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February 19, 2020

Ms. Sheila Dillon  
Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02108

Dear Ms. Sheila:

Historic Boston Inc. (HBI) is pleased to submit this proposal to the Department of Neighborhood Development for rehabilitation and re-use of the historic Nawn Factory.

As an abutter to the site and a citywide historic preservation organization, we are pleased that the City has consolidated municipal and State property in order to make the property available for a preservation-based solution.

HBI proposes to restore the existing structure to its original 1880s appearance, and to re-construction the rear of the building over the historic foundations. HBI has entered into an agreement with The Wellness Collaborative (TWC), an organization devoted to holistic health and wellness programs, for a master lease of the rehabilitated building to TWC as a hub for its programs and services with the goal of their acquiring the building eventually from HBI.

HBI's project financing relies on conventional debt, HBI equity, State, Federal Historic and New Markets Tax Credit programs as sources of subsidy for what will be a very expensive project. We expect a \$3.5 million financing gap after the tax credit subsidies. While the City's generous commitments of cash for public improvements and historic interpretation are helpful, HBI and TWC are committed to raising the additional funds from charitable sources.

We are designing the Nawn Factory to be an important entry to Nubian Square and a new "place" for the interpretation of Roxbury's rich history. We look forward to working with the City, the Boston Planning and Development Agency and the neighborhood to fulfill the vision of a neighborhood economic development, wellness, education and heritage preservation.

Thank you for your consideration.

Sincerely,

Kathy Kottaridis  
Executive Director

**Historic Boston Incorporated**  
**Proposal for Redevelopment of the Owen Nawn Factory**  
**2080 Washington Street, Roxbury, MA 02119**

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## Proposal Summary

### Project Introduction

Historic Boston Inc. (HBI) proposes to transform the long-vacant Nawn Factory into a new commercial mixed-use space that 1) restores and reactivates an important historic Roxbury building, 2) creates a dynamic center in which to learn the neighborhood's rich history, and 3) supports innovation in community health and wellness through professionally delivered, culturally relevant programs and services.

The \$8.26 million rehabilitation project restores the Nawn Factory to its 1880s appearance, and a re-creates the portion of the building that was lost to fire more than 20 years ago so that the Nawn Factory will appear in volume much as it was through the 20<sup>th</sup> century.

Within the Nawn Factory, nearly 2400 square feet of mixed-use space will host the Roxbury History and Orientation Center in the form of a "History Café," a café-retail-interpretation space that welcomes residents and visitors to explore the neighborhood's varied and diverse past. HBI will work with a community advisory group to develop themes and plans for static and digital exhibits, geo-coded walking tours, and immersive augmented and virtual reality content that seamlessly integrates with the on-site visitor's journey and enables site visitors to take a trip through time and history.

Space within the History and Orientation Center will be used for public programs, discussion groups and meetings, and a retail space will be set aside for Roxbury-made and Roxbury-themed items. Revenue from retail and traditional café uses will help to underwrite management and maintenance of the space.

In addition to the preservation activity and community uses described, the HBI team expects to abide by the employment and social goals set out by the Plan Nubian Square process, and to work closely with surrounding property owners and developers to create a place that becomes a source of pride for the neighborhood.

HBI will aim to work closely with public agencies on creating handicap accessibility to the abutting Eliot Burying Ground in order to encourage connection, visitorship and educational opportunities in that unique space.

Plans for the Nawn Factory's development and landscape will be coordinated closely with plans for a new open space at the corner of Melnea Cass Boulevard and Washington Street in an effort to further extend the interpretive opportunities that the site's archeological remains can offer to place making.

