Green Corridor. The Green Corridor will be a landscaped corridor that passes through the site and is open to the public. The concept of the Green Corridor also works into the elements of the building designs and the approach with each building. will make a direct connection between Parker Street and Terrace Street. The landscape approach was therefore really important for the design approach to the project.

As the green corridor developed along the North edge of the site, the locations for the affordable housing development created itself off of the corridor. Note the development along Parker Street is split into 3 separate buildings to mimic the scale and density of the Parker Street surroundings while the Terrace Street development is broken down into two larger masses to mimic the Terrace Street density and surroundings. At the south side of the Parker Street side it was also important for our Green Corridor approach to preserve the existing park space rather than overdeveloping the site. We have kept this park with the intent to rehabilitate it and create a new but already established space for the community to gather.

5.3 Overall Landscape Design and Site Plan



The landscape design concept is to create a coherent yet diverse community with a balance of indoor/outdoor private, semi-private and public open spaces. The site provides a great opportunity to maximize the use of the open space and provide as much green space as possible for an already dense neighborhood. In addition, the site offers opportunities to create a Food Forest Park, which will include sustainable a community gardens with garden beds, food-producing fruit orchards and green space, managed by the Boston Food Forest Coalition (BFFC). Using the site to build on community living and aiding in sharing of outdoor spaces is invaluable to a healthy lifestyle.

However, the complexity of the site with more than a thirty-foot change in elevation and the very different building types and uses between Parker Street and Terrace Street provides a challenge. We took this challenge as an opportunity to integrate the historic residential context of triple deckers and single-family homes along Parker Street and the commercial context along Terrace Street.

On the west side of the site, 778-796 Parker Street, responds to the neighborhood fabric yet sets the proposed 9 units back from the street giving the opportunity of planting “back of sidewalk street trees” adding much needed street trees along Parker Street. Small private gardens in the rear of the units expand to a private open area of permeable paving used both for residential parking and as private connection to the public park on one side and community gardens to the other.

On the east side of the site, 77 Terrace Street, the 16 units integrate with the current changing industrial and contemporary residential buildings. The residential/artists building along Terrace Street is set back to provide wider sidewalks and street tree plantings. The street trees help announce a more residential zone along Terrace Street. The entry drive to the parking garage also serves as a forecourt/plaza to the

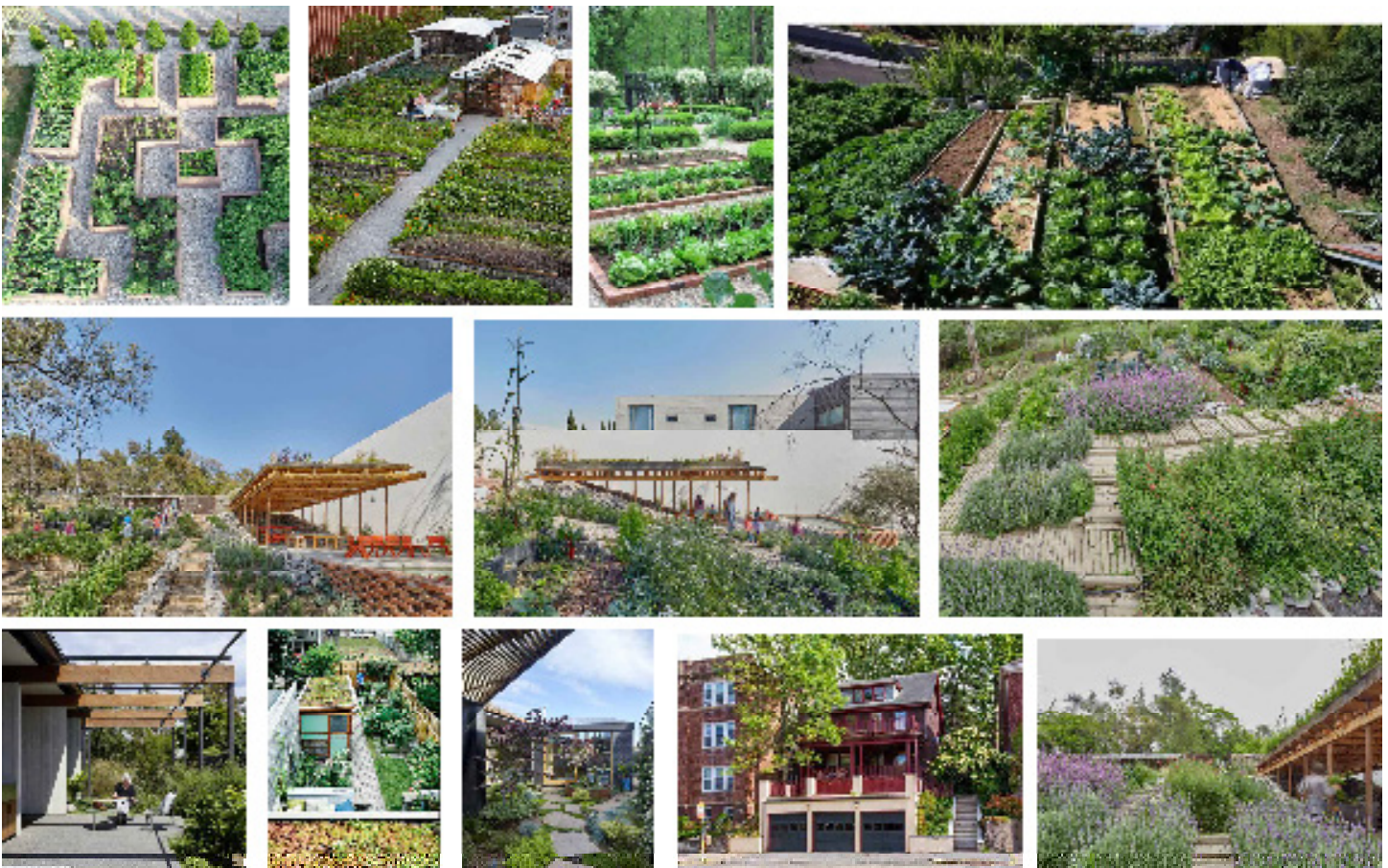
existing mural on the façade of the existing storage building. This entry acknowledges the existing mural which we understand to be part of an existing mural walk on Mission Hill. Adjacent to the Artist Live/Work units an outdoor terrace is integrated into the landscape which also serves as an exhibition space for artists' works. A terraced open space between the units on the Terrace Street site provides ample space for semi-private outdoor gathering areas and a terraced community garden area.



The site plan connects both Parker Street and Terrace Street with a meandering public passageway/connector that traverses the site connecting the neighborhood from Parker Street to Tremont Street and beyond. A graceful walk from Parker Street, starting at the neighborhood community garden along Parker Street down steps to Terrace Street, will take residents through the terraced fruit tree orchard adjacent to private outdoor spaces.

The landscape design concept also expands on an already existing neighborhood park located at the SW portion of the site by creating a fruit tree orchard within the park. Its existing trees and plantings will be carefully assessed for health and structural integrity. Improvements to the existing remnants of a circular paved seating area provides an accessible entrance and open space from Parker Street.

The overall landscape design carefully integrates private green spaces, semi-private green spaces, a community garden, fruit tree orchards—a “food forest park” and a public passageway or “green corridor” through the neighborhood. Precedent and inspirational images for the landscape design are below.



Parker and Terrace Street Landscape Design Orchards



5.4 Site One



778 - 796 Parker Street Concept Integration

Per the notes above and the approach that was driven by the surrounding context, we have split the building design into two packages as there is a clear difference between the Parker Street side of the site and the Terrace Street side.



Site One Zoning

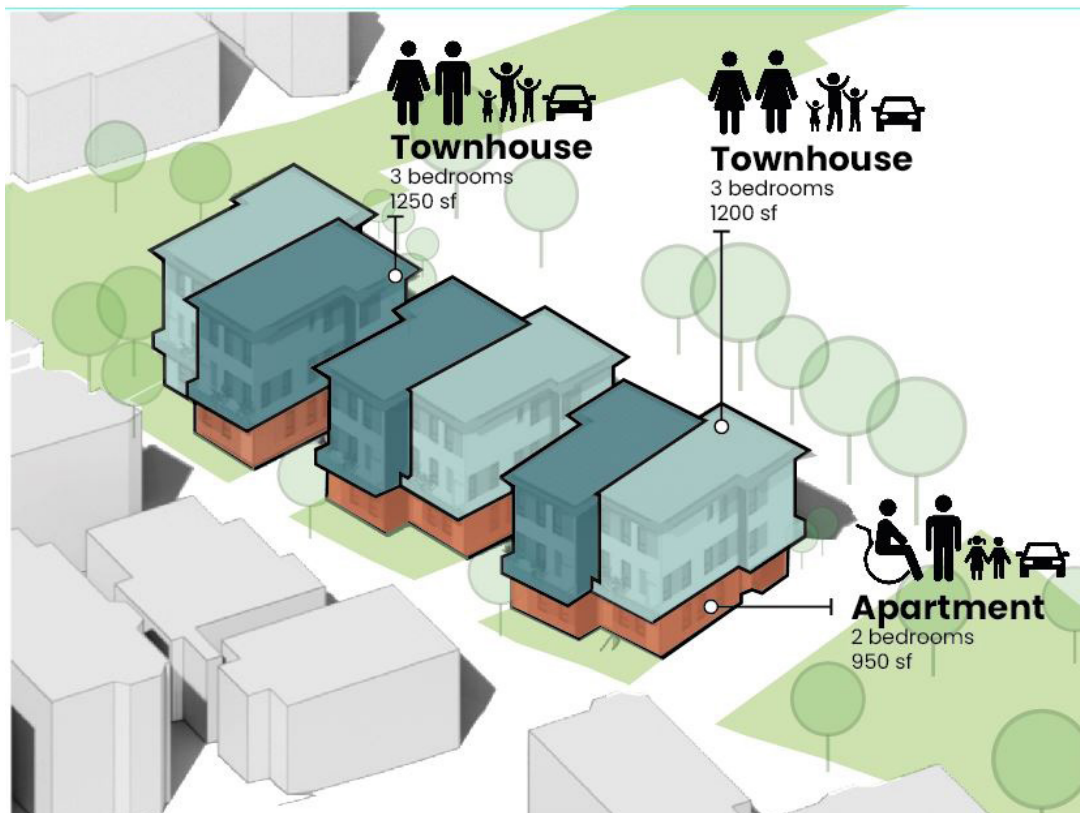
On the left side of the site you'll note the existing circle from the park is preserved and a nice escape from the business of the area is provided. Along the right side of the plan is the upper entrance to the Green Corridor which has a path that works through it but is also a well designed Community Garden with a central area storage.

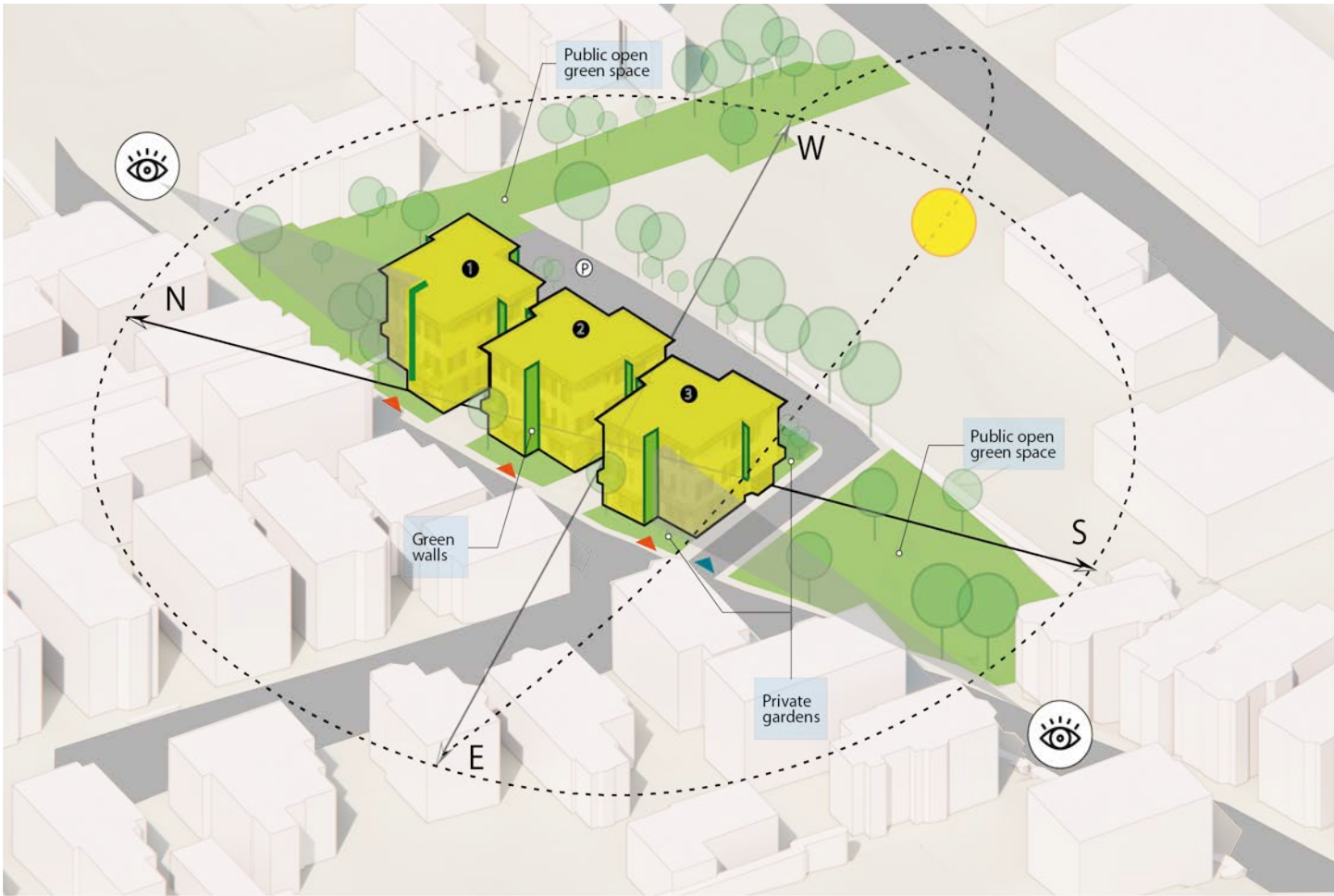
The Parker Street side of the site is zoned for residential three family use and the site is therefore divided into three separate buildings to better fit within the scale of the context. Each building will have three separate units. The first level will be an accessible unit while the top two levels will be split down the middle to create two separate townhouse units.

The three buildings are located in the center of the site on the north/south axis in between the future rehabilitated park and the future Green Corridor and Community Garden space.

The **Concept of the Green corridor** carries itself from the approach of the landscape up into the building forms themselves. The building is split along the center line and the two halves are offset and shifted to create small slivers of facade where green screens will work their way up the edges of the building. In addition, the building itself is also colonized by the concept of connector/green corridor, since the small walls of the building, resulted of the decomposition of the geometry, become green walls that invite you to enjoy the green areas of the site. Also, the geometry and placement of the buildings is designed so that the green walls can be seen from any point.

The scale and the proportions of the buildings place off of the lessons learned from the context analysis in the previous pages along with the designated entrances from the street side and the large overhangs present in many of the three story residential properties in the area.





- Green spaces
- Road access
- P Parking
- Building
- Vegetation
- Pedestrian access
- Road access
- 👁️ Visibility of the green walls

Site One Units

As noted, the lower level units will be fully accessible units with direct access from the street and from the parking in the rear of the units. The upper two levels of each building are then divided into two story townhouse units with the main living spaces on the lower second level and the bedroom units on the upper level for increased privacy and separation. In addition to the two public to public green spaces on both sides of the development, there is also a smaller backyard area for each building to give them a dedicated exterior space for their own use. The breakdown of the units is below for reference and laid out in the following Schematic Design package.

Designing for Family needs:

The design proposal responds to the following family's hierarchy of needs:


- Access to green space for family members to be active outdoors.
- Living Spaces are designed to host family activities during the day with flexibility to enable a variety of family activities including cooking, eating, playing, and hosting.
- Family sized units - the units are sized in excess to the Mayor's Office of Housing standards to allow for adequate space for the families.
- Fostering the sense of individuality through the design - each unit has it's own dedicated entrance from the street side and the accessible units have an additional entrance from the parking area.
- Accessibility - three accessible units will allow for families with disabilities to be accommodated in this space.



Site One: 3d view of the site in context looking down Parker Street.

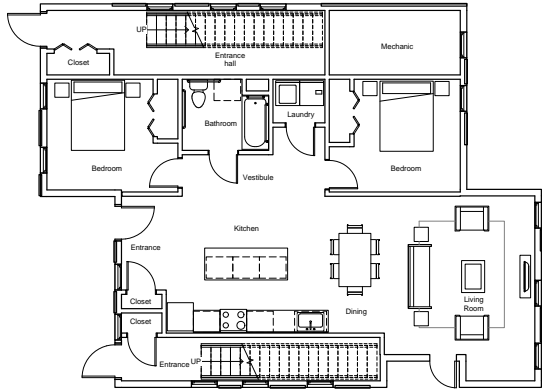




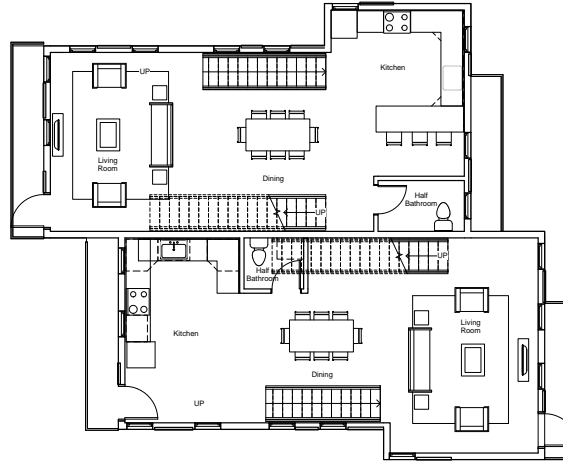
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CLIENT	
CLIENT NAME	
ARCHITECT	
 ADAPTIV ARCHITECTURE & PLANNING 44 CORNING ST, BEVERLY MA 01915	
NO.	DATE
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KEY PLAN	
SITE PLAN	
DRAWING TITLE	
SCALE 3/64" = 1'-0"	DATE 03/25/22
JOB NUMBER 12345	
SD - SCHEMATIC DESIGN	
DRAWING NUMBER	
A-001	

03/25/22 12:34:56
 44 CORNING ST BEVERLY, MA, 01915
 PROJECT NAME

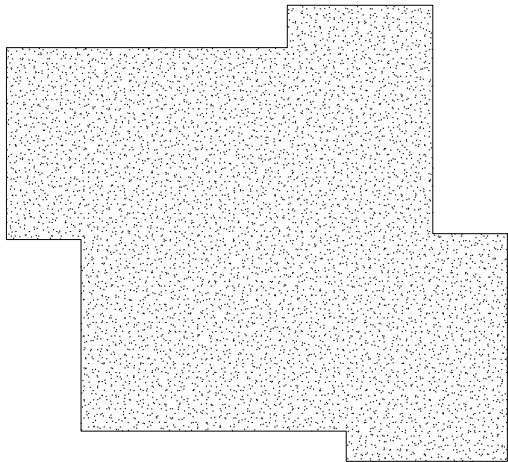
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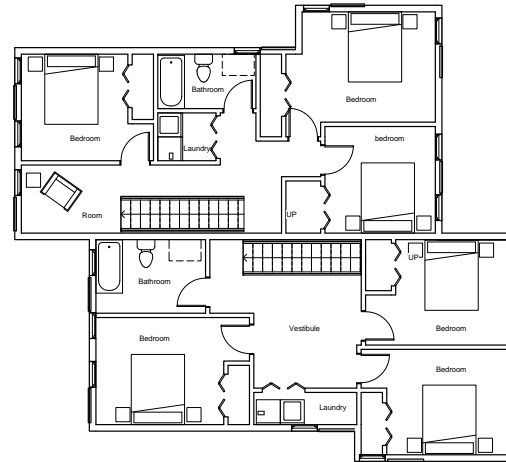
A1- Level 1
SCALE 3/16" = 1'-0"



Level 2
SCALE 3/16" = 1'-0"



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



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

PROJECT
PROJECT NAME
44 CORNING ST BEVERLY, MA, 01915

CLIENT
CLIENT NAME

ARCHITECT

ADAPTIV ARCHITECTURE & PLANNING
44 CORNING ST,
BEVERLY MA 01915

NO.	DATE	DESCRIPTION
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--	--	--

SD PLAN

FLOOR PLAN

DRAWING TITLE	
SCALE	3/16" = 1'-0"
DATE	03/25/22
JOB NUMBER	12345
SUBMISSION	SD - SCHEMATIC DESIGN
DRAWING NUMBER	

A-100

03/11/2022 10:40:23
 A:\Projects\44 Corning St\44 Corning St.dwg
 PROJECT NAME



Front Facade
SCALE 3/16" = 1'-0"



Elevation Right Facade
SCALE 3/16" = 1'-0"



Back Facade
SCALE 3/16" = 1'-0"



Elevation Left Facade
SCALE 3/16" = 1'-0"

PROJECT
PROJECT NAME
44 CORNING ST BEVERLY, MA, 01915

CLIENT
CLIENT NAME

ARCHITECT

ADAPTIV ARCHITECTURE & PLANNING
44 CORNING ST.
BEVERLY MA 01915

NO.	DATE	DESCRIPTION

EXTERIOR ELEVATIONS

SCALE	3/16" = 1'-0"	DATE	03/25/22
JOB NUMBER	12345		
SUBMISSION	SD - SCHEMATIC DESIGN		
DRAWING NUMBER	A-300		

00111000 10/27
 Adaptiv Architecture & Planning, Inc. 44 Corning St. Beverly, MA 01915
 PROJECT NAME

THE ORIGINAL OF THIS DRAWING IS 24" X 36". IF THIS COPY IS ANY OTHER SIZE, IT HAS EITHER BEEN REDUCED OR ENLARGED. TAKE APPROPRIATE PRECAUTIONS ACCORDINGLY.



PROJECT
PROJECT NAME
44 CORNING ST BEVERLY, MA, 01915

CLIENT
CLIENT NAME

ARCHITECT

ADAPTIV ARCHITECTURE & PLANNING
44 CORNING ST,
BEVERLY MA 01915

NO.	DATE	DESCRIPTION
-----	------	-------------

KEY PLAN

URBAN ELEVATION

DRAWING TITLE

SCALE 1/16" = 1'-0" DATE 03/25/22

JOB NUMBER 12345

SUBMISSION SD - SCHEMATIC DESIGN

DRAWING NUMBER

A-400

5.5 Site Two



SITE 2
Terrace St, Boston, MA



Terrace Street Concept Integration

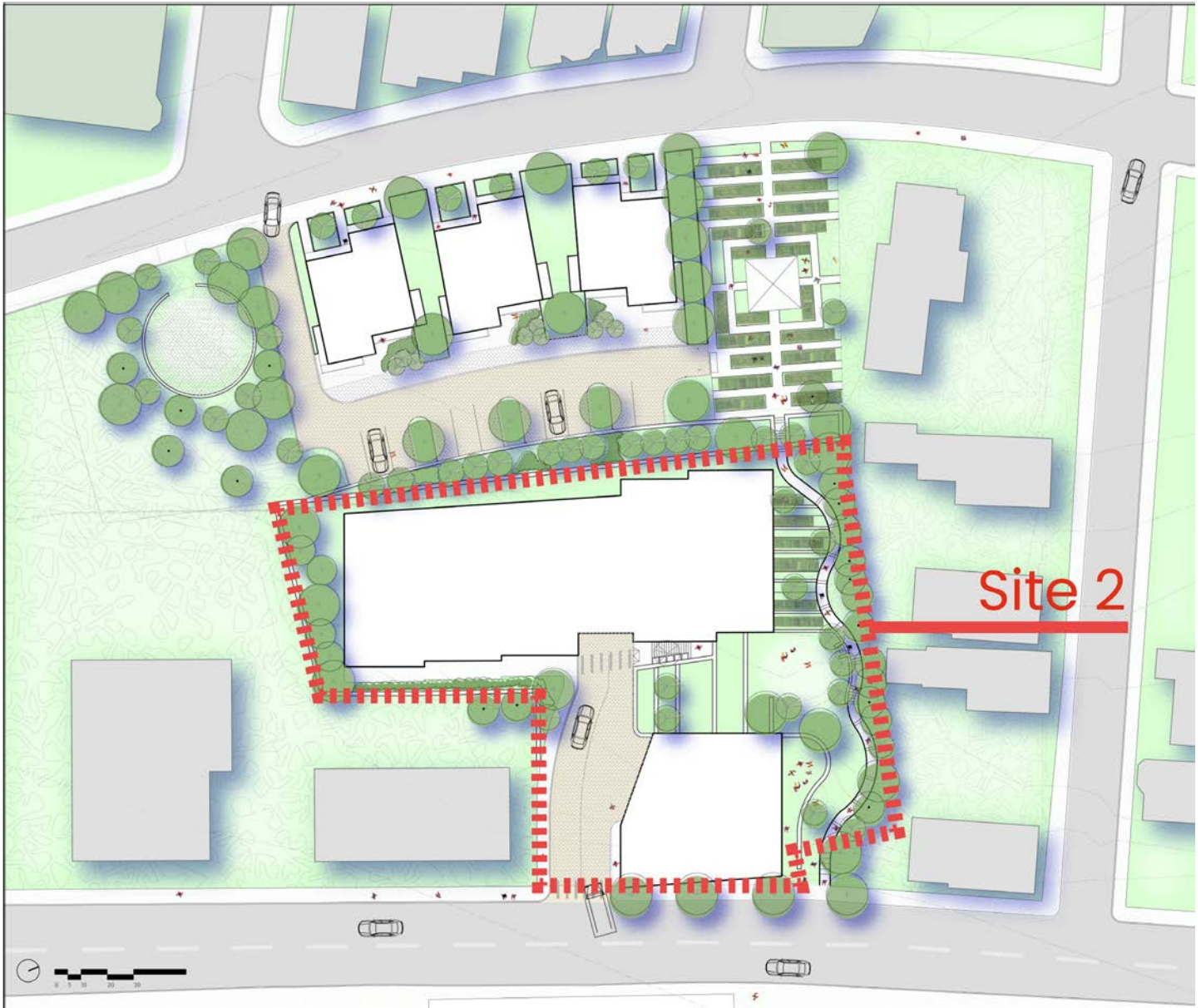
In response to the Request for Proposals (RFP) for parcel 1000396000 at 77, Terrace Street in the Mission Hill district issued by the Mayor's Office of Housing (MOH), Habitat for Humanity (HFH) is pleased to submit our enclosed design proposal. We believe that our design proposal meets the objectives outlined in the (RFP) and will contribute greatly to the resiliency and vitality of the neighborhood by transforming the site into long-term affordable homes for residents and anchoring artists into the fabric of the community. Becoming an integrated part of the neighborhood, this proposal also strives to develop connections within the community by means of community gardens and a public green corridor.

Our proposal for Site 2 (77 Terrace Street) addresses the neighborhood's need for affordable residences, incorporates a unique artist live/work experience, complemented by an anchor non-profit arts space, and proposes a connected ribbon of green spaces for resident amenities, community gardens, and a public pedestrian corridor.

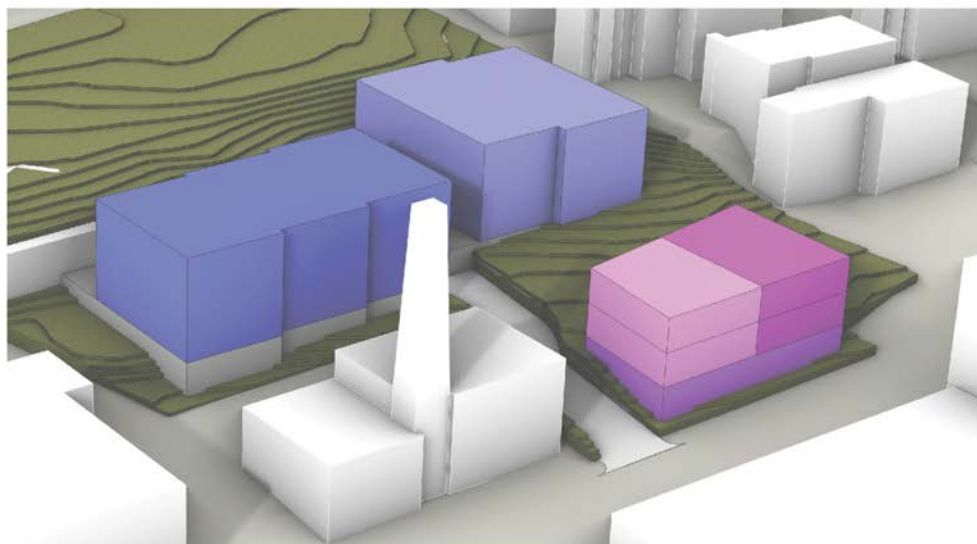
The project's interior program is divided into 3 main buildings:

- Building A: Streetfront residential building incorporating artist live/work apartments and Artists for Humanity art/community space.
- Building B: Southernmost residential building incorporating 6 4-bedroom townhouse-style units.
- Building C: Northernmost residential building incorporating 6 4-bedroom fully ADA accessible apartment-style units.

The siting and massing of the three structures is intended to create visual connections across the site from Parker Street down to Terrace Street in response to community feedback to preserve views looking down the hill for Parker Street Residents. The building heights are strategically set to work in concert with the grading of the site, stepping down to bridge the gap between the adjacent industrial structures and residential townhomes along Terrace Street.



Site 2



Design Development

■ Community Asset	1454 SF
Potential RESTORE/ ARTIST SPACES	
Units:	18
■ 2 Bedroom	2
Apartment	4
■ 3 Bedroom	6
Apartment	2
■ 4 Bedroom Flats	6
■ 4 Bedroom Townhouse	6
Parking (enclosed)	14 spaces (.78)
	10 regular
	04 accessible

Building A

Building A is dedicated to supporting the development of artists and anchoring the artist community with the neighborhood, boasting four affordable artist live/work units on the upper floors and a community arts space along the ground floor. The enduring presence of the artist community surrounding the site, along with adjacent murals, and nearby art schools position the building as a nexus within a vibrant arts community. Partnering with Artists for Humanity (AFH), a local NGO, the ground floor art/community center will support AFH's program for the development of arts among the community for students of all ages. The ground floor art/community center is complemented by an outdoor patio that can host classes, installations or gatherings for the artist community space. The building's prominent location on Terrace Street is also highly visible and easily accessible to the public, with a public green corridor on the North side designed as a connector between Terrace and Parker St.

In keeping with our objective of creating artist live/work experiences, the upper floors of the building are composed of 4 affordable artist live-work units within 2 stories. The unit distribution includes 2-bedroom and 3-bedroom options. Prioritizing the flexibility needed for artist live/work spaces, this proposal provides flexible units with an open work space that can be used as dedicated artist workspace thereby accommodating a plethora of artistic disciplines. The artist workspace contains a second oversized entry door, giving the residents the option for privacy and separation of their artmaking practice from their living area.

Maximizing daylight and views, each unit provides large windows looking out to Terrace Street from the living area and work space. Creating a functional artist live/work space is address throughout the entirety of the building, with each unit equipped with four-foot-wide entry doors and elevator access to the arts/community space below for ease of transporting art and materials, while acoustical separation between units in both the floors and walls supports multidisciplinary building residents and the ability for 24-hour art making to occur within the building. The varied unit sizes aim to support multiple disciples and household sizes and allow emerging local artists to stay within the community as their needs evolve.

Building B

In keeping with our objective of incentivizing affordable housing within the Mission Hill district, Building B comprises 6 4-bedroom affordable townhouse units within four stories (3 above grade, 1 below grade). Given the RFP's marked request for non-surface parking, this proposal incorporates below grade parking for both Building B and C, utilizing the sloping landscape to provide below grade parking while freeing up green space among the proposed buildings. Each of the six townhouse-style units incorporates 4 bedrooms and 2 ½ bathrooms in addition to space for private washer and dryer. Given the nature of the townhouse style, whereby a vertical lot is occupied by a single family, a private patio space is also provided behind each unit. Additionally, private access is provided to the parking below.

Building C

We believe accessibility is central to building a strong and equitable community, and as such, Building C is proposed to be a fully accessible building, consisting of 4 4-bedroom fully ADA accessible apartment-style units within four stories (3 above grade, 1 below grade). These ADA apartment style units are maximized to incorporate 4 bedrooms, 2 ADA accessible bathrooms, and space for a private washer and dryer. Access to the below grade fully ADA accessible parking structure is provided by means of a shared elevator and central staircase.

Additionally, this building includes storage and bicycle storage space for residents at the parking level and provides direct access to outdoor green space such as a private resident patio space as well as a shared resident green space between the buildings.

Zoning

The Terrace Street Site 2 (77 Terrace Street) is located within the Mission Hill Neighborhood Zoning District with no zoning overlays and is locally an Local Industrial (LI) subdistrict. This zoning allows for small scale industrial including light industrial commercial spaces such as the neighboring Diablo Glass School. The uses we propose for multi-family residential use would therefore require zoning relief. Proposed uses include Business Use Group - B or Assembly Use Group - A2 (Food/Drink), and Residential Use Group - R2. These requested variances will allow for increased density to support local arts and entrepreneurship development opportunities, uphold contextual typologies, and create the necessary space for local residents and artists to thrive.

