

# **Request for Expressions of Interest (RFI)**

*for*

**The Historic Preservation & Adaptive Reuse**

*of*

## **THE BROWN SCHOOL**

**Newburyport, Massachusetts**



**Submitted to The City of Newburyport**

*by*

**The Joint Venture of**

**PARENT + DIAMOND, LLC  
&  
URBAN SPACES, LLC**

**8 September 2023**

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Andrew R. Port  
Director of Planning & Development  
Newburyport City Hall  
Newburyport, Massachusetts 01950  
978-465-4400 x 5

**Re: Request for Expressions of Interest (RFI)  
The Adaptive Reuse of the Newburyport Brown School**

Dear Andrew,

It is with great pleasure that we are providing this Cover Letter to express our team's interest in again assisting the City of Newburyport in preserving its architectural heritage through historic preservation and adaptive re-use. It is our intention to do so while enhancing the existing residential fabric of this part of the city's South End.

Our previous work to preserve and redevelop Newburyport's historic Kelley School was an example of a more limited, site-specific challenge. The Brown School presents the opportunity for a different and more impactful challenge, one that incorporates historic preservation, adaptive re-use, and likely new construction that is aligned with the city's programmatic objectives and the exiting neighborhood context.

This presentation will elaborate on the above and will provide a financeable approach that is both viable and expeditious, the latter being unusual in the world of affordable housing. Not only is our team amply capitalized for a project of this size, but it benefits from some innovative subsidy programs that are likely unique to our team due to its composition.

In that regard, our development team is a Joint Venture of [Parent + Diamond, LLC](#), a Minority Business Enterprise, and [Urban Spaces, LLC](#), a Cambridge-based development company with which we've enjoyed a decade of successful joint venture projects. As with The Kelley School, the site planning and architecture will be under the auspices of Stephen E. Tise, AIA of [Tise Design Associates, Inc.](#)

For the purposes of this RFI and, hopefully, the RFP, I will be the primary contact for the JV with my contact information noted below.

Thank you very much for your consideration of our Response to this Request for Information and we look forward to hearing from you, especially to answer any questions.

Best regards,

*Merrill H. Diamond*

Merrill H. Diamond  
Parent + Diamond, LLC  
90 Marion Street  
Brookline, MA 02446  
617.512.1027  
mdiamond@parentdiamond.com

(Please scroll for RFI Response)

## 2. Experience & Qualifications

The following Members of our Development Team have over decades of experience in the creation and delivery of affordable housing for all income and age groups:

Merrill H. Diamond, **Parent + Diamond** - Mr. Diamond completed the first of HUD's HOPE VI affordable projects using all local minority and women contractors to keep the dollars flowing in the subject community. The implementation strategy for Concord Village became the template for future HOPE VI projects, and Mr. Diamond's interest in HOW we build is of equal interest to WHAT we build. It was with this interest in mind that Mr. Diamond joined Ralph Parent to form Parent + Diamond, an MBE-certified development company.

Ralph A. Parent, **Parent + Diamond** – Mr. Parent founded Parent + Diamond specifically to advance both principals' goals of creating employment opportunities for minority and women professionals and builders throughout the development process, and especially during construction. Further, Mr. Parent has created a fund aimed at wealth creation through minority investment and is well versed in the required protocols and subsidies, some of which are geared to minority developers.

Paul M Ognibene, **Urban Spaces** – A true urban pioneer, Mr. Ognibene, the CEO of Cambridge-based Urban Spaces, is primarily responsible for “The Renaissance on 1<sup>st</sup> Street” in Cambridge where Urban Spaces has created a vital residential and commercial environment from a declining retail environment. Certainly not his company's first neighborhood that has been transformed because of his entrepreneurial vision, Mr. Ognibene's company has been providing leadership, foundational ideas, and capitalization for the JV with Parent + Diamond for over a decade.

Stephen E. Tise, AIA, **Tise Design Associates** – Principal Stephen E. Tise has been providing site planning and architectural services for Merrill H. Diamond and his development company since their work together on numerous HOPE VI public and affordable housing communities. Mr. Tise was one of the creators of the HOPE VI programs, and his work in addressing shelter insecurity is almost legendary in the world of Public and affordable housing. Arguably, there is no better designer for a project of this nature – one that marries the need for affordable housing with an important neighborhood context.

\* \* \*

The extensive experience of our Development Team can best be summarized by visiting the respective websites of the two Joint Venture Development Partners and our Urban Planner / Architect.

At [Parent + Diamond](#), you will find 43 years of project images and descriptions, almost all of which featured a substantial affordable component. Of note is that a recent JV project, *The Lancaster* at 1501 Commonwealth Avenue in Boston, featured 18 of the 55 units as affordable, with the balance being high-end market rate units. This project has implications for our approach to this project and will be described later in this presentation.

At [Urban Spaces](#), you will note Urban Spaces' decades of experience with large-scale, multifamily developments that have been truly transformative, programmatically and physically. Although Urban Spaces has its own portfolio of work, the Joint Venture with Parent + Diamond has resulted in the aforementioned project, *The Lancaster*, and the creation of affordable homes in Dorchester under the auspices of the Mayor's Office of Housing (MOH) in Boston.

Even more current, the Joint Venture is about to break ground on a \$40M condominium project overlooking the Brookline Reservoir. Although noteworthy because of the price point (\$3M - \$4M), the project will be constructed by a minority general contractor with a significant amount of the construction dollars earmarked for Minority and Women-owned Business Enterprises (MBE/WBE). In addition, the project is committed to minority wealth creation through a project investment fund aimed at financially secure minority investors.

At [Tise Design Associates](#)., you will note that architect Steve Tise's career is as "bi-polar" as my own. His decades of work are marked by beautiful private sector architecture, often for developers like myself, amid a reservoir of public and affordable projects. Steve is one of the nation's "gurus" regarding what works and what doesn't in the world of affordable housing and his body of work in this arena has earned him continued national attention. I've worked with many architects; I'd argue that there's nobody more creative and more knowledgeable about affordable housing than Steve Tise.

### **3. Development Concepts**

#### **A. Adaptive Reuse Concepts under Existing Zoning:**

To the extent determined by the City of Newburyport and as endorsed by the neighbors, the “as-of-right” approach would be the historic preservation and adaptive re-use of The Brown School into over-62 affordable housing with the existing gym preserved and the enhancement of the remaining open space. We think that this approach will take a long time, if ever, to become a financially viable reality in an environment of increasing competition for tax credits and subsidies. In our opinion, the city and the neighborhood can do better.

Under this scenario, it is our intention to work with Joseph Corentti, Esq., as our permitting attorney as we did for The Kelley School in Newburyport.

#### **B. Adaptive Re-use Concepts Requiring Alternative Zoning and/or Removal of gym**

We would respectfully suggest two alternative approaches to the project, each of which would call for the complete historic preservation and adaptive re-use of The Brown School and each of which would feature the demolition of the existing gymnasium in favor of a new building on the site. We envision structured parking and a gym facility located under new residential units. The height of the new building would mirror the height of The Brown School and the space between the buildings would be landscaped as an outdoor seating area to “marry” the populations of each building.

Two ideas then emerge: One calls for keeping The Brown School as 100% over-62 affordable housing and using the new building for market-rate units to help finance the development.

The other approach would be to maintain the same number of over-62 affordable units programmed for The Brown School and to spread them between the two buildings. In other words, a mixed-income development with a new building that fits the context of its host neighborhood.

