

Andrew Consigli
Civico Development
aconsigli@civicodevelopment.com
(617) 646-9020

Experience:

- Wentworth Institute & Technology – Architecture and Building Construction Technology
- Imai Keller Moore Architects
- Elkus Manfredi Architects
- Civico Development 2015 to present

Real Estate Development Projects:

- Abbey Road, Sherborn, MA 2016
- Oriole Landing, Lincoln, MA 2020
- Portfolio of Bell Hill, Worcester triple decker homes (seventy (70) three bedroom apartments) developed 2019 to 2021
- Ace Flats, Reading, MA 2021
- Adaptive reuse eighteen (18) home new and historic in Auburndale MA 2021 to present

Bob Murchison
Fenix Partners
bob.murchison@me.com
(617) 308-1961

Experience:

- Yale University B.A. 1982
- Fidelity Investments Head of Trading 1992 to 2009
- Fenix Partners 2009 to Present

Real Estate Development Projects:

- Abbey Road, Sherborn MA (eighteen home 55+ community) 2016
- Portfolio of Bell Hill, Worcester triple decker homes (seventy (70) three bedroom apartments) developed 2019 to 2021
- Adaptive reuse eighteen (18) home new and historic in Auburndale MA 2021 to present

Desheng Wang
CL&W Engineering
deshengw@yahoo.com
(774) 454-0266

Education:

- M.S. and B.S. Hydraulic Engineering
- Licentiate/M.S. Environmental Planning and Design
- Ph.D. Civil and Environmental Engineering

DONALD POWERS AIA, LEED AP, CNU

FOUNDING PRINCIPAL



Donald W. Powers has nearly three decades of experience in all aspects of architectural practice. His completed work includes urban and town planning, commercial and institutional buildings, affordable housing, historic restoration of landmark buildings, and single-family residences. In recent years, his work has concentrated on integrated, mixed-use planning and architectural design with the goal of creating truly diverse and vibrant neighborhoods. A 20-year association with the Congress for the New Urbanism and frequent collaboration with some of the best firms in the country doing traditional urban design has brought an expertise in the technique and art of creating livable communities and cherished places. Donald has a single minded vision to restore communities and save the world from sprawl.

REGISTRATIONS

Registered Architect: Licensed in Rhode Island, Connecticut, Massachusetts, Michigan, and Virginia. LEED AP.

EDUCATION

Harvard University, Graduate School of Design - Cambridge, MA
Master of Architecture

University of Virginia, School of Architecture - Charlottesville, VA
Bachelor of Science in Architecture
Awarded Annual Design Prize

PROFESSIONAL HISTORY

2000 - Present **Union Studio Architecture & Community Design**
Providence, RI
Principal & Founder

1993 - 1998 **Graham Gund Architects - Cambridge, MA**
Project Architect/Designer

1992 - 1993 **Kyu Sung Woo Architects - Cambridge, MA**
Architectural Designer

1987 - 1989 **Cooper Robertson + Partners - New York, NY**
Architectural Intern/Designer



UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

140 Union Street Providence, Rhode Island 02903 p. 401.272.4724

DONALD POWERS AIA, LEED AP, CNU

FOUNDING PRINCIPAL

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AFFILIATIONS

Grow Smart Rhode Island - *Board of Directors*
Congress for New the New Urbanism (CNU) - *Member*
CNU | New England Chapter - *Board of Directors*
Institute for Classical Architecture | New England Chapter - *Founding Board Member*
City of Providence Zoning Commission, Subcommittee for Form Based Zoning - *Committee Chairman*
CNU IX Providence (held in June of 2006) - *Executive Committee & Program Co-Chair*

SPEAKING ENGAGEMENTS

Small Housing Trends: Recession Survival Tactics & Moving Forward
Presented at the 12th Annual New Partners for Smart Growth Conference 2013

Innovating Community Design and Mass Market Housing - and - Deconstructing the Mass Appeal and Continued Relevance of Traditional Architecture

Presented at Residential Architect magazine's *Reinvention 2012*

The Real Deal: Implemented Incremental Urbanism
Presented at CNU 20, 2012

Cottage Housing & Innovative Zoning
Presented at the 6th Annual Massachusetts Housing Institute

Principles of Compact Cottage Court Development
Presented at Build Boston 2011

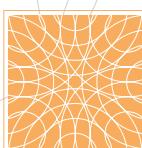
Utopias: A Conversation
Presented at the List Art Gallery at Brown University 2011
(a panel discussion responding to the David Winton Bell Gallery exhibition *Building Expectation: Past & Present Visions of the Architectural Future*)

Planning and Designing Successful Mixed-Use Centers
Presented at the Healthy Places by Design Community Workshops 2011

Small Site Development: Resources and Best Practices
Presented at the Massachusetts Municipal Association Conference 2011

The "New" Increment of Urbanism: Opportunity & Technique
Presented at CNU NE 2009 (Donald Powers & Douglas Kallfelz)

The Details of the New Urbanism: From Curb to Cupola - The Case for Simplicity
Presented at CNU 2007, CNU 2008, & CNU 2009 (with Douglas Kallfelz)



Paul J. Haverty, Esq.