This proposal respects building height zoning regulations for the Mission Hill Neighborhood Zoning District restricting the building height to 4 stories or 45 feet, with the proposed project having a maximum building height of 40'-0".

A zoning dimensional chart is provided in the submission.

Parking and Transportation

As marked in the RFP, surface parking is heavily discouraged for the development of this site. Therefore, and as aforementioned, our proposal incorporates below grade structured parking for Building B and C. As such, the project offers 14 parking spaces within the structured parking for a 0.78 parking ratio, and provides 4 fully ADA accessible spaces. Moreover, the project also encourages more sustainable modes of transportation by providing a 1:1 bicycle storage in the same space or space for 18 bicycles. The site is also connected to public transit, located a mere 2-minute walk from the nearest bus stop.

Design

Per the requirements of the RFP, the massing, planning, and exterior design of our proposed project has been developed with an awareness of the need for ample green space and therefore proposes to fully engage with Site 1 on Parker Street by providing a green corridor which doubles as a community garden and open green space. Moreover, the landscape design is derived under the pretense of respecting the existing conditions of the site, and as such, is able to preserve the majority of existing mature trees. This proposal includes 3 buildings to achieve a village-style arrangement, which when coupled with structured parking allows the interstitial spaces to be incorporated into the green corridor or become activated community green space. Furthermore, this proposal is responsive to the scale and materiality of the surrounding buildings as well as the character of the neighborhood. As such, we have aimed to create a contemporary translation of the industrial typologies present on the opposite side of the street, while keeping in mind its residential purpose. Likewise, the proportion of the proposed buildings reflect the neighboring buildings while offering a green, spacious, and dynamic proposal.

In order to fully engage the street front, our proposal creates a highly transparent and permeable art/community space on the ground floor operated by Artists for Humanity. The massing of the building is highly responsive to the heights of the adjacent buildings while acknowledging the economic and environmental necessity for maximizing density. Maintaining the three-story typology of the existing buildings throughout the neighborhood, both streetside corners of the site are designated as open spaces and peel back; the Southern corner reacting to the adjacent Diablo Glass School murals on its façade and making space for a wider driveway and front entrance to both Building B and C in the back, and the Northern corner connecting to the green corridor and creating an exterior area for spill-out from the art/community space. This proposal calls for Construction Type VA, using any materials, and all wood framing which falls in line with Habitat for Humanity's volunteer driven construction.

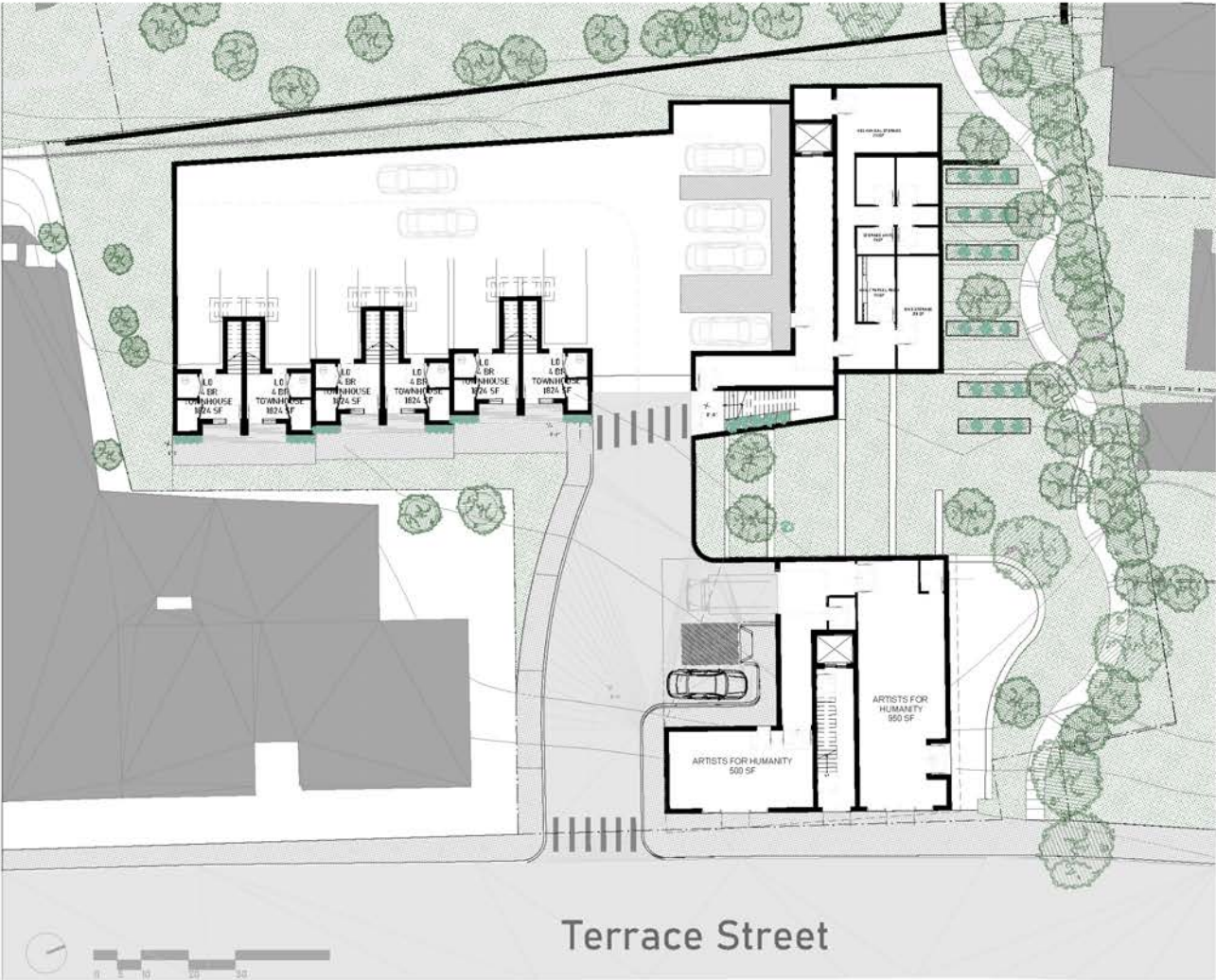
The palette of materials selected, displays a variety of fiber cement panels in differing textures and colors, and is intended to be in harmony with the look and feel of the neighborhood. Our objective to create a

distinctive façade is achieved through material variety, diversity, and character, while keeping in mind economy and constructability under HFH's volunteer-build model.

Conclusions

In conclusion, we envision the future of Site 2 on Terrace Street as an integral part of the community, acting as a supportive residential community and a locus of artistic activity, while also maximizing the opportunity to establish connections within the neighborhood and weave together two currently unrelated spaces. Our proposal for a village-style affordable housing development and a community artist space, paired with a public green corridor from Terrace Street to Parker Street becomes an ambitious project that puts local artists, community residents and public green space front and center. Working closely with community members and embracing a multidisciplinary design approach, we believe our proposal will facilitate impactful change that reaches far beyond the limits of our site.

Ground Floor Plan



SITE 2
Terrace St, Boston, MA

First Floor Plan



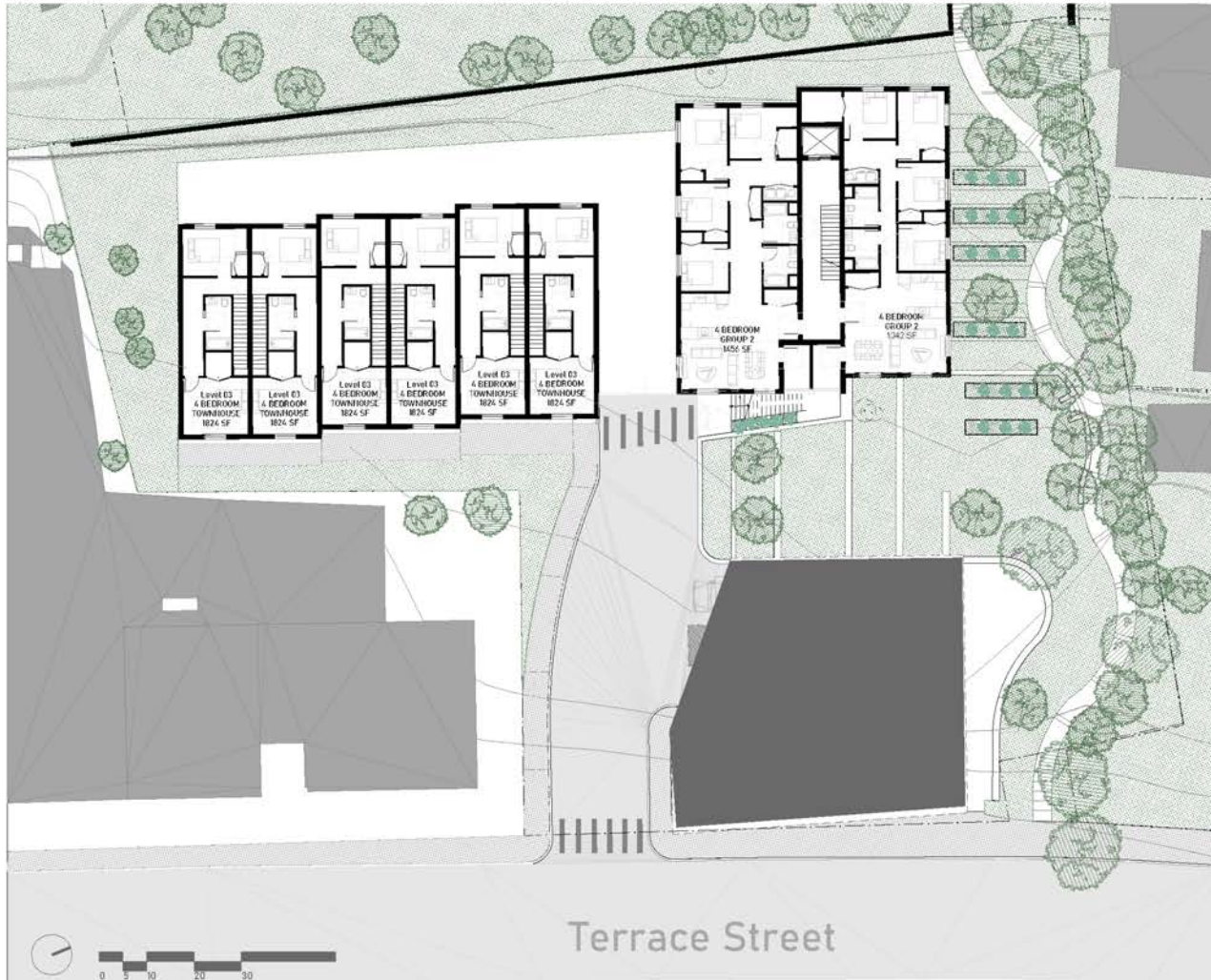
SITE 2
Terrace St, Boston, MA

Second Floor Plan

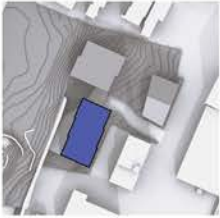


SITE 2
Terrace St, Boston, MA

Third Floor Plan

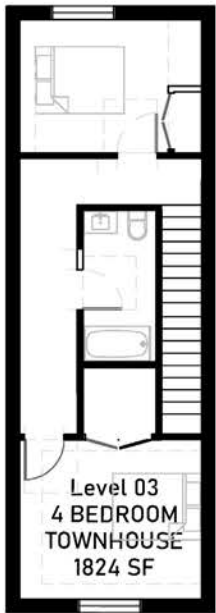


SITE 2
Terrace St, Boston, MA

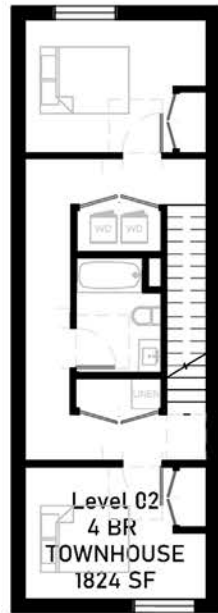


4 BR Townhouse Typical Unit Plan

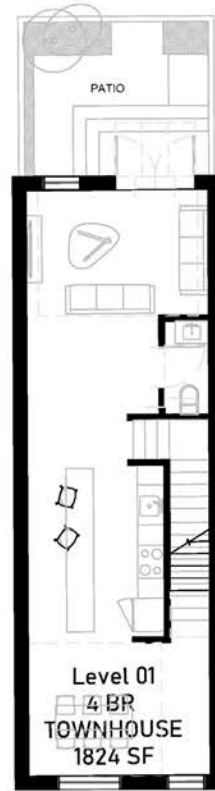
4 Bedroom Townhouse 1824 SF
1 Parking Space



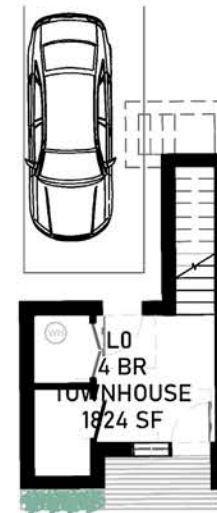
L3



L2

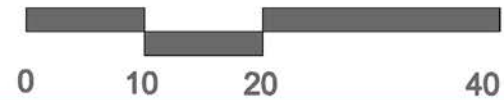


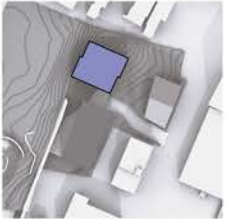
L1



L0

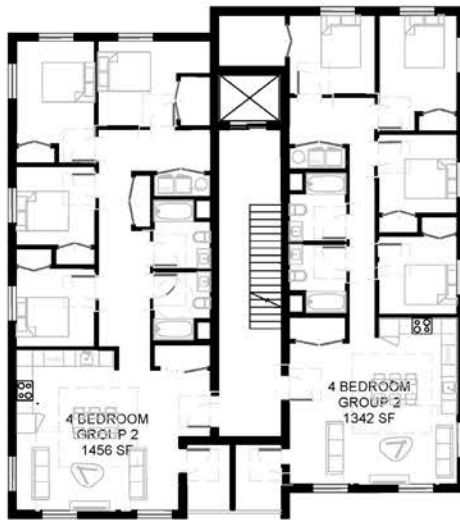
SITE 2
Terrace St, Boston, MA



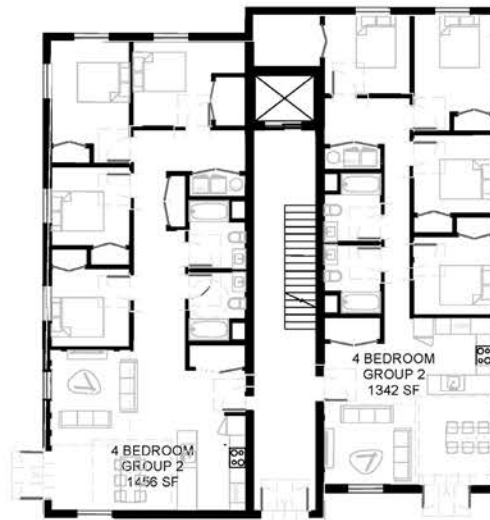


4 BR Accessible Flats Typical Unit Plans

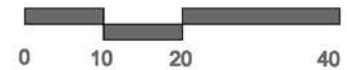
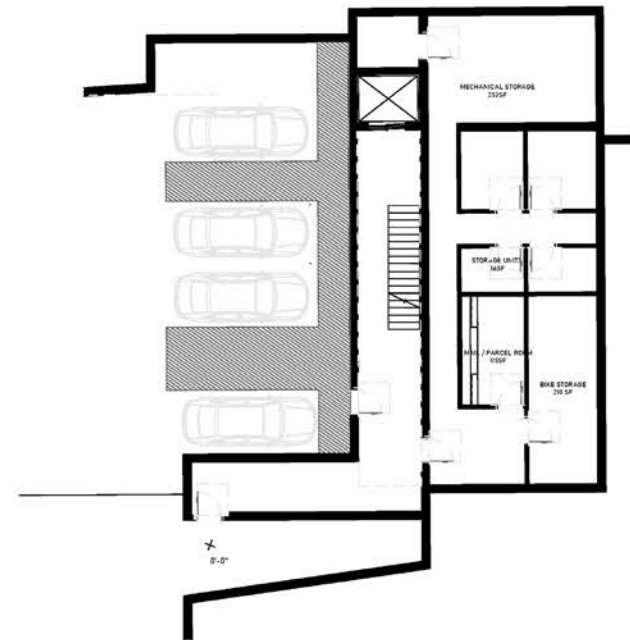
4 Bedroom Flats 1342-1456 SF
Group 2 Accessible -
Stairwell and Elevator Access to Structured
Parking Below



L2 + L3



L1

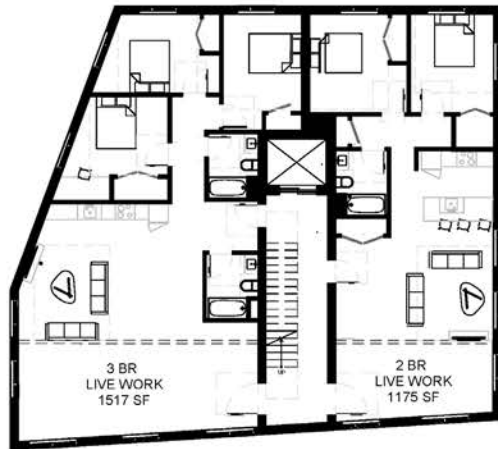




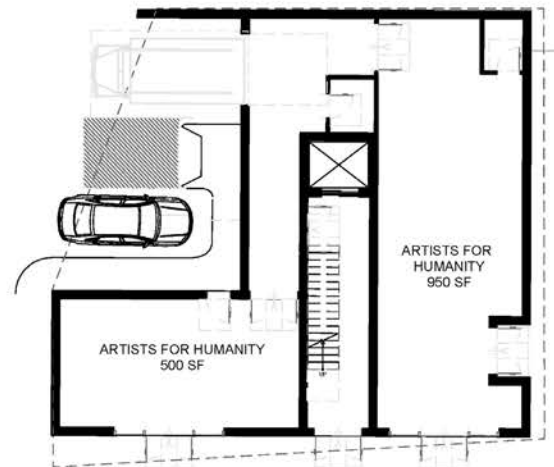
Artist Live-Work Flats Typical Unit Plans

2 Bedroom Live Work - 1175 SF
3 Bedroom Live Work - 1517 SF

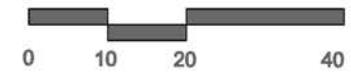
Community Asset Space 1 500 SF
Community Asset Space 2 950 SF



L1 + L2



L0

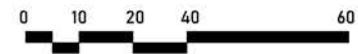


SITE 2
Terrace St, Boston, MA

Terrace Street Elevation



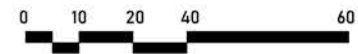
SITE 2
Terrace St, Boston, MA



Interior Block Elevation



SITE 2
Terrace St, Boston, MA

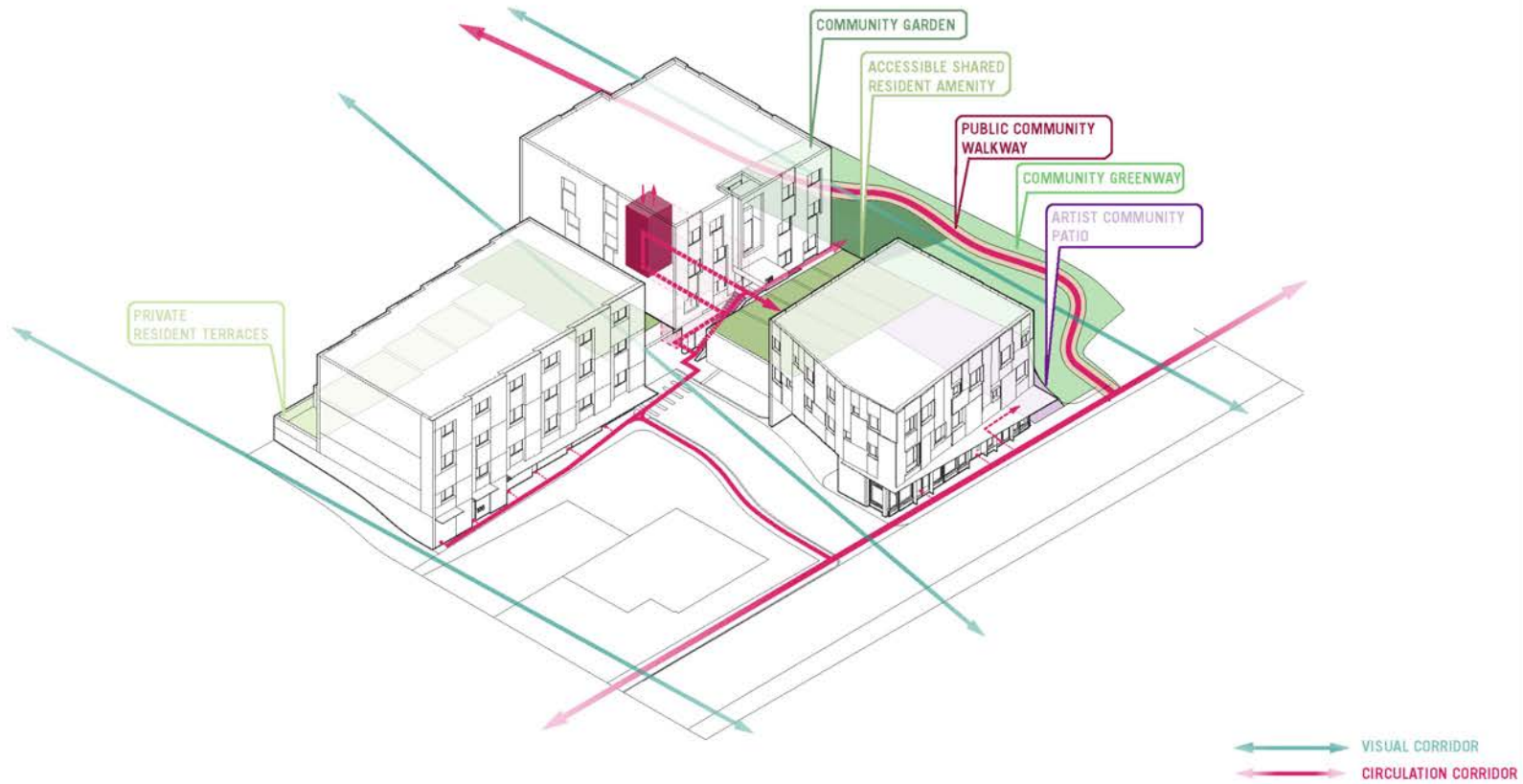


Terrace Street Render



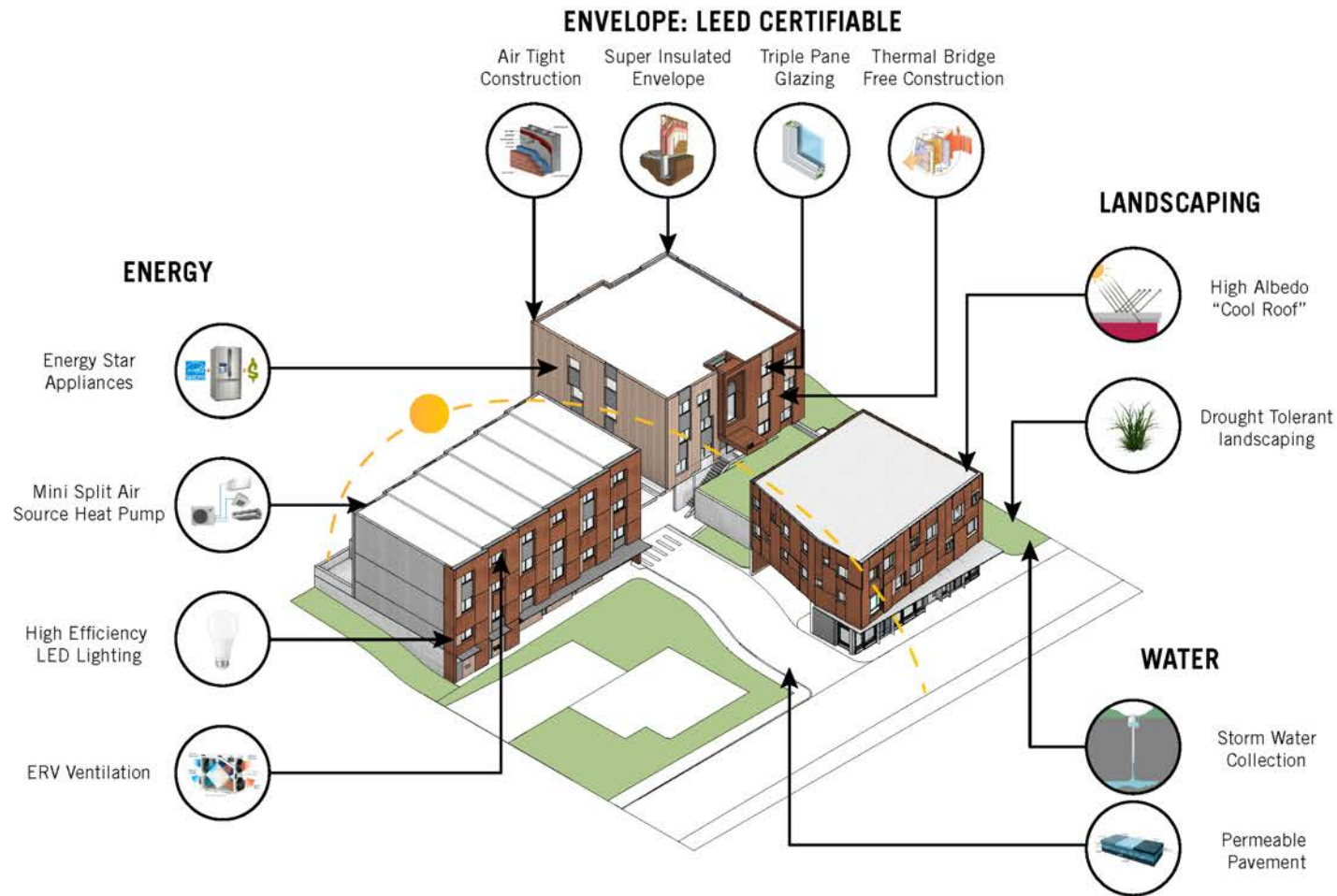
SITE 2
Terrace St, Boston, MA

Connectivity Diagram



SITE 2
Terrace St, Boston, MA

Sustainability Diagram



SITE 2
Terrace St, Boston, MA



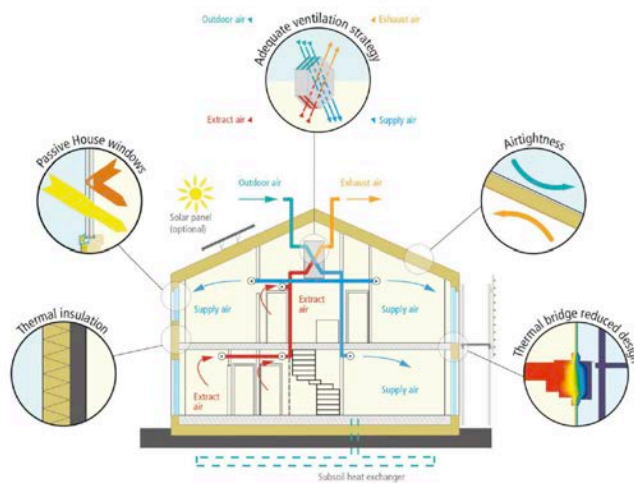
SITE 2
Terrace St, Boston, MA

5.6 Green Building

Narrative and description of Green Building elements, LEED for Homes checklist and HERS index, and approach for meeting the Zero Carbon requirement.

Sustainability:

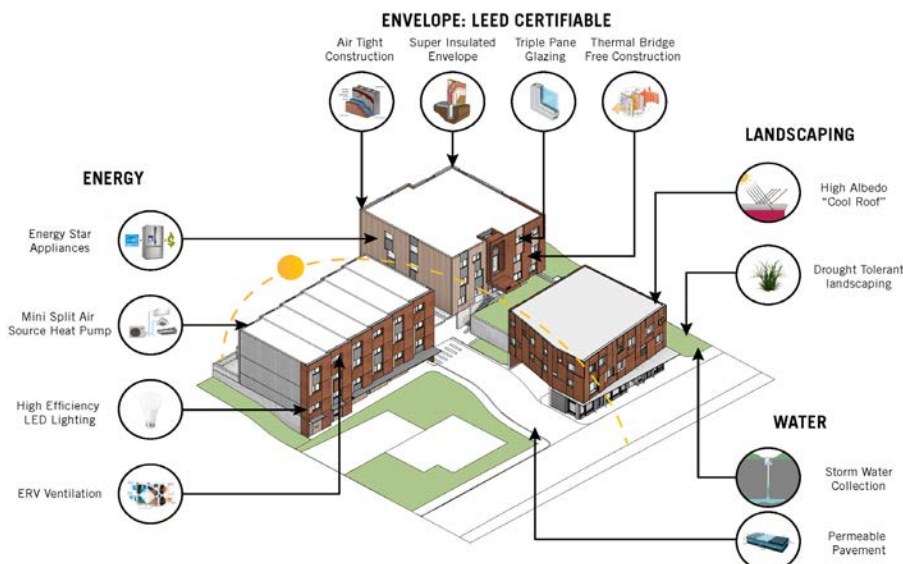
To address sustainability requirements as they relate to performance metrics and project delivery methodology, our intent is that an integrated project delivery approach will facilitate an in-depth analysis and optimization of structural and mechanical systems from day one. This approach will result in a fully engaged team from the inception of the project, making design decisions as a team that can offer reciprocal benefits and opportunities for an expedited project schedule. The performance goals for the project will be established with the full design team early in the schematic design phase and will be implemented throughout the project. All mechanical systems will be selected based on a thorough initial energy assessment, taking into consideration the buildings' orientation, potential for daylighting, and possibilities for passive design approaches that will be facilitated by the integrated project delivery methodology.



Careful management of factors such as massing, form, glazing, and orientation early in the design process will result in opportunities for passive reductions in energy consumption, even before employing active energy conservation measures in the design of the building systems. We will strive for a holistic approach in addressing carbon emissions, overall energy efficiency, and the impacts of climate change.

Furthermore, the proposal already looks to utilize the LEED system to develop the design through a series of measures that consider energy, water and landscape (please refer to our energy diagram included in the submittal for further information). The design team will also utilize the Passive House system to create a tight energy efficient envelope system and conserve energy usage as much as possible.

The team will also be carefully reviewing all materials for use and insuring they meet the high standards set forth in LEED and Passive house and minimize the Carbon Footprint of the project.