The latter is my preference since, as folks older than 62, my wife and I far prefer living, working, and just being around younger folks as we do now. That might just be us, but I kind of doubt it.

Although we would like to be considered for the “basic” approach if the city lands in that direction for the RFP, we believe that there are significant advantages to demolishing the gym in favor of a new, contextual building as described above.

The advantages of such a mixed-income approach to the site include the following:

1. The new Market-Rate Units will help pay for the renovation of The Brown School and help limit the number of subsidies required to start the project and greatly accelerate a ground-breaking.
2. The Composition of our Development Team and a socially responsible approach to real estate development permits us to qualify for certain subsidies that are not available to other development companies.
3. In addition to providing much needed senior affordable housing and market-rate housing opportunities, our concept provides for many more Employment and Vendor opportunities than would be provided by only renovating The Brown School.
4. In the final analysis, this is a site planning project as well as an historic preservation and adaptive re-use project. The gym might be familiar, but it's a blight on the existing residential fabric of an otherwise wonderful neighborhood of traditional residential architecture.
5. Let's think "outside the box" together to arrive at a project program that can have an impact that far transcends preliminary and visceral thinking in a Request for Information. In that regard, we remain hopeful of being able to flesh out our thinking in a Response to a Request for Proposals.

\* \* \*

Under any scenario, it is our intention to work with Joseph Corentti, Esq., as our permitting attorney as we did for The Kelley School in Newburyport.

I would also note that over a 40+ year career of developing residential real estate, I have never failed to obtain entitlements and financing to complete a project for which I had an agreement with the government, the Commonwealth, a municipality, or a private seller.

### C. Details Regarding Proposed Housing Units

All adaptive reuse concepts shall be accompanied by a summary of the following:

1. The number of market rate units proposed

We are suggesting that serious consideration be given to demolishing the existing gymnasium building in favor of a new market-rate residential building, assuming the idea gains traction with the City of Newburyport and the neighborhood. If our new building mirrors the size of the existing Brown School building, we would suggest an architectural vernacular that worked well with the latter.

Such a proposal would create approximately 32 new units of which 29 would be market-rate and approximately 3 of which would be affordable to the level desired by the city. We are aware of Newburyport's requirement of 12% for Inclusionary Zoning.

The number of affordable units proposed for The Brown School, the proposed level or depth of affordability for such units has been preliminary assumptions are as follows.

The existing Brown School would have a total of approximately 32 units that range between 30% - 80% AMI.

Gross Square Feet = 37,701

Net Usable Square Feet = 27,526 (25% is common areas, stair and elevator core, corridors, etc.)

Average Unit Size = 850 Square Feet (Preliminary Assumption)

2. The number of bedrooms associated with both affordable and market rate units.

The proposed unit mix for both the existing Brown School and the new Market-rate building is currently projected to be 2/3 two-Bedroom units and 1/3 one-bedroom and Three-bedroom units.



## D. Proposed or Anticipated Financing

For each adaptive reuse concept:

1. Provide a preliminary pro forma, including sources and uses of funds

Respectfully, we would expect a meaningful pro forma to be an important part of the Request for Proposals. At this point, creating a preliminary pro forma for a 100% affordable building is challenging, if not useless, without having a complete building program, inclusive of a consensus unit count and a consensus unit mix to be discussed with the various stakeholders vested in the success of this project.

This includes the neighborhood. We have never moved forward with any project without hosting several neighborhood meetings, one to solicit input and ideas and the other to demonstrate that “we heard you.” As an example, subsidies for One-bedroom, Two-bedroom and Three-bedroom units vary between the use of LIHTC, PBV’s, and MRVP subsidies.

2. Provide a brief narrative on how the development team plans to utilize proposed financing sources, including permanent loans, DHCD subsidies, tax credits, local funding sources, and other grant programs.

The development team will conduct a thorough analysis of using both the 4% and 9% LIHTC vehicles. Based on the determined vehicles, our team will use all available tax credits listed in the Executive Office of Housing and Livable Communities - Notice of Funding Availability (NOFA)

Federal Low Income Housing Tax Credits (LIHTC)  
Massachusetts Low Income Housing Tax Credit  
American Rescue Plan Act (ARPA)  
HOME Investment Partnership Program  
Affordable Housing Trust Fund (AHTF):  
Housing Stabilization and Investment Fund (HSF)  
Capital Improvement & Preservation Trust Fund (CIPF)

3. Provide an estimated timeline for the project including any major milestones (e.g. property acquisition, design, permitting, construction start, final occupancy, etc.)

0-3 Months - Feasibility Analysis, Neighborhood & Municipal Meetings  
3 Months - Schematic Design for Permitting  
9-12 Months – Permitting Process from PSA to Entitlement  
9 Months – Planning & Architecture (Working Drawings & Specifications)

12 - 18 Months - Construction Start to Completion  
6 Months - Final Occupancy

**We anticipate that the entire project, from PSA to Construction Completion should take approximately 3 - 3 ½ years.**

#### **4. Transparency:**

Please note that the only contact that any member of our development team has had with the City of Newburyport regarding the subject Request for Information has been limited to receiving the RFI from Andrew Port whom we know from our previous work on The Kelley School in Newburyport. In addition, Messrs. Diamond and Tise toured the buildings with former Mayor Holaday (and you?) a long way back and before any decisions were made as to its disposition.

**5. Other Documents & Information** Include any other pertinent information about the proposer/developer or proposal that would aid the City in understanding the nature and benefits of the proposed adaptive reuse program.

# # #



September 7, 2023

To Whom It May Concern:

I am pleased to submit this Letter Of Recommendation for Ralph Parent and Parent + Diamond on behalf of the Builders of Color Coalition.

I had initially crossed paths with Ralph and his firm through the Builders of Color Coalition Affordable Housing Developer Fellowship - a state and foundation-funded program designed to convene minority-owned real estate firms to expand the scope and capacity of their projects. Our organization selected Parent + Diamond to participate due to its real estate track record and ability to pursue inclusive and affordable housing. Over the six-month program, Ralph and his firm received the tools and resources necessary to impact the affordable housing space significantly.

Beyond our fellowship program, Ralph has been an active and valued Builders of Color Coalition member. Through that, we have seen that he has applied his expertise and background to his real estate endeavors, including but not limited to a project in Brookline consisting of 12 new construction townhouses, an 11-unit residential development in Cambridge, and a 61-unit condominium in Salem. His enthusiasm and determination to create economic mobility for residents across the Commonwealth matched with his skills and expertise, make his firm an asset to any partnership or project they are involved in.

As an organization devoted to increasing access and diversity in Boston's commercial real estate sector, we are proud to see minority-owned real estate firms within our network forging ahead in the industry. Parent + Diamond demonstrates the potential to create a generational impact in expanding economic opportunity.

Sincerely,

Colleen N. Fonseca

Executive Director

Builders of Color Coalition

EQUITY REALIZED

# A Vision for 2023: Offering Others a Seat at the Table

Boston Developer and His Brookline Mentor Show the Power of Inclusion

By Malia Lazu | Special to Banker & Tradesman | Jan 15, 2023 | [Reprints](#) | [Print](#)



**Malia Lazu**

“Now that I have a seat at the table, the question I ask myself is, ‘How do I provide opportunity for others?’”