Blatman, Bobrowski, & Haverty, LLC

9 Damonmill Square, Suite 4A4, Concord, MA 01742

paul@bbhllaw.net

Blatman, Bobrowski & Haverty, LLC, Concord, MA

Partner, January 1, 2017 to Present

My practice is focused on representing private developers in the development process, with a continued strong focus on permitting, particularly permitting pursuant to G. L. c. 40B, §§ 20-23. I am also Town Counsel for the Town of Chelmsford, have acted as Special Town Counsel for numerous municipalities, and have represented many other municipalities on Chapter 40B applications as a consultant pursuant to the MHP Technical Assistance Program.

Blatman, Bobrowski, Mead & Talerman, LLC, Newburyport, MA

Senior Associate, April 2015 to December, 2016

My practice was focused upon representation of municipal clients, with a strong focus on permitting, including the comprehensive permit process. I also continued to represent developers seeking local permits, including comprehensive permit applications.

Regnante, Sterio & Osborne LLP, Wakefield, MA

Associate, September 2002 – March 2015

My practice consisted of representing clients seeking comprehensive permits pursuant to G. L. c. 40B, §§ 20-23. I represented developers in all facets of the comprehensive permit development process, including the project eligibility stage, representation before the local zoning board of appeals, representation at the Housing Appeals Committee, and subsequent litigation in the trial courts and appeals courts. I also represented some municipal clients while at this firm.

Land Court Division of the Trial Courts, Boston, MA

Law Clerk, September 2001 to August, 2002.

As law clerk for the Hon. Karyn F. Scheier, I participated in trials and motion sessions, assisted with the drafting of decisions, and conducted legal research on land use appeals.

PUBLICATIONS

Compelling Reasons Why the Legislature Should Resist the Call to Repeal Chapter 40B, 88 Mass L. Rev. 77.

Massachusetts Housing Appeals Committee Reporter – Case Commentary (2009-2015) (developer commentary) and 2019 to present (municipal commentary).

EDUCATION

Suffolk University Law School – JD, *magna cum laude*, 2001

Salem State College – BA *summa cum laude*, 1998

JEREMY LAKE AIA, LEED AP, CNU

SENIOR ASSOCIATE



Jeremy brings over 16 years of experience of affordable and market rate neighborhood design, HOPE VI neighborhood revitalization projects, town planning and urban design. He specializes in project management, with a talent for serving as a versatile liaison between planning and architecture. Jeremy joined Union Studio in July of 2012 after eleven years at Torti Gallas and Partners in Silver Spring, Maryland. He earned a Master of Architecture in Suburb and Town Design from the University of Miami, a Master of Architecture from the University of Miami, and a Bachelor of Arts with a major in Anthropology from Bowdoin College. He formerly served on the Board of Directors of the Rhode Island Chapter of the American Institute of Architects and is an active member of the Congress for the New Urbanism.

REGISTRATIONS/AFFILIATIONS

Board of Directors, American Institute of Architects RI Chapter 2013 - 2016
Registered Architect in State of Maryland
Member: American Institute of Architects (AIA); Congress for the New Urbanism (CNU)
LEED Accredited Professional (LEED AP)
Construction Documents Technologist (CDT)

EDUCATION

University of Miami - Miami, FL
Master of Architecture in Suburb and Town Design
Master of Architecture

Bowdoin College - Brunswick, ME
Bachelor of Arts, Anthropology Major, Biology Minor

PROFESSIONAL HISTORY

2012 - Present **Union Studio Architecture & Community Design**
Providence, RI
Senior Associate (2016 - Present)
Associate (2012 - 2016)

2001 - 2012 **Torti Gallas and Partners, Inc.**
Silver Spring, MD
Senior Associate

1997 - 2000 **University of Miami, School of Architecture**
Miami, FL
Part Time Faculty Member and Teaching Assistant



ABOUT LDS CONSULTING GROUP, LLC

Founded in 2000 by Lynne Sweet, LDS Consulting Group, LLC is a full-service real estate advisory firm with a proven track record of success in housing development and planning for public and private interests. Our team of analysts and planners bridge the gap between planning and financing to resolve complex housing issues for both private and public-sector clients. What sets us apart is our unique perspective on all types of housing and financing resulting from our substantial experience of working with municipalities, developers, lenders, investors and operators.

We offer a full-range of customized, client-centered solutions including

- All things housing as well as complementary commercial uses such as office, research and development, medical, retail, public/community and transit.
- A wide range of housing needs assessment and planning experience including site specific, campus, town-wide, regional.
- Specializing in working with multifamily, workforce, senior, affordable, mixed income, mixed-use, low-income, market-rate and luxury housing.
- We are equally comfortable being a team leader or a team member.