5.7 LEED Checklist



LEED v4 for Building Design and Construction: Homes and Multifamily Lowrise

Project Checklist

Project Name:

Date:

Y ? N

2			Credit	Integrative Process	2
---	--	--	--------	---------------------	---

11 2 2 Location and Transportation 15

Y			Prereq	Floodplain Avoidance	Required
---	--	--	--------	----------------------	----------

PERFORMANCE PATH

11	2	2	Credit	LEED for Neighborhood Development Location	15
----	---	---	--------	--	----

PRESCRIPTIVE PATH

			Credit	Site Selection	8
			Credit	Compact Development	3
			Credit	Community Resources	2
			Credit	Access to Transit	2

5 2 0 Sustainable Sites 7

Y			Prereq	Construction Activity Pollution Prevention	Required
---	--	--	--------	--	----------

Y			Prereq	No Invasive Plants	Required
---	--	--	--------	--------------------	----------

1	1		Credit	Heat Island Reduction	2
---	---	--	--------	-----------------------	---

2	1		Credit	Rainwater Management	3
---	---	--	--------	----------------------	---

2			Credit	Non-Toxic Pest Control	2
---	--	--	--------	------------------------	---

6 4 2 Water Efficiency 12

Y			Prereq	Water Metering	Required
---	--	--	--------	----------------	----------

PERFORMANCE PATH

6	4	2	Credit	Total Water Use	12
---	---	---	--------	-----------------	----

PRESCRIPTIVE PATH

			Credit	Indoor Water Use	6
			Credit	Outdoor Water Use	4

27 7 4 Energy and Atmosphere 38

Y			Prereq	Minimum Energy Performance	Required
---	--	--	--------	----------------------------	----------

Y			Prereq	Energy Metering	Required
---	--	--	--------	-----------------	----------

Y			Prereq	Education of the Homeowner, Tenant or Building Manager	Required
---	--	--	--------	--	----------

PERFORMANCE PATH

21	4	4	Credit	Annual Energy Use	29
----	---	---	--------	-------------------	----

BOTH PATHS

3	2		Credit	Efficient Hot Water Distribution System	5
---	---	--	--------	---	---

1	1		Credit	Advanced Utility Tracking	2
---	---	--	--------	---------------------------	---

1			Credit	Active Solar Ready Design	1
---	--	--	--------	---------------------------	---

1			Credit	HVAC Start-Up Credentialing	1
---	--	--	--------	-----------------------------	---

PRESCRIPTIVE PATH

Y			Prereq	Home Size	Required
---	--	--	--------	-----------	----------

			Credit	Building Orientation for Passive Solar	3
--	--	--	--------	--	---

			Credit	Air Infiltration	2
--	--	--	--------	------------------	---

			Credit	Envelope Insulation	2
--	--	--	--------	---------------------	---

			Credit	Windows	3
--	--	--	--------	---------	---

			Credit	Space Heating & Cooling Equipment	4
--	--	--	--------	-----------------------------------	---

EA PRESCRIPTIVE PATH (continued)

			Credit	Heating & Cooling Distribution Systems	3
			Credit	Efficient Domestic Hot Water Equipment	3
			Credit	Lighting	2
			Credit	High Efficiency Appliances	2
			Credit	Renewable Energy	4

6 2 2 Materials and Resources 10

Y			Prereq	Certified Tropical Wood	Required
---	--	--	--------	-------------------------	----------

Y			Prereq	Durability Management	Required
---	--	--	--------	-----------------------	----------

1			Credit	Durability Management Verification	1
---	--	--	--------	------------------------------------	---

2	1	1	Credit	Environmentally Preferable Products	4
---	---	---	--------	-------------------------------------	---

2	1		Credit	Construction Waste Management	3
---	---	--	--------	-------------------------------	---

1		1	Credit	Material Efficient Framing	2
---	--	---	--------	----------------------------	---

8 7 1 Indoor Environmental Quality 16

Y			Prereq	Ventilation	Required
---	--	--	--------	-------------	----------

Y			Prereq	Combustion Venting	Required
---	--	--	--------	--------------------	----------

Y			Prereq	Garage Pollutant Protection	Required
---	--	--	--------	-----------------------------	----------

Y			Prereq	Radon-Resistant Construction	Required
---	--	--	--------	------------------------------	----------

Y			Prereq	Air Filtering	Required
---	--	--	--------	---------------	----------

Y			Prereq	Environmental Tobacco Smoke	Required
---	--	--	--------	-----------------------------	----------

Y			Prereq	Compartmentalization	Required
---	--	--	--------	----------------------	----------

1	2		Credit	Enhanced Ventilation	3
---	---	--	--------	----------------------	---

1	1		Credit	Contaminant Control	2
---	---	--	--------	---------------------	---

2	1		Credit	Balancing of Heating and Cooling Distribution Systems	3
---	---	--	--------	---	---

1			Credit	Enhanced Compartmentalization	1
---	--	--	--------	-------------------------------	---

	1	1	Credit	Enhanced Combustion Venting	2
--	---	---	--------	-----------------------------	---

1	1		Credit	Enhanced Garage Pollutant Protection	2
---	---	--	--------	--------------------------------------	---

2	1		Credit	Low Emitting Products	3
---	---	--	--------	-----------------------	---

4 2 0 Innovation 6

Y			Prereq	Preliminary Rating	Required
---	--	--	--------	--------------------	----------

3	2		Credit	Innovation	5
---	---	--	--------	------------	---

1			Credit	LEED AP Homes	1
---	--	--	--------	---------------	---

2 2 0 Regional Priority 4

1			Credit	Regional Priority: Specific Credit	1
---	--	--	--------	------------------------------------	---

1			Credit	Regional Priority: Specific Credit	1
---	--	--	--------	------------------------------------	---

	1		Credit	Regional Priority: Specific Credit	1
--	---	--	--------	------------------------------------	---

	1		Credit	Regional Priority: Specific Credit	1
--	---	--	--------	------------------------------------	---

71 28 11 TOTALS Possible Points: 110

Certified: 40 to 49 points, Silver: 50 to 59 points, Gold: 60 to 79 points, Platinum: 80 to 110

DIVERSITY & INCLUSION PLAN

Subcontractors, Goods, and Services

HFHGB prioritizes awarding contracts for goods, services, and labor to small businesses within our service area, giving preference to businesses within the city and neighborhood where each project is located. Historically, it has been beneficial to work with businesses who have an intimate knowledge of the area and good relationships with other local businesses and residents. We take care to select businesses that have self-identified as women or minority owned. Although not applicable to HFHGB projects, we aim to follow as closely as possible the standards in the Boston Residents Job Policy and follow the following guidelines from outreach through data collection.

Bid outreach

- Request proposals from at least 75% of businesses with our service area and at least 25% of minority and women owned businesses.

Bid review plan guidelines for selection

- Overall price
- Business located within HFHGB service area
- Business located within the city/town of this project
 - For Boston –business located within the neighborhood of this project
- Business BMWE

Tracking and data collection

- HFHGB tracks all business contacted for goods and services, all businesses awarded contracts, and keeps a list of potential businesses not yet approached. Location, MWBE status, and other data is collected. This allows for a faster and more effective process for selecting businesses to approach during the outreach process and helps ensure we reach our target numbers.

Local Trade School Partnerships

HFHGB has partnerships with local trade schools and programs; Madison Park Technical and Vocational High School, Youth Build Boston, Just-a-Start Youth Build (Cambridge), and Northeast Metro Tech. Currently, the partnership offers several volunteer Build Days per semester to each of these groups. Typically, a Build Day is booked by a paying group (\$2,500 for companies -\$750 for schools and churches), that fee is waived for this program. The next benchmark for growth in this partnership is to offer these groups longer-term projects on each build, for example; flooring installation, baseboards, interior painting. This will provide students with a more comprehensive learning experience from start to finish of an entire project.

One of the goals of this program is for HFHGB to contribute to building pathways to employment in the trades for local young people. Each of the schools and programs listed serves a high number of students from historically marginalized and disadvantaged backgrounds. Madison Park High School and Youth Build Boston are within walking distance of this project and many of the students live in the locally.

Construction, Design, Development, Financing, Operations, Management, and Ownership

HFHGB has carefully selected a diverse team to manage all aspects of property development, construction, homeownership, property management, and future use of the community art space. In this

project as in all others, it is essential to our process to collaborate with professionals and businesses who bring a broad range of ideas and experiences to best serve future HGHB homeowners and the surrounding communities. We seek out collaborations specifically with organizations that are registered non-profits, that are led and owned by women and people of color, and who also prioritize hiring, collaborating with, and serving people from historically marginalized and disadvantaged backgrounds.

HFHGB Staff

The HFHGB Construction and Real Estate Development team is comprised of more than 50% women and non-binary people. This helps create a more welcoming environment for women-owned businesses and volunteer groups to take part in construction-related activities.

Adaptiv

As a non-profit organization our mission is to reduce inequality by providing access to high-quality planning and architecture services in emerging communities across the globe. We promote sustainable community development by employing a community-centric, collaborative methodology of research and design thinking, to problem solve and develop resilient solutions in partnership with the organizations and communities we serve.

Studio Luz

At Studio Luz, we pride ourselves on cultivating a community of socially engaged designers. We prioritize mutual respect and inclusivity within our own team and our partners. For every project we take on, we strive for our work to leave a lasting impact on the communities we serve.

UHM Properties

Every year since its inception, UHM has earned the Multi-Million MBE/WBE Achievement Award from MassHousing for high levels of spending with women and minority-owned businesses. Of UHM's staff of 60, a large portion is from Caribbean heritage representing 10 different countries. Many of our staff are bi-lingual (a few tri-lingual) speaking Spanish, French, Portuguese, Cape Verdean Creole, Haitian Creole, and even sign language.

Artists for Humanity

Artists For Humanity (AFH) provides under-resourced teens the keys to self-sufficiency through paid employment in art and design. AFH is built on the philosophy that engagement in the creative process is a powerful force for social change, and that creative entrepreneurship is a productive and life-changing opportunity for young people. Bridging economic, racial and social divisions, AFH enriches urban communities by introducing young people's creativity to the business community.

Homeowners

HFHGB starts its partnership with homeowners by casting a wide net during the outreach process to ensure we reach the largest range of potential applicants. The outreach is targeted to local residents and many different modes of communication are used. Our selection process is run by our Family Selection Committee which ensures there are several different voices and perspectives that take part in the decision-making process for selecting future homeowners.

Habitat for Humanity's unique model of Sweat Equity allows homeowners to work alongside other volunteers, subcontractors and HFHGB staff.

HFHGB Build Day volunteers

HFHGB Build Day volunteer groups are an important part of our workforce, providing about 70% of the labor on each project. Our Build Day groups are local churches, schools, and a variety of businesses in different sectors. Individuals from these groups represent a broad range of ages, backgrounds, and expertise all coming together to add their contributions to our projects.

OPERATIONAL PLAN

Property Management

As a non-profit whose objective is to provide pathways to stability, self-reliance and wealth building through affordable homeownership, Habitat for Humanity Greater Boston is invested in the success of its partner homeowners. To this end, upon closing on the residential units within this development, Habitat Greater Boston will continue to work with the homeowners to create a condominium association, and to seamlessly facilitate the engagement of our property management partners at UHM Properties.

UHM Properties, LLC (UHM) is a professional property management and development company with extensive managing affordable housing properties owned by local not-for-profits. In this capacity, UHM in partnership with Habitat Greater Boston will manage future the Parker and Terrace Streets condominium. As future homeowners, Habitat families will become trustees in their 25-unit condominium association at the Parker and Terrace Streets site.

UHM has a long-standing partnership with Habitat Greater Boston as the manager of the Blue Hill Place condominium, a 26-unit development built by Habitat. UHM currently manages 24 residential properties consisting of 1,640 units and approximately 360,000 sf of commercial space in greater Boston. UHM has the proven capacity and experience to manage both rental and homeownership affordable housing properties. UHM is a Certified MBE with the City of Boston and the Supplier Diversity Office with the Commonwealth of Massachusetts.

Programming for the Arts

The community within which this development lies has identified the desire and need for supportive programming for local artists. Habitat Greater Boston is excited to venture into a partnership with Artists for Humanity (AFH) to provide these services. AFH will operate its Fellowship Program from the allocated community space at 77 Terrace Street rent-free, with monthly rental being absorbed by Habitat for Humanity Greater Boston. We feel that this will benefit AFH by freeing up monies formerly used for rent to engage more underserved youth. This will also help to extend the organization's reach in order to further advance the careers of AFH alumni and other under-represented local artist by using AFH's experience, resources and connections to amplify their voices on the public stage

Community Gardens: Boston Food Forest Park

The Boston Food Forest will establish and manage a community land trust as an integral part of the Habitat Greater Boston Parker Terrace development, which will include sustainable a community gardens with garden beds, food-producing fruit orchards and green space, managed by the Boston Food Forest Coalition (BFFC).

Using the Boston Food Forest community-building model on other sites in the City, BFFC's management and operations of the Parker and Terrace Streets Food Forest will start with a multi-stakeholder process engaging abutting neighbors, neighborhood associations, community-based organizations, and the City of Boston. Food forest development will include soil remediation, removing unwanted invasive plants, installing the ADA accessible hardscape (pathways, patios, gazebos, arbors, benches, fences, etc.), and planting out the food forest. This work is done with professional subcontractors and community workdays often involving hundreds of volunteers. From conception to design to installation, neighbors work collab-

oratively with BFFC staff and receive training and technical assistance to care for and maintain their new edible public park. As in other communities lacking green spaces and harmed by racialized climate injustice, BFFC’s collaborative work will: increase tree canopy with agroforestry to reduce the carbon footprint, mitigate the urban Heat Island Effect, capture rainwater runoff, and reduce stress while adding insectary plants that create habitat for endangered native pollinators.

BFFC will coordinate the care and management of the Parker and Terrace Streets food forest by neighborhood volunteers, who will plant and maintain the spaces without reserving or paying for use in advance. Naturally, this approach invites collaboration and democratic decision-making when developing a space. For this reason, food forests lend themselves well to the community land trust model, which center neighbors and community at the heart of these special spaces. Once established, the Parker and Terrace Streets food forest park will be available to everyone — no prerequisites, no wait lists, no fees—and reflect BFFC belief that land equity goes beyond neighborhood placement to include actual, tangible accessibility. Food access is a huge part of community resilience, and we work alongside many others in the food justice movement to increase accessibility and equity within Boston’s food systems.



1. ARTISTS FOR HUMANITY

Artists For Humanity (AFH) will launch the AFH Artists Fellowship Program in the Habitat Greater Boston affordable Artists Housing building on 77 Terrace Street. The Program, led by acclaimed Boston artist and AFH co-founder Rob “ProBlak” Gibbs, will engage and mentor local and national artists at the 778-796 Parker Street and 77 Terrace Street development. In alignment with current national movements in the public art landscape, the Program seeks to advance the careers of AFH alumni and other under-represented artists by using our experience, resources, and connections to amplify their voices on the public stage.

Artists for Humanity (AFH) provides under-resourced teens the keys to self-sufficiency through paid employment in art and design. AFH is built on the philosophy that engagement in the creative process is a powerful force for social change, and that creative entrepreneurship is a productive and life-changing opportunity for young people. Bridging economic, racial, and social divisions, AFH enriches urban communities by introducing young people’s creativity to the business community.





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William Stanton
Caroline Taggart
Lannhi Tran
Lisa Van Oossanen
Bradley Vernatter
Clara Wainwright
David Walek
Scott Walker
Bob Wiggins

November 7, 2022
Habitat for Humanity Greater Boston
c/o James Kostaras, CEO
434 Massachusetts Ave
Boston, MA 02118

Re: Programming Partnership for Parker-Terrace Development RFP

Dear Jim,

On behalf of Artists For Humanity, I am pleased to present to you our qualifications to partner on providing programming to AFH alumni and local artists from the 1,450 s.f. community space you're proposing to develop on Terrace Street in Mission Hill.

Artists for Humanity (AFH) provides under-resourced teens the keys to self-sufficiency through paid employment in art and design. AFH is built on the philosophy that engagement in the creative process is a powerful force for social change, and that creative entrepreneurship is a productive and life-changing opportunity for young people. Bridging economic, racial, and social divisions, AFH enriches urban communities by introducing young people's creativity to the business community. Through the AFH Artists Fellowship Program, AFH seeks to extend its reach to advance the careers of AFH alumni and other under-represented artists by using our experience, resources and connections to amplify their voices on the public stage.

Enclosed in this package you will find our history, programming experience, a profile of one of our founders, Rob "ProBlak" Gibbs, and a portfolio of some of his work.

We thank you for your consideration concerning this opportunity and we are confident that the submitted qualifications are in line with your expectations and requirements to provide programming to the Mission Hill community where you're building.

Sincerely,

Yolanda Peña Mazzoni
Artistic Director

Artists For Humanity

100 W 2nd St
Boston MA, 02127

T.617.268.7620
F.617.268.7358
afhboston.org

Artists For Humanity provides under-resourced teens the keys to self-sufficiency through paid employment in art and design.



AFH Artists Fellowship Program

Overview

Artists For Humanity (AFH) is launching the AFH Artists Fellowship Program, led by acclaimed Boston artist and AFH co-founder Rob Gibbs, to engage and mentor local and national artists. In alignment with current national movements in the public art landscape, the Program seeks to advance the careers of AFH alumni and other under-represented artists by using our experience, resources and connections to amplify their voices on the public stage.

The Program will host two, back-to-back, six-month Fellowships that will serve as a catalyst for advancing artists' goals, building long-term creative connections, and bringing a richer diversity of perspectives to the AFH community and beyond.

Since 1991, AFH has used creative paid employment to build equity for Boston's young people. AFH alumni have embraced diverse pathways to success after AFH, with many growing their artistic practice into a lifetime commitment. We believe that some of these working artists would benefit from an extended period of intensive promotion and career development to take their success to the next level. Creating under the AFH umbrella will offer them an opportunity to contribute to a growing and thriving intergenerational artistic community.

This Fellowship aims to facilitate Fellows' professional and artistic development goals. During their Fellowship, artists will expand their individual body of work and collaborate on murals, public art installations, interactive art happenings, traditional gallery exhibitions, and other innovative creative formats to showcase their work and vision. Through the Fellowship, we also hope to build a deeper talent pool, collaborative opportunities, and reciprocal partnerships for events and projects that will develop a broad base of new partners to expand AFH's reach.

Fellowship Award

Total Award per session: \$9,600, paid out with a monthly stipend of \$1,600 over 6 months

Program Offers: Mentoring, Exposure and Resources

- 1x1 mentoring with ProBlak
- Access to space to create and collaborate
- Dedicated time to create of a unique body of work for curated exhibitions at the conclusion of the program
- Participation in an external project (mural) and AFH client projects
- Presence at relevant events and public presentations, which will serve as a platform for additional
- Exposure for the Fellows and a deepening of AFH's relationship to the Boston artistic community
- Opportunity to serve as role models for AFH teens (ex. presentation of their body of their work), and
- Increased exhibition exposure through collaboration with the Director of the Artists Fellowship Program, AFH's Artistic Director and the Exhibitions team.

AFH Artists Fellowship Program

Applicant Profile (Criteria)

The Artists Fellowship Program aims to support and develop the careers of ten community-based artists per year with a focus on identifying early-mid career artists, including AFH Alumni. Successful applicants will be:

- Early to mid-career, community-based artists
- Open to teaching AFH teens their unique talents and techniques
- Committed to building and strengthening their skills in partnership with other Fellows
- Able to dedicate two days per week for six months to the Fellowship Program
- Interested in mutually collaborating to increase online and community profile

About AFH

Artists for Humanity (AFH) provides under-resourced teens the keys to self-sufficiency through paid employment in art and design. AFH is built on the philosophy that engagement in the creative process is a powerful force for social change, and that creative entrepreneurship is a productive and life-changing opportunity for young people. Bridging economic, racial, and social divisions, AFH enriches urban communities by introducing young people's creativity to the business community.

AFH began in 1991 as an entrepreneurial venture that produced and marketed large-scale collaborative paintings reflecting the voice and vision of urban teens to Boston's business community. Together with six talented and dedicated middle school teens, including Rob Gibbs, Jason Talbot, and Damon Butler, Artist/entrepreneur Susan Rodgerson co-founded Artists For Humanity to amplify the voices of diverse young people throughout the city of Boston. Her vision was to inspire a group of teens to engage in the creative process and participate in commerce. The paintings created by Rob, Jason and the other co-founding artists were unlike anything the Boston business community had seen before, and were a powerful tool to communicate the experiences of urban young people to the larger world. Since AFH's founding over 30 years ago, the scale, variety and complexity of the projects have grown but the mission to give a voice to underrepresented young people has continued.

Now in 2022, two of AFH's original teen co-founders, Jason Talbot and Rob Gibbs, continue their dedicated leadership in crucial creative and entrepreneurial roles. AFH remains a haven for teens from every corner of the city, a place where they can explore and express their creative abilities, identify possibilities for continuing education, and most importantly, dispel the myth that the larger world is forever closed to them. A new generation of young people is now being heard, and showcasing how they can contribute to our society's creative conversation. It remains as true today as it was in 1994 when AFH co-founder Damon Butler, then age 16, declared "Artists For Humanity gave me a voice when no one else would give me a thought."

About ProBlak

Rob "ProBlak" Gibbs is a visual artist and organizer who has transformed the cultural landscape of Boston through graffiti art since the early 90's. In 2022, he was named one of Boston's 100 Most Influential People. Rob grew up in Roxbury, Massachusetts during the Hip-Hop Golden Age and was in his teens when he found that graffiti was a powerful form of self-expression.

In 1991, Rob co-founded Artists for Humanity (AFH), an arts non-profit that hires and teaches youth creative skills, ranging from painting to screen printing to 3-D model making. For the past 31 years, Rob has served in many leadership roles at AFH and currently is the Director of Artist Fellowships. Rob's personal practice includes the curation of multiple exhibitions and maintains the ongoing role of curating a rotating public art campus in Boston, offering emerging graffiti writers and muralists real-time opportunities to experience a guided practice. He had his debut solo exhibit titled "Small Change" at the Crewest Gallery in Los Angeles in 2012 and since has participated in more than 25 group and solo exhibitions. Rob's most recent Breath Life mural series has received national acclaim.

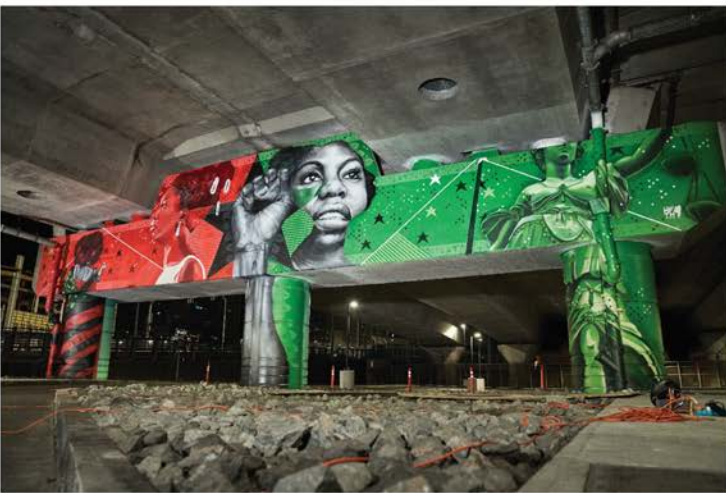
Rob has a strong focus on arts education. He has been an adjunct educator for Boston Public Schools, conducted countless workshops, and is a formal and informal mentor to artists who are early and mid-career. Most recently he served as a guest lecturer at Northeastern University for their "Foundations of Black Culture: Hip-Hop" course, curated the 2019 BAMS Fest's "Rep Your City" exhibition and was

invited to be one of two Artists-in-Residence with the Museum of Fine Arts, Boston making his, the inaugural residency.

Rob is the recipient of a number of awards, including the 2006 Graffiti Artist of the Year award from the Mass Industry Committee and the Goodnight Initiative's Civic Artist Award. In 2020, he was honored with the Hero Among Us award by the Celtics, Boston's NBA team and he was awarded the Brother Thomas Fellowship in 2019 and the MLK Drum Major Award in 2021. His work has been covered in publications and media outlets like WBUR- the ARTery, the Boston Art Review, Boston Magazine, 2020 Best of Boston Artist of the Year, Forbes, PBS NewsHour, the Boston Globe and many others. In 2021, February 1st was proclaimed to be Rob "ProBlak" Gibbs day in the City of Boston. February 3, 2022 – Boston, MA – The Rose Kennedy Greenway Conservancy announced the commission installation of new public artwork from Rob for the Greenway mural at Dewey Square. Honored to partner with the Greenway Conservancy as the first Black Boston-based artist on the tenth iteration of the Dewey Square mural that also comes as the Conservancy's Public Art Program that builds new strategies to engage and support Greater Boston's local creative communities in just and inclusive ways.

Beyond his own personal artistic practice, Rob envisions graffiti and hip-hop as avenues to reach and educate young people. He continues to expand his practice as an artist and educator. Lastly, his role as father to Bobbi, his daughter, is his strongest reason for wanting to leave images of beauty, strength and resilience in the work he creates.

Rob "ProBlak" Gibbs Select Portfolio



AFH Artists Fellowship Program

2. BOSTON FOOD FOREST COALITION

The Boston Food Forest will establish and manage a community land trust as an integral part of the Habitat Greater Boston Parker Terrace development, which will include sustainable a community gardens with garden beds, food-producing fruit orchards and green space, managed by the Boston Food Forest Coalition (BFFC).

The Parker and Terrace Streets food forest will include a diverse arrangement of plants that attempts to mimic the ecosystems and patterns found in nature. Food forests are inspired by the style of land management known as permaculture, an approach that focuses on growing perennials: plants that return year after year. Rainwater harvesting and composting, in addition to the fruit trees, shrubs, and ADA-compliant pathways will be incorporated into the design of the Food Forest. The Boston Food Forest at the Parker and Terrace Streets will be a combination of perennial plantings and raised beds, some gardened by residents and others designated for communal use. It will be a place of peace where anyone is welcome to connect with nature, to have a picnic while their children play in the sandbox, and to grow their own food as well as food for others.

The Parker and Terrace Streets food forest will provide delicious seasonal foods for both Habitat for Humanity residents and the Mission Hill neighborhood, habitat for pollinators and songbirds, and vibrant local ecosystems that increase plant diversity, urban tree canopy, and carbon sequestration — to name a few benefits. On this site, BFFC will incorporate fruit and nut trees, perennial plants, annual crops, herbs and other edibles into their landscapes. Food forests are designed to address food access by providing habitat for low-maintenance, edible food-producing plants to which all stewards, volunteers and neighbors can eat. By growing food, fruit trees, and berry vines, and by creating a community gathering space, the Boston Food Forest at the Parker and Terrace Streets Development will strengthen the connection between people, food, and land---among both future Habitat for Humanity families and residents in the Mission Hill neighborhood. As the trees in our food forests grow, both neighbors and Habitat families will have access to more fresh fruit, berries, nuts, and other food sources right in their neighborhoods.





BOSTON FOOD FOREST COALITION

Nov 7, 2022

James Kostaras, AIA
President & CEO
Habitat for Humanity Greater Boston
434 Massachusetts Ave. Suite 201 Boston, MA 02118

RE: Support for Parker and Terrace Streets Proposal

Dear Mr. Kostaras,

We are excited and enthusiastic about the opportunity to partner with Habitat for Humanity's development team to create up to 25 affordable homeownership opportunities for low-income families, including artist housing that includes a community land trust for urban agriculture. We are thrilled and eager about this possibility. This approach would be special because it would embrace our model, which would offer a distinctive way of living by providing nearby as well as on-property families with access to nourishing food that fosters health and wellness.

As discussed, BFFC is prepared to support community engagement in the design of a food forest park and to train neighborhood stewards to ensure its care and maintenance. We are ready to receive that portion of the land designated for a food forest park into our land trust to permanently protect the open space for the community.

We look forward to working with Habitat for Humanity and the wide array of stakeholders during the course of this project from concept idea all the way to construction and ongoing care and maintenance of healthy food forests.

Sincerely,

Orion Kriegman
Executive Director

76 Weld Hill St. | Jamaica Plain, MA 02130 | 857.928.4066 | www.bostonfoodforest.org | orion@bostonfoodforest.org

3.UHM PROPERTIES

UHM Properties, LLC (UHM) is a professional property management and development company with extensive managing affordable housing properties owned by local not-for-profits. In this capacity, UHM in partnership with Habitat Greater Boston will manage future the Parker and Terrace Streets condominium. As future homeowners, Habitat families will become trustees in their 25-unit condominium association at the Parker and Terrace Streets site.

UHM has a long-standing partnership with Habitat Greater Boston as the manager of the Blue Hill Place condominium, a 26-unit development built by Habitat. UHM currently manages 24 residential properties consisting of 1,640 units and approximately 360,000 sf of commercial space in greater Boston. UHM has the proven capacity and experience to manage both rental and homeownership affordable housing properties. UHM is a Certified MBE with the City of Boston and the Supplier Diversity Office with the Commonwealth of Massachusetts.

OUR PARTNER:

Habitat for Humanity Greater Boston is excited to partner with UHM Properties LLC (UHM) on the proposed development in the Parker and Terrace Development RFP. This project will only serve to strengthen an existing relationship started when UHM Properties took over management responsibilities at our “Blue Hill Place Condominium”, a 5 Building, 24 Unit Residential and 1 Unit Commercial Habitat For Humanity Greater Boston project on Blue Hill Avenue in Dorchester.

Management Services Proposal

Submitted to

HABITAT FOR HUMANITY

By

UHM PROPERTIES, LLC

Company Profile

530 Warren Street
Dorchester, MA 02121
Telephone (617) 541-5510
kbynoe@uhmproperties



November 3, 2022

Habitat for Humanity
240 Commercial Street
Boston, MA 02109

Re: Management Agent for Parker and Terrace Development RFP

Dear Habitat for Humanity:

On behalf of the Partners of UHM Properties LLC, I am pleased to present our qualifications to Habitat for Humanity for management in response to the Parker and Terrace Development RFP. UHM is a professional property management and development company that has been in business for over 19 years. UHM has extensive knowledge and a complete understanding of facilitating an owner's needs when working with multiple subsidies and funding sources and has an excellent working relationship with the Department of Housing and Urban Development, MassHousing, Massachusetts Housing Partnership, Massachusetts Housing Investment Corporation, and other funders.

Enclosed in this package you will find our history, management experience, portfolio of properties managed, and highlights regarding our key employees.

We thank you for your consideration concerning this opportunity and we are confident that the submitted qualifications are in line with your expectations and requirements to manage the properties.

Best Regards,



Chris Shepherd
Director of Business Development



Brief History of UHM Properties

UHM Properties, LLC (UHM) is a professional property management and development company that has been in business for over 19 years. The founding members had worked together before UHM was established, as the company was started by the entire senior staff of the residential division of Long Bay Management Company. They have a 30-year history of working together in the affordable housing industry. UHM purchased the Long Bay residential portfolio of the retiring general partners in 2003 and began the new venture as United Housing Management LLC. As part of a strategic growth plan, the name was changed to UHM Properties LLC on January 1, 2019. UHM Properties is a Certified MBE with the City of Boston and the Supplier Diversity Office with the Commonwealth of Massachusetts.



UHM currently manages 24 residential properties consisting of 1,640 units and approximately 360,000 square feet of commercial space in the greater Boston area. The residential properties include 14 that have 100% Section 8 contracts, and the remaining properties all have affordability components. UHM has the capacity and experience to manage affordable housing properties owned by local not-for-profits as well as for-profit owners. Not-for-profit customers include Dorchester Bay EDC, Madison Park DC, Habitat For Humanity, VBCDC, and also the Boston Housing Authority. For-profit, customers included nationally represented companies such as the NHP Foundation, PNC Bank, and Vitus Corporation of Seattle, WA. With all clients, there is professionalism and full-service management, but with community owned non-profit organizations, UHM can have a more substantial connection with the owner because of the greater commitment to the residents which is essential to our mission. We have also established a 501(c)(3) organization called the Neighborhood Network Center which provides support services to the greater community.

Please see the attached chart of the entire portfolio which lists the number of units, subsidy/ funding, and contact person if you need references.

UHM PROPERTIES LLC
LIST OF MANAGED PROPERTIES

Project	Address	Managed Since	# of units	Income Level %	Subsidy/Regulatory Type	Property Owners	Contact for References
RESIDENTIAL							
BHA Highland Park	50-68 Highland	2003	26		BHA	George.Mcgrath@bostonhousing.org	Yes
BHA Condo	Scattered	2008	75		BHA	George.Mcgrath@bostonhousing.org	Yes
BHA 56 Condo	Scattered	2003	56		BHA	George.Mcgrath@bostonhousing.org	Yes
Blue Hill Place Condominium	Blue Hill	2016	25	Deed restrictions	N/A	Habitat for Humanity jamekostaras@habitatboston.org	Yes
Blue Mountain Apartments	Scattered	2003	217	30,50	PBS8	The NHP Foundation	Yes
BNCLT	Scattered	2021	30	30,50	BHA ,Metro	Boston Neighborhood Community Land Trust Mlevy@bnclt.org	Yes
Boston Bay	Scattered	2003	88	30,50,60	LIHTC,PBS8	kbynoc@uhmgt.com	Yes
Dudley Terrace	Scattered	2013	56	50,60,80	LIHTC,PBS8	Dorchester Bay cmcvea@dbedc.org	Yes
Esperanza	Scattered	2019	42		PBS8	Vitus Scott.muioio@vitus.com	Yes
Fort Hill	Scattered	2019	40		PBS8	Vitus Scott.muioio@vitus.com	Yes
Fairmont Langston	Fairmont St	2021	4 res 5 comm	50	BHA	Nikia.londy@gmail.com	Yes
Geneva Apartments	Scattered	2013	47	30,50,60	LIHTC,PBS8	Dorchester Bay / Geneva Tenants Organization cmcvea@dbedc.org	Yes
Grove Hall Apartments	Scattered	2022	104	30,50	PBS8	haroldraym@aol.com	Yes
Heritage Corner Condominium	Elmore / Brinton	2019	26	10 Market 16 Affordable	N/A	Michelle Carroll, Trustee	Yes
Hope Bay	Scattered	2003	45	30,50,60	LIHTC,PBS8	kbynoc@uhmgt.com	Yes
Imani House	516 Warren St	2008	9	30	TBS8	The Canton Group ffairfield@cantoncorporation.com	Yes
New Port Antonio	Scattered	2003	227	30,50,60	LIHTC,PBS8	PNC Bank National Assoc. John.Wooldridge@pnc.com	Yes

Quincy Heights	Scattered	2003	129	30,50,60	LIHTC,PBS8	Dorchester Bay cmcvea@dbedc.org	Yes
RAP UP I	Scattered	2007	33	30,50	PBS8	Unicorn 2021 LLC Darryl Settles - dsettles@cvduboston.com	Yes
Rockville Park	Scattered	2018	10	50,60	TBS8 Market	Veterans' Benefits Clearinghouse DC VBCDC – haroldraym@aol.com	Yes
Sanoma, Maple, Schuyler LLC	Scattered	2022	100	30,50	PBS8	Sanoma Maple Schuyler LLC Haroldraym@aol.com	Yes
VBC Housing	495 Blue Hill Ave	2003	30	30,50,60	PBS8	Veterans' Benefits Clearinghouse DC VBCDC – haroldraym@aol.com	Yes
Washington Heights	Scattered	2004	175	30,50,60	PBS8	Washington Heights Tenant Association / VBCDC – haroldraym@aol.com	Yes
10 Taber Street Condominium	10 Taber Street	2021	45	37 Market 8 Affordable	N/A	10 Taber Street Condominium Trust klauskimel@gmail.com	Yes
COMMERCIAL							
Bruce Bolling Municipal Building	2300 Washington Street	2020	6 Tenants	240,000 SF	N/A	City of Boston Peter.osullivan@boston.gov	Yes
Rivermoor Archive Building	201 Rivermoor Street	2022	7 Tenants	120,000 SF	N/A	City of Boston Peter.osullivan@boston.gov	Yes

Minority Business Enterprise and our Commitment to Local Hiring

UHM is at the forefront of ensuring economic stability for minorities in the communities of Boston. Our commitment to supporting local minority-owned and women-owned businesses is paramount to the foundation of UHM. Every year since its inception, UHM has earned the Multi-Million MBE/WBE Achievement Award from MassHousing for high levels of spending with women and minority-owned businesses. The last year alone, over \$11,000,000 was spent on MBE/WBE businesses representing almost 65% of our discretionary spending. We believe that those dollars are well spent as those vendors tend to be located in inner-city communities of Boston that need economic support. Those vendors will make their money in the community and spend it in the community, thus creating an economic cycle that improves the community as a whole. The commitment to hiring local women and minority-owned businesses will continue if we are selected to manage the properties.