Those words were spoken by Ralph Parent, a Boston-based real estate developer, when we talked at the close of 2022. As an entrepreneur of color and a real estate developer, Parent credits his success to the mentorship he has received over the years. Now, it’s his turn: paying it forward by providing opportunities for others.

His mission paints a picture for all of us. As 2023 gets underway, this can be a year when we, at last, see genuine strides made toward greater diversity, equity, and inclusion in real estate development and

elsewhere in the business world.

For too long, real estate development in Boston and nationwide has remained predominantly white and male. The problem is generational – long-standing and entrenched. It took many years to create this gap; therefore, it will take time to bridge the divide in wealth and economic opportunity so that knowledge, capital and project participation can flow more freely.

Change can only happen when we're willing to acknowledge the inherent racism of the system in which people can be excluded so easily. It happens as the status quo is perpetuated: People who have always worked together in the past keep working together in the future. Doors are opened to only a select few; others remain shut out.

"How much opportunity has been missed because minorities and women have been excluded?" Parent asked.

It's a question that should be pondered with more intentionality in this new year.

All it takes is one person who is willing to provide opportunities for others to learn and grow, and then scale from smaller projects to bigger ones. Success begets more success. The real estate industry needs to get on board with this wave of change, and for two simple reasons: Greater diversity and inclusion is good for the bottom line and good business.

## **The Value of Mentorship**

Parent knows first-hand the benefits of being included. The [son of Haitian immigrants](#) and the youngest of five children, he grew up in subsidized housing in Brookline. He played football in high school and earned a scholarship to play at Boston College. After a year of professional football in Europe, he returned to the United States.

As Parent soul-searched for the right career, Brookline developer Merrill Diamond, who had coached him back in Little League baseball, offered to be his mentor. Parent began sitting in on meetings and learning the business from the ground up – sometimes literally.

Today, they are partners in Parent + Diamond Real Estate Development. They are also part of The Boston Partnership for Community Reinvestment, a joint venture of Parent + Diamond and Cambridge-based Urban Spaces LLC. Current projects include single-family home development in Dorchester and promoting affordable homeownership in partnership with the Boston Mayor's Office of Housing.

Parent spoke with particular pride about The Boston Partnership for Community Reinvestment team, where he designed a diverse and inclusive team of an architect who is a woman from India and the civil engineer and general contractor are two Black men. This is how positive change begins: shifting the demographics of the industry, one person at a time.

"Over my years in development, I've seen the difficulties for minorities to get into large-scale development. It's a very heavy lift," Parent said. "You can't just jump into it. You have to be guided into it."

I have also seen this countless times in my own career, from neighborhoods to corporations, from community rooms to boardrooms: Economic growth comes from new ideas. Diversity of thinking and fresh perspectives are the direct result of becoming more inclusive of women and people of color. Doing business with more women- and minority-owned business enterprises (WMBEs) helps grows the proverbial pie so there is more for everyone to share.

## A Year for Change

As 2023 gets underway, calls for real change are getting louder. We're seeing it among community advocacy groups that want to see an [expansion of the Massport Model](#) for greater diversity and inclusion in all aspects of the development process. We're hearing it across communities and neighborhoods that desire more affordable housing and inclusive community development.

Now it's time for real estate development to ensure more WMBEs are part of their development projects. When the people in real estate companies are representative of the communities in which development is happening, it is much easier to partner on the local level. Old antagonisms fade; alignment becomes possible.

While his plate is full of his current projects, Parent does not stop looking ahead. The next phase is moving into private equity and syndication, to help minorities build wealth through alternative investment vehicles.

"This is about creating partnerships, including people who have never before been asked to show what they can do," Parent said. "All they need is the opportunity."

*Malia Lazu is a lecturer in the Technological Innovation, Entrepreneurship and Strategic Management Group at the MIT Sloan School of Management, CEO of The Lazu Group and former Eastern Massachusetts regional president and chief experience and culture officer at Berkshire Bank.*

# Featured Member Highlight: Ralph Parent—Championing Diversity & Inclusion in Real Estate Development



It gives us immense pleasure to feature Ralph Parent, Managing Partner of [Parent + Diamond](#), in our member highlight this month. Ralph is not merely leaving footprints on Boston, Massachusetts property development scene; he's indeed rewriting the rules by promoting a culture of diversity, equity, and inclusion (DEI).

Ralph's unwavering dedication to his city, manifests in his tireless collaborations with established development firms to narrow disparities, encourage inclusiveness, and construct a more equitable Boston and surrounding neighborhoods. His next development, beginning this September, is in joint venture with [Urban Spaces](#), a Cambridge, MA-based development firm. Named [The Townhomes at The Richardson Estate](#), the project consists of 12 new-construction townhouses located in the affluent Town of Brookline, Massachusetts. Sales are forecast at an average of \$1,300 psf., which translates into townhomes priced between \$3.8 and \$4.8 million (\$4.3 million average).

His strategy transcends the mere erection of buildings or living spaces. In parallel, he focuses on wealth generation and equity investments, through his company called Ascending Communities . The spirit of Ascending Communities was born out his desires to:

1. Leverage his joint-venture developments and lowering minimum contributions, to provide access to minorities who have not had the opportunity to invest in commercial real estate
2. Leverage his established relationships with outside development teams; thereby, creating opportunities and invest member capital
3. Building wealth in the minority community

Ralph has made it very clear that although the syndication was born out of providing minorities access and opportunity to invest, it is inclusive of ALL people. Ascending Communities is to not be known as a syndication for minorities only.

Expressing his conviction, Ralph stated that such initiatives are vital for the city's economic development and welfare. He foresees a Boston where mutual growth is the norm, not in spite of, but because of the diversity it houses. As Ralph stated, to him, it's not about giving or taking a piece of the pie; rather, make the pie larger, so everyone can share. Notably, Ralph recommended Janey Construction, a Black-owned construction company for the Brookline development. Ralph emphasized it was not an altruistic endeavor by him or his joint-venture partners. Out of six separate GC proposals (one proposal from the son of a principal in the development), Janey offered the best plan for the project success. Janey earned the position as a reputable construction firm, with a great history of hospitality and luxury construction.

With Parent + Diamond, Ralph demonstrates that an emphasis on DEI doesn't only bring a variety of perspectives and novel concepts, but also facilitates a more fair and inclusive society.

In a recent conversation, Dustin, a fellow member, remarked, "Ralph's transition from an employee to a business owner and multifamily developer is nothing short of impressive. It's fascinating to see how he uses his position to effect such meaningful changes. His commitment to diversity and community growth truly stands out."

Ralph's principles and determination resonate with our values at BCREN. His ambition to revolutionize Boston's property market, his zeal for community enrichment, and his advocacy for diversity and inclusion are lighting the path towards a more inclusive future.

We invite you to join us in applauding Ralph's significant contributions to our community and the city of Boston. As our featured member this month, we have no doubt that his journey will serve as a source of inspiration to many within our network.