Our word does not sit on shelves...recommendations are implemented

- We recognize the complex concerns of municipalities, developers and funding sources.
- We understand the market for different types of housing at various income levels and have current data on market conditions.
- We are familiar with many types of funding programs and have a proven track record of success with state and federal funders as well as commercial lenders.
- **We produce results: zoning is adopted, projects are funded, developments get built!**

Through market research and analysis, LDS works with private sector clients to create highest and best use plans for developing properties, re-developing existing buildings and obtaining financing. Our clients are provided with recommendations for housing types, unit counts, building amenities, income projections, financing alternatives – and a timeline for achieving their plans. What sets LDS apart is our unique perspective on all types of housing, which results from our substantial experience in working with developers, investors and operators.

LDS helps municipalities and not for profit organizations across New England determine their housing and community development needs, while educating and working with local boards, committees, and employees. We strive to achieve maximum community participation through extensive public outreach. With more than 35 years of experience in housing finance, Principal Lynne Sweet also helps cities and towns identify funding options. The combination of research and finance skills allows LDS to provide recommendations that can be, and are, implemented and achieved.

Research and Planning

- **Market Studies (Supply and Demand)**
 - LIHTC Market Studies
 - New Market Tax Credit Studies
 - HUD Rent Comp Studies
 - Luxury Apartment Studies
 - Highest and Best Use Studies
 - Fiscal Impact Studies
- Fair Housing Plans
- Housing Needs Assessments
- Development Plans
- Housing Production and Action Plans
- Master Plans
- Resident and Community Surveys

Comprehensive Development Consulting

- Development Feasibility Analysis
- Permitting and Land Use Analysis
- Real Estate Development Business Plans
- Development, Operating and Income Pro-formas
- Development Team Building
- RFQ/RFP Preparation and Facilitation
- M.G.L. Chapter 40b and 40r Applications
- M.G.L. Chapter 40b Monitoring
- GIS Capabilities
- Expert Witness

Brokerage Services

LDS offers specialized brokerage services, largely within the affordable housing and senior housing industries. Our understanding of supply and demand in these areas, along with our extensive industry network, allows us to successfully match sellers to buyers.

Financing

LDS provides financial services at all stages of development, from conception to asset management. Our business plans ensure that real estate development projects are financially viable. We work with a variety of funding programs: state and federal programs, taxable and tax-exempt bonds, and low-income, historic, and new market tax credits. We complete financing applications including one stop applications and grants.

LDS Professional Designations and Licenses

- Approved Consultant: MassHousing HUB Program
- House Doctor: **MassDevelopment Gateway Cities Transformative Development Program** which includes District Improvement Financing
- Certified Member of National Association of Housing Market Analysts

- Approved Market Research Company: Kentucky, Minnesota, New Hampshire, New York, Ohio, Tennessee, Virginia, Massachusetts/MassHousing
- Certified M.G.L. **Chapter 40B Monitoring Agent**
- Approved Consultant: **MHP M.G.L. Chapter 40B Technical Assistance Program**
- Qualified Technical Assistance Consultant: **DHCD Downtown Initiative Program**
- Approved consultant: DHCD **Massachusetts Gateway Cities Grants**
- Certified Minority and Women Business Association (SOMWBA) in Massachusetts
- Certified Women's Business Enterprise (MA WBE) in Massachusetts
- Certified Disadvantaged Business Enterprise (DBE) in Massachusetts
- Certified Women Business Enterprise (RI WBE) in Rhode Island and Providence Plantations
- Licensed Massachusetts real estate brokerage firm

STATE AGENCIES

Commonwealth of Massachusetts
MassDevelopment
Massachusetts Gaming Commission
MassHousing
Massachusetts Housing Investment Corp.
Massachusetts Housing Partnership Fund
New Hampshire Housing Finance Authority
State of Rhode Island
Vermont Housing Finance Agency

MUNICIPALITIES

Amesbury, Ashland, Boston, Boxford, Brewster, Conway, Danvers, Erving, Dartmouth, Dunstable, Duxbury, Framingham, Georgetown, Gloucester, Hanson, Hingham, Holyoke, Kingston, Lincoln, Marlborough, Melrose, Milton, Natick, Newbury, Newburyport, Norwell, Somerville, Southbridge, Sunderland, South Hadley, Wayland, Wellesley, Wendell, West Bridgewater, Winchester, Yarmouth.

HOUSING AUTHORITIES

Acton Housing Authority
Cambridge Housing Authority
Charlton Housing Authority
Harvard Housing Authority
Hingham Housing Authority
New Bedford Housing Authority
Sudbury Housing Authority
Westford Housing Authority

AFFORDABLE HOUSING DEVELOPERS

Bateman Partners
Carabetta Companies
Cruz Development
Dakota Partners
Great Bridge Properties
Pennrose Properties
Preservation of Affordable Housing
Norwich Corporation
Trinity Development Associates
Trinity Financial
Women's Institute for Housing