We practice inclusion in our workplace, with our staff of 86 employees being made up of multiple races and nationalities. A large portion of our staff boasts Caribbean heritage representing 10 different countries. Many of our staff are bi-lingual (a few tri-lingual) speaking Spanish, French, Portuguese, Cape Verdean Creole, Haitian Creole, and even sign language. No one is ever turned away because of language; we use a translation service to accommodate anyone that speaks another language when they come to our office.

J. KEVIN BYNOE
CHIEF EXECUTIVE OFFICER

Mr. Kevin Bynoe is the Chief Executive Officer (CEO) of UHM Properties. As the CEO, Kevin is responsible for overseeing all aspects of the company including management decisions, implementing UHM's long and short-term goals, and acts as the primary spokesperson.

Kevin's career in affordable housing began while still in high school and continued as a construction laborer early in his career. In 1987, Kevin began his professional career in the housing industry as a Maintenance Supervisor; he then progressed through the ranks as an Assistant Property Manager, Property Manager, Senior Property Manager, and Regional Manager. Kevin attended Central State University where he majored in Management. He has received Boston University's Certificate in Real Estate Finance, the Registered Housing Manager (RHM) designation from the National Center for Housing Management, his Low Income Housing Tax Credit C¹²P certification from Spectrum Enterprises, and completed the Minority Property Management Executive Program at MIT.



PATRICIA A. FARR
DIRECTOR OF HUMAN RESOURCES

Ms. Patricia A. Farr is our Director of Human Resources.

As the Director of Human Resources, Pat is responsible for coordinating all aspects of the business relationship between our company and each of our employees, providing information and training about our company policies, procedures, benefits, compensation, and insurance.

Pat was born and raised in Jamaica, West Indies. When Pat immigrated to the United States in 1977, she attended Roxbury Community College where she received a degree in business administration in 1979. She pursued her education by attending courses in real estate finance and management at Boston University, as well as completing the Minority Developer Executive Program at MIT, and attending various human resource management programs at Northeastern University.



SHEILA P. HARPER

DIRECTOR OF COMPLIANCE

Ms. Sheila P. Harper is our Director of Compliance.

Sheila grew up in Roxbury and graduated from Fisher Junior College in 1980. She began her career in housing management in 1984 as a Property Manager for Long Bay Management Company. In 1992 she was appointed as a Senior Property Manager, and again in 1995, she was promoted to Regional Manager. In 1996, she became the Director of Operations where she assumed responsibility for supervising all of the other property managers.

Sheila's most critically important job, however, is acting as our company's tax credit compliance monitor. This critical role began in 2000 when she assumed responsibility of ensuring that every property under management, to which federal low-income housing tax credit had been allocated, was in full compliance with state and federal regulations. She also assumed responsibility for training all of the staff about the appropriate procedures for maintaining compliance. Simply stated, Sheila reviews every resident file and she must give the final OK before any resident/applicant can sign a lease and move into a regulated property. Her depth of experience and education ensures that all of the government regulations have been followed. Sheila is certified as a Credit Compliance Professional by Spectrum Enterprises at level C¹⁵P and a Registered Cooperative Manager.



PROFILES OF KEY MEMBERS OF THE UHM LEADERSHIP TEAM

CHRISTOPHER A. SHEPHERD

Director of Business Development

Chris serves as Director of Business Development and is responsible for producing new business opportunities for UHM Properties. This work includes the review of opportunities for the acquisition of existing properties and portfolios, in addition to the review of new construction and renovation possibilities. Chris also manages energy efficiency and green programs, as well as serves as a liaison between UHM and the owners of the properties that UHM manages. Chris joined UHM in 2007 as Manager of Real Estate Development and then later became Director of Real Estate Development.

Chris graduated from Howard University, with a degree in Finance with a concentration in banking. Early career experience included progressing from commercial lending trainee to Vice President in commercial lending within various lending areas including construction lending and real estate loan workouts. Chris has also owned a construction company and has developed and managed commercial real estate.

JEFFREY CAPUTI, CPA

Chief Financial Officer

Jeff joined UHM in 2016 and serves as the Company's Chief Financial Officer. Jeff and his team provide financial and accounting support for all of the Company's activities. Jeff oversees UHM's financing and banking functions and is responsible for external audits, tax reporting, budgeting and provides strategic support in helping UHM achieve its goals and objectives.

Jeff comes to UHM with over 15 years of experience in public accounting specializing in the affordable housing industry. He graduated from the University of Massachusetts - Amherst and is a Certified Public Accountant and a member of the Massachusetts Society of CPAs.

WINNIE LAMOUR

Chief Operating Officer

Winnie has been with UHM since its inception in 2003, originally as Support Coordinator, and progressed to the position of Director of Administration where she was responsible for a variety of administrative duties including preparation of all HAP Contract Renewals and Rent Adjustments for the UHM portfolio, and the Waiting List Department where she maintained and revised policies and procedures that are consistent with HUD regulations for all properties. Winnie currently serves as the Company's Chief Operating Officer where she oversees the operations of the Company. With over 20 years of experience in the Housing Industry, she plays an active role in strengthening and assisting in the management, governance culture, and practices that reflect the Company's core values, discipline, and professionalism.

Before joining UHM, Winnie began her career in 1990 as a Paralegal for Long Bay Management Company where she worked closely with the Company's Legal Counsel, attending court on non-payment and violation cases for the entire portfolio. In 1997 she was appointed as a Property Manager where she was responsible for the management of 185 units.

Winnie Lamour holds a Bachelor of Science in Business Management with certifications as a Registered Cooperative Manager, Paralegal Studies, and Tax Credit Professional C3P. She is fluent in French, Haitian Creole, and conversational Spanish and Sign Language.

Genesa Mendes
Director of Property Management

Genesa has over 18 years of experience in the property management industry. As Director of Property Management at UHM, she is responsible for overseeing the management operations of our mixed-use properties. In her role, she is responsible for the overall operation of our community and administers all aspects of property management services including annual budgeting, cost control, financial planning, and recommendations for capital improvement. In addition, she ensures the completion and the processing of all reporting required by Federal, State, and Local Agencies as well as the implementation of corporate policies and procedures. Ms. Mendes also manages all on-site property personnel, is involved in all personnel decisions, and fosters employee relations, including annual and quarterly performance evaluations as well as the execution of an employee bonus structure. Ms. Mendes contributed to shaping corporate policies and initiatives

Genesa holds the designation of ARM from the Institute of Real Estate Management, C5P from The Spectrum Companies; and CPO, NAHP, SHCH, and CGPM from the National Affordable Housing Management Association.

Everton Blake
Director of Maintenance

Everton is responsible for the overall supervision and administration of maintenance programs for the properties in the UHM portfolio consistent with each property's budget. He makes recommendations to the CEO and Human Resources Department on all aspects of maintenance operations and personnel.

Everton joined UHM in 2003 after many years of work in supervisory positions in construction companies in the area of carpentry. Everton maintains a Massachusetts construction supervisor's license

Dwayne Watts
Executive Director of Neighborhood Network Center

For the past 27 years, Mr. Dwayne Watts has worked in numerous areas of affordable housing, mortgage lending, and homebuyer development. His experience includes participating in the development and implementation of the Boston Home Center. For 3 years, Mr. Watts worked in all three program areas of the Boston Home Center: Education and Counseling, Affirmative Marketing Services, and Financial Assistance.

While working in the Boston Home Center, Mr. Watts successfully closed approximately 800 financial assistance grants in one year, successfully marketed numerous affordable homeownership developments throughout Boston neighborhoods, provided timely education and counseling to thousands of first-time homebuyers, provided financial assistance to approximately 4,000 first time homebuyers within his tenure, and is a team recipient of HUD'S Gunther Best Practices Award.

HABITAT FOR HUMANITY GREATER BOSTON QUALIFICATIONS, EXPERIENCE, & REFERENCES



1. Qualifications and Experience

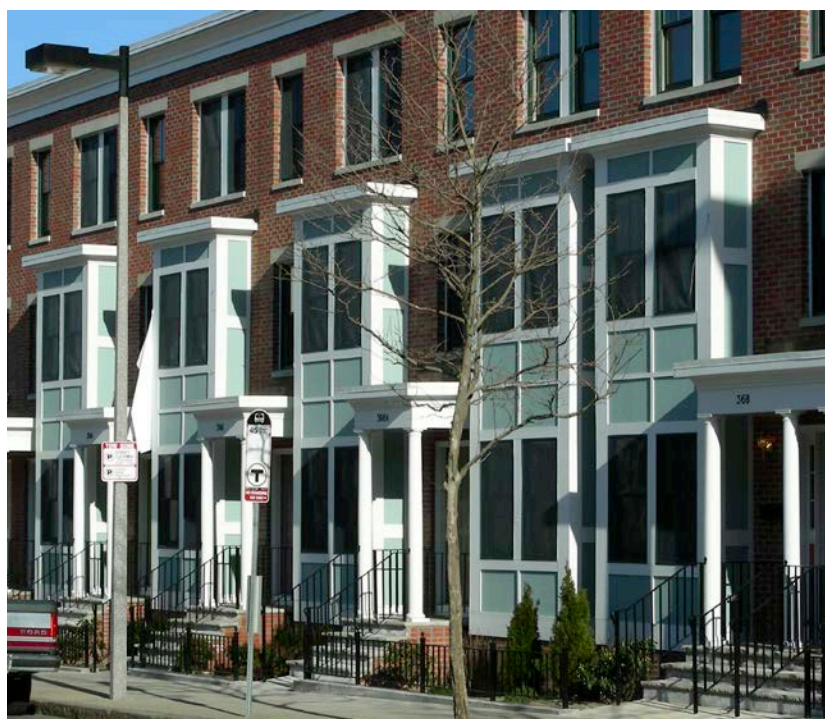
Habitat Greater Boston has been building affordable housing units in the Greater Boston Area since 1987. Our projects have been built throughout the City of Boston, as well as more suburban locations such as Belmont, Needham, and Newton. The following are a few examples of recently or soon to be completed projects in various Boston neighborhoods and the City of Malden. All units have been or will be sold to families with incomes between 50% and 80% of Area Median Income:

- 964 & 968 Main Street, Malden-Phase 1: We recently moved 2 families into their new homes in the first of 2 phases on this project. Each home has three bedrooms, 1.5 baths, a living room, dining room, kitchen, laundry and 1 car garage. The 2nd phase is a 5-unit condominium building, currently in the framing stage.
- 7-17 Balina Place, Dorchester: This 5-unit condominium complex was completed in 2020. It consists of 2 phases of new construction with the first phase a 2-family duplex, and the second phase of a 3-unit townhouse, all on Balina Place Dorchester.
- 172 Fairmount Street, Dorchester: We acquired this project through D.N.D., it consisted of remodeling an abandoned, 2 family home into two affordable condominium units.
- 38 Woodbine Street, Roxbury: This 2-unit "Philadelphia style" split-level condominium was a new construction project on a vacant lot between two residential structures.
- Red Rose Condominiums, Roslindale: This project contains 6 affordable units in three buildings, all new construction, it is located between Bradeen and Fawndale Street.
- 51 Navarre Street, Roslindale: Complete gut-rehab of a 19th century 3-family house and conversion to 2 condominium units.
- 352R Blue Hill Avenue, 24-32 Intervale Street, Dorchester: located on Blue Hill Avenue between Intervale and Creston Streets, Blue Hill Place contains 23 affordable residential units in five buildings, and one commercial unit. Now called "Blue Hill Place Condominium".

Portfolio examples:



Past Experience with Small-scale Residential Developments and the Team's Design



2. Resumes of Development Team Members

- 1 [James Kostaras, AIA](#)
- 2 [Gerry Patton](#)
- 3 [Cathy Kurczak](#)
- 4 [Katie Theodoros](#)
- 5 [Micaela Younger](#)
- 6 [Shannon McCormack](#)
- 7 [Robert Fitzgerald](#)
- 8 [Andrew Steinginser](#)
- 9 [Antonia Bellalta](#)
- 10 [Robert Freni](#)
- 11 [Abby Gordon](#)
- 12 [Angela Dominguez](#)
- 13 [Bill Fitzpatrick](#)
- 14 [Gillian Kazzas](#)
- 15 [Hansy Better Barraza](#)
- 16 [Sophie Nahrman](#)



James George Kostaras, AIA

Habitat for Humanity Greater Boston
President & CEO

Summary of Experience

- Leader with executive experience in creating and implementing successful affordable housing and re-development strategies to revitalize urban areas challenged by decades of disinvestment in the United States and other countries.
- Executive Director of the City of Somerville's (MA) Office of Strategic Planning and Community Development, a 65-person agency with a \$ 10 million budget charged with the economic development of the City. (2004 - 2007)
- Project director at the Boston Planning and Development Agency (former Boston Redevelopment Authority) with multi-disciplinary experience in urban design, land use planning, and urban redevelopment. Experienced in mediating conflicts over controversial projects and coordinating the public participation process. (1985 - 2002)
- International urban development specialist with experience helping communities and local governments, in Haiti, Colombia, Belize, Brazil, Bolivia, Chile, Morocco and other developing countries, to address the problems of urban poverty, rapid urbanization and the impact of climate change on the most vulnerable urban populations.
- Senior Project Director at Sasaki Associates providing consulting services to the City of Abu Dhabi in the United Arab Emirates. (2007)
- Lecturer at the Graduate School of Design at Harvard teaching core urban planning and design studios and courses on negotiation and conflict resolution in urban development. (1998-2008)
- Experienced in developing and teaching international executive training programs for elected government officials and technical staff from cities in emerging economies and developing countries on urban development strategies.
- Experienced in teaching executive education and training workshops on negotiation in urban planning and development to professional staff at public agencies including the New York City Economic Development Corporation and the Harvard University Graduate School of Design Executive Education Program.
- Lectured widely at international conferences and universities in Latin America, Asia, North Africa and Europe; experience as a consultant to international development organizations since 1994.

Selected Accomplishments

U.S.-based:

- As Executive Director, created and organized the City of Somerville's (MA) Office of Strategic Planning

and Community Development, a 65-person multi-disciplinary planning and economic development agency, by successfully merging several city departments.

- Secured the State's commitment to build a \$ 600 million Green Line light rail transit extension and transit-oriented development (TOD) corridor through Somerville in collaboration with the Mayor.
- Implemented an innovative strategy to transform Somerville's Union Square into a vibrant district and center for the City's emerging creative economy with the potential for over 1 million SF of mixed-use development.
- Initiated Advancing Somerville, a competitive business development strategy to attract high-growth industries to the City. Recent success: construction of Biogen Idec's biotech distribution facility in Somerville.
- Led the review and approval of Assembly Row (Somerville), a 5 million SF mixed-use transit-oriented neighborhood on the Mystic River, which includes a new transit station, 2000 condos, a 200 room hotel, two office towers and 1.5 million SF of street-level retail modeled on the "new urbanism concept".
- Founded Acadia Strategic Planning LLC, a consulting firm. Acadia directed and managed the permitting and development review of the first phase of Westwood Station, a 4.5 million SF mixed-use, transit-oriented development in Westwood MA. Envisioned and launched a major economic development strategy in Somerville that has attracted over \$1.5 billion in anticipated public and private investment. (City's approximate population: 80,000).
- Co-directed strategic planning for the air rights over the Massachusetts Turnpike, including guidelines for future development in Boston's downtown core; managed a controversial public participation process. The project, A Civic Vision for Turnpike Air Rights Development in Boston, received the following awards: the 2001 American Institute of Architects Honor Award for Urban Design and the 2001 Congress for the New Urbanism Charter Award of Excellence
- As project director, created a revitalization and re-investment strategy for Boston's Washington Street corridor. Major result to date: over \$500 million in new mixed-use development; construction of the Silver Line public transit line; and transformation of Washington Street into a new boulevard.

International:

- Assisted and advised Ecuador's Ministry of Housing and Urban Development in the preparation of a reconstruction strategy for San Jose de Chamanga, a community devastated by the 2016 magnitude 7.8 earthquake.
- Advised and assisted Build Health International, a Boston-based NGO, in the preparation of a community development plan for the community of Fonds des Blancs, Haiti associated with the planned expansion of the St. Boniface Hospital.
- Provided technical assistance and led training workshops to build the capacity of municipal governments to plan for urban growth and address problems of rapid urbanization in Belize, funded by the World Bank.
- Recommended climate adaptation strategies, in a published policy paper, that link urban planning and development practice with the management of water shortage crises in El Alto / La Paz, Bolivia in collaboration with the Stockholm Environment Institute.
- Reviewed and recommended urban design modifications to the USAID EKAM housing project for low-income 1500 families in Caracol, Haiti, at the request of the US State Department and Haiti's InterMinisterial Committee for Regional Planning (CIAT).
- Assisted in developing a comprehensive regional plan for the Cap Hatien / Ouanaminthe region in northern Haiti as part of a cross-disciplinary team of experts.
- Led a prize-winning team of architects and planners in the Hong Kong-Zhuhai-Macao Bridge-Hong Kong Boundary Crossing Facilities International Design Ideas Competition.

- Directed the initial stage of a comprehensive master plan for the City of Abu Dhabi in the United Arab Emirates to guide over \$200 billion

Major Skills:

- Strategic thinking: ability to integrate planning, urban design, development and implementation tasks into a coherent strategy for complex multi-faceted projects and initiatives.
- Executive leadership and management: proven ability to lead and manage large organizations responsible for complex projects and multi-faceted operations.
- Consensus-building as an integral part of urban design practice and the public participation process: skilled as a negotiator and trained as a professional mediator in the leading stakeholders to a meaningful consensus.

Work History:

Habitat for Humanity Greater Boston

President and CEO | 2019 - present

Institute for International Urban Development (I2UD)

Senior Fellow | 2010-2019

- Participatory Community Planning in Haiti
Advised and assisted Build Health International, a Boston-based NGO, in the preparation of a community development plan for the community of Fonds des Blancs, Haiti associated with the planned expansion of the St. Boniface Hospital (2017 - 2018).
- Earthquake Reconstruction Planning in Ecuador
Advised and assisted the Empresa Public de Vivienda, an agency of Ecuador's Ministry of Housing and Urban Development, in planning the earthquake reconstruction of San Jose de Chamanga, a community devastated by the 2016 magnitude 7.8 earthquake (2016).
- Financing Mechanisms for Resilient Green Infrastructure in Cali, Colombia
Currently participating in a research project to investigate the use of land value capture instruments and the benefits associated with introducing green resilient infrastructure along the Cafiaveralejo River in Cali, Colombia, in partnership with the Institute for Housing and Urban Development (IHS) and Universidad del Cali (Univalle) funded by the Lincoln Institute of Land Policy (2016 - 2017).
- Assessment of alternative resiliency strategies in under resourced coastal communities in Belize impacted by climate change and vulnerable to environmental risk, funded by the Lincoln Institute of Land Policy (2015).
- World Bank-funded Belize Municipal Development Program
Provided technical assistance and led training workshops to build the capacity of municipal governments to plan for urban growth and address problems of rapid urbanization. Training focus: vision, strategy and growth scenario development, socio-economic development and community consultation, land use planning, infrastructure planning and financing, and the key strategies to implementing the municipal plan (2014).
- Assessed the impacts of climate change on land use and urban development in El Alto | La Paz, Bolivia and recommending climate adaptation strategies in collaboration with the Stockholm Environment Institute with funding from the Lincoln Institute of Land Policy (2013).

- **Regional Comprehensive Plan for Northern Haiti**
Assisted in developing a comprehensive plan for the Cap Haitien / Ouanaminthe region in northern Haiti as part of a cross-disciplinary team of experts, organized by the American Institute of Architects (AIA), at the invitation of the US State Department, the Inter-American Development Bank and Haiti's Inter-Ministerial Committee for Regional Planning (CIAT) (2012).
- **USAID Haiti**
Reviewed and recommended urban design modifications to the USAID EKAM housing project for low-income 1500 families in Caracol, Haiti, at the request of the US State Department and Haiti's Inter-Ministerial Committee for Regional Planning (CIAT) as part of the AIA Northern Haiti Project (2012).
- **Redevelopment in Monterrey, Mexico:** advised the Instituto Tecnologico de Monterrey on a proposed initiative to redevelop low-income neighborhoods in Monterrey, Mexico, challenged by poverty and insecurity due to drug cartel violence.
- **Haiti | Wentworth Institute Train the Trainers Program:** assisted in the launch of an executive training program for elected government officials and technical staff in Haiti to expand the capacity of local government to implement innovative urban development strategies.
- **International Centre for Local and Regional Development (ICLRD):** participated in writing a report, Cross-Border and Inter-Jurisdictional Planning and Governance Reform for CrosSPlan, an ICLR initiative, funded by the European Union, to promote the competitiveness of metropolitan regions in the global economy.
- **Municipal Capacity Building:** led a research project to assess the capacity of municipal government in economically distressed post-industrial cities in the United States to provide the basic services at a time fiscal crisis. Developing a program to provide pro bono consulting services to low-income communities.
- **Cape Town, South Africa Joint Development:** prepared a technical memorandum, Joint Development and "Value Capture" Strategies involving Real Properties to Finance Transportation Projects, with recommendations for the Cape Town (South Africa) International Airport Rail Link Project feasibility study.

Acadia Strategic Planning LLC

Principal 2008-2010

Created and directed a consulting practice providing strategic programming and project management services for public sector clients in the areas of real estate development; urban design and planning; and economic and community development.

Sasaki Associates, Inc.

Senior Project Director | 2007

Managed the initial stage of a comprehensive master plan for the City of Abu Dhabi In the United Arab Emirates.

Office of Strategic Planning and Community Development, City of Somerville (MA)

Executive Director | 2004-2007

- Created and directed an innovative multi-operational development agency. Integrated City functions to support economic development including: planning, zoning, permitting, urban design, parks, housing, business development, historic preservation and inspectional services.
- Secured over \$ 50 million in State and Federal funding for affordable housing, parks, transportation

and new infrastructure; formulated a creative strategy to finance urban development by leveraging public resources to attract private investment through tax increment financing, municipal land disposition and HUD Section 108 financing.

Planners Collaborative

Vice-President, Urban Design and Planning

2003 - 2004 | Assisted in the community planning component of the proposed \$300 million Anacostia metro line for the Washington (DC) Metropolitan Area Transit Authority.

Boston Planning and Development Agency (former Boston Redevelopment Authority)

Assistant Director for Economic Development/ Senior Architect | 1985- 2002

Directed several major planning and development initiatives in Boston including:

- A Civic Vision for Turnpike Air Rights Development in Boston, strategic plan for the air rights over the Massachusetts Turnpike.
- South End/ Lower Roxbury Development Policy Plan: Produced a master plan for neighborhoods in Boston's South End and Lower Roxbury district, which included revitalization and re-investment strategy for Boston's Washington Street corridor.
- Boston Center for the Arts (BCA) / Atelier 505: managed the planning and development of a \$100 million mixed-use project, which includes new theaters for the performing arts. Facilitated a public/ private partnership comprising the Druker Company, the BCA and the Huntington Theatre.

Academic Experience:

Harvard University, Graduate School of Design

1998-2008 | Lecturer and Design Critic in Urban Planning and Design. Multi-year faculty appointment. Courses: Core Urban Planning and Design Studio and Seminar on Negotiation and Conflict Resolution in Urban Planning and Development.

Harvard University, Graduate School of Design

1995-1998 | Visiting Design Critic and Studio Instructor.

Wentworth Institute of Technology

2015- present | Visiting Professor teaching architecture/urbanism studio and lecture courses.

Boston Architectural College

2013 -present | Faculty member teaching a course on leadership in sustainability

Northeastern University, School of Architecture

2016 -2017 | Lecturer teaching architecture/urbanism studios

Related Work Experience

Planning and Development Collaborative International (PADCO)

1986 | Urban Planning Consultant to the U.S. Agency for International Development (USAID) / Morocco.

Aga Khan Program for Islamic Architecture and Urbanism | Harvard University

1983-84 | Research Associate: conducted field research in Tunisia on urban design and development.

U.S. Peace Corps

1979-81 | Architect: designed and supervised construction of clinics and community centers in Morocco.

Education

Harvard University, Graduate School of Design
Master of Architecture in Urban Design I 1983

Rhode Island School of Design
Bachelor of Architecture I 1978

University of Massachusetts I Boston
Graduate Program in Dispute Resolution I 1992

Professional Affiliation

- Registered Architect in Massachusetts; American Institute of Architects {AIA}
- Sustainable Adaptive Gradients in the Coastal Environment {SAGE}, a network of U.S., Caribbean and European engineers, geoscientists, ecologists, social scientists, planners and policy-makers that develops and promotes resilient coastal infrastructure. Massachusetts Port Authority Designer Selection Panel (2014-2018).
- Board of Directors, Community Design Resource Center, Boston Society of Architects.

Languages

Fluent in French and Spanish, minor proficiency in Greek.

Lectures I Presentations:

- "Urban Resiliency & Green Infrastructure through Land Value Capture", Panel: Resiliency Design Case Studies in the Developing World at the 2018 American Institute of Architects National Convention, New York City, June 2018
- "Urban Planning Initiatives and Resiliency in Boston", 2018 International Workshop on Urban Ecological Security and Sustainability sponsored by Suffolk University, Boston, and Fudan University, Shanghai, June 2018.
- "Financing Urban Resiliency & Green Infrastructure through Land Value Capture", 2016 International Conference on Urban Development: Accelerating Resilience and Inclusive Growth, Manila, Philippines at the invitation of USAID, 2016.
- "Financing Urban Climate Adaptation and Resiliency through Land Value Capture in Latin America", Sustainable Cities and Climate Change conference, Lima, sponsored by the Peruvian government with support from USAID, the Inter-American Development Bank and other organizations, 2014.
- "The Revitalization of Historic Cities as a Competitive Urban Strategy in the Global Economy", Smart City Business Conference in Recife, Brazil, 2013, at the invitation of the U S Consulate in Recife. Organized by Associação dos Dirigentes de Vendas e Marketing do Brasil (ADVB), Federação Nacional das Associações dos Dirigentes de Vendas e Marketing do Brasil, and Instituto Smart City Business.
- "Strategic Land Use Planning for Climate Change-Driven Water Shortages in El Alto, Bolivia," funded by the Lincoln Institute of Land
- Policy, UN-HABITAT World Urban Forum, Naples, Italy, 2012
- "A Critique of New Songdo City, Korea, and other Privately-Developed New Smart Cities", the New Towns/ New Territories conference, organized by the International New Town Institute (INTI) in collaboration with the Netherlands Architecture Institute, and the Dutch Ministry of Infrastructure and the Environment, Rotterdam, the Netherlands, 2012.
- "City-Regions in the 21 Century from an International Perspective", keynote speech, Revive MTY Forum

2011 hosted by the Graduate School of Public Administration and Public Policy (Escuela de Graduados en Administracion Publica y Politica Publica), Instituto Tecnologico de Monterrey, Mexico, 2011.

- “New Smart Cities of the 21st Century and the End Of Civic Engagement in the Modern Democracy”, conference on New Towns and Politics organized by the International New Town Institute (INTI) in collaboration with the University of Amsterdam and the Technische Universiteit Delft, Almere, the Netherlands, 2010.
- “Building the City of the Future,” at the invitation of POLIS International School of Architecture and Urban Development Policies to give a week-long lecture series attended by government officials, graduate students and the general public, Tirana, Albania, 2010.
- “Urban Redevelopment Strategies: Boston”, conference on Revitalization Strategies for Urban Centers sponsored by ULI / South America and the Ministry of Urbanism of Chile, Santiago de Chile, 2003
- “Major Redevelopment Initiatives in Boston”, Proyecto Cities/ Learning from Cities Conference, sponsored by the Basque Government, the Eisenhower Foundation and Fundacion Metropoli at the Guggenheim Museum, Bilbao, Spain, 2000
- “Approaches to Urban Development in Boston”, Japan’s National Land Agency 6th International Land Policy Forum, Tokyo, Japan, 1999
- “Urban Land Development in North American Cities”, International Seminar on Urban Vacant Land: New Challenges and Opportunities, sponsored by the Lincoln Institute of Land Policy and the Prefecture of the City of Rio de Janeiro, Rio de Janeiro, Brazil, 1999
- “City of Negotiation: the Politics of Urban Planning in Boston”, Harvard Graduate School of Design Urban Planning Lecture series, 1999
- “Urban Design as Public Policy”, lecture at the invitation of Petroleos of Venezuela and Universidad Metropolitana, Caracas, Venezuela, 1998
- “The Redevelopment of Boston’s Washington Street Corridor”, American Planning Conference National Conference, 1998
- “Urban Management and Land Development Policy in Boston”, presentation requested by the World Bank to Mayor Luiz Paulo Fernandez Conde, Mayor of Rio de Janeiro, 1997
- “Re-invention: Boston’s South End”, American Institute of Architects Regional and Urban Design Conference, 1997
- “Boston’s Redevelopment Initiatives”, presentation requested by MassPort and the New England Latin American Business Council to Governor Jorge Alberto Escobar, Province of San Juan, Argentina, 1997.
- “The Rehabilitation and Conversion of Commercial and Former Industrial Buildings for Mixed Income Housing”, presentation to a delegation of housing developers from Johannesburg, South Africa, sponsored by the Planning and Development Collaborative (PADCO) and the U.S. Agency for International Development (USAID) / South Africa, 1997
- “Land Management Strategies for Revitalization and the Creation of Economic Opportunities for City Residents” and “Joint Transportation and Urban Redevelopment Projects: Boston’s Southwest Corridor Project as a Case Study”, International Training Program, sponsored by the Center for Urban Development Studies, Harvard Graduate School of Design, 1997
- “The South End Neighborhood Housing Initiative”, Harvard Institute of Affordable Housing seminar: Development, Financing, Design and Management, 1996
- “Urban Industrial Initiatives in Boston”, Symposium sponsored by the Harvard Graduate School of Design and the Loeb Fellowship: Manufacturing Cities: “Competitive advantage and the Urban Industrial Community”, Cambridge, 1996
- “Urban Change and Consensus-building in Boston”, lecture presented at the Conference on Urban Development: “Stakeholders in the Process of Urban Change” at the invitation of the University of Bio Bio and Chile’s Ministry of Housing and Urban Development, Concepcion, Chile, 1995

- “Joint Transportation / Urban development Projects: Boston’s South Station and Post Office Square as case studies”, International Training Program for senior development and planning officials from Beirut, Lebanon, sponsored by the World Bank and the Center for Urban Development Studies, Harvard Graduate School of Design, 1995
- “Social Housing Development in Boston”, presentation to the Housing and Urban Development Office, City of Montreal, Quebec, 1995
- “Revitalization of City Centers in an Era of Limited Resources from an American Perspective”, international conference on Low Income Housing Strategies, sponsored by the U.S. Agency for International Development (USAID) and the Government of Morocco’s National Housing Agency, Meknes, Morocco, 1994
- “The Evolution of Housing Policy in Boston: the South End Neighborhood Housing Initiative” and “Local Government Partnerships with Community Development Corporations in the Redevelopment of Transitional Urban Districts”, two presentations for the International Training Program for senior development and planning officials from the Government of Morocco, sponsored by the Center for Urban Development Studies, Harvard Graduate School of Design, 1993
- “Social Housing Development in Boston”, Canadian Housing and Renewal Association (CHRA) annual conference and study tour, 1991

Publications

- Grafakos, Stelios; Kostaras, James; D’ Acci, Lucca; Tsatsou, Alexandra; Lopez, Adriana; Morales, Carlos; and Summers, Barbara.
- Exploring the use of land value capture instruments for green resilient infrastructure benefits: a framework applied in Cali, Colombia.
- Lincoln Institute of Land Policy Working Paper, 2017.
- Kostaras, James; Hamin, Elizabeth; Solloso, Elda; Meerman, Jan; and Larsen, Maren.
- Assessing Alternative Resiliency Strategies in Under-Resourced Coastal Communities in Belize Impacted by Climate Change and Vulnerable to Environmental Risk.
- Lincoln Institute of Land Policy Working Paper, 2015.
- Kostaras, James. Financing Urban Climate Adaptation through Land Value Capture in Latin America and the Caribbean.
- Lincoln Institute of Land Policy White Paper, 2015.