## Development Team

<b>Development Team</b>	<b>Company</b>	<b>Primary Contact</b>
Developer:	Historic Boston Incorporated	Kathy Kottaridis
Primary Architect:	Stull & Lee (MBE)	David Lee
Tenant Architect:	Next Phase Studios	Rick Ames
Landscape Architect:	Deborah Myers Landscape Architecture (WBE)	Deborah Myers
Structural Engineer:	Structures North Consulting Engineers	Greg Nowak
Contractor:	To be determined	
Permitting Attorney:	Mintz, Levin, Cohn, Ferris, Glovsky and Popeo	Rebecca Lee
Tax Credit Attorney:	Klein Hornig	Dan Kolodner
Historic Consultant:	Tremont Preservation Services LLC (WBE)	Leslie Donovan
Communications:	Kelley Chunn & Associates (MBE, WBE)	Kelley Chunn
Interpretation/Digital Experiences:	TimeLooper	Andrew Feinberg
Tenant:	The Wellness Collaborative (MBE, WBE)	Robin Reed

## Organizational Structure

**Historic Boston Incorporated (HBI)** will be the developer and owner of the Nawn Factory. It will provide all customary functions of a developer including project management throughout all phases of the project, the procurement of design, engineering, legal and other professional consultants. HBI will be responsible for obtaining the equity, debt and tax credits needed for financing the project, and will fundraise in collaboration with The Wellness Collaborative to fill the noted funding gaps.

**The Wellness Collaborative, Inc. (TWC)** will be the tenant, operator and manager of the Nawn Factory and will share fundraising responsibilities with HBI for base build and fit out for their unique needs. The project is planned in a manner that anticipates TWC's acquisition of the property from HBI after the 7-year New Markets Tax Credit compliance period.

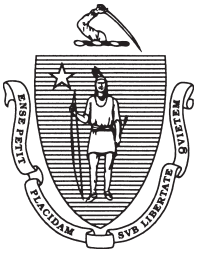
## Lawsuits

HBI's affiliate entity, Fowler Clark Farm LLC, was named in a personal injury claim, Dayla L. Santurri vs. Fowler Clark Farm, LLC et. al., Suffolk Superior Court Civil Action NO. 1784CV00677C. This case was dismissed on June 5, 2018.

HBI has been named in a pending personal injury claim based on negligent construction supervision by Santos Nunez-Marte at the Fowler Clark Epstein Farm in Mattapan. It is HBI's attorney's position

that liability is questionable. A \$100,000 Liberty Mutual insurance policy is written to HBI (and Fowler Clark Farm LLC) that would cover any judgement.

## Secretary of State Certificate



*The Commonwealth of Massachusetts*  
*Secretary of the Commonwealth*  
*State House, Boston, Massachusetts 02133*

William Francis Galvin  
Secretary of the  
Commonwealth

Date: February 13, 2020

To Whom It May Concern :

I hereby certify that according to the records of this office,

**HISTORIC BOSTON INCORPORATED**

is a domestic corporation organized on **December 29, 1960**

I further certify that there are no proceedings presently pending under the Massachusetts General Laws Chapter 180 section 26 A, for revocation of the charter of said corporation; that the State Secretary has not received notice of dissolution of the corporation pursuant to Massachusetts General Laws, Chapter 180, Section 11, 11A, or 11B; that said corporation has filed all annual reports, and paid all fees with respect to such reports, and so far as appears of record said corporation has legal existence and is in good standing with this office.



In testimony of which,

I have hereunto affixed the

Great Seal of the Commonwealth

on the date first above written.

A handwritten signature in blue ink that reads "William Francis Galvin".

Secretary of the Commonwealth

Certificate Number: 20020289690

Verify this Certificate at: <http://corp.sec.state.ma.us/CorpWeb/Certificates/Verify.aspx>

Processed by:

## Development Plan

### Development Description

Historic Boston Inc. (HBI) is pleased to present its vision for the redevelopment of the historic Owen Nawn Factory. Built circa 1880, the Nawn Factory is an important marker at the gateway to Roxbury from the north, and is one of three contributors to the Eustis Street Architectural Conservation District, with the adjacent 1630 Eliot Burying Ground and the 1859 Eustis Street Fire House, the oldest fire house in the city and HBI's headquarters. Preservation of the Nawn Factory has been of interest to HBI for over 35 years, when it was included in the organization's 1985 target inventory of threatened historic buildings of interest for redevelopment and protection.

The Nawn Factory site is an ideal location from which to welcome both visitors and Roxbury residents to celebrate the rich, diverse history of Roxbury's people and land, and to contribute to the health and economic renewal of Nubian Square. Together with HBI's development team and proposed end user, The Wellness Collaborative (TWC), HBI has developed a reuse concept that preserves and re-constructs the original proportions of the Nawn Factory for use as education and service delivery space for the health and wellness programming of TWC, and provides more than 2400 square feet of multi-purpose flex space dedicated to interpretation, community meeting spaces, café and retail space in which to highlight Roxbury culture and history, from pre-colonial times through to today.