COMMUNITY DEVELOPMENT CORPORATIONS

Brookline Housing Assistance Corporation
Chinese Economic Development
Coalition for a Better Acre
Codman Square Neighborhood Dev. Group
Cruz Development
Bank of America CDC
Hilltown CDC
Housing Corporation of Arlington
Housing Assistance Corp. of Cape Cod
Jamaica Plain Neighborhood Development
Lena Park CDC
Lawrence Community Trabajando, Inc.
Madison Park Development Corporation
Mission Hill Neighborhood Housing
Neighborhood of Affordable Housing
New Vue Communities
North Shore CDC
Nuestra Comunidad CDC
Oak Hill CDC
S. Boston Neighborhood Dev. Corporation
Somerville Community Action
Springfield Neighborhood Housing
The Neighborhood Corporation
Valley Community Development Corporation
Women's Development Corporation
Worcester Common Ground, CDC
Veterans Transitional House

SENIOR HOUSING

Chelsea Jewish Nursing Home Foundation
Franchi Group
Grantham Group/Christopher House AL
HealthBridge Management
Jewish Community Housing for the Elderly
LCB Senior Living
Newton Senior Living (Now Atria)
Rogerson Communities
South Cove Manor Nursing and Rehabilitation Center
Stow Elderly Housing Corporation
Watermark Retirement Communities
The Shelter Group/Brightview Senior Living

CONTRACTORS, DEVELOPERS AND MANAGERS

AIMCO
Ancient Glacier, LLC
Bateman Partners
Bonacorso Construction
BRG Group
Carlisle Tax Credit Advisors
Chartwell Holdings
Chestnut Hill Realty
Erika Realty Trust
Framework Properties
The Gutierrez Company
Hamlet Homes
Holland Construction and Development
JPI Development Company
Lupoli Companies
Mark Investment
Marcus Partners
Micozzi Companies
NAI Norwood Group
North Star Realty Trust
O'Neill Properties, Inc.
Pappas Enterprises, Inc.
Peabody Properties
Pennrose Properties
Sudbury Station, LLC
Trafalgar Capital
Toporosky Real Estate
Toll Brothers Apartment Living
William Street Corporation
Winn Development

NOT FOR PROFITS

Archdiocese of Boston
Brighton Marine Health Center
Caritas Communities
Cape Ann Clergy Association
Common Ground Development
Combined Jewish Philanthropies
East Boston Neighborhood Health Center
ETC Development Corporation
Grtr. Boston Nazarene Compassionate Ctr.
Harborlight Community Partners
House of Hope
Jewish Community Housing for the Elderly
Lawyers Clearinghouse
Lowell Community Health Center
Mass Alliance of Portuguese Speakers
New England Center for Homeless Veterans
Pine Street Inn
Preservation of Affordable Housing
St. Mary's Center for Women and Children
The Learning Center at Bromley-Heath
The Dimock Center
Vietnamese-American Initiative for
Development
Volunteers of America
Women's Inst. for Housing + Economic Dev.
YMCA and YWCA of Cambridge
YMCA Metro North
YMCA North Shore

CHAPTER 40B MONITORING

Bellingham, Lakeview Estates
Berlin, Berlin Woods and Green Acres/Hilltop at
Berlin Woods
Dover, Dover Farms
Foxboro, Highland Ridge
Gloucester, Good Harbor
Harvard, Craftsman Village
Ipswich, Primrose Farm
Lancaster, Muirfield Homes
Lexington, Courtyard
Littleton, Kimloch Farms
Medfield, Country Estates

Mendon, Brookview
Middleboro, Louise Estates
Newton, Commonwealth Residences
Norfolk, Meetinghouse Village
Norfolk, Waites Landing
Norwell/Hingham, Damon Farm
Plymouth, Cottages at Twin Pines
Salisbury, Northpoint Village
Sterline, South Meadow Village
Wayland, Craftsman Village
Westford, Graniteville Woods

1. Fee Schedule

Principal: \$220

Senior Planner: \$125

Junior Planner: \$80

About Lynne Sweet

Founder and Principal, LDS Consulting Group, LLC



Lynne D. Sweet is the founder and principal of LDS Consulting Group, LLC, a real estate advisory firm. With 30 years of experience in the real estate industry, Ms. Sweet plays a vital role as consultant to both private and public-sector clients. She is experienced in providing planning, market research, feasibility analysis, financial structuring, grant writing, land use and permitting, team building and project management. She specializes in all housing product types including luxury, workforce, senior, veterans, affordable, mixed income and mixed-use, rental and ownership.

Past Experience

- Senior positions with BRFG Consulting Group, Inc. of Boston, Hartford and Providence, where she established the Senior Housing Strategies Group at BRFG Consulting and managed the group for three years while providing project management services, including market research and financial structuring.
- Senior positions with Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C. of Boston, where she represented real estate developers, owners and lenders as she worked on all phases of real estate acquisitions, financings and workouts for office, medical, multi-family housing and retail properties during her twelve-year tenure. She worked with conventional commercial lenders and public and quasi-public lending agencies on a variety of programs, including those that used historic and low-income tax credits, taxable and tax-free bonds and operating subsidies.