Articles

- Kostaras, James. “Give BRA a chance at Urban Renewal”, Boston Globe, March 3, 2016
- Kostaras, James and Barnes, Rebecca, “Questioning the Authority”, Architecture Boston, Spring 2014: Blueprint (Volume 17 n1).
- Kostaras, James. “Planning for a new day: Don’t throw out the BRA - use it to create a blueprint for Boston’s future”, Boston Globe, December 18, 2013
- Kostaras, James, “What I Learned: An Insider’s Guide to Improving Local Government. Modest proposals for fixing local government in America”, Architecture Boston, Summer 2011: Government (Volume 14 n2).



Gerald E. Patton

Habitat for Humanity Greater Boston
Director of Construction

Work Experience:

Habitat for Humanity Greater Boston, Inc. | 2017 - Present
Director of Construction

Habitat for Humanity Greater Boston, Inc. | 2005-2017
Construction Superintendent

Oakman Construction | 1999-2005
Owner & Operator

Sub-contractor, contracted the framing of additions and new construction of residential buildings between 1800 and 7500 square feet. Responsible for 8 - 14 employees

Cedar Ridge Developers - Attleboro, MA | 1990-1999
Construction/Foreman Supervisor

Supervising foreman for residential construction crews including several condominium projects

Northeast Framing Contractors - Attleboro, MA | 1982-1990
Carpenter

Worked two years as a carpenter prior to a promotion to foreman.

Responsible for construction crews on residential sites including large condominium projects

Dor-Vin Lumber and Hardware, North Attleboro, MA | 1981-1982
Customer Service Representative

Worked two years as a carpenter prior to a promotion to foreman.

Responsible for construction crews on residential sites including large condominium projects

Education:

King Philip Regional High School, Wrentham, MA
1976-1981



Cathy Kurczak

Habitat for Humanity Greater Boston
Construction Site Supervisor/Construction Administrator

Work Experience:

Habitat for Humanity Greater Boston | October 2018 - Present

Construction Site Supervisor/Construction Administrator

Habitat for Humanity of St. Joseph County | August 2015 - September 2018

Construction Site Manager - South Bend/ Mishawaka, IN

- Learn all aspects of construction as each Habitat affiliate builds homes, from foundation to completion
- Train and lead volunteers in all aspects of construction on Habitat for Humanity build sites
- Develop and maintain volunteer schedule
- Calculate material take offs
- Supervise construction assistants
- Maintain quality control and safety of construction procedures

Greater Indy Habitat for Humanity (GIHFH) | September 2014 -August 2015

AmeriCorps - Indianapolis, IN

- Commit to 1,700 hours of full-time AmeriCorps service with GIHFH
- Learn all aspects of construction as GIHFH build homes, from foundation to completion
- Instruct and delegate construction tasks to groups of volunteers at build sites

YMCA of Greater Indianapolis | August 2013 -August 2014

AmeriCorps VISTA- Indianapolis, IN

- Assess intermediate school sites and assess the tutoring needs of YMCA Before and After School programs at those sites and survey parents to identify tutoring needs
- Create volunteer partnership with local high schools for students to volunteer with the YMCA
- Co-lead Volunteer Committee for YMCA Youth Enrichment branch

Girl Scouts GCNWI - Ottawa, IL January | 2013 - August 2013 | January 2012 -August 2012

Camp Director

FedEx - Carol Stream, IL | October 2012 - April 2013

Package Handler/Scanner

Franklin College - Franklin, IN

- Assistant Volleyball Coach, August 2010 - May 2012
- Interim Head Softball Coach, August 2011 - May 2012
- Assistant Softball Coach, August 2010 - May 2011

Saint Mary's College - Notre Dame, IN | August 2009 - November 2009

Assistant Volleyball Coach

Girl Scouts GCNWI - Woodridge, IL | Summers 2010 - 2011 & 2005 - 2007

Unit Counselor

Skills

Management

- Hire, train, supervise and evaluate staff
- Implement procedures and work routines
- Assign staff activities and responsibilities
- Oversee crisis management plan and maintain safety of staff and campers at summer camp
- Plan, organize, and run collegiate sport practices and games
- Implement and monitor budget expenditures

Outreach

- Identify fundraising opportunities
- Write and design monthly newsletters
- Communicate effectively on questions or concerns from staff, patrons, volunteers

Additional Skills

- Microsoft Excel, Outlook, PowerPoint, Publisher, and Word



Katie Theodoros

Habitat for Humanity Greater Boston
Manager of Construction Administration

Experience

Manager of Construction Administration, Habitat for Humanity Greater Boston

2022-Present: Manage Construction Department administrative processes and organization including; standard operating procedures, accounting, technology, subcontractor hiring, internal and external partnerships.

Construction Administrator / Assistant Site Supervisor, Habitat for Humanity

2021-2022: Lead volunteer groups on build sites while supporting Site Supervisor and assisting in construction tasks. Manage day-do-day construction department administrative tasks.

Director of Continuing Education, North Bennet Street School - Boston, MA

2015 - 2022: Oversaw adult Continuing Education classes and K-12 School Partnership Program, serving over 1,000 students each year in woodworking, carpentry, jewelry making and book arts.

Family Programs Coordinator, Peabody Essex Museum - Salem, MA

2012-2015: Developed, scheduled and managed a year-round arts and cultural programming for multi-generational public audiences, including large festivals, studio workshops, in-gallery experiences, and performances.

Volunteer Work

Boston Cyclists Union. Board Member 2019-2022. Board President 2021-2022. Development Committee 2018-2022

Education

- 2009-2010 MA, Museum Education, Newcastle University, Newcastle, UK.
- 2001-2005 Bachelor of Fine Arts, Lesley University College of Art & Design, Cambridge, MA.

Skills

- Staff and team management
- Scheduling and registration
- Project management
- Operations management
- Visual/Trade education theories and approaches
- Customer service
- Google Workspace
- Registration and marketing software



Micaela Younger

Habitat for Humanity Greater Boston
Construction Crew Lead

Education

Master of Architecture | Massachusetts College of Art and Design 2021

Primary subject covered: - Design architecture, social housing, and sustainable engineering - Calculation and design; construction, structures and installations.

Major: Architecture Design emphasis Urban Planning

Association of Science in Structural Engineering Technology | Delaware Technical and Community College 2014

Architectural and Structural Engineering

Bachelor's in Fine Arts in Photography | Texas Christian University 2010

Primary subject covered: Lighting effects on photographic interpretations

Experience

Construction Crew Lead | Habitat for Humanity Greater Boston

FEB 2019 – PRESENT

- Periodically assist the Site Supervisor with onsite leadership responsibilities
- Possess a strong understanding of onsite operations, processes, and efficiencies
- Ensure compliance to safety protocols
- Oversee a team of Spartan staff, local labor, and volunteers in order to construct or assemble obstacles according to Spartan specifications
- Instruct inexperienced team members concerning the assembly process

Makerspace Operations Coordinator | Maverick Landing Community Services

FEB 2019 – PRESENT

- Integrated technology into the classroom as an instructional tool.
- Planned and supervised class projects and visits by guest speakers
- Created Makerspace workstations, providing hands-on activities for individuals who needed assistance with project ideas
- Maintained inventory and all makerspace materials, tools, and equipment, including hardware and software.
- Developed programming training and exploring STEAM content through hand on approaches.
- Provided one-on-one attention to students, while maintaining overall focus on the entire group.
- Prepared instruction materials, including copying and setting up work areas.

Welcome Representative | YMCA Oak Square

MARCH 2019 –PRESENT

- Served as the first point of contact for all members and guests at four different fitness facilities that service approximately an average of 8000 people per day
- Enforced rules and regulations

- Collaborated with staff members to maintain a clean and safe environment
- Ensured customer satisfaction by answering patrons' questions and assisting in the retrieval of lost belongings
- Managed the flow of patrons coming in and out of the facilities to prevent overcapacity

Teaching Assistant | Massachusetts College of Art and Design

MAY 2016 – DECEMBER 2018

Leading a team of student and community partners in private and public projects in the Boston community. Designing outreach programs and events that engage residents.

Project Team Leader | SPARC! The Art Mobile

SEPTEMBER 2015 – DECEMBER 2018

Leading a team of student and community partners in private and public projects in the Boston community. Designing outreach programs and events that engage residents.

House Assistant | The Thalia

APRIL 2017 – PRESENT

- Manage, organize, and direct aspect of theatrical productions including actor placement, lights, sound, and props
- Responsible for managing a multi-faceted stage team, and for ensuring the success of a show by looking after the technical aspects to the production.

Logistics Manager | Center for Arts and Community Partnerships 2016 - 2017

Oversee and organize events that will make an impact on the Massachusetts College of Art community. Coordinate operations and committees within budgets and on time.

Assembly & Shipping Clerk | Alden Galleries

SEPTEMBER 2015 – OCTOBER 2018

Responsible for managing a multi-faceted stage team, and for ensuring the success of a show by looking after all the technical aspects to the production.

Head Seamstress | UNIQLO

JUNE 2015 – SEPTEMBER 2016

Fit, alter, repair, and make made-to-measure clothing, according to customers' and clothing manufacturers' specifications and fit, and applying principles of garment design, construction, and styling.: Sew clothing or other articles and repair textiles or apparel.

Curatorial / Office Intern| Biggs Museum of American Art

FEBRUARY 2012 – AUGUST 2015

- Assist in the development and construction of new exhibits as well as develop and manage exhibitions, research, and educational programs for the museum.
- Provide administrative support for event mailings, record keeping and logistics.
- Work with the team to brainstorm and design marketing concepts and executions
- Conceptualize original designs that can translate across digital and in-store retail and represent the seasonal themes of the museum
- Collaborating with other museum departments, such as education, fundraising, marketing and conservation
- Produces presentation materials that effectively communicate the concept behind the creative for internal and external audiences
- Coordinate exhibit installations, assisting with design, constructing displays, dioramas, display cases, and models, and ensuring the availability of necessary materials.
- • Work with the Education Director, Marketing, and Curator to create and maintain design strategy and campaign strategy.
- Assist with the physical maintenance of the collection, including condition reporting, labeling, housing, and storage. Assist with collection inventory and curatorial assessments.
- Designs, communicates, and presents design concepts of projects as assigned.

Teaching Artist| Timothy Smith Network

SUMMER 2018

Planning and implementing curriculum to introduce teens and pre-teens to the creative process, new technologies, and software; often for the first time.

Visual Merchandising Assistant| Charlotte Russe

OCTOBER 2013 - AUGUST 2015

- Work with the Visual Manager and Store Manager to create and maintain retail experience design strategy, campaign strategy, and retail branding strategy.
- Preparation of clothing and accessories for store promotions.
- Safe operation and management aspects of the visual department, and clothing and prop storage.
- Advises customers by providing information on products.
- Documents sale by creating or updating customer profile records.
- Designing displays, stands and panels for exhibitions, conferences and other events. They also produce point-of-sale displays.
- Merchandise Product to Visual Standards.

Shoe Graphic Artist| TOMS Shoes

JUNE 2013 – JUNE 2015

- Advise clients and understand how to create the appearance their customers seek
- Generating ideas, idea developments, sketching, making models while consulting clients
- Communicates and presents design concept
- Produces presentation materials that effectively communicate the concept behind the creative for external audiences.
- Work in a constantly shifting environment and open to constructive feedback and input.
- Working with a wide range of media including photography, computer software, and traditional hand skills
- Interpreting the clients business needs and developing a concept to suite their purpose

Artist in Residence| Delaware Agriculture Museum

JUNE 2011 – AUGUST 2014

- Develops and co-ordinates exhibitions; responsible for research, design, production, and marketing • Provide administrative support to office staff
- Organize original exhibitions of varying size and scope
- Provide general curatorial support for the Director
- Conceptualize and conducts scholarly and market research; discusses results and prepares reports

Teaching Assistant| Delaware Tech Community College

JUNE 2004 – AUGUST 2014

- Instruct and monitor students in the use and care of equipment (hardware and software) and materials in classrooms and laboratories
- Organize and label materials, and display students works
- Plan, prepare, and create various teaching aids such as syllabus, visual aids, supplementary notes, charts and graphs, and course websites
- Work with the department staff to brainstorm and marketing concepts and executions for program awareness
- Requisition and stock teaching materials and supplies
- Prepare presentations for lectures

Mystery Shopper| Secret Shopper

FEBRUARY 2010 – APRIL 2014

- Reviewed performance indicators, such as sales and discount levels
- Wrote reports and forecasting sales levels
- Acquired feedback from customers
- Liaised with head corporation about sales performances

Assistant Creative Director| Diamond State Roller Girls

AUGUST 2011 – AUGUST 2013

- Develop creative programs and design concepts that meet the business objectives of the organization and that advance brand strategy

- Work with internal teams to generate ideas for branding and marketing strategies
- Created and maintain designs for promotional records for all projects
- Work with the Creative Director to create and maintain retail experience design strategy and branding strategy.
- Execute and maintain the league graphic standards across platforms and departments
- Work as part of a team or as the head of the team and is responsible for deciding the deadlines and the budgets for the project
- Support the creative director in maintaining quality and building the league's creative reputation.
- Work with the team to brainstorm and design marketing concepts and executions

Photographer / Photo Editor| Barksdale Portrait Studio

AUGUST 2010 – AUGUST 2012

- Perform maintenance tasks necessary to keep equipment working properly. Maintain all equipment such as lights, cameras and printer, etc.
- Utilize artistic skill to plan the composition, the lighting, the background and the color values of each assignment
- Assist the department's photography staff on photo shoots
- working with clients to discuss the images they require and how they want to use them
- Determine desired images and picture composition; and select and adjust subjects, equipment, and lighting to achieve desired effects.
- Select and assemble equipment and required background properties, according to subjects, materials, and conditions.
- Consult with clients or advertising staff, and study assignments to determine project goals, locations, and equipment needs.

Assistant Photographer / Sales Representative| Brightroom Event Photography

JANUARY 2010 – MAY 2010

Began as sales representative and was promoted after one month to photographer's assistant/photographer, depending on the job

Organized and managed photo sessions for clients

Met with clients to establish desired services, filed clients' contracts and served photographer on shoots

Often required to multi-task between sales, clients and completing photography assignments

Promoted and marketed products and services

Determine desired images and picture composition, selecting and adjusting subjects, equipment and lighting to achieve desired effects.

Guest Art Teacher| Rigmar Elementary School

MARCH 2010 – APRIL 2010

Communicate with parents and the educational community on developing work and lesson plans

Identify and select different instructional resources and methods to meet students' varying needs

Maintain discipline in accordance with the rules and disciplinary systems of the school

Skills

- Windows
- Mac Os X
- Word
- PowerPoint
- AutoCAD
- Sketchup
- Rhino
- Maya
- Revit
- Photoshop
- Lightroom
- Illustrator
- InDesign
- Project Scheduling

- Communication
- Team Management
- Problem Solving
- Quick Learner
- Excellent plan comprehension
- Trouble shooting
- Good at following instruction
- Solid Independent worker
- Computer literate
- Solid communication
- Strong organization
- Strong work ethic
- Team player
- Timely project completion
- Deadline driven

Bio

Micaela is an aspiring Architect (Massachusetts College of Art and Design 2019) and future founder of a socially invested architecture non-profit firm, that will develop several formats with the philosophy that housing is a human right and community is a need. Achieving this through articulating the knowledge of design with the needs of the neighborhoods.

She is currently working on a thesis model that will help in maximizing housing and resources available to the homeless and low-income residents. By making structural components easily assembled, minimizing utility (water, electric, etc.) consumption. By investing in sustainable communities in appropriate and efficient and efficient set of construction technologies with the urban fabric along with unconventional resources. This will include they quality of life received from despondent communities along with environmental, social, economic, and political constraints and policies. The proposed model will help in pricing housing and the evolution of future housing demands. Part of her passion for everyone to have a roof over their head. Comes from a point in time when she was homeless. When first perusing her master's degree she spent the first 2 months homeless and going to school by day and living in her car at night. Drawing on a dash board is not as hard as one would think.

Before starting her journey for a Master of Architecture at Massachusetts College of Art, she worked as a curatorial assistant work for museums such as the Biggs Museum of American Art and Delaware Agriculture Museum and Village. Working with local and regional artists and exhibits for installation including and fully function movie theater exhibited the Projectionist.

Artist Statement

Micaela Younger focuses on her studies on create environmental engagement in communities. Weaving together fragmented sections of the urban fabric in cities and suburbs in order to promote social and generational equality, particularly areas described as underserved or blighted. The work attempts to address issues of division, while creating a base for connectivity and social engagement.

Artist, future architecture and community leader Micaela believes the design is an overlooked quality that can be a powerful tool for building relationships and community.

Focusing on the components of resiliency and sustainability. One of her main principles, the bases for her master's thesis, to which she also brings abundance compassion in her design addressing the social, economic, and educational effects of poverty and lack of racial equity.

If you are one of the millions of people who struggle to get by or worry about the roof over you hear, or the future of your community. Her design philosophy is one of togetherness to be distributed to amplify community voices for the betterment of all American. She approaches design work from and artistic and equitable perspective incorporating my awareness of social reforms, community engagement, interaction.

She strives to explore what is just beyond the boundaries set by others.



Shannon McCormack

Habitat for Humanity Greater Boston
Homeowner Relations Manager

Experience

Family Services Coordinator, Habitat for Humanity Greater Boston

11/20 – Current

- Support the Family Services Manager in the management of a portfolio of 116 families
- Assist with condominium bill payments and condo fee deposits
- Create annual budgets and update the annual actuals for the condominiums
- Assist with screening homeownership applications and interviewing potential partner families
- Collect, create, and organize Family Services data for internal and external purposes
- Perform outreach and answer inquiries about Habitat's homeownership program

Customer Service Representative, ezCater

10/19 – 11/20

- Manage catering orders from start to finish, assisting customers and caterers at every step of the life-cycle of the order
- Efficiently and effectively resolve urgent problems
- Maintain an insanely helpful QA score each month
- Assist with training recently hired representatives

Server, The Broadway

10/18 – Current

- Deliver efficient and friendly service to each customer
- Demonstrate the ability to multitask and problem solve effectively
- Responsible for training new servers

Marketing Associate, Kraft Sports + Entertainment

07/17 – Current

- Distribute marketing materials to guests at the New England Patriots home games
- Provide customer support during on field promotions and special events
- Act as a lead associate when assigned tasks in teams

Product Marketing Assistant, Pearson

08/17 – 08/19

- Supported the Higher Education Math Marketing team with gathering market insight for 4 disciplines (Calculus, Applied Math, Statistics, and Precalculus) totaling in \$2,225,000 in revenue each year
- Completed and presented multiple market research projects for the product marketing, field marketing, editorial, and sales teams to support customer acquisition and retention
- Aided in the drafting and implementation of marketing plans, including support in creating sales

tools, customer-facing communications, and marketing collateral used for marketing, sales, and campaign purposes

- Assisted with market development and market seeding activities for new product launches, including tracking participants and payments on a central document
- Participated in customer events both online, through focus groups, demos, and interviews, and in-person, at ICTCM and frequent campus visits
- Fulfilled requests and answered questions from professors and sales representatives

Kindergarten Prep Teacher, Bright Horizons at Harborview

07/16 – 08/17

- Created, implemented, and taught a diverse curriculum to 10 students between the ages of 3 and 5 years old each week
- Fostered intellectual and social emotional development through interaction
- Maintained a daily report of each student's day with photographs and anecdotes of achievements to share with families
- Consistently communicated and collaborated with families to ensure the best for each student

Education

Marist College, Poughkeepsie, NY

Bachelor of Arts, Major in Psychology, Minor in Business, May 2016
Honors Program, Dean's List (7 semesters), Presidential Scholarship

National University of Ireland, Galway, Galway, Ireland

API Study abroad, Fall 2014 semester

Leadership

Habitat for Humanity - Marist Campus Chapter

President of the chapter for the 2015-2016 term. Managed and lead a team of 6 board members, overseeing all operations. Raised awareness and educated campus on the mission of Habitat. United with 3 local affiliates to organize weekend builds and guest speakers.

Hosted monthly meetings for 150 student members. Planned and organized the Collegiate Challenge Spring Break 2016 experience to Birmingham, Alabama for 26 individuals.

Marist College Student Government

In four successive years, served as the Class of 2016 Treasurer, President, Vice President (twice). Acted as a voice for the class and brought attention to concerns of peers. Budgeted for, planned, and organized five events each semester.

Skills

Intermediate Spanish

Extensive knowledge of Microsoft programs, Google Suite, and CRM Strong Work Ethic



Robert Fitzgerald

Goodwin
Counsel

Executive Summary

Robert Fitzgerald, a counsel in the firm's Real Estate Transactional Services and Environmental & Energy practice areas, has more than 20 years of experience representing clients in the federal, state and local permitting of residential, commercial and industrial projects, the environmental review of corporate and real estate transactions, waste site cleanups under federal and state Superfund statutes, and supporting litigation in each of these areas.

Experience

Mr. Fitzgerald supports the firm's Real Estate Transactional Services practice by providing clients advice on zoning and entitlement matters in support of project development and financing, and also provides counsel on securing development entitlements on projects throughout Massachusetts. In addition, Mr. Fitzgerald has worked on several significant real estate development projects within the City of Boston, providing strategic advice on zoning issues, project impact review, and the wide variety of entitlements, agreements and approvals generally required from various City departments. Mr. Fitzgerald also advises clients on the risks associated with transactions involving contaminated sites, the process and strategy for moving contaminated sites to regulatory closure, and how best to use technical experts in both administrative and judicial proceedings. Mr. Fitzgerald also represents clients in administrative proceedings before municipal boards and state agencies, and supports the firm's litigation practice on matters involving land use, permit appeals, and environmental matters.

Representative Matters

- Assisted energy sector client in avoiding possible enforcement action by developing statutory and legal arguments related to the application of hazardous waste regulations in EPA-authorized states.
- Represented energy sector client before administrative agencies during appeal of Clean Water Act permits, working with engineering, biology, and environmental experts to develop testimony and rebuttal arguments.
- Represented real estate development client by performing entitlement diligence on a proposed 1 million square foot development located in Boston.
- Represented pro bono clients in obtaining entitlements for proposed school expansion, including approvals related to historic resources, zoning, and environmental review.
- On behalf of energy sector client, negotiated the settlement of an enforcement matter involving alleged violations of clean water laws, alleged violations of hazardous waste storage rules, and the assessment of natural resources damages.

Professional Activities

Mr. Fitzgerald is a member of the Boston and American Bar Associations.

Recognition

Mr. Fitzgerald has been selected for inclusion in Chambers USA: America's Leading Lawyers for Business and Best Lawyers. While attending law school, he served as an editor for the NUForum Law Journal at Northeastern University School of Law.

Publications

Mr. Fitzgerald is an annual presenter at the Massachusetts Continuing Legal Education series on Environmental Law Plus+, and a contributing author on the topics of zoning and environmental law in the MCLE manual entitled Drafting Commercial and Real Estate Documents in Massachusetts and MCLE's Massachusetts Zoning Manual.

Education

- J.D., Northeastern University School of Law, 1999
- M.E.S., Yale University, 1996
- B.S., University of California, 1989

Admissions

Mr. Fitzgerald is admitted to the Massachusetts Bar and the Second and Ninth Circuit Courts of Appeal.



Andrew Steinginser

Project Architect | Passive House Consultant
RDH Building Science

Executive Summary

Andrew is a registered architect in Massachusetts with more than 15 years of experience. He is also a Certified Passive House Consultant (CPHC) and a LEED Accredited Professional (AP). Andrew has broad experience with commercial, residential, and higher education projects. A well-rounded and detail-oriented architect, he can carry a project from conceptual design through construction to ensure the design intent is realized.

Expertise + Experience

Since becoming a Certified Passive House Consultant in 2013, Andrew has been primarily involved in high-performance and Passive House projects of all types that provide exemplary thermal envelopes, while reducing or eliminating carbon emissions. Andrew has experience leading design and construction administration of large-scale PHIUS-certified higher education projects and promoting sustainability and energy efficiency initiatives across multiple projects. Andrew has presented regularly at the national PHIUS conference and Passive House Massachusetts, and has served as a guest lecturer at academic institutions such as the WIT and Boston Architectural College. For the MassCEC Decarbonization Pathways Pilot, Andrew would serve as RDH’s representative on the advisory panel.

Education

B.Arch., Syracuse University School of Architecture, Syracuse, NY

Memberships + Certifications

- Certificate, National Council of Architectural Registration Boards (NCARB), 2009–Present
- CPHC, Passive House Institute US (PHIUS)
- LEED AP, US Green Building Council (USGBC)
- Member, Passive House Massachusetts

Passive House Design + Deep Energy Retrofits

- Wheaton College Passive House, Wheaton College, Norton, MA – Passive House design for a new student residence hall*
- Garfield House, Williams College, Williamstown, MA – Passive House design for a new student resi-

dence hall*

- SUNY Oneonta Ford Hall, DASNY, Oneonta, NY – Deep energy retrofit for a 1960s residence hall *

Architectural Design

1812 Ashland Ave, Forest City, Baltimore, MD – Architectural design for a life science lab building

Salisbury Hall, WPI, Worcester, MA – Architectural design for a new 380-bed modular residence hall

*15 McGrath Highway, Leggatt McCall, Somerville, MA – Architectural design for a new 380,000gsf life science lab building

*These projects were completed at Andrew's previous place of work.

*These projects were completed at Andrew's previous place of work.

Presentations

- Holistic Sustainable Design Integration course, Wentworth Institute of Technology, 2020 – Guest lecture on Passive House principles, practices, and large-scale case studies
- North American Passive House Annual Conference, 2019 – Presented lessons learned through construction and certification process of large-scale PHIUS certified projects
- Modeling the Perfect Wall course, Boston Architectural College, 2019 – Guest lecture on Passive House principles, practices, and case studies
- Passive House in Higher Education Panel Discussion, 2019 – Presented on Passive House design in higher education and participated in moderated panel discussion with Katrin Klingenberg, Executive Director and Co-founder of PHIUS, hosted by SGA

North American Passive House Annual Conference, 2018 – Presented on the early design of SGA's two PHIUS certified residential halls at Williams College and Wheaton College

North American Passive House Annual Conference, 2016 – Co-presented with James Ortega of PHIUS certification team on WUFI Passive modeled case studies of university residential hall and hotel typologies in the Boston area, showing minimal modifications required from code-compliant base cases to meet PHIUS standards

ABX Architecture Boston Expo Annual Conference, 2015 – Presented on multifamily Passive House design on behalf of PHIUS.



Antonia Bellalta, ASLA

Principal & Senior Project Manager
Bellalta 3 Design

Education

- Harvard University Graduate School of Design, Masters of Landscape Architecture
- University of Notre Dame School of Arts and Letters Bachelor of Arts in Theology
- University of Chile School of Design, Department of Landscape Architecture

Registration Massachusetts

Commonwealth of Massachusetts Division of Professional Licensure #1035

Professional Experience

Bellalta 3 Design

(2002-Present) Brookline, MA

Principal. Founder and Principal of Bellalta 3 Design. Responsibilities include managing the firm's landscape design approach, encouraging fresh ideas and developing landscape design solutions within a studio environment. Contribution of philosophical insight and technical training to the firm's projects. Since 1986 I have provided site planning and programming, conceptual design, design development and construction administration services for projects which include private and public open spaces, historic landscapes, religious institutions, planning and design for colleges and universities, preparatory schools, healthcare institutions, affordable homes and private residences. I have developed a personal passion for interpreting the landscape as a therapeutic ecological environment and have written and lectured regarding therapeutic benefits of landscapes.

Child Associates, Inc.

(2000-2002) Boston, MA

Principal. As Principal of the firm, design responsibilities included establishing conceptual design for the firm's projects. Review and coordination of the design process through construction documents and site observation. Management responsibilities included marketing, proposal writing, interviews, contracts, client contact, management of the day to day design process and supervision of design team. Coordination with the architectural, structural and civil teams for specific projects.

Payette Associates, Inc.

(1992-2000) Boston, MA

Director of Landscape Architecture and Associate. Responsibilities included leadership and management of a seven person department and strategic marketing and business development with the CEO and Partners of the firm.

Established the project design approach and process, coordination with the architectural, structural and civil team members. Provided project management through schematic design, design development, construction drawings and site observation. Developed master plans, reports, and presentation drawings for diverse projects and sites such as historic parks, academic and medical campuses, corporate headquarters, and private residences.

Management responsibilities consisted of writing contracts, developing marketing qualifications, proposals and interviews. Define the scope of work and landscape design fees as well as management of client contact. Contributed to the further development of the Landscape Architecture Department by increasing its visibility and credibility within the profession by pursuing projects outside the conventional boundaries of Payette Associates.

Walker-Kluesing Design Group

(1985-1992) Boston, MA

Landscape Architect. Responsible for the diverse phases of design and planning. Development of construction drawings, cost estimates, renderings and coordination with clients and consultants. Projects included Historic Landscapes such as Boston Common, Buttonwood Park, Larz Anderson Park, Medical Campus Planning and Academic Buildings.

Boston Urban Gardeners

(1984-1985) Boston, MA

- Landscape Intern. Provided design services and implementation throughout the City of Boston for a non-profit organization involved with Boston Housing.
- Planning Office for Urban Affairs Justice and Peace Commission
(1980-1981) Boston, MA.
- Volunteer Member. Appointed by Cardinal Medeiros. Develop subsidized housing.

Professional Affiliations

Member of the Visionary Group studying Boylston Street (Route 9), Brookline, Massachusetts

(August 2018 - December 2018)

Board Member of Bayridge Residence at the Ayer Mansion,

Ayer Mansion was designed by Louis Comfort Tiffany during America's Gilded Age at the turn of the twentieth century.

(July 2016 - Present)

Park and Recreation Commissioner, Town of Brookline

(June 2009 - Present)

ASLA American Society of Landscape Architects

BSLA Boston Society of Landscape Architects

Teaching Experience

- Harvard University Career Discovery, Guest Critic, Dept. of Landscape Architecture (Summer 2007, 2009)
- Harvard University Radcliffe Seminars, Landscape Architecture Program Studio III
- Campus as an Archetype of Place (Spring 2001)
- Harvard University Career Discovery, Guest Critic, Dept. of Landscape Architecture (Summer 1990 and 1991)
- University of Notre Dame, Fourth Year Architecture Program, Chicago Waterfront Development (1990 and 1991)
- Boston Architectural College, Architecture Thesis Project, (1987)
- Community School Corporation, South Bend, IN, Art teacher, elementary and secondary school (1982-1983)

Project Awards

Uphams Crossing Housing Dorchester, Massachusetts

Multifamily Executive Magazine

Affordable Housing Finance Reader's Choice Award/Family Housing (2016)

St. Aidan's Redevelopment Brookline, Massachusetts

Multifamily Executive Magazine, Project of the Year/Mixed Income (2010)

St. Mary of the Assumption Church Brookline, Massachusetts

Preservation Award , Brookline Preservation Commission (2006)

Restoration of House and Renovation of the Carriage Barn and Landscape

74 Davis Avenue, Brookline, Massachusetts

Brookline Preservation Commission (2009)

Project Awards while at Payette Associates

Nathan Tufts Park Somerville, Massachusetts

Frederick Law Olmstead Award for Leadership in Landscape Preservation

Massachusetts Historical Commission (2006)

Biogen Inc., New Research Facility Cambridge, Massachusetts

Merit Award for Commercial Design, Boston Society of Landscape Architects (1997)

Project Awards while at Walker Kluesing Design Group

Larz Anderson Park Brookline, Massachusetts

Preservation Award

Massachusetts Historical Commission (1992)

The Children's Hospital Boston, Massachusetts

Merit Award for Institutional Design

Boston Society of Landscape Architects (1990)

Visitor Center Park: Lawrence Heritage State Park Lawrence, Massachusetts

Citation for Excellence in Urban Design Massachusetts Heritage State Parks Program,

The American Institute of Architects (1990)

Buttonwood Park New Bedford, Massachusetts

Annual State Award for Excellence in Design
Massachusetts Recreation and Park Association (1989)

Merit Award for Landscape Planning

Boston Society of Landscape Architects (1988)

Personal Academic Awards

- Norman Newton Scholar, Harvard University Graduate School of Design (1984)
- Student Representative, Harvard University Graduate School of Design (1984-1985)

Lectures/ Publications

- "Roberto Burle Marx: Landscapes Reflected"

Editor: Rossana Vaccarin; with essays by William Howard Adams, Lelia Coelho Frota, Anita de la Rosa de Berrizbeitia, Silvio Soares Macedo

Wrote review, Land Forum magazine, Issue 09, 2001, page 31

- "Healing Environments"

The Second Annual Healthcare Symposium in New Hampshire, Speaker, May 2000

- "Healthcare Landscape Can Be a Profound Contributor to the Healing Process"

Author, Banker & Tradesman, January 2000

- "Landscape as a Positive Contributor to Patient, Staff and Family Satisfaction"

Speaker, Build Boston, November 1999

- "The Healing Garden Cliche is Now Rampant"

Author, ASLA Professional Interest Group on Therapeutic Garden Design; Volume 1, November 1, 1999

Juror

Boston Society of Landscape Architects Awards (BSLA)

Awards program (1999 and 2010)



Robert Freni, AIA

CEO & Co-Founder / 15 Years of Experience
Adaptiv

Overview

Robert Freni is an AIA licensed architect with LEED AP BD+C accreditation. He has been designing and planning for low- and middle-income communities (LMIC) healthcare, education, and affordable housing facilities for the past ten years. He practiced at US based architecture firm Shepley Bulfinch primarily on Health Care Facilities ranging from 500,000 SF to over 1 million SF as an Associate and Project Manager. He led the Architecture department at Build Health International for 3 years on projects including the Saint Boniface Hospital Master Plan, the Haiti Projects Library, the Koidu Government Hospital Master Plan, and the Center for Infectious Disease and Emergency Care at Saint Boniface Hospital.