CITY OF NEWBURYPORT  
OFFICE OF THE MAYOR  
DONNA D. HOLADAY, MAYOR

60 PLEASANT STREET - P.O. Box 550  
NEWBURYPORT, MA 01950  
978-465-4413 PHONE  
978-465-4402 FAX

December 22, 2014

Merrill H. Diamond & Nicholas E. Sinacori  
Diamond Sinacori, LLC  
231 West Canton Street  
Boston, MA 02116

Messrs. Diamond and Mr. Sinacori,

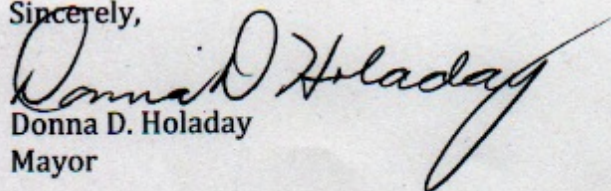
Thank you for your submission to the City in response to the Request For Proposals for the sale and adaptive reuse of the Kelley School building. I was very impressed with your proposal for this important site and your considerable portfolio as a development team.

Based on the evaluation criteria, the Selection Committee and I have determined that your submission is the most advantageous proposal for the City. In keeping with the conditions of award outlined in the RFP, please consider this correspondence as formal notice that the City has selected Diamond Sinacori, LLC as the preferred proposer for the disposition of this facility.

Please contact the City's Director of Policy and Administration, Peter Lombardi, at 978-465-4413 or [plombardi@cityofnewburyport.com](mailto:plombardi@cityofnewburyport.com) to schedule a time to meet in City Hall to finalize the terms of a Purchase and Sale Agreement for this property.

I look forward to meeting with you and your team in the coming weeks.

Sincerely,

  
Donna D. Holaday  
Mayor

cc: Andrew Port, Director of Planning and Development  
Peter Lombardi, Director of Policy and Administration

**Boston:**  
370 Washington Street  
Brookline, MA. 02146  
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317-926-3937 (fax)

## The Indianapolis Approach: Utilizing the HOPE VI Construction Process as a Tool for Economic Development

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*"I argue that the disappearance of work and the consequences of that disappearance for both social and cultural life are the central problems in the inner-city ghetto."*

from *When Work Disappears* by William Julius Wilson

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### 1. OBJECTIVE

The intention of this memorandum is to discuss the use of the construction process as a tool for generating sustainable economic development opportunities for residents and the host communities of HOPE VI developments. As such, the focus will be on Concord Village and Eaglecreek, two distressed public housing development in Indianapolis, Indiana, and the subjects of HOPE VI planning and implementation grants from the Department of Housing and Urban Development (HUD).

### 2. BACKGROUND

From its inception in 1993, the HOPE VI program has attempted to pioneer new ways of addressing the conditions of distress of some of our cities' most distressed public housing developments. In doing so, the program has focused on three fundamental precepts which are unique in the history of government-sponsored initiatives in this area: first, that sustainable revitalization requires a comprehensive, "holistic" approach in dealing with a myriad of inter-related physical, social and economic issues; second, that revitalization must recognize the symbiotic relationship between distressed public housing projects and their community context; and third, that the revitalization process must be founded on resident and community input and participation. To the extent that public housing authorities could demonstrate that their applications for revitalization funding were based, among other things, on these precepts, HUD allocated both planning and implementation grants to selected cities across the country. Among these was Indianapolis, Indiana, a recipient of a planning grant focusing on two distressed public housing developments located on the Near Westside of the city.

The revitalization planning process for the impacted developments, Concord Village and Eaglecreek, began in July 1994. Orchestrated by the joint venture of Tise, Hurwitz & Diamond, Inc. and Clyde Woods & Associates (The **TH&D/Woods** URD Team) the effort resulted in a comprehensive Revitalization Master Plan which was submitted to HUD in May 1995. Calling for density reduction and the complete demolition of both developments, the physical aspects of the plan called for the introduction of a building typology that is architecturally and historically



indigenous to the area. In addition, the plan provided for the re-introduction of the historic street grid, creating a neighborhood of individual homes with identifiable front doors and private front and rear yards - essentially replicating the fabric of the surrounding neighborhood. Off site, the plan envisioned an ambitious program of scattered-site housing, an attempt to eradicate problem properties and “jump-start” the revitalization of the surrounding Near Westside community. As is the case with all HOPE VI revitalization plans, the Revitalization Master Plan also mandated important social and economic programs to support the new communities. In the Fall of 1995, the Concord Village - Eaglecreek Revitalization Master Plan was approved by HUD, along with a commitment of approximately \$30 million dollars in HOPE VI funding. In addition, the joint venture of **TH&D/Woods** was approved to provide comprehensive program management to implement the approved revitalization plan.

After a period of revisiting and refining the approved master plan, a period marked by a change in leadership at the Indianapolis Public Housing Agency and two unsuccessful attempts at obtaining amendment funding from HUD to address a \$5 million dollar budget shortfall, a revised Revitalization Master Plan in the form of a Plan Refinement Report was submitted to HUD in May 1995. While keeping the main thrust of the plan intact, the Plan Refinement Report proposed a dramatic change in the general implementation strategy for the project. The previous Executive Director had envisioned implementation carried out by a housing authority non-profit (PRIME, Inc.) in partnership with a private sector, for-profit developer, with construction being performed by a single large general contractor provided by the developer. At the recommendation of **TH&D/Woods**, Executive Director Edward R. Jagnandan actively supported a different implementation approach – one that maximized the participation of local, disadvantaged contractors.

### **3. CURRENT PROJECT STATUS**

At this writing, demolition is almost completed at both developments (Concord Village and Eaglecreek) and bid packages have been let for on-site infrastructure and the first group of the total of 170 on-site houses at both developments. Construction of 8 homes is underway for the off-site component of the project, a scattered-site initiative aimed at jump-starting revitalization in the Near Westside neighborhood surrounding the developments.

In addition, a LIHTC deal is currently being negotiated with the local CDC, the Westside Community Development Corporation. If successful, this initiative will partner the IPHA with the WCDC and will provide 50 rental homes (the tax-credit units) which will become a “training ground” for homeownership. Residency will be from 1 to 3 years, with priority given to residents of the impacted developments and then public housing residents, system wide. The City of Indianapolis is actively supporting this project (as well as the entire HOPE VI program, by providing equity funding for up to 50 additional homes which will be the homeownership units that public housing residents transition to after completing their training.

Social service, community service, and management improvement programs are currently being initiated by TAG Associates, an important component of the **TH&D/Woods** URD Team.

### **4. CONCEPT: THE INDIANAPOLIS APPROACH**

Most HOPE VI implementation strategies rely on the utilization of large, well-financed developers and contractors to complete the construction process on and off site. While the best of these comply with Section 3 in creative ways, there is a likelihood that many of the jobs created to build out the projects will end after the project is completed. In addition to this lack of sustainability, it is likely that this approach will result in most of the construction dollars, the largest component of the HOPE VI grant, leaving the neighborhood or even the city.

The approach for the Indianapolis HOPE VI looks to build the capacity of local businesses, seeks to create jobs which will be sustaining long after construction is completed, and endeavors to keep the HOPE VI dollars circulating within the impacted community. It does so by maximizing

the participation of local, disadvantaged contractors, builders and suppliers through the utilization of small, multiple bid packages.

While this concept was spawned and championed by **TH&D/Woods**, the Program Management team, much of the credit for the approach must go to the Indianapolis-based component of the joint venture, Clyde Woods & Associates, an MBE architectural and program management firm. Their familiarity with the neighborhood and, in particular, the frustrations felt by local businesses precluded in the past from large construction projects in their own neighborhood, was the progenitor of the concept of providing opportunity for local, disadvantaged builders through HOPE VI.