Education

- Master of Business Administration, Babson College's F.W. Olin Graduate School of Business, Wellesley, MA
- Licensed real estate broker in the Commonwealth of Massachusetts
- On-going real estate industry educational trainings and conferences, as well as staying up-to-date with daily reports and updates

Awards

- CREW Boston (Formerly NEWIRE) 2016 Achievement Award: Entrepreneur of the Year
- Crew Boston (Formerly NEWIRE) 2006 Achievement Award for Networking: Mission Hill Health Movement and Boston Self Help Center Development Project
- CREW Community Involvement Award 2001: Founding NEWIRE Small Business and Entrepreneurial Exchange

Articles/Publications

- Case Study: Affordable Housing and Real Estate Tax Assessing
- A New Approach to Fiscal Impact Studies
- Senior Housing NCHMA White Paper
- National Tax Credit Advisor Article titled “Study Points to Significant Need Among Veterans for Affordable Housing, Services”
- Co-author: “Expanding Access to Assisted Living in Massachusetts: Five Development Models of Affordability”

Current Affiliations

- Board Member: Consulting Planners of Massachusetts
- Certified Member of the National Council of Housing Market Analysts: Member of Standards Committee
- Member of the Citizens Housing and Planning Association (CHAPA), Housing Production and Preservation Committee
- Member: CREW Boston Community Development Committee
- Member: MACDC Development Committee
- Member of CREW Boston, Founding and Member of Entrepreneur Exchange Group, Founder and Member of Housing and Community Development Committee
- Member of the Massachusetts Associate of Community Development Corporations, Housing and Real Estate Peer Group
- Member of the Boston Chapter of the American Planning Association, on its Housing Committee

Past Affiliations

- Long-term member of the Newton Housing Partnership
- Board of Directors Member of CREW Boston (formerly NEWIRE)
- Director of the Massachusetts Assisted Living Association (MASS-ALA) and Mass-ALA Board of Advisors, Affordability Task Force and Quality Committee
- Director of the Rhode Island Assisted Living Facilities Association (RIALA)
- Member of the Boston Club
- Board member of The Second Step, a not for profit organization for women and children who are survivors of domestic violence
- Committee Against Repealing the Housing Law, Advisory committee
- Commonwealth's Chapter 40B Task Force, Active Observer

Recent Speaking Engagements

- 2021 Lynne was a presenter for the Neighborhood HUB presentation on “Renew & Repair Webinar Series: Health and Affordable Homes” and discuss her work on the Holyoke HUB.
- 2019 Training to Metro-west Assessors Association on assessing affordable ownership units
- **2018-40B Technical Consultant under an MHP Grant to the Town of Dartmouth, MA Zoning Board of Appeals. Proposed 300-unit apartment development.** LDS provided Chapter 40B training to ZBA members and town staff on April 4, 2018.
- MACDC Housing and Real Estate Peer Group, “Discussion of Market Studies and Lease-up Issues”.
- New England Appraisal Institute (300+ attendees, continuing education for commercial and residential appraisers from New England States), “Panel on Affordable Housing”
- Massachusetts Housing Partnership (Certification Program), “Workshop on Affirmative Fair Marketing & Resident Selection Plans”
- Massachusetts Housing Partnership (Certification Program), “Workshop on Affordable Housing Lotteries”.

Sample of LDS Massachusetts Chapter 40B Experience/AFMRSP

- **2022-present Brookline, MA**
Obtained PEL for a 40-unit rental development on Route 9, Brookline. Comprehensive Permit granted 2/2023.
- **2022-present Wilmington, MA**
Obtained PEL for a 120-unit rental development at 100 West Street, Wilmington, MA
Comprehensive Permit expected to be granted 3/2023.
- **2022-present Peabody, MA**
Friendly 40B. Obtained PEL February 2023 for a 60-unit rental development at 41 Newbury Street Peabody, MA. Working on ZBA Comprehensive Permit Application.
- **2022-present Winchester, MA**
Friendly 40B. Obtained PEL February 2023 for a 9-unit town house rental development at 87-89 Cross Street, Wilmington, MA. Working on ZBA Comprehensive Permit Application.
- **2022-Puddingstone, Brookline, MA**
LDS worked on the market study for financing for 250 units of mixed income housing on Sherman Avenue in Brookline, MA. LDS also worked on the affirmative marketing and tenant selection plan with Maloney Properties for the tax credit financing with MassDevelopment.
- **2021 – Saugus Ridge, Saugus, Toll Brothers.** LDS worked with the development team to file and obtain final approval from MassHousing for a 300-unit rental housing development on Route 1 in Saugus including working the affirmative fair marketing and resident selection plan Final approval completed October 2021.
- **2021 –J. Woburn Heights, Woburn, Jefferson Apartment Group.** LDS worked with the development team to file and obtain final approval from MassHousing for a 168-unit rental housing development on Washington Street in Woburn including working on the affirmative fair marketing and resident selection plan. Final approval completed August 2021.
- **2021 – Present 40B Technical Consultant under an MHP Grant to the Town of Seekonk**
for a proposed 240-unit rental development. In process.
- **2020 – Present 40B Consultant to Toll Brothers** – Proposed 268-unit rental development in Scituate, MA. LDS prepared the Project Eligibility Application which was granted on July 19, 2021. LDS is working with the project team on the Zoning Board of Appeals comprehensive permit application.