Education

2014 | Boston Architectural College,
Masters of Architecture

Professional Registrations

AIA Licensed Architect
LEED AP BD+C Accredited

Work Experience

Adaptiv | CEO & Co-Founder,
2017 - Present

Build Health International | Director of Architecture
2017 – 2019

Shepley Bulfinch | Associate, Designer and Planner
2013 – 2017

Project Experience

Habitat For Humanity, Boston, MA
104 Walter Street
978 Blue Hill Avenue

1085 Blue Hill Avenue
3 Baird Street
In progress

Root, Salem, MA
In Progress

Salem YMCA Feasibility & Viability Study
In progress

Jean Charles Academy, Lynn, MA
In progress

Iftin Foundation Peace Hub, Somalia
In progress

Summits School Prototype Design, Haiti, 2021
In progress

Projects Completed

- Infectious Disease Center, Kara, Togo 2020
- Sustainable Learning Village Community, Arcahaie, Haiti 2020
- Haitian Education Leadership Program, Haiti 2020
- Educating Haiti Primary School, St Marc, Haiti 2020
- COVID Prototype Design, 2020
- CURE, Kijabe, Kenya Hospital Master Plan, 2019
- CURE, Uganda, Hospital Master Plan, 2019
- Sierra Leone KGH Master Plan, 2018
- Peru, Multi drug-resistant Tuberculosis Center, 2018
- HUM Cholera Center, Haiti, 2018
- Saint Boniface Hospital Master Plan 2016-2017
- Fond Des Blancs Master Plan, 2016 - 2018
- Fond Des Blancs Library, Fond des Blancs, Haiti 2016
- Infectious Disease Center, Saint Boniface
- Hospital, Fond des Blancs, Haiti 2016-2017
- Emergency Department, Saint Boniface Hospital, Fond des Blancs, Haiti 2016-2017



Abby Gordon, AIA

Director of Design & Co-Founder/ 17 Years of experience
Adaptiv

Overview

Abby Gordon is a registered architect who brings more than 15 years of experience in healthcare and institutional design in the US, and internationally, in resource strained areas. Her work centers around understanding social and cultural nuances to inform the development of programming, planning and design. Prior to co - founding Adaptiv, Abby spent 2 years honing her ability to design in resource strained settings as an architect and planner at Build Health International. She credits her 5 years working at Shepley Bulfinch for providing her a strong foundation in healthcare planning, institutional design and the importance of collaboration.

Education

2012 | Boston Architectural College,
Masters of Architecture

Professional Registrations

NCARB Registered Architect

Work Experience

- Adaptiv | Director of Design, 2017 - Present
- Build Health International | Project Architect, 2017 – 2019
- Shepley Bulfinch | Planner and Architect 2012-2017

Project Experience

- Jean Charles Academy, Lynn, Massachusetts, In progress
- Summits School Prototype Design, Haiti, 2021 In progress
- Salem YMCA, Feasibility Study, Salem, Massachusetts, In progress
- Infectious Disease Center, Kara, Togo 2020
- Sustainable Learning Village Community, Arcahaie, Haiti 2020
- Haitian Education Leadership Program, Haiti 2020
- Educating Haiti Primary School, St Marc, Haiti 2020
- COVID Prototype Design, 2020
- CURE, Kijabe, Kenya Hospital Master Plan, 2019
- CURE, Uganda, Hospital Master Plan, 2019
- Sierra Leone KGH Master Plan, 2018
- Peru, Multi drug-resistant Tuberculosis Center, 2018
- HUM Cholera Center, 2018
- Saint Boniface Hospital Master Plan 2016-2017



Ángela Domínguez

Architect/ 5 Years of Experience

Adaptiv

Overview

Angela is an architect specialized in international cooperation to development projects. She has developed her practice across Latin America, Africa and Europe and is experienced in leading multidisciplinary teams. Her passion about social impact design and sustainable architecture has focused her on the cross-roads between resilient construction, human settlements, health and sustainability.

Education

Education

2022 | University of the Basque Country (Hegoa Institute, Spain), Masters programme in International Cooperation and Development

2018 | University of Valladolid (Spain), Masters of Architecture

Work Experience

- Adaptiv | Architect, 2022 - Present
- Istituto Oikos | Project Manager, 2021 – 2022
- BuildX Studio | Architect and Project Manager, 2019-2021
- UNEN | Architect, 2019

Project Experience

- SVLC Master Plan, Haiti, 2022, In progress
- Summits School Prototype Design, Haiti, 2022, In progress
- Little Lambs Orphanage, Guatemala, 2022, In progress
- Re, Mozambique, 2021, In progress
- Prefab Sustainable Affordable Housing, Kenya, 2019-2021
- Makini Pre-Primary School, Kenya, 2019
- Penda Health Clinics, Kenya, 2019
- Liberty Seguros Offices, Lisbon, 2019
- Lagasca Offices, Madrid, 2019
- Protos Wine Cellar, Valladolid, 2018



Bill Fitzpatrick

Architect/+40 Years of Experience

Adaptiv

In over 40 years of practice Bill Fitzpatrick has been project manager or lead designer for a wide range of project types. He has led teams creating classroom and laboratory buildings, libraries, student and dining halls, various health care facilities, municipal facilities. Community buildings and various types of multi-unit housing projects. His experience ranges from single family homes to projects costing over \$100 million, of virtually all construction types. A thorough understanding of technical and construction knowledge illuminate his design work. Respect for the clients' needs above all and an appreciation of the value of teamwork in execution inform his approach to design and building. Bill is a graduate of the Harvard Graduate School of Design and the recipient of two Boston Society of Architects Design Awards.



Gillian Kazzaz

Interior Designer/4 Years of Experience

Adaptiv

Gillian Kazzaz serves as an intern Interior Designer for the Adaptiv team and is passionate about creating spaces that have a positive impact on people in their everyday life. She is in her final year at Boston Architectural College pursuing her Master's of Interior Architecture as part of a career transition. Prior to pursuing her Master's degree, Gillian spent 10 years in increasing roles of responsibility in sales and customer service within the technology industry. She holds a B.A. in Sociology from Chapman University.



Hansy Better Barraza, AIA LEED AP, NOMA

Principal + Co-Founder
Studio Luz Architects, Ltd.

Professional Formation

2002-present

Studio Luz Architects, Ltd.
Founding Principal
Boston, MA
Architectural License
MA #20252, NY #032750, RI #3560 TN #106481, NH #04100

2010-present

BR+A+CE | Building
Research, Architecture,
Community Exchange Inc.
President and Co-Founder
501(c)3 Non-Profit Corporation
www.br-a-ce.org

Education

2000 - Harvard GSD

Master of Architecture in Urban Design. Thesis with Awards of Distinction

1997 - Cornell University

Bachelor of Architecture. Thesis with Awards of Distinction

Experience

- BLUE HILL AVE B1 PARCELS | Principal in Charge for 27 Unit Passive House Certifiable Apartment | On-going
- ONE CHARLESTOWN | Principal in Charge for new multi-unit housing project in Charlestown Boston, MA
- SOCIEDAD LATINA | Principal in Charge for full building renovation, including facilities assessment, participatory design process, of organization headquarters into multiuse space in Roxbury, MA
- LAWRENCE WEST ISLAND MASTER PLAN | Principal in Charge for Master Planning Study for potential development of the West Island located in Lawrence, MA | On-going



Sophie Nahrman

Associate, AIA
Studio Luz Architects, Ltd.

Professional Formation

2021-present

Studio Luz Architects, Ltd.
Project Manager , Marketing, Community Engagement Liaison

2018-2021

sanDesign
Designer

2016-2018

Urban Design Build Studio
Architectural Designer + Research Associate

Education

2018 - Carnegie Mellon University

Bachelor of Architecture, University and College Honors

Experience


- BLUE HILL AVE B1 PARCELS | Project Manager and Designer for 27 Unit Passive House Certifiable Apartment | On-going
- LYNN VIADUCTS | Project Designer and Community Engagement Liaison for revisioning study for the Lynn Viaducts | 2022
- REIMAGINE MCKINLEY | Project Designer and Community Engagement Liaison for revisioning study of the McKinley School into a community asset | 2022
- WELLESLEY CENTERS FOR WOMEN | Project Designer and Community Engagement Liaison for Programming, Conceptual Design, and Feasibility Study for WCW relocation | 2022

PERMITS & LICENSES

Commonwealth of Massachusetts
Division of Occupational Licensure
Board of Building Regulations and Standards
Construction Supervisor

CS-109666 Expires: 03/13/2024

GERALD PATTON
17 PARSONS WALK
BERKLEY MA 02779



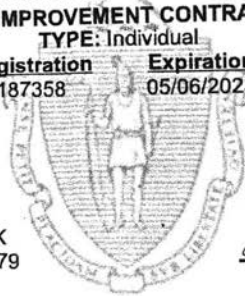
Commissioner *Layla R. Demile*

THE COMMONWEALTH OF MASSACHUSETTS
Office of Consumer Affairs & Business Regulation
HOME IMPROVEMENT CONTRACTOR
TYPE: Individual

Registration	Expiration
187358	05/06/2023

GERALD PATTON

GERALD PATTON
17 PARSONS WALK
BERKLEY, MA 02779



Edward A. Pallone
Undersecretary

Commonwealth of Massachusetts
Division of Professional Licensure
Board of Building Regulations and Standards
Construction Supervisor

CS-115321 Expires: 09/25/2024

CATHERINE L KURCZAK
45 HOBART TERRACE
BRAintree MA 02184



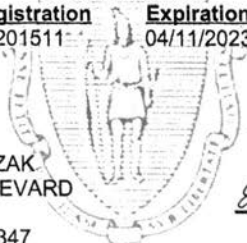
Commissioner *Layla R. Demile*

THE COMMONWEALTH OF MASSACHUSETTS
Office of Consumer Affairs & Business Regulation
HOME IMPROVEMENT CONTRACTOR
TYPE: Individual

Registration	Expiration
201511	04/11/2023

CATHY KURCZAK

CATHERINE KURCZAK
70 LEBARON BOULEVARD
UNIT 7
LAKEVILLE, MA 02347



Edward A. Pallone
Undersecretary

OGDEN UT 84201-0029

In reply refer to: 4077550277
Mar. 09, 2015 LTR 4167C 0
91-1914868 000000 00
00040704
BODC: TE

HABITAT FOR HUMANITY INTERNATIONAL
INC
HABITAT FOR HUMANITY INTRNL PARENT
% EDWARD K QUIBELL - CFO/SR VP
121 HABITAT ST
AMERICUS GA 31709-3423



052913

Employer Identification Number: 91-1914868
Group Exemption Number: 8545
Person to Contact: Ms Benjamin
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Jan. 20, 2015, request for information about your tax-exempt status.

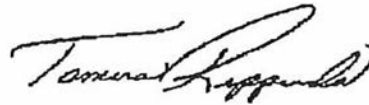
Our records indicate that you were issued a determination letter in January 1987, and that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Based on the information supplied, we recognized the subordinates named on the list you submitted as exempt from Federal income tax under section 501(c)(3) of the Code.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106 and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Tamera Ripperda
Director, Exempt Organizations



Help build it!

September 29, 2015

HFH Greater Boston
240 Commercial St 4th floor
Boston, MA 02109

RE: 501(c)(3) Letter for HFH Greater Boston, Partner ID# 0072-1721

Dear Affiliate Leader:

This letter will confirm that HFH Greater Boston, with employer identification number 04-2994233, is considered a subordinate under the group tax exemption umbrella of Habitat for Humanity International, Inc. ("HFHI") under Section 501(c)(3) of the Internal Revenue Code.

The group exemption number assigned to HFHI by the IRS is 8545. This number may be provided to prospective donors, foundations and other grant organizations as they request it and is required on certain IRS forms.

Enclosed is a copy of the determination letter dated March 9, 2015, provided by the IRS as evidence of HFHI's tax exempt status as well as its group exemption. The determination letter, together with this letter, confirms HFH Greater Boston's subordinate status and provides evidence of its tax exempt status under Section 501(c)(3) of the Code.

In partnership,

Beverly Huffman
Director, US/Canadian Support Services Center
Habitat for Humanity International 877-434-4435
USSupportCenter@habitat.org · habitat.org | **Habitat. We build.**

Enclosure



We build strength, stability, self-reliance and shelter.

March 16, 2021

HFH of Greater Boston
240 Commercial St 4th floor
Boston, MA 02109

RE: HFH of Greater Boston, Tax Exempt Verification #04-2994233

Dear Affiliate:

This letter will confirm that HFH of Greater Boston, with employer identification number 04-2994233 is considered a subordinate under the group tax exemption umbrella of Habitat for Humanity International, Inc. ("HFHI") under Section 501(c)(3) of the Internal Revenue Code.

The group exemption number assigned to HFHI by the IRS is 8545. This number may be provided to prospective donors, foundations and other grant organizations as they request it and is required on certain IRS forms.

Enclosed is a copy of the determination letter dated Feb. 4, 2020 provided by the IRS as evidence of HFHI's tax exempt status as well as its group exemption. The determination letter, together with this letter, confirms HFH of Greater Boston, subordinate status and provides evidence of its tax-exempt status under Section 501(c)(3) of the Code.

In partnership,

A handwritten signature in blue ink, appearing to read "Jim Mellott".

Jim Mellott
VP Finance

Enclosure

285 Peachtree Center Ave. NE, Suite 2700, Atlanta, GA 30303-1220 USA

322 W. Lamar St., Americus, GA 31709-3543 USA (229) 924-6935 toll-free (800) 422-4828 fax (229) 928-8811 habitat.org



Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077967774
Feb. 04, 2020 LTR 4167C 0
91-1914868 000000 00

00022612

BODC: TE

HABITAT FOR HUMANITY INTERNATIONAL
INC
HABITAT FOR HUMANITY INTRNL PARENT
% LEGAL DEPARTMENT
270 PEACHTREE ST NW STE 1300
ATLANTA GA 30303-1246

015435

Employer identification number: 91-1914868
Group exemption number: 8545

Dear Taxpayer:

This is in response to your request dated Jan. 09, 2020, for information about your tax-exempt status.

Our records indicate we issued a determination letter to you in January 1987, and you're currently exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also recognized the subordinates on the list you submitted as exempt from federal income tax under IRC Section 501(c)(3).

For federal income tax purposes, donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106 and 2522.

Because IRC Section 170(c) describes your subordinate organizations, donors can deduct contributions they make to them.

Please refer to www.irs.gov/charities for information about filing requirements. Specifically, IRC Section 6033(j) provides that, if you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

In addition, each subordinate organization is subject to automatic revocation if it doesn't file a required return or notice for three consecutive years. Subordinate organizations can file required returns or notices individually or as part of a group return.

For tax forms, instructions, and publications, visit www.irs.gov or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).

4077967774
Feb. 04, 2020 LTR 4167C 0
91-1914868 000000 00
00022613

HABITAT FOR HUMANITY INTERNATIONAL
INC
HABITAT FOR HUMANITY INTRNL PARENT
% LEGAL DEPARTMENT
270 PEACHTREE ST NW STE 1300
ATLANTA GA 30303-1246

Sincerely yours,

Stephen A. Martin

Stephen A. Martin
Director, EO Rulings & Agreements

FINANCIALS



Financial Narrative

Implementation plan and development schedule

We anticipate completing the design of the 25 affordable homes approximately 46 months after tentative designation, including design review by the Mayor's Office of Housing and other City agencies. During the design period, we expect to meet with and invite neighbors and community groups to collaborate with us to design a project that reflects guidelines proposed by neighborhood groups. After completion of the design, we will apply for a building permit to trigger the zoning relief process within 4 weeks. We expect that the permitting and approval process will take approximately 5 months to obtain the following required regulatory approvals:

We anticipate the issuance of a building permit about 12-14 months after tentative designation at which time all development financing will be committed. Within 4 weeks of the building permit issuance, we plan a construction start and anticipate completion of the project within 36-44 months. Key milestone dates, assuming tentative designation in February 2023, are indicated in the Development Timetable Form, although the exact dates will be predicated on actual the date of tentative designation.

Sources Of Debt And Equity For The Total Project Cost

Equity

We will secure \$3,500,000 in funding through fundraising and the sale of selected mortgages in our portfolio to First Republic Bank.

In addition to being developer and builder, Habitat for Humanity Greater Boston is the loan originator providing new homeowners with a zero percent or zero percent-equivalent mortgages based on each household's ability to afford pay a monthly mortgage payment. Our approach is to strategically leverage our mortgage portfolio to generate capital for new construction by selectively selling mortgages. As the bank for our homeowners, we have a consistent and substantial monthly cash flow from mortgage payments which is available for future development projects, such as the Parker and Terrace Street Development . Currently, we have a mortgage portfolio valued at \$6,000,000 in terms of outstanding balances, which we monetize on a selective basis to finance new construction.

At the anticipated start of construction, the projected value of our mortgage portfolio will be approximately \$10,400,000, which we will monetize to finance new construction through the sale of selected mortgages to First Republic Bank or other banking institution. We will earmark \$3,000,000 from the proceeds of this sale for the Parker and Terrace Street Development if we are designated as developer.

Cash on Hand

We have \$2,000,000 cash in hand, of which \$1,500,000 will be earmarked for the Parker and Terrace Street Development as is indicated in the sources of funding in our proposal's Preliminary Development Budget Form and our submitted Developer's Statement of Qualifications and Financial Responsibility Part II ("5. Sources and amount of cash available to developer to meet equity requirements of the proposed undertaking"). We expect to supplement these funds with the proceeds, totaling \$2,000,000, from the anticipated sale of mortgages to First Republic Bank (or other banking institution), scheduled in June 2023, with others to follow.

Philanthropic Fundraising

We will supplement cash on hand with a minimum of \$500,000 in philanthropic fundraising. In addition to the monetization of assets (through the sale of mortgages in our portfolio), Habitat for Humanity Greater Boston largely self-finances projects through the generosity of donors. We anticipate that we will raise an

average of \$2,400,000 on an annual basis over the next three years, a portion of which will be designated to the Parker and Terrace Street Development.

Debt

Dedham Savings Bank has provided a Letter of Interest in financing up to \$500,000 through a line of credit to support Habitat Greater Boston's proposed Parker and Terrace Street Development. We are currently negotiating an increase to \$1,500,000 through an expanded line of credit with Dedham Savings Bank, which we anticipate being in place by the start of construction.

MOH Funding

We will apply for MOH funding totaling \$3,750,000 (for 25 units). Our understanding is that MOH will make available up to \$150,000 per affordable homeownership unit if we are qualified. Please note that 100% of the units in our proposed Parker and Terrace Street Development will be homeownership units affordable to households earning 40%-80% of Area Median Income (AMI). We will also apply for \$650,000 in Haz-Mat remediation funds as stated in the RFP.

Assumptions Regarding Financing Terms On Acquisitions, Pre-Development, Construction, And Permanent Loans

Habitat for Humanity Greater Boston will self-finance this project without having to secure construction loans or conventional permanent loans. As indicated, Habitat for Humanity Greater Boston will apply for MOH funding totaling \$4,400,000 but will require no other additional subsidies or other types of resources from the City of Boston, through MOH.

Dedham Savings Bank has provided a Letter of Interest in financing up to \$500,000 through a line of credit to support Habitat Greater Boston's proposed Parker and Terrace Street Development. This is an unsecured loan.

We are currently negotiating a \$1,500,000 expanded line of credit with Dedham Savings Bank, which we anticipate being closed by the start of construction. This will be a non-recourse loan with an interest rate of prime minus 0.50%, with a floor of 2.75%

Calculation Of Total Project Costs

Our total construction and development budget estimate for our proposed Parker and Terrace Street Development is \$9,600,036, with an average \$384,001 per unit cost. The project costs indicated in our Preliminary Development Budget Form are based on hard costs of Habitat Greater Boston's projects currently under construction, adjusted for this project and informed by Habitat Greater Boston's long experience building over 130 units of multi-family affordable home ownership buildings in the City and the metropolitan area. In keeping with the Habitat for Humanity model, volunteers provide approximately 70% labor. Additionally, with the benefit of corporate donations of material and the generosity of sub-contractors who, in some cases, provide discounted or at-cost services, we are able to build at a lower cost—and sell homes affordable to low-income households. The Development Budget also accounts for additional costs associated with the demolition of the barn structure, related site work and a premium for a high quality of ecological and sustainable landscape design that we believe will be in keeping with the intent of the Roslindale Wetlands Urban Wild.

Support For Habitat For Humanity Homeowners

Habitat Greater Boston acts as the bank for our homeowners. We ensure that a family's monthly payments are no more than 25%-30% of their monthly gross income including their mortgage payment, real estate taxes, and condominium fees. As mortgagor, Habitat Greater Boston has the ability to offer a zero % interest rate with no down payment required. In lieu of a down payment, Habitat families contribute 250-300 hours of sweat equity on the construction site building their homes with volunteers. The monthly mortgage payments for our homeowners will be based on an amount affordable to them based on their household income which never exceeds 80% AMI---and typically is in the 50%-60% AMI range. Our partnership with these families continues even after they move in their new home. As the bank, we can work with Habitat families in the event that a homeowner loses a job, falls ill, or has any sort of financial hardship to lower payments until they are able to reach some measure of financial stability again. Habitat Greater Boston seeks to maximize the public benefit by ensuring that our families become successful homeowners. Our Homeowner Services Department begins with the family selection process. All our families must meet work and financial guidelines; be in critical need of affordable housing; able to pay an affordable mortgage; and willing to partner with our organization. Critical need can be anything from unsafe living environments with poor ventilation and rodent infestation to cramped living quarters in extremely dangerous areas. Every family is different, and each case is unique. Their ability to pay takes into account their work history, income level, credit score, and general finances. In addition, our families complete home ownership education courses sponsored by Habitat Greater Boston. Through our family selection, we are providing deserving, low-income families the opportunity of homeownership.

Price

Proposal

Habitat for Humanity Greater Boston proposes a price in the amount of Eleven Hundred dollars (\$1,100.00) for the purchase of the 11 parcels composing 778-796 Parker Street and 77 Terrace Street. We are offering less than the appraised value due to our status as a 501(c)3 non-profit organization and our development plan to maximize the public and community benefit by building efficient and affordable homes while focusing on Development without Displacement objectives, and public facing, garden and community space. We believe that community stability through home ownership provides the greater community many benefits and economic rewards, which warrants a price below the appraised value of this property. Our offered price is also based on several of the following critical factors:

- The high cost of providing affordable home- ownership opportunities in an expensive real estate market. Because of our philanthropic financial model, the acquisition price for vacant parcels is a major determinant of our ability to build affordable homes and meet our mission. Our capacity to offer the appraised value of this property is constrained by the fact that we do not seek access to conventional financing, and we do not rely on public subsidies. In the expensive Boston real estate market, as a 501(c)3 non-profit organization, we are significantly limited in our financial capacity to buy vacant property for development at market value. This presents a serious impediment to achieving our mission to create homeownership opportunities to Boston families earning less than 80% of the Area Median Income (AMI). A discounted land price allows us to create more homeownership opportunities to low-income families to a greater extent than we would if we paid the appraised value of development sites
- The high cost of construction post-pandemic.
- The additional cost of building affordable homes along Passive House net zero/zero carbon guidelines. We believe that every effort we make towards this approach not only aligns with the City's Green Building goals but benefits low-income homeowners in terms ensuring a safe, healthy envi-

ronment. The upfront cost of building to Passive House standards typically requires a premium above the cost of conventional construction. A below-market acquisition price would allow more funding toward these costs that would otherwise be prohibitive if we paid the appraised value. Over the mid- and long-term, net zero/zero carbon measures will benefit future homeowners by ensuring that utility bills will be very low and a minimal burden on the household budgets of low-income families.

Sources and amount of cash available to developer to meet equity requirements of the proposed undertaking:

a. In banks:		
NAME AND ADDRESS OF BANK	Amount	
Brookline Bank	\$2,006,332	
Dedham Savings Bank-Line of Credit	\$ 500,000	
b. By loans from affiliated or associated corporations or firms:	0	
c. By sale of readily salable assets:	Market Value \$ 6,000,000	Mortgages or Liens 0

1. Audited Financial Statement

HABITAT FOR HUMANITY
GREATER BOSTON, INC.

FINANCIAL STATEMENTS AND
INDEPENDENT AUDITORS' REPORT

YEARS ENDED JUNE 30, 2021 AND 2020

HABITAT FOR HUMANITY GREATER BOSTON, INC.
TABLE OF CONTENTS
YEARS ENDED JUNE 30, 2021 AND 2020

	<u>Page No.</u>
INDEPENDENT AUDITORS' REPORT	2
 FINANCIAL STATEMENTS	
Statements of Financial Position	3
Statement of Activities and Changes in Net Assets.....	4
Statement of Functional Expenses Year ended June 30, 2021	5
Statement of Functional Expenses Year ended June 30, 2020	6
Statements of Cash Flows	7
Notes to Financial Statements.....	8-21

CAIN, BOURRET, JARRY & CRESSMAN LLC

CERTIFIED PUBLIC ACCOUNTANTS

Steven R. Bourret, CPA, CGMA
Carmel Pappas, CPA
Kara M. McSwiggin, CPA, MSA

David A. Jarry, CPA, MST
Kevin T. Jarry, CPA, MBA, MST
Renée B. Plummer, CPA

Kristin M. Cressman, CPA, MST
Beth A. Weeks, EA
Richard A. Kerouac, EA

INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
Habitat for Humanity Greater Boston, Inc.
Boston, Massachusetts

We have audited the accompanying financial statements of HABILITAT FOR HUMANITY GREATER BOSTON, INC. (a Massachusetts not-for-profit corporation), which comprise the statements of financial position as of June 30, 2021 and 2020, and the related statements of activities and changes in net assets, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of HABILITAT FOR HUMANITY GREATER BOSTON, INC. as of June 30, 2021 and 2020, changes in its net assets, functional expenses and cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Cain, Bourret, Jarry & Cressman LLC

Dracut, Massachusetts
February 9, 2022

1175 Mammoth Road • Dracut, MA 01826 • Voice: (978) 957-1421 • Fax: (978) 957-3480
12 Parmenter Road, Building D, Unit 3 • Londonderry, NH 03053 • Voice: (603) 432-9222 • Fax: (603) 432-0911

HABITAT FOR HUMANITY GREATER BOSTON, INC.
STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2021 AND 2020

ASSETS

	2021	2020
CURRENT ASSETS		
Cash	\$ 1,947,474	\$ 876,602
Cash - New Markets Tax Credit (NMTC)	2,257	2,110
Promises to give	158,583	249,208
Housing - land and construction in progress	1,512,085	1,954,313
Inventory - Restore	289,763	225,047
Current portion of mortgages receivable	299,053	117,782
Total Current Assets	4,209,215	3,425,062
PROPERTY AND EQUIPMENT		
Leasehold improvements	49,714	49,714
Office equipment	35,831	35,831
Furniture and fixtures	23,070	23,070
Vehicles	22,500	22,500
Less: accumulated depreciation	(105,922)	(98,163)
Net Property and Equipment	25,193	32,952
OTHER ASSETS		
Loan receivable	7,743	-
Mortgages receivable, net of current portion	4,878,736	5,303,475
Investment in NMTC	-	1,925,054
Closing costs and fees, net of accumulated amortization of \$0 in 2021 and \$89,626 in 2020 - NMTC (Note 2)	-	101,007
Security deposits	60,628	60,628
Audit and tax fee reserve fund - NMTC (Note 12)	-	4,069
Flexcap Note reserve	-	13,720
Total Other Assets	4,947,107	7,407,953
TOTAL ASSETS	\$ 9,181,515	\$ 10,865,967
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Line of credit	\$ 228,050	\$ 342,260
Accounts payable and accrued expenses	235,051	293,372
Agency accounts	4,861	9,589
Citibank NMTC Loan - NMTC (Note 12)	-	2,660,790
FlexCap Note Payable, current portion	-	26,996
Massachusetts Housing Finance Authority loan, current portion	51,830	50,552
Payroll Protection Program Loan (PPP)	229,610	250,867
Total Current Liabilities	749,402	3,634,416
LONG-TERM LIABILITIES		
Economic Injury Disaster (EIDL) Loan	149,900	149,900
Massachusetts Housing Finance Authority loan, net of current portion	103,099	104,377
Total Long-Term Liabilities	252,999	254,277
TOTAL LIABILITIES	1,002,401	3,888,693
NET ASSETS		
Unrestricted	8,179,114	6,713,821
Temporarily restricted	-	263,453
Total Net Assets	8,179,114	6,977,274
TOTAL LIABILITIES AND NET ASSETS	\$ 9,181,515	\$ 10,865,967

See independent auditors' report and notes to financial statements

Page 3

HABITAT FOR HUMANITY GREATER BOSTON, INC.
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS
FOR THE YEAR ENDED JUNE 30, 2021

(With Summarized Financial Information for the Year Ended June 30, 2020)

	<u>Without Donor</u>	<u>With Donor</u>		
	<u>Restrictions</u>	<u>Restrictions</u>	<u>2021</u>	<u>2020</u>
SUPPORT AND REVENUES				
Support				
Contributions	\$ 994,942	\$ 59,895	\$ 1,054,837	\$ 810,767
Grants	29,922	210,037	239,959	-
Donated services and materials	1,219,790	-	1,219,790	914,604
Special events, net	309,413	-	309,413	406,399
ReStore revenue	1,092,569	-	1,092,569	849,004
Net assets released from restrictions				
Satisfaction of program/donor restrictions	533,385	(533,385)	-	-
Total support	4,180,021	(263,453)	3,916,568	2,980,774
Revenues				
Sale of homes	1,435,100	-	1,435,100	363,600
Gain on foreclosed home	92,467	-	92,467	-
Mortgage discount amortization	229,884	-	229,884	115,500
Miscellaneous income	9,812	-	9,812	10,994
Other income (POB debt forgiveness)	736,129	-	736,129	-
Other income (PPP forgiveness)	250,857	-	250,857	-
Other income (EIDL Advance)	-	-	-	10,000
Interest income	9,997	-	9,997	20,247
Total revenues	2,764,246	-	2,764,246	520,341
TOTAL SUPPORT AND REVENUES	6,944,267	(263,453)	6,680,814	3,501,115
FUNCTIONAL EXPENSES				
Program service expenses - family services	398,453	-	398,453	283,550
Program service expenses - pre/post conveyance	2,418,422	-	2,418,422	962,720
Program service expenses - ReStore	2,007,416	-	2,007,416	1,789,744
General and administrative	173,087	-	173,087	177,151
Fundraising expenses	481,597	-	481,597	381,073
TOTAL FUNCTIONAL EXPENSES	5,478,974	-	5,478,974	3,604,238
CHANGES IN NET ASSETS	1,465,293	(263,453)	1,201,840	(103,123)
NET ASSETS, BEGINNING OF YEAR	6,713,821	263,453	6,977,274	7,080,397
NET ASSETS, END OF YEAR	\$ 8,179,114	\$ -	\$ 8,179,114	\$ 6,977,274

See independent auditors' report and notes to financial statements

Page 4

HABITAT FOR HUMANITY GREATER BOSTON, INC.
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2021