In addition, and in no small measure, the Indianapolis Approach was based on the work of William Julius Wilson, Malcom Wiener Professor of Social Policy at Harvard University, noted author, and one of the nation's most influential urban sociologists. His recent book, *When Work Disappears* (Alfred A. Knopf, 1996) discusses both the challenges and opportunities inherent to America's inner cities in the necessary effort to create sustainable jobs.

#### **4. METHODOLOGY**

In order to create a viable program which maximizes the involvement of local, disadvantaged contractors, builders and suppliers, the following tools are being utilized by the **TH&D/Woods** URD Team, the Program Managers, and the construction management arm, a joint venture of local construction firms called GM/Geupel DeMars:

##### **a. Small, Multiple Bid Packages**

No tool has been more effective in reaching the intended market of local, disadvantaged contractors and builders (and discouraging the participation of large, well-financed contractors and builders) than the use of small, multiple bid packages. By taking the hundreds of homes to be built and breaking them down into small bid packages (anywhere from one home to ten homes), small builders were able to consider participation on a project which had been earmarked by large construction firms as a likely source of work. Correspondingly, the hope was that the larger firms, although not barred from bidding by law, would decline to bid on small numbers of homes, preferring instead to concentrate on projects more appropriate for their staffing patterns and dollar volume experience. In addition, the small bid packages opened the project to small contractors whose bonding capacity and credit standing would otherwise have prevented their participation.

##### **b. Outreach**

One of the most challenging aspects of this approach is identifying the pool of local, disadvantaged contractors, builders and suppliers and notifying them of the opportunities to be afforded through this HOPE VI approach. This effort is complicated by their past experiences of being misled and disappointed by previous government initiatives which promised substantive involvement, but delivered token participation. In order to get the targeted firms and individuals to consider our program, the approach was touted in local, community newspapers, added to the meeting agenda of local, minority business associations, and discussed on television and radio.

##### **c. Workshops**

Once notified, those interested in participating in the program were invited to a series of community workshops hosted by the Housing Authority, the Program Management team and the Construction Managers. These workshops focused on a number of issues, including: a description of the HOPE VI program and the approved revitalization plan, a discussion of the intended implementation strategy, and comprehensive presentations (including the distribution of written materials) in the areas of reading bid documents, insurance, bonding, Section 3 compliance, etc. Ample time was allotted to answer questions about all aspects of the program, and the workshops concluded with individual consultations regarding specific issues. There have been two such workshops to date, with more scheduled throughout the construction process.

#### **d. Bonding and Surety Assistance**

Many local, disadvantaged contractors had experience with being excluded from construction projects due to restrictive bonding requirements. This issue was, and is being tackled successfully by the construction management component of the team, working with individual contractors to find companies that would guarantee construction performance. In addition, the concepts of partnering and "mentoring" are being utilized successfully; in the former case, small builders are being encouraged to partner with other small builders to build bonding capacity, and in the latter case, bondable firms are being encouraged to team with smaller, less qualified firms in order to ensure participation on work components which would otherwise be unattainable.

#### **e. Loan Programs**

In order to address the difficulties faced by local, disadvantaged contractors in the area of credit and purchasing power, the Program Management team, inclusive of the construction management component, is currently exploring the availability of low-interest financing for small, disadvantaged contractors currently involved with the program.

#### **f. Section 3**

Clearly, one of the most significant tools at the disposal of those involved with the implementation of this program are the Section 3 requirements related to construction. Conveying the intent of this legislation to all parties involved in the construction of Concord Village and Eaglecreek has been important to the success of the program, and is providing opportunities for both the community and residents interested in participating in the revitalization process.

It should be noted that the construction management component of the team, GM/Geupel DeMars is implementing a construction training program, the charge of which is to enable residents and community members to become integrated into the construction process.

### **5. EFFECTS**

While it is too early to predict ultimate success, it is clear from an analysis of the first group of contractors working on the project (on and off site), that the program is attracting the intended target market of local, disadvantaged contractors and builders (All of the off-site homes currently under construction are being built by local, disadvantaged MBE and WBE firms, and much of the on-site demolition is being performed by local MBE firms, either independently or partnered as part of a "mentoring" program). It is also clear from the respondents to date that large, well-financed contractors have largely decided that the small bid packages make this project less than desirable.

At the suggestion of HUD/Washington, the program is being carefully monitored with regard to changes in the capacity of local firms and sustainability of jobs for residents of both local public housing residents and the Near Westside community. A "snapshot" of each firm is taken as they start work, and follow-up portraits are created on a bi-annual basis, continuing even after the conclusion of construction. Ultimately, one of the most important measurements of success will be a function of the future capability of neighborhood firms to undertake larger projects and the permanence of resident and community jobs afforded by the use of this approach.

### **6. CONCLUSION**

*"We find it paradoxical that so much attention has been focused on changing the labor-supply behavior of welfare recipients and so little has been given to changing the demand side of a labor market that has been increasingly unable to employ less-skilled and less-experienced workers."*

Sheldon Danziger and Peter Gottshalk  
from *When Work Disappears* by William Julius Wilson

While noble in intent, the Indianapolis Approach does not come without some degree of difficulty, risk and even some confusion. Most construction initiatives, even under HOPE VI, try to eliminate or lessen problems and risk by utilizing capable, well-financed contractors to complete the work. The effort of explaining the use of contractors encumbered with limited experience, poor credit, and the need for administrative and clerical assistance was initially met with reactions which ranged from understandable skepticism (e.g. the IPHA Board of Commissioners) to self-serving derision (e.g. large contractors afraid of being marginalized by the approach). It became important to remind all parties that the target market of local, disadvantaged contractors came, by definition, with certain limitations and liabilities, and that the success of the approach would be measured, in part, by how well the program provided opportunities for surmounting these limitations and liabilities.

It is conceivable that there may be as many as 30 or 40 different local, disadvantaged contractors working on and off site at the height of the construction process. Clearly, this mandates a high degree of administration, supervision, and general assistance. In addition, there will undoubtedly be contractors and sub-contractors who falter, regardless of the helping hand extended, when necessary, to assist them in taking advantage of a unique opportunity to build professional growth and personal self-esteem. There will be moments of both triumph and defeat with this process, with the ultimate results, sustainable capacity-building and permanent job creation, only measurable with the passage of time.

The Indianapolis Approach is not the most efficient, cost effective, or fastest method of construction; however, to the extent that the HOPE VI program is a comprehensive approach to revitalization, the legacy of the construction process of Concord Village and Eaglecreek may be as, or more important than the hundreds of new homes which are being created through HOPE VI in Indianapolis. As a generator of sustaining economic development for public housing residents and their host communities, it is our hope that the Indianapolis approach will prove to be a viable, if not preferable, method to implement the construction phases of future HOPE VI projects.