- **2020- Present 40B Consultant to Settlers Glen** – Proposed 20-unit ownership development in Wareham, MA. LDS prepared the Project Eligibility Application which was granted on January 12, 2021. LDS worked with the project team on the Zoning Board of Appeals comprehensive permit application which was granted on May 26, 2021. Sold to a third party.
- **2019- Present 40B Consultant to Corvo Companies** – proposed 60-unit rental development in Norton, MA. LDS prepared a rent comparability study, financial analysis, and a Comprehensive Permit Project Eligibility Letter application which was issued by MassHousing on May 21, 2020 comprehensive permit issued June 2021.
- **2019 –Present 40B Consultant to Corvo Companies** – proposed 24-unit rental development in West Bridgewater, MA. LDS prepared a market study with rental recommendations and financial analysis for the proposed development. A Project Eligibility Letter application was submitted on January 31, 2020. LDS worked with the project team on the Zoning Board of Appeals comprehensive permit application which was granted on June 8, 2021, final approval issued June 2022, under construction.
- **2018-Present - 40B Consultant to Cedar Place, LLC** – Proposed 17-unit rental development in Wellesley, MA. LDS prepared the project eligibility/site approval application, which was submitted in November 2018. LDS also prepared a brief market study and financial analysis. The project received its project eligibility letter (“PEL”) from MassHousing on March 29, 2019. On April 17, 2019, it filed for a comprehensive permit with the Wellesley Zoning Board of Appeals and closed the public hearings on December 17, 2019. It was granted a comprehensive permit on January 27, 2020. LDS also worked on the MassHousing final approval which was granted on February 4, 2021. Under construction.
- **2019-Present – 40B Consultant to Barsky Estate Realty Trust** – Proposed 28-unit ownership project and 60-unit rental project in Sherborn, MA. LDS prepared a rent comparability study, ownership recommendation letter, and financial analysis. Project Eligibility Letter applications (one for the ownership project and one for the rental project). PELs issued April 30, 2020. LDS filed ZBA application in November 2020. The ZBA denied the permits and the developer appealed to the HAC.
- **2019 – 40B Consultant to Tamposi Brothers Development** – Two 20-40 unit projects and one 50-100 unit project planned in Milton, MA. LDS prepared a market study letter with rent recommendations, as well as a financial analysis.
- **2019 – 40B Consultant to Elio Silva** – proposed 41-unit rental development in Oak Bluffs, MA. LDS prepared a rent comparability study with market rate rent recommendations.
- **2019 – 40B Consultant to Universal Properties** – 124-unit rental property proposed in Millis, MA. LDS prepared a rent comparability study and financial analysis.

- **2019 – Present 40B Consultant to Eastward Companies** – 60-unit rental property proposed in Brewster, MA. LDS prepared a market study letter and financial analysis.
- **2018-Present - 40B Consultant to NY Ventures, LLC** – 132-unit rental development proposed in North Reading, MA. LDS prepared the project eligibility/site approval application, which was filed in December 2018. LDS also prepared a market study and is providing financial analyses for the project. The project received its PEL from MassHousing on March 27, 2019. The project filed for a comprehensive permit with the North Reading Zoning Board of Appeals and the town has claimed a safe harbor under the gross minimum land area. LDS is working on project alternatives as well as supporting the team on the safe harbor appeal. Lynne was an expert witness on the 1.5% land area minimum in front of the HAC in March 2022.
- **2018- 40B Consultant to Szecon Development**– 124-unit rental property in Melrose, MA. LDS prepared a market study and performed financial analyses for the proposed project. LDS also prepared the PEL application for the 124-unit project, which was filed in December 2018. The project scope has since been revised, and now proposes to construct 44 townhouse-style homeownership units, a reduction of 80 units. LDS prepared the PEL application for the updated project, which was filed in March 2019 and after a number of changes, the development received a site eligibility letter on September 20, 2019 for 36 town house ownership units.
- **2018-40B Technical Consultant under an MHP Grant to the Town of Dartmouth, MA Zoning Board of Appeals. Proposed 300-unit apartment development.** LDS provided Chapter 40B training to ZBA members and town staff on April 4, 2018 and is currently worked with the ZBA to review the application. The town issued a comprehensive permit in 2021.
- **2017 - 40B Development Consultant to Ten Gates Development, Gloucester, MA** LDS worked with Ten Gates Development on the adaptive re-use of an existing building in downtown Gloucester to 7 units of affordable rental housing. The project is fully supported by the Mayor of Gloucester, is offering and two additional affordable units over and above what is required by Chapter 40B. It will also offer a veteran's preference. It received its site eligibility application from DHCD in less than 60 days in March 2018, with no comments from the City of Gloucester, and filed with the City of Gloucester Zoning Board of Appeals on April 5, 2018. It received CPA funding in the amount of \$120,000 and a comprehensive permit in August 2018. LDS obtained DHCD final approval in November 2018. LDS also assisted with the affordable housing lottery. The project is fully occupied and has completed its cost certification.
- **2016- 40B Technical Consultant under an MHP Grant to the Town of West Bridgewater Zoning Board of Appeals.** Proposed project 139 homes located off of Maple Street.