	2021						
	Program Services				Supporting Services		Totals
	Cost of Homes		ReStore	Total Program Expenses	General and Administrative Expenses		
	Family Services	Sold and Program Support			Fundraising Expenses	Fundraising Expenses	
Salaries	\$ 129,051	\$ 380,550	\$ 359,291	\$ 868,892	\$ 93,881	\$ 329,480	\$ 1,292,253
Payroll taxes	13,153	35,693	33,734	82,580	8,967	29,860	121,407
Benefits	23,290	60,439	57,562	141,291	12,113	28,779	182,183
Salaries and related expenses	165,494	476,682	450,587	1,092,763	114,961	388,119	1,595,843
Advertising	-	-	1,022	1,022	336	72	1,430
Americorps	-	23,764	-	23,764	-	-	23,764
Amortization closing costs	-	101,007	-	101,007	-	-	101,007
Applicant costs	26,109	-	-	26,109	-	-	26,109
Bank charges	-	-	28,345	28,345	7,282	-	35,627
Conferences	1,588	-	-	1,588	-	-	1,588
Consultants	-	76,166	-	76,166	407	30,601	107,174
Cost of goods sold	-	-	15,048	15,048	-	-	15,048
Cost of homes sold	-	1,163,598	-	1,163,598	-	-	1,163,598
Depreciation	-	7,759	-	7,759	-	-	7,759
Dues, fees and subscriptions	-	31,089	-	31,089	-	-	31,089
Equipment rental	-	11,696	7,851	19,547	-	-	19,547
Insurance	-	17,678	-	17,678	-	-	17,678
Interest	13,699	11,847	-	25,546	-	-	25,546
Mortgage discount expense	-	247,912	-	247,912	-	-	247,912
Office expenses and supplies	3,713	2,985	6,144	12,842	4,659	2,650	20,151
Postage	385	362	-	747	472	3,673	4,892
Printing	-	375	-	375	-	7,488	7,873
Professional fees	23,379	23,379	23,379	70,136	23,379	-	93,515
Real estate taxes	-	6,940	-	6,940	-	-	6,940
Rent	23,696	26,594	342,974	396,264	13,818	32,637	441,719
Repairs and maintenance	-	37,057	297	37,354	-	-	37,354
Site cleaning and disposal	-	37,891	41,186	79,077	-	-	79,077
Tithe expenses	-	87,211	-	87,211	-	-	87,211
Truck expenses	-	-	15,272	15,272	-	-	15,272
Telephone and information technology	5,580	12,195	8,453	26,228	5,629	13,153	45,010
Travel	2,034	10,606	2,293	14,933	981	247	16,161
Utilities	5,555	1,629	36,711	43,895	1,163	2,947	48,005
	<u>\$ 271,232</u>	<u>\$ 2,418,422</u>	<u>\$ 979,562</u>	<u>\$ 3,669,215</u>	<u>\$ 173,087</u>	<u>\$ 481,597</u>	<u>\$ 4,323,899</u>
Donated services and goods:							
ReStore gifts in-kind	-	-	1,027,854	1,027,854	-	-	1,027,854
Professional fees	127,221	-	-	127,221	-	-	127,221
	<u>127,221</u>	<u>-</u>	<u>1,027,854</u>	<u>1,155,075</u>	<u>-</u>	<u>-</u>	<u>1,155,075</u>
Total	<u>\$ 398,453</u>	<u>\$ 2,418,422</u>	<u>\$ 2,007,416</u>	<u>\$ 4,824,290</u>	<u>\$ 173,087</u>	<u>\$ 481,597</u>	<u>\$ 5,478,974</u>

See independent auditors' report and notes to financial statements

HABITAT FOR HUMANITY GREATER BOSTON, INC.
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2020

	2020						
	Program Services				Supporting Services		Totals
	Family Services	Cost of Homes Sold and Program Support	ReStore	Total Program Expenses	General and Administrative Expenses	Fundraising Expenses	
Salaries	\$ 114,076	\$ 348,206	\$ 393,364	\$ 855,646	\$ 82,550	\$ 203,651	\$ 1,141,847
Payroll taxes	9,475	29,431	33,533	72,439	6,711	17,219	96,369
Benefits	<u>12,382</u>	<u>44,501</u>	<u>36,219</u>	<u>93,102</u>	<u>7,281</u>	<u>17,397</u>	<u>117,780</u>
Salaries and related expenses	135,933	422,138	463,116	1,021,167	96,542	238,267	1,355,996
Advertising	-	570	2,265	2,835	773	750	4,358
AmeriCorps	-	25,596	-	25,596	-	-	25,596
Amortization closing costs	-	13,789	-	13,789	-	-	13,789
Applicant costs	6,204	-	-	6,204	-	-	6,204
Bad debt expense	17,217	-	-	17,217	-	-	17,217
Bank charges	-	-	18,748	18,748	4,937	-	23,685
Conferences	367	-	-	367	-	-	367
Consultants	-	29,017	-	29,017	-	88,422	117,439
Cost of goods sold	-	-	8,382	8,382	-	-	8,382
Cost of homes sold	-	150,924	-	150,924	-	-	150,924
Depreciation	-	7,545	-	7,545	-	-	7,545
Dues, fees and subscriptions	-	39,193	2,400	41,593	-	-	41,593
Equipment rental	-	10,837	386	11,223	-	-	11,223
Insurance	-	20,846	-	20,846	-	-	20,846
Interest	27,398	22,729	-	50,127	-	-	50,127
Mortgage discount expense	-	97,245	-	97,245	-	-	97,245
Office expenses and supplies	9,530	4,739	7,110	21,379	7,773	4,703	33,855
Payroll services	501	1,330	1,046	2,877	261	663	3,791
Postage	618	1,226	-	1,844	380	5,113	7,337
Printing	-	1,272	-	1,272	-	8,506	9,778
Professional fees	-	-	-	-	46,928	-	46,928
Real estate taxes	-	1,950	-	1,950	-	-	1,950
Rent	18,098	21,866	328,911	368,873	10,556	24,882	404,311
Repairs and maintenance	-	20,116	1,124	21,240	-	-	21,240
Site cleaning and disposal	-	40,589	34,643	75,232	-	-	75,232
Tithe expenses	-	6,631	-	6,631	-	-	6,631
Truck expenses	-	1,495	24,273	25,768	-	-	25,768
Telephone and information technology	3,029	4,147	4,347	11,523	2,299	5,258	19,080
Travel	2,034	14,222	3,375	19,631	5,814	2,425	27,870
Utilities	<u>1,523</u>	<u>2,708</u>	<u>26,865</u>	<u>31,096</u>	<u>888</u>	<u>2,094</u>	<u>34,078</u>
	<u>\$ 222,450</u>	<u>\$ 962,720</u>	<u>\$ 926,991</u>	<u>\$ 2,112,161</u>	<u>\$ 177,151</u>	<u>\$ 381,073</u>	<u>\$ 2,670,385</u>
Donated services and goods:							
ReStore gifts in-kind	-	-	872,753	872,753	-	-	872,753
Professional fees	<u>61,100</u>	<u>-</u>	<u>-</u>	<u>61,100</u>	<u>-</u>	<u>-</u>	<u>61,100</u>
	<u>61,100</u>	<u>-</u>	<u>872,753</u>	<u>933,853</u>	<u>-</u>	<u>-</u>	<u>933,853</u>
Total	<u>\$ 283,550</u>	<u>\$ 962,720</u>	<u>\$ 1,799,744</u>	<u>\$ 3,046,014</u>	<u>\$ 177,151</u>	<u>\$ 381,073</u>	<u>\$ 3,604,238</u>

See Independent auditors' report and notes to financial statements
Page 6

HABITAT FOR HUMANITY GREATER BOSTON, INC.
STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2021 AND 2020

	2021	2020
CASH FLOWS FROM OPERATING ACTIVITIES		
Change In Net Assets	\$ 1,201,840	\$ (103,123)
Adjustments to reconcile change in net assets to net cash provided by (used in) operating activities:		
Bad debt expense	-	17,217
Depreciation	7,759	7,545
Amortization	101,007	13,789
Donated furniture and fixtures	-	(4,500)
Mortgage amortization income	(229,884)	(115,500)
Imputed interest expense	247,912	97,245
POB debt forgiven	(736,129)	(19,248)
Payroll Protection Plan (PPP) Loan Forgiven	(250,857)	-
Sale of mortgages	799,619	-
Sale of housing and property financed with mortgage receivable, net of cost	(133,002)	(363,600)
Decrease (increase) in assets:		
Promises to give	90,625	157,339
Inventory - Restore	(64,716)	23,749
Flexcap Note reserve	13,720	-
Loan receivable	(7,743)	17,216
Audit and tax fee reserve fund	4,069	8,146
Increase (decrease) in liabilities:		
Accounts payable and accrued expenses	(58,321)	34,487
Agency accounts	(4,728)	5,747
Net Cash Provided (Used) by Operating Activities	981,171	(223,491)
CASH FLOWS FROM INVESTING ACTIVITIES		
Construction of housing and improvements	(567,237)	(384,617)
Cash received from mortgage notes receivable	568,534	455,387
(Increase) decrease in cash required for NMTC	-	11,630
Net Cash Provided (Used) in Investing Activities	1,297	82,400
CASH FLOWS FROM FINANCING ACTIVITIES		
Principal payments on long-term debt	(141,206)	(246,823)
Proceeds from Payroll Protection Plan (PPP) Loan	229,610	250,857
Proceeds from Economic Injury Disaster (EIDL) Loan	-	149,900
Net Cash Provided by Financing Activities	88,404	153,934
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	1,070,872	12,843
CASH AND CASH EQUIVALENTS - BEGINNING	876,602	863,759
CASH AND CASH EQUIVALENTS - ENDING	\$ 1,947,474	\$ 876,602
SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION:		
Interest paid	\$ 25,546	\$ 50,127

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2021 AND 2020

Note 1. ORGANIZATION AND PURPOSE

Habitat for Humanity Greater Boston, Inc. (the Organization) is a charitable nonprofit Massachusetts corporation organized in December 1987. It is an affiliate of Habitat for Humanity International (HFHI), an organization with a grassroots structure which is dedicated to eliminating poverty housing from the earth and making poverty housing and homelessness socially and politically unacceptable in the world. The Organization's mission is to help low-income families become homeowners in the Greater Boston area using the Habitat model of volunteer labor, donated materials and charitable contributions to construct housing. Each Habitat family helps build their home by providing at least 300 hours of "sweat equity". When the home is complete, Habitat sells it to the family for an affordable price and provides the family with a no-interest mortgage loan. The Organization is responsible for raising funds for all of its projects, its annual operating budget and for "tithing" 10% of its unrestricted revenues to HFHI projects overseas.

The Organization's program divisions are as follows:

Family services: The Family Service division interacts with applicants for the Habitat homeowner program and assists the Family Selection Committee with the family selection process. It also monitors the "sweat equity" program and conducts a series of education classes on topics relating to homeownership, including budgeting, credit and financial management, condominium associations, home repairs and legal matters. Existing Habitat families with financial problems receive credit counseling and, when appropriate, referrals to other social service programs. The Organization also helps families living in condominium associations communicate effectively with each other so they can manage the association's finances. In addition, the Organization promotes energy efficiency and monitors those Habitat projects where solar energy panels have been installed.

Construction and Sale of Habitat Homes: The Organization builds homes in partnership with low-income families, volunteers, and donors. The division identifies and acquires land for projects, works with architects on the design of homes, and works with lawyers on permitting and real estate documentation. It also obtains permits for projects and functions as a general contractor during construction, including procuring construction materials and managing subcontractors.

ReStore Operations: In 2011 the Organization opened up its Habitat ReStore. The ReStore is a retail business that accepts donations of new and gently-used building materials, furniture, appliances, and housewares and resells them to the general public through a retail store front warehouse. The Habitat ReStore helps to protect the environment by keeping hundreds of tons of material out of our landfills and provides a low-cost outlet for home improvement materials, and making home renovations and improvements more affordable.

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Financial Statement Presentation

The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with generally accepted accounting principles in the United States of America (GAAP). Net assets, revenues, expenses, gains and losses are classified based on the existence or absence of donor-imposed restrictions. If donor-imposed restrictions are met in the same period as the gift is received, the amount is reported as unrestricted revenues. Accordingly, net assets of the Organization and changes therein are classified and reported as follows:

- *Net assets without donor restrictions* – Net assets whose use is not subject to donor-imposed stipulations. Contributions are available for unrestricted use unless specifically restricted by the donor.
- *Net assets with donor restrictions* – Net assets that are either available for use, but expendable only for those purposes specified by the donor, or net assets subject to donor-imposed stipulations that they be maintained permanently by the Organization.

See independent auditors' report.
Page 8

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Financial Statement Presentation (Continued)

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statement of activities. Contributions restricted for capital improvements are released to unrestricted revenue at the time funds are expended for the specified improvement.

Use of Estimates

The preparation of financial statements in conformity with generally accepted accounting principles in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Cash and Cash Equivalents

The Organization considers all highly liquid investments with an original maturity of three months or less to be cash equivalents. There were no cash equivalents for the years ended June 30, 2021 and 2020.

Pledges and Other Receivables

Receivables, other than mortgages, are stated at the amount management expects to collect from outstanding balances. Management provides for uncollectible amounts through a charge to expense, based on its assessment of the current status of individual accounts. Bad debt expense for the year ended June 30, 2021 and 2020 was \$0 and \$17,217, respectively.

Promises to Give

Unconditional promises to give are recognized as assets, net of allowances, and as revenue in the period in which the promises are made. Conditional promises to give are recognized only when the conditions on which they depend are substantially met and when the promises become unconditional. Unconditional promises to give are recorded, in the year received, at the present value of estimated future cash flows using a risk adjusted discount rate. Amortization of the discount is included in contribution revenue.

Unconditional promises to give are periodically reviewed to estimate an allowance for doubtful accounts. Management estimates the allowance by review of historical experience and a specific review of collection trends that differ from scheduled collections on individual promises. As of June 30, 2021 and 2020, management has determined any allowance would be immaterial.

See independent auditors' report.
Page 9

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Mortgage Receivables

The Organization is a charity engaged in providing homeownership opportunities to low-income families living or working in the Greater Boston area. Upon completion of construction, the home is conveyed to a selected family for an affordable price. The Organization takes back a non-interest bearing note and the note is secured by a first mortgage on the home. The Organization takes a second note, secured by a second mortgage, for the difference between the first note and the home's fair market value as determined by an independent appraisal. The first note receivable is then discounted in accordance with Internal Revenue Code Section 1288. The discounted amount, which represents the underlying mortgage receivable, is recorded at its face value less the calculated discount. The Organization utilizes the rates determined by the applicable long-term Federal Funds rate in effect as of the date of transfer to the homeowner. The mortgages have an original maturity of 20 to 35 years and arise in connection with the Organization's homebuilding initiatives in Greater Boston. These mortgages are secured by the underlying real estate that is located in the Greater Boston area.

The underlying real estate is transferred to the homeowner at fair market value. The fair value of the homes are equal to the related mortgage note balances, and due to the secured creditor status of the Organization all mortgage balances are deemed fully collectible. The Organization believes that no allowance for doubtful accounts is necessary.

Inventory

Inventory consists of donated building supplies and other home improvement items to be sold at the Organization's ReStore. Purchased inventory is valued at cost. Donated inventory is calculated using a three-month average of sales. At June 30, 2021 and 2020 inventory was valued at \$289,763 and \$225,047, respectively.

House Construction in Progress

Property held for development consists of costs to develop homes for projects located in Massachusetts. Property held for development is recorded on the cost method. Costs associated with the acquisition, development, and construction of property, including property taxes, interest, and associated general and administrative costs are capitalized as a cost of the property, and are reported net of contingent liabilities.

The Organization reviews its investment in real estate for impairment whenever events or changes in circumstances indicate that the carrying value of such property may not be recoverable. Recoverability is measured by a comparison of the carrying amount of the real estate to the future net undiscounted cash flow expected to be generated by the property and any estimated proceeds from the eventual disposition of the real estate. If the real estate is considered to be impaired, the impairment to be recognized is measured at the amount by which the carrying amount of the real estate exceeds the fair value of such property. There were no impairment losses recognized in 2021 or 2020.

As of June 30, 2021 and 2020, the Organization had 4 properties and 5 properties, respectively, that were held for development.

See independent auditors' report.
Page 10

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Property and Equipment

Property and equipment purchased by the Organization with unrestricted funds are recorded at cost. Donated property and equipment is recorded at fair value at the date of the gift. Depreciation is provided for in amounts sufficient to amortize the cost of depreciable assets to operations over their estimated service lives. Improvements, including planned major maintenance activities are capitalized, while expenditures for routine maintenance and repairs are charged to expense as incurred. When assets are sold or are otherwise disposed of, the appropriate cost and related accumulated depreciation amounts are removed from the accounts, and any gain or loss is included in the change in net assets. Depreciation expense for the years ending June 30, 2021 and 2020 was \$7,759 and \$7,545, respectively.

Property and Equipment

The Organization computes depreciation using the straight-line method over the following estimated lives:

Leasehold improvements	7 years
Office equipment	5 years
Furniture and equipment	7 years
Vehicle	5 years

Compensated Absences

Employees of the Organization are entitled to paid vacation, sick days, and other personal days off, depending on job classification, length of service, and other factors. Any unused vacation days or personal days will not be carried from one calendar year to the next and employees are not entitled to compensation for any accrued but unused vacation or personal days. Unused sick days are cumulative and may be carried from one year to the next up to a maximum of 60 days; however, employees are not entitled to compensation for any accumulated but unused sick leave.

Revenues and Support Recognition

Revenue Recognition

Effective July 1, 2020, the Organization has adopted Accounting Standards Update (ASU) No. 2014-09: Revenue from Contracts with Customers (Topic 606), as amended, as management believes the standard improves the usefulness and understandability of the Organization's financial reporting. ASC 606 is effective for annual reporting periods beginning after December 15, 2018, and interim periods within fiscal years beginning after December 15, 2019. The Organization delayed initial adoption of ASC 606 in accordance with FASB's notice on April 8, 2020.

Analysis of various provisions of this standard resulted in no significant changes in the way the Organization recognizes revenue, and therefore no changes to the previously issued audited financial statements were required on a retrospective basis. The presentation and disclosures of revenue have been enhanced in accordance with the standard.

Transfer to Homeowners

Mortgage income includes the annual amortization of the discount for the present time value of money on the primary mortgage and recognition for the release of the contingent mortgage (See Note 7) upon the premature sale by a homeowner.

See independent auditors' report.
Page 11

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Revenues and Support Recognition (Continued)

Contributions and Contributed Services

Contributions are recognized as revenue in the period received. Contributions to be received after one year are discounted at an appropriate discount rate commensurate with the risk involved.

Contributions received with donor-imposed restrictions that will lapse are reported as temporarily restricted revenues when they are received. A reclassification to unrestricted net assets is made to reflect the expiration of such restrictions in the year the restriction is met. Contributions received with donor-imposed restrictions that are met in the same year as received are reported as unrestricted.

Contributions of property and equipment without donor stipulations concerning the use of such long-lived assets are reported as unrestricted revenues. Contributions of cash or other assets to be used to acquire property and equipment with donor stipulations are reported as temporarily restricted revenues, and the restrictions are considered to be released at the time of acquisition of such long-lived assets.

Contributions of services are reported as temporarily restricted revenues and expenses at the fair value of the services received only if the services create or enhance a non-financial asset or would typically need to be purchased by the Organization if they had not been provided by individuals with those skills. A substantial number of volunteers have made significant contributions of their time to the Organization's program of building and rehabbing houses, and other supporting services. The value of this contributed time is not reflected in these financial statements since it does not require a specialized skill. However, certain other contributed services that require specialized skills, such as design work, legal services, plumbing, HVAC and electrical work are provided by individuals possessing those skills and/or licenses that would otherwise need to be purchased if not provided by donation are recognized as temporarily restricted revenue. Contributions of materials to be used in program operations are reported as revenues and expenses of the temporarily restricted net asset category at the time the materials are received.

Fundraising and Special Events

Special event revenue is primarily derived from contributions collected and fees charged for admission at various sponsored events. Special event contributions and fees are recognized as income when received.

ReStore Sales

Retail store sales represent merchandise sales of building materials, furniture, appliances, and housewares donated to the Organization. Retail store revenues are recognized when the related goods are sold. The Organization collects sales tax on Restore sales and remits the funds collected to the appropriate taxing authority.

Advertising

The Organization expenses advertising costs as they are incurred.

Income Taxes and Uncertain Tax Positions

The Organization is exempt from federal and state income taxation under Section 501(a) as an organization described in Section 501(c)(3) of the Internal Revenue Code and Section 830 CMR 63.38T.1 of Massachusetts General Laws. Since the Organization is exempt from federal and state income tax liability, no provision is made for current or deferred income tax expenses. The Organization is not a private foundation. Only unrelated business income, as defined by Section 512(a)(1) of the Code, is subject to federal or state income tax. The Organization accounts for income taxes in accordance with income tax accounting guidance in FASB ASC Topic 740, *Income Taxes*. Management is not aware of any transactions that would negatively impact the Organization's tax-exempt status.

See independent auditors' report.

Page 12

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Income Taxes and Uncertain Tax Positions

The preparation of financial statements in conformity with generally accepted accounting principles in the United States of America requires the Organization to report information regarding its exposure to various tax positions taken by the Organization. The Organization has determined whether any tax positions have met the recognition threshold and have measured the Organization's exposure to those tax positions. Management believes that the Organization has adequately addressed all relevant tax positions and that there are no unrecorded tax liabilities. Any interest or penalties assessed to the Organization would be recorded in operating expenses for the year. No interest or penalties from any tax authorities were recorded in the accompanying financial statements.

The Organization's federal tax returns and state reports for the years ended June 30, 2019 through June 30, 2021 (open years) are subject to examination by the Internal Revenue Service and Massachusetts Attorney General's Office.

Fair Value of Financial Instruments

Generally accepted accounting principles establish a framework for measuring fair value.

Fair value is the amount that would be received to sell an asset, or paid to settle a liability, in an orderly transaction between market participants at the measurement date. Accounting principles require the use of observable market data, when available, in making fair value measurements. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

The Organization's financial instruments, none of which are held for trading purposes, consist primarily of cash, accounts payable and accrued expenses. The Organization estimates the carrying amount of these financial instruments approximate their fair value recorded in the accompanying financial statements due to their short-term nature.

The carrying amount of the Organization's mortgages receivable and debt generally approximates its fair value at June 30, 2021 and 2020 as the instruments' current interest rate approximates market rates.

Functional Allocation of Expenses

The costs of providing various programs and other activities of the Organization have been summarized on a functional basis in the Statements of Activities and Statement of Functional Expenses. Directly identifiable expenses are charged to programs and supporting services. Expenses related to more than one function are allocated to programs and supporting services directly or on the basis of time records and utilization estimates made by the Organization's management. Administration expenses include those expenses that are not directly identifiable with any other specific function but provide for the overall support and direction of the Organization.

Contributed Services and Gifts in Kind

Donated materials are reported as contributions in the financial statements at their estimated fair values at the time of receipt. Donated services are similarly reported when services are performed, and which would otherwise have been purchased or performed by the Organization personnel.

See independent auditors' report.
Page 13

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Contributed Services and Gifts in Kind (Continued)

In-kind contributed goods and services were recorded as follows:

	2021	2020
Professional fees	\$ 127,221	\$ 61,100
Donated goods - Office equipment	-	4,500
Donated goods - ReStore	1,092,569	849,004
	\$ 1,219,790	\$ 914,604

Many individuals volunteer their time and perform a variety of tasks that assist the Organization with specific services related to the construction and development of the properties. However, the Organization determined it was not practical to quantify the value of these commercial services.

Investment in Partnership

Investments in partnerships or similar entities in which the Organization does not have a controlling financial interest are accounted for as equity method investments.

As of June 30, 2020, the Organization had an investment in NFH Northeast 1 Leverage Lender, LLC (the LLC) which was accounted for under the equity method. Under the equity method, the investment is carried at cost and adjusted for the Organization's share of income, losses, additional investments and cash distributions from the limited liability company. As a member of the LLC, the Organization ceases recognition of losses for financial statement purposes once the cost of the investment is reduced to zero.

Declines in the fair value of the Organization's investment in the LLC below their carrying value that are deemed to be other than temporary are reflected in the statements of operations as an impairment loss. In estimating other than temporary impairment losses, management considers many factors which include: the length of time and the extent to which the fair value has been less than carrying value, the financial condition of the LLC, and the intent and ability of the Organization to retain its investment in the LLC for a period of time sufficient to allow for any anticipated recovery in fair value, as calculated based primarily on remaining tax benefits. There were no impairment losses recognized during the years ended June 30, 2020.

Habitat NMTC is wholly owned by HFHI. On December 31, 2020, Habitat NMTC purchased all of the investor's interest, and the Organization's investment in the partnership ended. Refer to Note 13 for a more detailed description of this transaction.

Closing Costs and Fees

Closing costs and fees related to the New Markets Tax Credit (NMTC) financing, as disclosed in Note 12, are recorded at cost and amortized over the respective life of the related agreements using the straight line method, which approximates the effective interest method for purposes of the closing costs and servicing fees, as follows:

Closing costs and servicing fees	\$122,756	360 months
HGHI guarantor fee	67,877	84 months

Amortization expense amounted to \$101,007 and \$13,789 for the years ended June 30, 2021 and 2020.

See independent auditors' report.
Page 14

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 3. CONCENTRATION OF CREDIT RISK

The Organization maintains its cash balances in bank accounts at high quality credit financial institutions. The balances, at times may exceed federally insured limits (FDIC). Pursuant to Section 343 of the Dodd-Frank Wall Street Reform and Consumer Protection Act (Dodd-Frank Act), the standard maximum insurance amount was permanently raised to \$250,000. At June 30, 2021 and 2020 Habitat exceeded the FDIC insured limit by approximately \$1,696,000 and \$667,000, respectively. In addition, the financial institution is a Massachusetts chartered Savings Bank that maintains additional insurance through the Depositors Insurance Fund (DIF), a private industry sponsored insurance company. The Organization has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk. The Organization monitors the credit-worthiness of the financial institutions in which it deposits money.

The Organization's concentration of credit risk with respect to mortgages receivable depends on its partner families' ability to repay, which may vary with economic conditions within this geographic area.

Note 4. PROMISES TO GIVE

The Organization has received unconditional promises to give related to fundraising events. Unconditional promises to give that are expected to be collected within one year are recorded at net realizable value. Unconditional promises to give that are expected to be received more than a year after June 30, 2021 are recorded at the present value of their future cash flows using a risk adjusted discount rate.

As of June 30, 2021 and 2020, all promises to give were expected to be received in one year and any allowance or discount is expected to be immaterial and has not been recorded.

Note 5. LOAN RECEIVABLE

The Organization has a loan receivable from the Quincy Street Condominium Association. The Organization lent the condominium association funds to pay outstanding bills. As of June 30, 2021 the loan receivable balance due totaled \$7,743.

Prior to June 30, 2020, the Organization had loans receivable from a homeowner at the Navarre Street Condominium Association and the Quincy Street Condominium Association totaling \$17,216. As of June 30, 2020, these loans were no longer considered collectible and were written off.

Note 6. MORTGAGES RECEIVABLE

Transfers to homeowners represent the sale of houses built by the Organization in exchange for mortgage notes with no interest. As discussed in Note 2 these mortgages are payable over 20 – 35 years and discounted for the present time value of money. Mortgage payments received after 30 days are considered late and subject to the Organization's delinquency policy. Notices of filing of foreclosure will be made if payments are 90 days delinquent, the homeowner is not on a payment plan and has not been granted a grace period. The Organization has a policy of working with homeowners to ensure that accounts are brought up to date and all remedies exhausted before any legal action will commence. At June 30, 2021, the Organization had 58 loans outstanding with a gross value of \$7,093,736 and a discounted value of \$5,177,789. At June 30, 2020 the Organization had 65 loans outstanding with a gross value of \$7,613,762 and a discounted value of \$5,421,257.

During the year ended June 30, 2021, five mortgages with a principal balance of \$1,092,789 and a carrying value of \$799,619 (net of discounts) were sold to First Republic Bank for \$799,619. As a result of the sale, a discount of \$293,170 was released. There was no gain or loss recognized on this transaction, as the purchase price was equal to the carrying value of the mortgages. The transfer of these financial assets meets all of the conditions of a sale per ASC 860, *Transfers and Servicing*.

See independent auditors' report.
Page 15

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 7. CONTINGENT MORTGAGES RECEIVABLE

Homeowners who purchase housing through the Organization's program are subject to additional payments should the house be sold before the full term of the mortgage is completed. The remaining payments on the original mortgage would be due at the closing and they would be subject to a second predetermined (contingent) mortgage. Contingent mortgage receivables are not reported in the accompanying financial statements, and their outstanding balances at June 30, 2020 and 2019 totaled \$3,421,813 and \$3,208,876, respectively. The Organization recognized income from second contingent mortgages totaling \$138,500 and \$0 for the years ending June 30, 2021 and 2020, respectively.

Note 8. RESTRICTED DEPOSITS AND FUNDED RESERVES

In accordance with the note payable to Habitat for Humanity International ("the FlexCap Note"), the Organization is required to maintain a reserve balance equal to the quarterly payment of interest and principal due under the note payable agreement. As of June 30, 2021 and 2020, the balance was \$2,257 and \$2,110, respectively. During March 2021, the FlexCap Note was paid off in full. As such, the reserve balance was not required at June 30, 2021.

In accordance with the loan and security agreement with Citi NMTC CDE XVI, LLC (CDE), the Organization is required to pay to the lender an annual audit and tax expense fee. The reserve was funded at the time of the NMTC financing closing and additional deposits are not required. During December 2020, the loan was forgiven and as such, there is no reserve required as of June 30, 2021. During the year ended June 30, 2020, fees of \$4,073 were paid and the balance was \$2,034. The balance is included in the audit and tax fee reserve fund on the accompanying statement of financial position.

Similarly, a separate reserve was established to fund the annual audit and tax expense fee of the HFH NMTC Investment Fund, LLC (HFH NMTC). HFH NMTC has a 99.99% interest in CDE. The reserve was funded at the time of the NMTC financing closing and additional deposits are not required. During December 2020, the loan was forgiven and as such, there is no reserve required as of June 30, 2021. During the year ended June 30, 2020, fees of \$4,073 were paid and the balance was \$2,034. The balance is included in the audit and tax fee reserve fund on the accompanying statement of financial position.

Note 9. LINE OF CREDIT

The Organization has available a line of credit with Dedham Institute for Savings in the amount of \$500,000 to be drawn upon as needed. The line of credit bears interest at 3% per annum. During the year ended June 30, 2021 the Organization made principal payments on the line of credit that amounted to \$113,688 and interest expense amounted to \$11,239. As of June 30, 2021, the balance outstanding was \$228,050. During the year ended June 30, 2020 the Organization made payments on the line of credit that amounted to \$153,000 and interest expense amounted to \$16,547. As of June 30, 2020, the balance outstanding was \$342,260.

Note 10. LONG-TERM DEBT

The Organization has a FlexCap note payable to Habitat for Humanity International (HFHI), in the original amount of \$335,200. The loan pool to affiliates is secured by collateral assignments of mortgages on eight mortgage loans receivable dated June 23, 2011 and amended December 12, 2013. The note bears interest at 3.8% per annum through December 2020, the maturity date, and is payable in quarterly payments of \$13,691. During the years ended June 30, 2021 and 2020, interest expense amounted to \$1,052 and \$2,278, respectively. The loan matured in December 2020, and as of June 30, 2021 and 2020, the principal balance due amounted to \$0 and \$26,996, respectively.

See independent auditors' report.
Page 16

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 10. LONG-TERM DEBT (Continued)

The Organization has a note payable to MassHousing in the original amount of \$600,000. The note is secured by five mortgages conveyed to buyers. The note bears interest at 2.5% per annum and requires monthly payments of principal and interest in the amount of \$4,471. Beginning in May 2020, the Organization entered into a Covid-19 Payment Deferral Agreement with MassHousing, under which principal and interest payments are deferred to the maturity date of the loan. Interest does not accrue on the unpaid principal and interest payments and the forbearance period expires on July 1, 2021. During the years ended June 30, 2021 and 2020, interest expense amounted to \$3,517 and \$3,699, respectively. As of June 30, 2021 and 2020, the principal balance due amounted to \$154,929.

The Organization had a note payable to CDE as part of the NMTC structure described in Note 12, in the original amount of \$2,660,790. The note is secured by collateral assignments of various accounts established as part of the NMTC structure. The note bears interest at 1.03% per annum and requires interest only payments through November 2020. Commencing November 2021, the note is payable in semi-annual payments of \$65,111 through the maturity date, December 2043. Debt covenants on the note include maintaining a debt to asset ratio, not to exceed 95%. On December 31, 2020, Habitat NMTC purchased all of its investor's interest, and as such, this loan was forgiven in its entirety. Habitat NMTC is wholly owned by HFHI. Debt forgiveness of \$736,129 is included in Other income in the accompanying financial statements. Refer to Note 13 for a more detailed description of this transaction. During the years ended June 30, 2021 and 2020, interest expense amounted to \$13,699 and \$27,398, respectively. As of June 30, 2021 and 2020, the principal balance due amounted to \$0 and \$2,660,790, respectively.

On June 26, 2020, the Organization received loan proceeds in the amount of \$149,900 under the COVID-19 Economic Injury Disaster Loan (EIDL) Program. The EIDL, established as part of the Coronavirus Aid, Relief and Economic Security Act ("CARES Act"), provides loans to help small businesses and other entities overcome the effects of the pandemic by providing borrowers with working capital to meet ordinary and necessary operating expenses. The loans and accrued interest are not forgivable and must be repaid. The note bears interest at 2.75% per annum and has a loan term of 30 years. Payments are deferred for the first 18 months, with principal and interest payments beginning immediately thereafter.

Principal payments due in the next five years and in the aggregate:

2022	\$ 511,309
2023	106,812
2024	3,817
2025	3,923
2026	4,032
Thereafter	<u>132,596</u>
Total	<u>\$ 762,489</u>

Note 11. OPERATING LEASES

The Organization occupies office space under a non-cancelable operating lease. The Organization is also liable for its proportionate share of common area expenses and real estate taxes. The original lease agreement expired in January 2020. The lease was renewed in January 2020 with a monthly rent of \$8,000. The new lease agreement expires in July 2022.

The Organization leases additional space, for its ReStore activities, of approximately 21,120 square feet as the lessee under a non-cancelable, operating lease agreement. The original lease term is for ten (10) years with two (2) five (5) year options.

Rent expense for the years ended June 30, 2021 and 2020 was \$441,719 and \$404,311, respectively.