# # #

# **HOPE VI**

## **Certificate of Appreciation**

*Awarded To*

**MERRILL DIAMOND**

*In recognition and appreciation of exemplary service, for  
strengthening communities, for encouraging responsibility,  
for expanding opportunity for getting things done.*

*Hereby awarded this Certificate  
by the*

**Concord Village Resident Management Corporation**

*This 19<sup>th</sup> day of September 1998*

*Virginia Ryder*  
**Virginia Ryder, President**





CITY OF BOSTON • MASSACHUSETTS  
DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT  
MARTIN J. WALSH, MAYOR

December 30, 2019

Ms. Lisa Wong  
Town Manager  
Winchester, MA


Dear Ms. Wong:

I am writing in support of the development team led by Merrill Diamond who is considering applying to the Town of Winchester's RFQ for Selection of Developers. As I understand, the Town of Winchester is seeking a developer to re-program and develop an existing parking lot adjacent to a railroad overpass that passes through the downtown. The town's focus is the creation of a mixed-income development with affiliated parking that activates and revitalizes this TOD site by making it more of an appropriate extension of downtown Winchester. My experience with Mr. Diamond relates to The Lancaster at 1501 Commonwealth Avenue, Brighton, a City of Boston owned former nursing home that in 2013 was redeveloped by a team led by Mr. Diamond to create 55 new mixed income condominiums. I was Boston's lead development officer involved in the community process resulting in the issuance of the development RFP; furthermore, I evaluated and recommended the developer designation of the Diamond-led team and over a period of approximately 8 years engaged with Mr. Diamond from schematic stage to certificate of completion and the final unit sale.

I found Mr. Diamond to be a very strong, capable and experienced development professional, drawing from his varied projects and affiliations in the real estate field. He committed to and fulfilled strong community engagement from the moment he expressed interest in the 1501 Commonwealth development. I remain impressed by the team he assembled that addressed the many design, development and finance challenges that arose. Notable was his ability to access financing in a very difficult financing climate. Besides the above, 2 characteristics of Mr. Diamond remain with me. One, he had a clear vision for redevelopment of the site based on his extensive research of the neighborhood and working with folks. That was manifested in the strong design that resulted. Second, he thought outside the box to consider unique and important community benefits, such as his "Building a Building" apprenticeship classes he ran with students at abutting Brighton High School.

Mr. Diamond has important qualities that would serve Winchester well. As an aside, Mr. Diamond has applied for other Boston sites and DND has recently designated his team.

Sincerely,

  
John Feuerbach, Senior Development Officer (617-635-0353 or john.feuerbach@boston.gov)





# **BUILDING A BUILDING**

**A Program That Explains It From Start To Finish**

*Submitted by*

**THE BRIGHTON PARTNERSHIP FOR COMMUNITY REINVESTMENT, LLC**

Diamond Sinacori, LLC

Urban Spaces, LLC

*and*

Ralph A. Parent

*in conjunction with the development of*

***The LANCASTER***

*1501 Commonwealth Avenue  
Brighton, Massachusetts*

1 March 2014

## *PREFACE*

"I argue that the disappearance of work and the consequences of that disappearance for both social and cultural life are the central problems in the inner-city..."

from *When Work Disappears* by William Julius Wilson

*The BUILDING A BUILDING program that is presented here is an attempt to create meaningful change in the lives of some of our host neighborhood's children. To the extent that it works as intended, as described and as modified from our experiences in real time, we believe that it can and, perhaps should serve as a template for other DND projects that are located in neighborhoods that have similar socio-economic dynamics as our own. We're confident that it will prove to be an extraordinarily inexpensive Community Benefit, but one that could have the same transformational impact on area youth that we envision The Lancaster having on an entire neighborhood in the Brighton section of Boston.*

## **The Brighton Partnership for Community Reinvestment, LLC**

### **BUILDING A BUILDING**

#### **A Program That Explains It From Start To Finish**

##### **1. Why Such A Program?**

A “Construction Apprenticeship Program” was a key component of The Community Benefits aspect of the BPCR’s successful Response to the City of Boston’s (DND) Request for Proposals for the development of 1501 Commonwealth Avenue in Brighton, Massachusetts. The *BUILDING A BUILDING* program is an initiative that addresses this commitment from the BPCR as it begins to develop, construct and market *The Lancaster*, a 55 unit, mixed-income condominium development at that location.

##### **2. Who Is The Target Market For This Program?**

The target market(s) for the *BUILDING A BUILDING* program are the youth of the neighborhood of *The Lancaster*. As such, the BPCR will be conducting an out-reach effort at the nearby Commonwealth Public Housing Development, Brighton High School and other venues where our target market might live and/or frequent. This outreach program will be a function of flyers placed in these venues, social media techniques, and talks with school administrators aimed at encouraging participation in the program among their student populations. This outreach program will be conducted in March of 2014 in anticipation of the start of the *BUILDING A BUILDING* program in April of 2014 as noted below. It should be noted that this program is unique and, to the best of our knowledge, largely untried. Consequently, the BPCR anticipates the possibility of some minor refinements as the program progresses (For example, addressing under or over-subscription to the program). The BPCR will report any such changes to the DND as soon as possible and,

hopefully, well in advance of implementing same. The BPCR will also report on the progress and accomplishments of the program to DND on a monthly basis.

### **3. What Is The Objective Of The Program?**

The goals and objectives of the *Building A Building* program is to introduce youth in the neighborhood of the subject condominium development to the development, design and construction of the subject building and to respond to the question of how such a building comes into being. The over-arching goal is to provide these young people with an overview of the entire process, from acquiring the property to final architectural and engineering design and then through the completion of construction. The hope is to pique interest in the overall target audience in one or more of the many facets of this process as a potential career path.

### **4. How Has It Evolved From Its Original Intention?**

The idea of a "Construction Apprenticeship Program," once it began to be defined and structured, presented an inherent contradiction. A real "apprenticeship" program implies that someone immersed in a program of this nature might matriculate into a job. Insofar as our target market is likely to be younger than those seeking employment in any of the professions and trades that are vital to the process of developing, designing and constructing a building, the *BUILDING A BUILDING* program is more of an overview of these disciplines and is essentially a survey program. Again, the intention is that our program will create a desire to pursue further education or a real apprenticeship and/or employment. We have tailored our efforts in this more limited, but far more realistic objective.

### **5. Who Will Be Administering And Conducting This Program?**

The *BUILDING A BUILDING* program will be administered and conducted by Messrs. Ralph Parent and Merrill H. Diamond. Ralph Parent is the living embodiment of the premise of this program. Having grown up in Public Housing, Mr. Parent was able to attend college and, subsequently, to pursue and begin a career in real estate

development in what was a later interest in life. Mr. Diamond, an architect-turned-developer representing the BPCR, has over 35 years of experience in the development of residential real estate and was part of the BPCR team that was designated to develop *The Lancaster*. Both of the aforementioned individuals will be on hand for each of the sessions explained below in Section 10.

## **6. Will Anyone Else Be Involved With The Program?**

In addition to the aforementioned administrators and the target audience, the program has a palette of guest participants representing many different types of disciplines and responsibilities involved in the development process including, but not limited to, the following: Identifying an appropriate development site; Securing control of that site; Obtaining governmental permits and approvals; Designing and constructing a multifamily building; and then Marketing/selling the condominium units within that building. These individuals, representing the City, the professions and the trades, will appear at many of the weekly meetings to explain their role in the evolution of our own building, *The Lancaster* as it morphed from an ethereal Response to a Request For Proposals to a real building.