Unanimous decision of West Bridgewater ZBA in October 2016 to build 89 single family homes, a reduction of 50 units.

- **2016 - 40B Fiscal Impact Consultant to the Gutierrez Companies, Westford, MA –** Proposed 282 rental apartments off of Littleton Road and Concord Road. To provide the Town of Westford with an understanding of the Project's long-term impacts on the local tax base, LDS provided a fiscal impact analysis study. This involved identifying key fiscal characteristics of the proposed project and estimating the project's annual fiscal benefit and financial impacts on municipal services. Resulted in white paper from LDS on how to approach fiscal impact studies.
- **2015 -Present 40B Technical Consultant to the Holland Companies, Washington Place, Braintree, MA –** 72-unit rental and 8 unit ownership development. LDS provided a market study and completed ownership and rental site eligibility application materials, including an affordable fair marketing and tenant selection plan and fiscal impact analysis. LDS provided sustainable development principles for the project's 40B application in August 2016. The site eligibility letters were filed on October 31, 2016. LDS was involved in the community meeting process and helped facilitate and create presentation materials for two community meetings held in January 2017. The project received site eligibility letters on February 13, 2017. LDS contributed to the applications to the Braintree ZBA, which were filed on February 14, 2017. The Town filed with DHCD under a safe Harbor provision for 1.5% land area. LDS provided GIS research regarding the land area requirement and DHCD ruled in favor of the developer. The Town appealed this decision to HAC and LDS continue to work on SHI, GIS and land area matters. The case was heard by HAC in December 2017 and a decision rendered in favor of the developer. The developer team used the draft DHCD regulations as part of its appeal. Among other matters, LDS preformed a lot of registry research to identify deed restrictions. As of November 2019, the development is in front of the Braintree Zoning Board of Appeals.
- **2013 – Present - 40B Technical Consultant The Holland Companies, Randolph Avenue, Milton, MA –** 90 unit rental development. LDS provided a market study and worked with the client on development, income and operating pro-formas as well as on completing application materials such as the AHFMP, Smart growth score card. LDS contributed strategic advice and research throughout the 40B permitting process and is participating in the appeal process. LDS was critical member of the team to prove to DHCD that the Town of Milton had not met its 1.5% land area requirement. LDS was an expert witness at the HAC hearing on behalf of the developer. HAC found in favor of the developer and the Town Appealed to the Land Court and lost, in additional Town lost as all higher courts. In final approval process as of February 2023.
- **City of Newton Housing Partnership –** Lynne Sweet was a long time member of the City of Newton Housing Partnership which regularly reviews and comments on Chapter 40B site eligibility applications as well as development applications for HOME, CDBG and CPA

funds. The review includes pro-formas for affordable housing developments, both rental and ownership, as well as reviewing plans, developer team qualifications and site visits. Projects in that past year include Kessler Woods, Rowe Street, 135 Wells Avenue, Austin Street mixed use, Turtle Lane Playhouse, 1521 Beacon Street. LDS was instrumental in negotiating the re-design of Court Street.

- 2015– 40B market researcher for a 31-unit mixed income development on Beacon Street in Newton, MA for ownership, rental and office as well as site design and planning services.
- 2014-Present – 40B Technical Consultant for a 36 market rate rental development, North Attleborough. Conducted a market study and provided site and building design consulting. Provided financial pro-formas. Project did not work financially.
- 2014-2017 40B Technical Consultant 68 unit affordable rental development, North Attleborough, MA. Conservation Commission order of Conditions received, ZBA hearing closed, permit approved and broke ground in 2017. It is constructed and occupied.
- **2013 – 2016 40B Technical Consultant in Sudbury, MA for a 300 unit rental development.** LDS provided a market study and worked with client on development, income and operating pro-formas as well as on completing application materials. In 2016, LDS is worked on the appeal on matters concerning local and regional need for affordable housing, and provided research and expert testimony regarding the regional need. The developer settled with the town.
- **Hingham Affordable Housing Trust (“HAHT”) – LDS was the 40B consultant to the HAHT.** Our work included assisting on the vision for the site and preparing the financial pro-formas and the LIP application for an 8 unit homeownership project, with 2 affordable units of small single family homes as well as taking the lead on the RFP process to find a third party developer. A lot of LDS’s time was been spent on helping the Trust understand the economics of the transaction, and to create a project that will be achievable. We also took the lead on the community process and attended a meeting with the Board of Selectman as well as public meeting for abutters. In addition, we worked hard to keep Trust members focused on their goals. We pride ourselves in the skill of recognizing Trust member’s contributions, while gently steering them back to the task at hand.