See independent auditors' report.
Page 17

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 11. OPERATING LEASES (Continued)

As of June 30, 2021, future minimum lease payments are as follows:

2022	\$ 391,680
2023	\$ 295,680
2024	\$ 295,680
2025	\$ 295,680
2026	\$ 147,840

Note 12. NMTC FINANCING

During 2014, the Organization embarked on a series of transactions with Citibank, HFHI, Habitat for Humanity of Costal Fairfield County, Inc. (HFHCFC) and Patterson Habitat for Humanity, Inc. (PHFH) to effectuate a NMTC structure to assist the construction of Habitat homes in certain low-income neighborhoods. NMTC allows for larger net proceeds than would otherwise be available under classic financing.

The Organization, HFHCFC and PHFH each invested in the LLC to leverage the capital contribution of the investor into a new entity set up for this purpose. The LLC then invested in the CDE. The CDE received allocations of NMTC funds pursuant to Section 45D of the Internal Revenue Code (IRC) in order to assist eligible businesses in making investments in certain low-income communities. The Organization's investment in the LLC effectively avails itself of \$2,454,146 in funds, net of fees and transaction costs, for the construction of Habitat homes in certain Boston neighborhoods.

As of June 30, 2020, the membership interests in the LLC are owned .01% by Habitat NMTC LLC (Habitat NMTC) (managing member), 44.70% by PHFH, 33.93% by the Organization and 21.36% by HFHCFC.

As part of the NMTC transactions, the Organization received cash in the amount of \$538,771 which had to be spent within twelve months on construction costs for the NMTC properties. All funds were spent as of June 30, 2015.

On December 31, 2020, Habitat NMTC purchased all of its investor's interest, and as such, this loan was forgiven in its entirety. Habitat NMTC is wholly owned by HFHI. Debt forgiveness of \$736,129 is included in other income in the accompanying financial statements.

The value of the Organization's investment as of June 30, 2020 amounted to \$1,925,054. The condensed unaudited financial statements of Habitat for Humanity Greater Boston, Inc.'s portion as of June 30, 2021 and 2020 are as follows:

See independent auditors' report.
Page 18

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 12. NMTC FINANCING (Continued)

Assets	<u>2021</u>	<u>2020</u>
Cash and cash equivalents	\$ -	\$ 2,110
Restricted cash	-	4,068
Mortgage receivable	-	2,810,803
Intangible assets, net	-	4,848
	<u> </u>	<u> </u>
Total Assets	<u>\$ -</u>	<u>\$ 2,821,829</u>
Liabilities and Net Assets		
Due to affiliate	\$ -	\$ 560,589
Loan payable	-	2,564,631
	<u> </u>	<u> </u>
Total Liabilities	<u>\$ -</u>	<u>\$ 3,125,220</u>
Unrestricted net assets	-	(303,391)
	<u> </u>	<u> </u>
Total liabilities and net assets	<u>\$ -</u>	<u>\$ 2,821,829</u>
Revenue	\$ 736,129	\$ -
Cost and expenses	114,704	41,187
	<u> </u>	<u> </u>
Net Income (Loss)	<u>\$ 621,425</u>	<u>\$ (41,187)</u>
Net assets at beginning of period	\$ (303,391)	\$ (262,204)
Deemed contribution of net assets upon POB unwind	1,924,661	-
Distributions to affiliate	(2,242,695)	-
	<u> </u>	<u> </u>
Net assets at end of period	<u>\$ -</u>	<u>\$ (303,391)</u>

Note 13. CONTRIBUTION TO HABITAT FOR HUMANITY INTERNATIONAL, INC.

Habitat for Humanity International, Inc. has a suggested 10% tithing based on internal calculations for unrestricted funds, however, there is no penalty for tithing less than this amount. This amount is used for Habitat for Humanity International's worldwide housing programs. For the years ended June 30, 2021 and 2020 contributions to Habitat for Humanity International, Inc. amounted to \$87,211 and \$6,631, respectively.

HFHI entered into a tax credit and indemnity agreement dated December 30, 2013 with Citibank, N.A. HFHI has guaranteed the delivery of the NMTC and the achievement of an annual internal rate of return of 8.79%. In addition, HFHI has entered into a servicing agreement with Citi NMTC Subsidiary CDE XVI, LLC dated December 30, 2013. In connection with these agreements, the Organization prepaid the service fee due to HFHI. For the years ending June 30, 2021 and 2020, \$4,848 and \$9,697 was incurred, respectively.

As described in Note 10, the Organization had a note payable to HFHI. As of June 30, 2021 and 2020, the principal balance due amounted to \$0 and \$26,996, respectively.

See independent auditors' report.
Page 19

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 14. TAX DEFERRED ANNUITY PLAN

The Organization maintains a tax-deferred qualified annuity plan under Section 403(b) of the Internal Revenue Code (IRC). The plan covers any employees electing to participate and is entirely funded with employee contributions up to the maximum amount allowed by the IRC. During the years ended June 30, 2021 and 2020, expenses incurred in connection with the plan were immaterial.

Note 15. RESTORE PROGRAM

The Organization established its ReStore in January 2011. The ReStore is set-up to receive donated goods such as building materials and household items that would otherwise be destined for landfills. The Organization stores and sells these goods to the public at discount prices. This raises money for the Organization's programs and makes discounted materials available for the public. The store received approximately \$1,092,569 and \$849,004 in donated materials and goods during the years ended June 30, 2021 and 2020. For the year ended June 30, 2021 the ReStore Program generated \$1,092,569 of revenues with associated costs of \$956,183. This resulted in net income of \$136,386 on ReStore activities. For the year ended June 30, 2020 the ReStore Program generated \$849,004 of revenues with associated costs of \$926,991. This resulted in a net loss of \$77,987 on ReStore activities.

Note 16. LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS

The Organization manages its liquidity and reserves following three guiding principles: operating within a prudent range of financial stability, maintaining adequate liquidity to fund near-term operations, and maintaining sufficient reserves to provide reasonable assurance that long-term obligations will be discharged.

The Organization has the following financial assets that could readily be made available within one year of the statement of financial position to fund expenses without limitations.

	<u>2021</u>	<u>2020</u>
Cash and cash equivalents	\$ 1,949,731	\$ 878,712
Mortgage notes receivable, current portion	<u>299,053</u>	<u>117,782</u>
Total financial assets and liquidity resources available within one year	<u>2,248,784</u>	<u>996,494</u>

Note 17. GAIN ON FORECLOSED HOME

In September 2020, the Organization repossessed a unit with a carrying book value of \$154,133. The Organization subsequently sold this property in October 2020 for \$246,600, recognizing a gain of \$92,467.

Note 18. OTHER SIGNIFICANT MATTERS

In December 2019, a novel strain of coronavirus (COVID-19) was reported in Wuhan, China. The World Health Organization has declared the outbreak a "Public Health Emergency of International Concern." The COVID-19 outbreak is disrupting supply chains and affecting production and sales across a range of industries. While the disruption is currently expected to be temporary, there is considerable uncertainty around the duration. The extent of the operational and financial impact that COVID-19 may have on the Organization depends on certain developments, which are uncertain and cannot be predicted. At this point, the extent to which COVID-19 may impact the Organization's future financial condition or results of operations is uncertain.

See independent auditors' report.
Page 20

HABITAT FOR HUMANITY GREATER BOSTON, INC.
NOTES TO FINANCIAL STATEMENTS (CONTINUED)
JUNE 30, 2021 AND 2020

Note 18. OTHER SIGNIFICANT MATTERS (Continued)

On April 4, 2020, the Organization received loan proceeds in the amount of \$250,857 under the Paycheck Protection Program ("PPP"). The PPP, established as part of the Coronavirus Aid, Relief and Economic Security Act ("CARES Act"), provides for loans to qualifying businesses or non-profits for amounts up to 2.5 times the average monthly payroll expenses of the qualifying business or non-profit organization. The loans and accrued interest are forgivable after a prescribed period as long as the borrower uses the loan proceeds for eligible purposes, such as payroll, benefits, rent, utilities, while also maintaining its payroll levels. The amount of loan forgiveness will be reduced if the borrower terminates employees or reduces salaries during the prescribed period.

On March 4, 2021, the Organization was notified by the Small Business Administration that its entire loan proceeds in the amount of \$250,857 received under the Paycheck Protection Program ("PPP") established as part of the Coronavirus Aid, Relief and Economic Security Act ("CARES Act"), was considered forgiven. This amount is classified as Other Income in the accompanying Statement of Activities and Changes in Net Assets.

On February 24, 2021, the Organization received additional loan proceeds in the amount of \$229,610 under the Paycheck Protection Program ("PPP"). The PPP, established as part of the Coronavirus Aid, Relief and Economic Security Act ("CARES Act"), provides for loans to qualifying businesses or non-profits for amounts up to 2.5 times the average monthly payroll expenses of the qualifying business or non-profit organization. The loans and accrued interest are forgivable after a prescribed period as long as the borrower uses the loan proceeds for eligible purposes, such as payroll, benefits, rent, utilities, while also maintaining its payroll levels. The amount of loan forgiveness will be reduced if the borrower terminates employees or reduces salaries during the prescribed period. The unforgiven portion of the PPP loan is payable over two years at an interest rate of 1%, with a deferral of payments for the first six months. The Organization intends to use the entire loan amount for qualifying expenses and expects it to be forgiven in its entirety (see Note 19 below).

Note 19. SUBSEQUENT EVENTS

Management has evaluated events and transactions for subsequent events that would impact the financial statements for the year ended June 30, 2021 through February 9, 2022, the date the financial statements were first available to be issued. There were no subsequent events that require recognition or disclosure in the financial statements; however, the following event was deemed to be significant as to require disclosure.

On January 14, 2022, the Organization was notified by the Small Business Administration that its entire loan proceeds in the amount of \$229,610, received under the Paycheck Protection Program ("PPP") established as part of the Coronavirus Aid, Relief and Economic Security Act ("CARES Act"), was considered forgiven.

See independent auditors' report.
Page 21

2. Annual Operating Budget for the Community Garden

ANNUAL OPERATING BUDGET, COMMUNITY GARDEN & ORCHARDS

APPLICANT'S NAME: Habitat for Humanity Greater Boston Inc

PROJECT NAME: Parker & Terrace Streets Development

ANNUAL MAINTENANCE		TOTAL (\$)		HFHGB annual funding
Clean-up &removals		\$1,200		Up to- \$1,500
Excavation		\$2,100		Up to- \$2,500
Drainage/utilities		\$1,200		Up to- \$1,500
Paving/edging		\$480		Up to- \$500
Masonry/concrete		\$220		Up to- \$500
Fencing		\$1,000		Up to- \$1,500
Structures		\$1,300		Up to- \$1,500
Planting		\$2,200		Up to- \$2,500
Other Materials		\$3,000		Up to- \$3,500
	Total:	\$12,700		Up to- \$15,500

APPENDICES



Appendix 1 - Proposal Form

PROPOSAL FORM

SUBMITTED TO: MAYOR'S OFFICE OF HOUSING

DATE RECEIVED BY MOH: 11/07/2022

SUBMITTED BY: NAME: Habitat for Humanity Greater Boston Inc.

ADDRESS: 434 Mass. Ave #201 Boston MA 02118

TELEPHONE: 617-423-2223

EMAIL: jameskostaras @ habitatboston.org

Under the conditions set forth by the Mayor's Office of Housing (MOH), the accompanying proposal is submitted for:

Property Address: 778-796 Parker St. & 77 Terrace St. Boston MA 02120

For this proposal to be properly evaluated all questions must be answered by the Proposer. The Awarding Authority (MOH) will regard all responses to questions and all submissions as accurate portrayals of the Proposer's qualifications and any discrepancy between these statements and any subsequent investigation may result in the proposal being rejected.

- i. The name(s) and address(es) of all persons participating in this application as principals other than the undersigned are:

Use separate sheet and attach if additional principals are involved.

- ii. The applicant is a/an:
Corporation (non-profit) _____
(Individual/Partnership/Joint/Venture/Corporation/Trust, etc.)

- A. If applicant is a Partnership, state name and residential address of both general and limited partners: _____

B. If applicant is a Corporation, state the following:

Corporation is incorporated in the State of: Massachusetts
President is: James Kostaras
Treasurer is: William DiSchino
Place of Business: Boston Massachusetts

C. If applicant is a Joint Venture, state the names and business addresses of each person, firm or company that is a party to the joint venture:

A copy of the joint venture agreement is on file at: _____ and will be delivered to the Official on request.

D. If applicant is a Trust, state the name and residential address of all Trustees as:

Trust documents are on file at _____
And will be delivered to the Official on request.

iii. Bank reference(s): _____

iv. If business is conducted under any title other than the real name of the owner, state the time when, and place where, the certificate required by General Laws, c.110, §5 was filed:

v. Number of years organization has been in business under current name:
35

vi. Has organization ever failed to perform any contract? No Yes/No

If answer is "Yes", state circumstances): _____

We propose the following purchase price:

\$1,100.00

ELEVEN HUNDRED dollar(s) & NO cents

vii. AUTHORIZATION:

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

James Kostaras

Signature of individual submitting proposal

President & C.E.O.

Title

Habitat for Humanity Greater Boston, Inc.

Legal Name of Organization

Dated at: Boston Massachusetts

This 7th day of November 2022,

NAME OF ORGANIZATION:

Habitat for Humanity Greater Boston

BY: James Kostaras

TITLE: President & C.E.O.

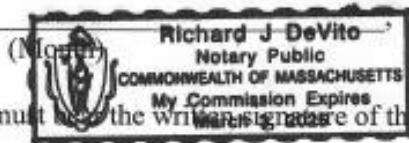
i. ATTESTATION:

I, James Kostaras being duly sworn deposes and says that (he/she) is the President/C.E.O. of Habitat for Humanity Greater Boston and that all answers to foregoing questions and all statements contained herein are true and correct.

Subscribed and sworn before me this 7th day of November 2022

Notary Public: [Signature]

My Commission Expires:



(Year)

NOTE: This proposal form must be signed by the written signature of the applicant.



If the applicant is an individual doing business under a name other than his own name the application must state so, giving the address of the individual.

If the applicant is a partnership a partner designated as such must sign the application.

If the applicant is a corporation, trust or joint venture the application must be signed by a duly-authorized officer or agent of such corporation, trust or joint venture and contain written evidence of the authority to bind the entity.

(Please include the name of the agency or department and position held in that agency or department.)

Appendix 2 - Project Summary

Project Summary Form

Project Name: Parker & Terrace Street Development
 Project Street Address(es): 778-796 Parker Street And 77 Terrace Street Mission Hill, Bost
 Developer: Habitat for Humanity Greater Boston Inc.
 Types of Units: Family Individuals Elderly Special Needs
 Other? (Describe) Artist live/work and work spaces Commercial Yes No
 Number of Units 25 Number of Affordable Units 25 Homeless Units

Number of Units	SRO	Studio	1-Bdr	2-Bdr	3-Bdr	4-Bdr	Total
<30% AMI							0
<60% AMI				2	2	2	6
<80% AMI				3	6	10	19
Market							0

Rents	SRO	Comm-Studio	1-Bdr	2-Bdr	3-Bdr	4-Bdr
<30% AMI						
<60% AMI						
<80% AMI						
0%	Artists for Humanity 1 unit \$0.00/Monthly					

Housing Budget

TDC:	\$ 9,600,036.00	TDC Per Unit:	\$ 384,001.00
Hard Cost/sf	\$ 290.62	Hard Cost/unit	\$ 339,037.00
Operating Exp/unit	\$ 0.00	Reserves/unit	\$ 0.00
		Developer Fee and Overhead	\$ 0.00

Funding Sources: (Check all that apply)

DND – HOME	<input checked="" type="checkbox"/>	DHCD-HOME	<input type="checkbox"/>	DHCD-CIPF	<input type="checkbox"/>	Others:	<input type="checkbox"/>
HSNG BOSTON 2030	<input checked="" type="checkbox"/>	DHCD-HSF	<input type="checkbox"/>	9% LIHTC	<input type="checkbox"/>	CPA Fund	<input checked="" type="checkbox"/>
NHT	<input checked="" type="checkbox"/>	DHCD-HIF	<input type="checkbox"/>	4% LIHTC	<input type="checkbox"/>		<input type="checkbox"/>
IDP	<input checked="" type="checkbox"/>	DHCD-TOD	<input type="checkbox"/>	New Market TC	<input type="checkbox"/>		<input type="checkbox"/>
FHLB	<input type="checkbox"/>	DHCD-CATNHP	<input type="checkbox"/>	Historic TC	<input type="checkbox"/>		<input type="checkbox"/>
AHTF	<input type="checkbox"/>	DHCD-CBH	<input type="checkbox"/>	MA State TC	<input type="checkbox"/>		<input type="checkbox"/>
MTC Grants	<input type="checkbox"/>	DHCD-FCF	<input type="checkbox"/>	HUD-Section 202	<input type="checkbox"/>		<input type="checkbox"/>

Appendix 3 - Statement of Proposer's Qualifications Form

STATEMENT OF PROPOSER'S QUALIFICATIONS FORM

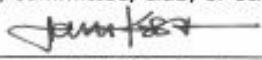
All questions must be answered. All information must be clear and complete. Attach additional pages, if needed.

1. Name of proposer: Habitat for Humanity Greater Boston, Inc.
2. Names and titles of principals: James Kostaras, President & CEO

3. Names of authorized signatories: James Kostaras, President & CEO
4. Permanent main office address: 240 Commercial Street, 4th Floor
Boston, MA 02109
Phone: 617-423-2223 Fax: 617-423-1044 Email: jameskostaras@habitatboston.org
5. Date organized: 1987
6. Location of incorporation: Boston, MA
7. Number of years engaged in business under your present name: 34
8. List at least three private or public agencies that you have supplied/provided with similar services to that in this solicitation:
 - a. Department of Neighborhood Development
 - b. Newton Housing Authority
 - c. MassHousing

Has organization ever failed to perform any contract? YES NO X
If YES, attach a written declaration explaining the circumstances.

AUTHORIZATION: The undersigned certifies under 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 certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.



Signature of individual submitting proposal
President & CEO
Title
Habitat for Humanity Greater Boston, Inc.
Legal Name of Organization
Date 11/07/2022

Appendix 4 - Construction Employment Statement Form

PROPOSER'S NAME: Habitat for Humanity Greater Boston

How many full time employees does your firm currently have?

Under 25 25 -99 100 or more

Are you a Boston-based business? YES NO

Boston Based: where the principal place of business and/or the primary residence of the Proposer is in the City of Boston.

Are you a Minority-owned Business Enterprise? YES NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? YES NO

Are you a Woman-owned Business Enterprise? YES NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? YES NO

RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT

DND encourages MIHI builders to seek to achieve the following construction employment goals:

Boston Residents	50% of project hours
Minority	25% of project hours
Female	10% of project hours

These are targets, not requirements, but proposals that provide better evidence of their ability to achieve these targets will be more highly ranked. Explain what actions you will undertake to promote employment of these groups:

Habitat for Humanity Boston currently has a number of minority, and woman employees in all of our departments. As a volunteer based organization we "employ" thousands of volunteers of every ethnicity, religion, gender and gender expression every year, on every project. Many of our employees in all areas are also City of Boston residents. Should any additional hiring become necessary to complete this project we agree to comply with all laws and regulations governing employment.

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with "Supplementary Construction Employment Statement" and the Proposer's name. *Note: if you are, according to the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND's employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City's Office of Jobs & Community Services, please list the most recent here: None

Appendix 5 - Property Affidavit Form

City of Boston (COB) – Property Affidavit Form

Instructions: List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest. If there are any past due amounts owed to the Department of Neighborhood Development, the Inspectional Services Department, the Treasury Department and/or the Boston Water and Sewer Commission, such **must be paid in full** before: (1) a vote request can be presented to the City of Boston Public Facilities Commission concerning the sale of property to the applicant or any other business entity in which the applicant has an ownership or beneficial interest; OR (2) the commitment of funding to the applicant or any other business entity in which the applicant has an ownership or beneficial interest. Public Facilities Commission votes are not to be requested until the Property Affidavit has been approved and the Legal Unit has signed the Property Clearance Form.

Upon approval, the Property Affidavit will be valid for ninety (90) calendar days from the date it is signed by the Applicant.

For any additional properties that do not fit on this form, attach a spreadsheet. Do not use another property affidavit form. Only one signature page is to be submitted. All entries made on this form must be typed in the form fields provided below.

Applicant: Habitat for Humanity Greater Boston, Inc.

List Addresses of Boston Properties Owned:	PARCEL ID NUMBER
3 Telegraph Street, Boston MA 02127	0701201-000
61-63 Apline Street, Boston MA 02119	1201464-010
725-727 Parker Street, Boston MA 02120	100496000 & 1000495000
Boston Properties Previously Foreclosed Upon by COB:	PARCEL ID NUMBER

I declare under pains and penalties of perjury that the foregoing representations are true, accurate, complete and correct in all respects.

Habitat for Humanity Greater Boston, Inc.

11/7/2022

Print Name and Title

Authorized Representative's Signature

Date

James Kostaras

617-423-2223

Applicant Contact (if different from above)

Telephone Number

OFFICIAL USE ONLY (Fax the completed form to DND at 635-0262. Delinquency Reported: (If Yes (Y) state the amount owed):

Boston Water & Sewer Commission

Y \$ _____ N

Signature and Date: _____

Notes: _____

Department of Neighborhood Development

Y \$ _____ N

Signature and Date: _____

Notes: _____

Public Works Department

Y \$ _____ N

Signature and Date: _____

Notes: _____

Treasury Department

Y \$ _____ N

Signature and Date: _____

Notes: _____

DND Contact

Division

Program

Phone: ext.

Approved by a vote of the Public Facilities Commission on August 23, 2012.

Appendix 6 - Affidavit of Eligibility Form

AFFIDAVIT OF ELIGIBILITY FORM

Developer's Name: Habitat for Humanity Greater Boston Inc.

Any person submitting an application for under this RFP must truthfully complete this Affidavit and submit it with their application.

1. Do any of the principals owe the City of Boston any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?
NO

2. Are any of the principals employed by the City of Boston? If so, in what capacity? (Please include name of principal, name of agency or department, and position held in that agency or department).
NO


3. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?
NO

5. Have any of the principals ever been convicted of any arson-related crimes, or currently under indictment for any such crime?
NO

6. Have any of the principals been convicted of violating any law, code, statute or ordinance regarding conditions of human habitation within the last three (3) years?
NO

Signed under the pains and penalties of perjury this

7th day of November, 20 22

SIGNATURE: 

TITLE: President & CEO

ORGANIZATION: Habitat for Humanity Greater Boston

ADDRESS: 434 Mass. Ave. Suite 201 Boston MA 02118

Appendix 7 - Conflict of Interest Affidavit Form

Conflict of Interest Affidavit Form

The undersigned hereby certifies, under the pains and penalties of perjury, that neither they, nor those with whom they have business ties, nor any immediate family member of the undersigned, is currently or has been within the past twelve months, an employee, agent, consultant, officer or elected or appointed official of the City of Boston Department of Neighborhood Development. For purposes of this affidavit "immediate family member" shall include parents, spouse, siblings, or children, irrespective of their place of residence.

I declare under penalties of perjury that the foregoing representations are true, correct, accurate, complete and correct in all respects.

WITNESS:

BORROWER:

Debi DeVito

James Kostaras

James Kostaras President & C.E.O.

THE COMMONWEALTH OF MASSACHUSETTS

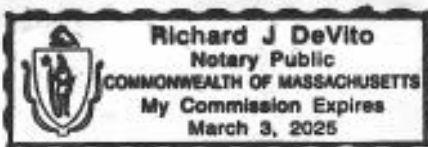
Suffolk, ss.

November 7th 2022

Then personally appeared the above named President & C.E.O., (title) of (organization) and executed the foregoing instrument and acknowledged the foregoing instrument to be (his/her) free act and deed as (title) aforesaid and the free act and deed of (organization), before me.

Richard J. DeVito
Name:
Notary Public

My Commission Expires:



Appendix 8 - Chapter 803 Disclosure Statement Form

CHAPTER 803 DISCLOSURE STATEMENT FORM

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this 7th day
of November, 2022
Month Year



Proposer Signature

Co-Proposer Signature (If Applicable)

Appendix 9 - Disclosure/Beneficial Interest Statement Form

**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:

778 Parker Street 1000437000, 780 Parker Street 1000436000
 782 Parker Street 1000435000, 784 Parker Street 1000434000
 786 Parker Street 1000433000, 788 Parker Street 1000432000
 790 Parker Street 1000431000, 792 Parker Street 1000430000
 794 Parker Street 1000429000, 796 Parker Street 1000428000
 77 Terrace Street 1000396000

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

(3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

CITY OF BOSTON ACTING BY AND THROUGH THE PUBLIC FACILITIES COMMISSION BY
 THE DIRECTOR OF THE DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT

(4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY:

Habitat for Humanity of greater Boston Inc.
 501C3 nonprofit

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

Lessor/Landlord Lessee/Tenant
 Seller/Grantor Buyer/Grantee

(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):

<u>NAME</u>	<u>RESIDENCE</u>
_____	_____
_____	_____

(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 (Check "NONE" if NONE):

NONE

<u>NAME:</u>	<u>POSITION:</u>
_____	_____
_____	_____
_____	_____

**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)**

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 time-shares 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.

Signature:  _____

Dated: 11/07/2022

Appendix 10 - Beneficiary Affidavit Form

Not Applicable

Appendix 11 - Beneficiaries of Assistance Form

Not Applicable

Appendix 12 - Housing Development Budget

PRELIMINARY DEVELOPMENT BUDGET FORM

PROPOSER'S NAME: Habitat for Humanity Greater Boston Inc.

Complete this Preliminary Development Budget or you may substitute another form that provides substantially equivalent information. Note: Total of Uses of Funds should equal Total of Sources of Funds.

USES OF FUNDING	AMOUNT
Acquisition - Land	\$ 1,100.00
Site Prep/Environmental	\$ 650,000.00
Construction	\$ 8,549,143.00
Construction Contingency	\$ 300,036.00
Architect(s) and Engineer(s)	\$ 315,000
Development Consultant	\$ 150,000
Survey and Permits	\$ 638,000
Legal	\$ 10,000
Title and Recording	\$ 5,000
Real Estate Taxes	\$ 16,200
Insurance	\$ 14,400.00
Construction Loan Interest	\$
Construction Inspection Fees	\$
Other:	\$
Other:	\$
Other:	\$
Other:	\$
Other:	\$
Soft Cost Contingency	\$ 86,457.00
Developer Overhead	\$
Developer Fee	\$
TOTAL: ALL USES	\$ 9,600,036.00

SOURCES OF FUNDING	AMOUNT	Committed
Sponsor Cash In Hand (Account info upon request)	\$ 1,500,000.00	<input checked="" type="checkbox"/>
Additional Sponsor Fundraising	\$	<input type="checkbox"/>
Philanthropic Funding	\$ 500,000.00	<input type="checkbox"/>
Philanthropic Funding	\$	<input type="checkbox"/>
Bank Loans (See attached letter of interest)	\$ 500,000.00	<input type="checkbox"/>
Donated Materials/Services:		
Other: MOH funding + Haz-Mat Remediation funding	\$ 4,400,000.00	<input checked="" type="checkbox"/>
Other: Proceeds from Sales of HFHGB mortgage portfolio	\$ 3,000,000.00	<input checked="" type="checkbox"/>
TOTAL ALL SOURCES:	\$ 9,900,000.00	

If any of the above-listed funding sources are already in hand or have been committed subject to designation/conveyance by DND, check off the right-hand box under "Committed".

Explanatory notes:

Appendix 13 - Development Budget for Community Garden

DEVELOPMENT BUDGET

APPLICANT'S NAME: Habitat for Humanity Greater Boston Inc.

Complete the below Development Budget, or substitute another form that provides substantially equivalent information. Note: Total of Uses of Funds should equal Total of Sources of Funds for the development.

PROJECT NAME: Parker & Terrace St. Community Gardens

Hard costs		TOTAL (\$)	Grassroots (\$)	Applicant Organization(\$)
Demo/removals		\$7,500		\$7,500
Earthwork/excavation/geotex		\$12,000		\$12,000
Drainage/utilities		\$54,400		\$54,400
Paving/edging	asphalt	36,340		\$36,340
Masonry/concrete	Block walls	\$19,280		\$19,280
Fencing	BVCL	\$16,000		\$16,000
Site furnishings/structures	Pergola, arch, bench	\$45,000		\$45,000
Planting	+soil, mulch	\$40,000		\$40,000
Other	Erosion	\$10,000		\$10,000
General conditions	Tree Protection	\$5,000		\$5,000
	Subtotal:			
Contingency 5%				
	Subtotal:			
Soft costs				
Consultants		\$7,500		\$7,500
Construction documents		\$9,000		\$9,000
Bid documents				
Civil Eng/Survey		\$9,000		\$9,000
Insurance				
Permits				
Staff		\$16,000		\$16,000
Project Management (non-staff)		\$0		\$0
Materials				
	Subtotal:			
Overhead		\$8,200		\$8,200
(not to exceed 10% of total project costs)				
Fee		\$0		\$0
	Subtotal			
	TOTAL project costs	\$295,220		\$295,220

ANNUAL OPERATING BUDGET, COMMUNITY GARDEN & ORCHARDS

APPLICANT'S NAME: Habitat for Humanity Greater Boston Inc

PROJECT NAME: Parker & Terrace Streets Development

ANNUAL MAINTENANCE		TOTAL (\$)		HFHGB annual funding
Clean-up &removals		\$1,200		Up to- \$1,500
Excavation		\$2,100		Up to- \$2,500
Drainage/utilities		\$1,200		Up to- \$1,500
Paving/edging		\$480		Up to- \$500
Masonry/concrete		\$220		Up to- \$500
Fencing		\$1,000		Up to- \$1,500
Structures		\$1,300		Up to- \$1,500
Planting		\$2,200		Up to- \$2,500
Other Materials		\$3,000		Up to- \$3,500
	Total:	\$12,700		Up to- \$15,500

PROPOSAL CHECKLIST

General Submission Requirements

Proposal Checklist (indicate “checks” on this form)

- ✓ **Appendix 1:** MOH Form Links- Proposal Form
<https://dndssl.boston.gov/SF/Public/RFPForms/1-ProposalForm.pdf>
- ✓ **Appendix 2:** MOH Form Links- Project Summary
<https://dndssl.boston.gov/SF/Public/RFPForms/RFP%20Project%20Summary.pdf>
- ✓ **Appendix 3:** Statement of Proposer’s Qualifications Form
https://dndssl.boston.gov/SF/Public/RFPForms/State_Proposers_Qualif.pdf
- ✓ **Appendix 4:** Construction Employment Statement Form
<https://dndssl.boston.gov/SF/Public/RFPForms/Construction%20Employment%20Statement.pdf>
- ✓ **Appendix 5:** MOH Form Links- Property Affidavit Form
https://dndssl.boston.gov/SF/Public/RFPForms/Property_Affidavit-From%20Intranet.pdf
- ✓ **Appendix 6:** MOH Form Links- Affidavit of Eligibility Form
<https://dndssl.boston.gov/SF/Public/RFPForms/AFFIDAVIT%20OF%20ELIGIBILITY.pdf>
- ✓ **Appendix 7:** Conflict of Interest Affidavit Form
<https://dndssl.boston.gov/SF/Public/RFPForms/Conflict%20of%20Interest%20Affidavit.pdf>
- ✓ **Appendix 8:** MOH Form Links- Chapter 803 Disclosure Statement Form
<https://dndssl.boston.gov/SF/Public/RFPForms/Ver%202-Ch%20803%20Disclosure%20Statement.pdf>
- ✓ **Appendix 9:** MOH Form Links- Disclosure/Beneficial Interest Statement Form
<http://dndssl.boston.gov/SF/Public/RFPForms/Ver%201-Beneficial%20Interest%20Statement.pdf>
- N/A **Appendix 10:** City of Boston-Beneficiary Affidavit Form
https://dndssl.boston.gov/SF/Public/RFPForms/lw-form_b-13-23.pdf

- N/A **Appendix 11:** City of Boston- Beneficiaries of Assistance Form
https://dndssl.boston.gov/SF/Public/RFPForms/b-3_fy2023_1.pdf
- Appendix 12:** Housing Development Budget Form
<https://dndssl.boston.gov/SF/Public/RFPForms/Prelim%20Develop%20Bdgt-Rev2.pdf>
- Appendix 13:** Development Budget for community garden
<https://dndssl.boston.gov/SF/Public/RFPForms/GrassrootsDevelopmentBudgetTemplateMarch2022.docx>
- Proposal Summary and Narrative (Developer Narrative - no form)
- Pre-Development Sources and Uses Budget (w/ proof of cash availability)
- One Stop Application for Development Budget- Use Sections 1-7, including “Project Summary Information”, “Operating Expense Analysis” and Development Cost Analysis”
- Development Timetable
- Evidence of Financing- Letter of Interest or Commitment Letter from an established Financial Institution
- Audited Financial Statement (most recent)
- Resumes of Development Team
- Design Submittal including 1 Full Plan Set that integrates all proposed Elements
- LEED Checklist demonstrating LEED Silver “Certifiable” strategy
- Green Narrative that addresses, at a minimum, Integrated Design Process, Green and LEED Silver “Certifiable” strategy and sources of green funding.
- Annual Operating Budget for the community garden

November 11th, 2022