## **7. What Is The Duration Of The Program?**

The *BUILDING A BUILDING* Program is scheduled to begin in April of 2014 and to continue for 11 consecutive weeks after school hours on a specific weekday to be determined. The duration of the program was primarily predicated on the seasons of the academic year with spring determined to be the particular season that will interfere least with both the school's academic calendar, sports calendar and vacation schedule. It was determined that, in order for the program to maintain interest among the target audience, it needed to be conducted on a weekly basis with each session lasting no more than 75 – 90 minutes. Spring was determined to be the ideal season in which to conduct the *BUILDING A BUILDING* program insofar as the most popular sports played or followed by our target audience in this particular neighborhood are football and basketball, a fall sport and a winter sport respectively. If the program

generates sufficient interest, it is the intention of the BPCR to continue the program on a monthly basis throughout the construction process in order for attendees to learn about and actually see the work of the various trades involved in the project.

## **8. WHAT ABOUT SAFETY CONCERNS?**

None of the participants in the *BUILDING A BUILDING* program will be allowed on the actual construction site unless accompanied by Skip Rose, the Project Manager for the construction of *The Lancaster*. Hard hats will be provided for all of the participants and will be worn when on the construction site. As a practical matter, the primary work that will be ongoing during this program will be post-demolition excavation and foundation work. Consequently, the primary danger will be falling into an open excavated area. Mr. Rose will take care to lead the participants in such a manner that minimizes the chances of this occurring. Finally, the BPCR will maintain appropriate liability insurance for the duration of the program or will have a rider on its current liability insurance that addresses the *BUILDING A BUILDING* program.

## **9. WILL THERE BE ANY FOLLOW-UP AFTER THE PROGRAM?**

With the assumption that at least some of the target audience will have their interest piqued in some aspect of the many disciplines that are involved, it is hoped that the *BUILDING A BUILDING* Program will prove to be a pathway towards Internship programs in local development, design, construction, and marketing-related firms. The *BUILDING A BUILDING* program will pursue the availability of these internships with an outreach campaign aimed at these kinds of firms, either through personal contacts or other means.

## **10. WHAT IS THE SCHEDULE AND PROGRAM FOR EACH SESSION?**

### **A. Week One: Introduction**

This will be the Introductory Session attended by the three administrators and led by Ralph Parent who will welcome the

participants. He will explain the goals and objectives of the BUILDING A BUILDING program and how his own history is an example of what can happen when an interest turns into a passion and then a career. He will also explain the expectations of the administrators as it relates to attendance, participation, and on-site behavior. Mr. Parent will explain the mechanics and duration of the program and will lay out the various pathways where the program might lead, including the program's assistance in identifying internship programs that might follow participation in the program. Particularly important, Mr. Parent will engage the participants in a discussion about their particular needs and desires so that adjustments might be made in the program's "curriculum." Certain words and terms related to development, design and construction will be introduced and defined. Binders containing information that is relevant to the program will be distributed to the participants with the intention that they will be continually updated with material related to the development, design and construction of *The Lancaster*.

## **B. Week Two: The Role of the Developer**

Week Two will focus on how the BPCR came into possession of this City-owned site and, after an introduction by Mr. Parent, Mr. Diamond of the BPCR will explain the role of a Developer in the entire process, especially as it relates to "conducting an orchestra" instead of "playing an instrument in the orchestra." Mr. Diamond will explain the various ways that a Developer can secure sites and, in doing so, will specifically describe the Request for Proposals issued by the City (DND) for 1501 Commonwealth Avenue. He will also note the reasons why the BPCR's Response to the subsequent Request for Proposals was successful with, hopefully, a Community Activist (e.g. Eva Webster) and a DND representative (hopefully John Feuerbach) on hand to provide background for that decision. Finally, Mr. Diamond will explain how a Developer analyzes a project such as 1501 Commonwealth Avenue in terms of both the cost side and the sales side of a project pro forma to determine if the project is financially viable and worth pursuing. There will be a review/quiz related to the words and terms explained in Week One and the introduction of some new words and terms (e.g.

“Developer,” “pro forma,” etc.) related to the work of a Developer in the overall process. A Schematic Pro Forma for *The Lancaster* will be discussed and provided for inclusion into the notebooks of the participants.

### **C. Week Three: The Developer & The Entitlement Process**

Mr. Diamond will speak generally about the permitting process as it relates to other communities and, specifically, to the permitting process proscribed by the City of Boston for *The Lancaster*. Mr. Parent will then speak to his experience in permitting his own DND project in Dorchester in which he, like Mr. Diamond as part of the BPCR, is functioning as the Developer. There will be a discussion of the role and purpose of zoning ordinances and other municipal regulations. Both Mr. Diamond and Mr. Parent will focus on the respective roles and responsibilities of the Boston Redevelopment Authority, the Zoning Board of Appeals and the Department of Inspectional Services and Mr. Diamond will explain the role of DND in the entitlement process. The program administrators intend to invite a representative of the City (hopefully, Lance Campbell, the BRA’s Project Manager for *The Lancaster*), to make some remarks as to the role and responsibilities of the City’s BRA in the entitlement process. There will be a review/quiz of the words and phrases presented in Week Two and the introduction of several more words and phrases (e.g. “entitlement process, BRA, etc.) for discussion purposes. A Schematic Schedule of the entitlement process for *The Lancaster* will be discussed and provided for inclusion into the notebooks of the participants.

### **D. Week Four: The Role of the Architect**

Mr. Parent will introduce a representative of Tise Design Associates (Stephen E. Tise and/or Kevin Wong) the Architect for *The Lancaster*. The Architect(s) will explain the planning and design process in general and how both interact with a client who comes to them for design services. As that discussion continues, it will begin to focus on the architectural design of *The Lancaster* and will touch upon that building’s particular design opportunities and challenges in creating a building that conformed to the Developer’s vision, the



project pro forma, the community's expectations and the City's many requirements related to density, FAR, zoning, etc. The Architect(s) will discuss the design drawings and working drawings that are produced to reflect both the design in the initial stages of the entitlement process and working drawings and specifications that explain in great detail how the General Contractor should construct a building such as *The Lancaster*. The role of the Architect's sub-consultants (e.g. structural and MEP engineers) will also be discussed. Also to be discussed will be the various potential career opportunities in the offices of Architects and Engineers (e.g., project manager, interior designer, etc.). It is hoped that Jay Lee, the architect for DND for *The Lancaster*, will be on hand to discuss his role in the project as it moved through the entitlement process. There will be a review/quiz of the words and phrases presented in Week Three of the program and several more words and phrases (e.g. "specifications," "working drawings," "elevations," etc.) will be introduced to the participants. Copies of some sample design drawings and working drawings for *The Lancaster* will be provided for inclusion into the notebooks of the participants.

#### **E. Week Five: The Role of The Lawyer(s) and Lenders**

Ralph Parent will introduce Don Wiest, the permitting attorney for *The Lancaster*. Mr. Wiest will describe the nature of his work during the entitlement process including, but not limited to making determinations with the Architect as to the allowable FAR, conformance to the City's Zoning By-Laws, and other areas of interest to both the Developer and the City's permitting agencies. Mr. Wiest will also discuss the nature of a submission to ISD for a "Turn-Down Letter," the submission of an Application under Article 80 for Large or Small Project Review, the presentation before the BRA Board and the City Zoning Board of Appeals, the last major step before securing a Building Permit.

Mr. Parent will then introduce Mr. Michael Surprenant and a representative from Brookline Bank, the primary lender for *The Lancaster*. Mr. Surprenant, a mortgage broker, will explain his role in the development process and the various financial aspects of the project that would persuade him to take on the task of seeking

construction financing for same. The next presentation will speak to the actual lender's role in the development process and will address those aspects of a project like *The Lancaster* that would persuade a lender to make a loan to construct the project and the various terms and conditions of such a loan. There will be a discussion of the various possible career opportunities with a lender (e.g. loan officer, bank inspector, etc.).