The HAHT received its site plan approval letter from DHCD in less than 60 days and DHCD staff stated that they will use the development as a model for other developers. LDS also prepared the filing with the ZBA for the comprehensive permit that was submitted in early June 2011 and the ZBA vote favorably for the development in the fall of 2011. Then the Trust asked LDS to assist with writing an RFP for a third party developer to build the development and run the RFP process, which RFP was issued in April 2012. The RFP received of three-dozen inquiries, six proposals from qualified bidders, narrowed the field to 3 development teams for interviews that were held on May 30, 2012. LDS prepared the

questions for the trust for the interviews, and followed up on references for the lead bidder. The project was awarded to a developer and has been completed as of April 2014.

When we worked in Hingham, we worked with the local Trust on a development that would not overburden the surrounding neighborhood. There was an educational component throughout the development including neighborhood meetings. By coming up with a low density plan, and bringing in the interested parties right away, as well as working with members of the community that were well respected in the community, we had minimal comments from the selectman and ZBA. Communication, conservative development goals, and facts and credibility were what led to the success of this development.

- **Norwell, MA** – LDS was the 40B technical consultant to the Norwell Affordable Housing Trust on a potential 24 unit homeownership project on Wildcat Lane.
- **Duxbury, MA** – LDS is the 40B technical consultant to the Duxbury Affordable Housing Trust on a two unit potential homeownership project on sites known as the grange and fire station in Duxbury, MA. LDS worked on a cost benefit analysis to inform the trust of several development and funding options.

In Duxbury, we came into a development that was pretty far down the road. We put the brakes on the project. This time out allowed us to educate the Trust on the legal, financial and building matters relevant to creating a creditable and successful development. We provided the Trust with three development alternatives that allowed them to make an informed decision and re-start the development process so that they could reach their goal.

- **Mixed Income Rental Housing** – LDS represented the owners of a 196 unit rental housing development in Georgetown, MA. LDS prepared the site eligibility application as well as provided market research advice to the owner all the way through the Chapter 40B permitting process. The development, Longview is successful in large part to several elevator buildings that have attracted senior renters.
- **Seekonk, MA** – LDS is the 40B consultant to a local contractor looking to create a small homeownership development. Our work has included preparing the financial pro-formas for the development and educating the client about the timing and costs for the 40B process.
- **Multi-Family Rental** - LDS was a consultant on the redevelopment of the Bliss School in Attleboro, Massachusetts to 40 units of affordable multi-family housing. On behalf of Great Bridge Properties, Inc. of New Hampshire, LDS identified the site, identified the appropriate use and worked on the zoning analysis and market study for the initial September 2004 low income housing tax credit application. In the winter of 2005 LDS assisted with amending a 15-year-old Comprehensive Permit for the site, obtaining City Council Approval to amend Deed Restrictions and preparation of the second low income housing tax credit application

to the Commonwealth. The development was awarded Low Income Tax credits, HOME Funds and Affordable Housing Trust Funds in July 2005. Opened October 2006.

- **Mixed Income Home Ownership** - LDS was a 40B financial consultant to developers of a 16 unit duplex condominium in Bridgewater, Massachusetts. The work involved preparing financial pro-forma's for the Site Plan Approval Application and educating the client on various financing options.
- **Chapter 40B Technical Assistance** - LDS represented the **Town of Framingham** Zoning Board of Appeals on local need and financial issues in connection with a friendly Chapter 40B application for Jewish Community Housing for the Elderly for 150 units of elderly rental housing, currently under construction.
- **Rental Market Examined for 300-unit Project in Bridgewater** - LDS analyzed market-rate rental housing in the Bridgewater area to help new client Claremont Companies make decisions about its proposed 300-unit, mixed-income development. Specifically, LDS examined 11 market-rate apartment complexes in Bridgewater and seven neighboring communities. Everything from the complexes' rents to occupancies were studied as part of the work. Ultimately, LDS offered recommendations on several issues, including proposed rents, target customers and amenities.
- **40B Expert Witness**
 - Principal Lynne Sweet testified in late November 2009 in a hearing before the Massachusetts Housing Appeals Committee (HAC) in support of Sugarbush Meadows, a Chapter 40B development in Sunderland. She served as an expert witness on regional need for affordable housing and other zoning by law matters such as the application of sustainable development principals within the bylaws. The case was decided in July 2010 in favor of the developer.
 - Principal Lynne Sweet was an expert witness for Cambridge Housing Authority in connection with the abutter appeal of a comprehensive permit granted by the City of Cambridge for 42 units of rental housing. LDS prepared written testimony and was disposed. The case settled before it was heard in Superior Court.
- **MHP 40B Technical Consultant**
- **LDS is a 40B Monitoring Agent for:**
 - Bellingham, Lakeview Estates
 - Berlin, Berlin Woods and Green Acres
 - Berlin, Capes of Berlin
 - Dover, Dover Farms
 - Foxborough, Highland Ridge
 - Littleton, Kimloch Farms
 - Medfield, Chapel Hill Landing

- Middleboro, Louise Estates
- Norfolk, Meetinghouse Village
- Norfolk, The Enclave at Norfolk
- Norwell-Hingham, Damon Farm
- Plymouth, Cottages at Twin Pines
- Reading, Reading Woods (40R development)
- Salisbury, Northpointe Village
- Wayland, Craftsman Village