There will be a quiz on the words and phrases from Week Four and new words and phrases will be discussed that are germane to both the legal work required for a building such as *The Lancaster* (e.g., "entitlements," "BRA," "ISD," "ZBA," etc.) and for the financial consultants and lenders involved in the financing of such a project (e.g. "Loan to Value," "Appraisal," etc.).

## **F. Week Six: The Role of The General Contractor**

Mr. Parent will introduce the Project Manager for the construction of *The Lancaster*. He will explain how a General Contractor is similar to a Developer in terms of "conducting an orchestra," in this case, an "orchestra" consisting of the many trades and vendors that are required to construct a building such as *The Lancaster*. He will note that subsequent sessions will focus on the various required trades and their specific roles, including the scheduling and timing of their respective responsibilities. There will be an explanation of the estimating phase of the project, the "buyout" of the job in order to meet the projected Project Budget, the occasional purpose of "Value Engineering," and an explanation of the Construction Schedule from the start of construction to obtaining of a Certificate of Occupancy. He will also demonstrate and discuss the importance of the Construction Schedule, the Line Item Project Budget and the Payment Requisitions during the course of construction. He will also discuss the role of Vendors in the construction of *The Lancaster*. There will be an introduction to the understanding and reading of working drawings related to *The LANCASTER*. As always, there will be a quiz on the words and phrases from Week Five and new words and phrases will be introduced (e.g. "Value Engineering," "Change Order," "Certificate of Occupancy," "Critical Path," etc.). It is anticipated that we will provide a sample Line-Item Project Budget

and a copy of the Project Schedule for inclusion into the notebooks of the participants.

It is the intention of the BPCR to invite at least one union General Contractor and representatives of certain union trades to provide, among other things, information related to the history and purpose of the unions and the opportunities for future, union-sponsored apprenticeship programs. These individuals will be on hand for one or more of the curriculum sessions, including the session devoted to the role of the General Contractor and the sessions related to the role of the trades. We currently anticipate using Joseph Albanese, the President of Commodore Construction, a union General Contractor, to advise us as to the appropriate union-affiliated individuals to be on hand for this aspect of the construction process.

#### **G. Week Seven: The Role of The Trades (Concrete & Masonry)**

The Project Manager for *The Lancaster* will discuss the general role of the concrete and masonry trades on a construction project and will introduce a representative from each of these disciplines to discuss their specific jobs in the overall construction of *The Lancaster* and the factors that contributed to their decision to work in these specific trades. Insofar as these trades will be on site and working during the initial duration of the BUILDING A BUILDING program, it will be possible to actually see some of the work performed by these trades and to discuss the various reasons why certain things are done in conjunction with this work (e.g. explaining the purpose of reinforcing rods in the concrete). The mason, although he will have yet to start with the brickwork for *The Lancaster*, will explain the particularities of his work and the challenges that are part of that job. It's hoped that there might be a sample panel featuring the proposed brick blend and mortar joints on site that can be the focus of the mason's comments. It is intended that the working drawings and specifications that relate to these two trades will be presented and discussed as part of an exercise in understanding the role that these documents play in the construction of a building. There will be a quiz on the words and phrases from Week Six and new words and phrases will be introduced that relate to the concrete and masonry work for *The*

*Lancaster* (e.g. “re-bar,” “core sample,” “brick blend,” “weathered mortar joint,” etc.).

## **H. Week Eight: The Role of The Trades (Steel & Carpentry)**

We will discuss the respective general roles of both the steel workers and the carpenters on a typical construction project and, more specifically, in the construction of *The Lancaster*. We will note the timing of their work by referring to the Project Schedule that was provided to each participant in Week Six. Representatives of both of these trades that are scheduled to work on *The Lancaster* will be on hand to discuss the reasons that they chose to pursue their particular construction careers, the specific nature of their work and the advantages and challenges of their work. It is intended that the working drawings and specifications that relate to these two trades will be presented and discussed as part of a continuing exercise in understanding and reading working drawings. There will be a quiz on the words and phrases from Week Seven and new words and phrases will be introduced (e.g. “an I-beam vs. a Wide Flange,” “welds vs. rivets,” “Rough Carpentry vs. Finish Carpentry,” etc.). There will be a white board on site and the participants will be expected to take down information related to the terms and phrases under discussion.

## **I. Week Nine: The Role of The Trades (MEPs)**

We will discuss the roles and responsibilities regarding the Mechanical, Electrical and Plumbing trades in the construction of a building and, specifically, the construction of *The Lancaster*. We will discuss the importance of the drawings that define the work of these trades being totally coordinated with the architectural drawings and samples of these drawings will be presented and discussed in this regard. We will also show the timing of the work to be performed by these trades based on the Project Schedule that was provided to the participants in Week Six. At that point, we will introduce representatives of each of these key trades who will be working on *The Lancaster*. Among other things, they will discuss how they each became interested and then involved in these trades, along with the advantages and disadvantages of the work that they do. There will

be a quiz on the words and phrases from Week Eight and new words and phrases will be introduced (e.g. “HVAC,” “electrical loads,” “risers,” etc.). Again, there will be a white board on site and the participants will be expected to take down information related to the terms and phrases under discussion.

## **J. Week Ten: The Role of the Marketing Company**

After an introduction by Mr. Parent, this session will feature a presentation by the entire Marketing Team and will stress one of the key tenets of the development process, i.e., that the Developer and the Marketing Team are in the business of *selling* condominiums, not building them. Topics for discussion will include the concept and importance of “branding” a project in terms of the over-arching mission of attracting a particular target market(s). The Marketing Team will discuss the degree to which the project’s name, logo, collateral materials, etc. must work with the overall “branding” of the project and how it can contribute to creating increased sales velocity and continual price increases, the latter being an important tool for adding a “sense of urgency” to the sales and marketing process. The Marketing Team will present sample collateral information for both *The Lancaster* and other projects and it is intended that one or two guests, including a Public Relations expert (e.g. Lisa Nickerson of Nickerson Communications), will speak to their role in creating “unpaid” advertising and third-party endorsements for a project like *The Lancaster*. There will be a quiz on words and terms from Week Nine and new words and phrases (e.g. Marketing vs. Sales,” “Collateral material,” “PR,” etc.) will be introduced to the participants. Copies of collateral information and other marketing materials (Offer Forms, a Purchase & Sale Agreement, Reporting Forms, etc.) will be explained and distributed to the participants for inclusion into their notebooks.

## **K. Week Eleven: Graduation**

The intention of the administrators, on behalf of the BPCR, will be to reward the participants of the *BUILDING A BUILDING* program with Graduation Certificates certifying successful participation in the program. This will likely be held on site, with refreshments and,

hopefully, a visit from The Mayor or a member of his administration. All of the guest “lecturers” who contributed to the program will be invited back to this event and, depending on the level of interest generated in the program, some dates will be set for a “reunion” meeting or two in order to explain later phases of the construction of The Lancaster in real time. As noted previously, the administrators of the *BUILDING A BUILDING* program, again based on interest, will attempt to identify firms and businesses involved in any of the disciplines involved in the creation of *The Lancaster* who might entertain an internship by one or more of the participants in the program who express an interest.

# # #