### The Wellness Center at the Nawn Factory

The Wellness Center envisioned for the Nawn Factory is an innovative hybrid social enterprise providing health and wellness opportunities to underserved populations in the Boston Area. With a mission to eliminate health care disparities in African American communities experiencing disproportionate impact, the Center will offer direct primary and integrative preventive care services. The Center will target those who are historically at high risk for poor outcomes, who live in underserved communities, and who feel disenfranchised from the mainstream health care market. (more on this expected from Robin) The center will be operated by The Wellness Collaborative, a non-profit founded by three black women – an internist, a pediatrician, and a psychologist.

Two entities constitute a hybrid approach to operating the Wellness Center:

- The **non-profit Wellness Collaborative** will provide health education and trainings for the community, employers, health care organizations and provider groups. The foundation of the non-profit is its multidisciplinary leadership, tasked with providing a think tank that researches and identifies best practices and trends for improving the wellbeing, advocacy and agency for the target community. The Wellness Collaborative will also offer low-cost co-working space and networking opportunities for small business, non-profits, and NGOs with health and wellness related missions.
- The **for-profit Wellness Center** will provide integrative medical services such as prevention, nutrition and movement programs, incorporating music, the arts, environmental connection,

relationship building and service commitment into patient-prioritized wellness plans. The for-profit will provide a mechanism for cooperative economics and wealth creation for small businesses in the health care and wellness-related fields. Wellness plans can be undertaken by community members through one-time consultations, intensive workshops, or year-long coaching supported graduated steps.

The Wellness Center will be differentiated from the usual medical clinic in the integrative nature of services, the member-directed, culturally-relevant features, the transparency and affordable pricing, easy navigation, and inclusionary environment.

The dual-use Roxbury History and Orientation Center café will provide the Wellness Collaborative with a coffee/juice/snack bar to be sublet to a local café operator.

### Roxbury History and Orientation Center

The Nawn Factory's position at the northern entrance to Dudley Square presents an opportunity to establish a new place for Roxbury residents and visitors to learn about the neighborhood's strategic importance in the physical, social, and political landscape of Boston. The rehabilitated Owen Nawn Factory is an important geographic point from which to help tell Roxbury's 400-year history:

- about the Native American path and only land connection between what became the Town of Roxbury and the peninsula of the City of Boston before Boston's massive 19<sup>th</sup> century landfill projects that begins just north of the Nawn Factory and follows contemporary Washington Street. Roxbury Neck helps tell the story of Roxbury's strategic geographic importance to the region in the first two centuries of European settlement;
- about the harbor's edge, which archeological evidence shows came as far inland as Harrison Avenue and Parcel 8;
- about the only remaining identifiable landscape from Roxbury's earliest days, the 1630 Eliot Burying Ground which shares a foundation wall with the Nawn Factory and is filled with names, stories and the art of Roxbury's people from the town's first 200 years.
- about the battle lines of the Revolutionary War when the Patriot's occupied Roxbury during the British Siege of Boston (April 19, 1775 – March 17, 1776) and a fortification, which saw skirmishes with the British, was built by the rebelling colonists along today's Eustis Street;
- about the Roxbury Canal, a short-lived private enterprise that brought commerce and industry inland to Roxbury from Boston Harbor, and which ran parallel to Albany Street to Harrison Avenue.
- about the industry and manufacturing uses clustered at the northern edge of Dudley Square that also attracted worker housing and immigrant workers through the early 20<sup>th</sup> century;
- about the evolution of transportation from horse carriage to trolley to the MBTA's elevated Orange Line; and
- about the State's efforts to drive a massive Federal highway (I-695) through Roxbury in the 1960s and 70s, only to be met with one of the region's most successful community mobilizations against

the plan, followed by construction of the Crosstown Boulevard, subsequently named for prominent Roxbury activist Melnea Cass.

HBI and TWC propose to set aside roughly 2400 square feet for a Roxbury History and Orientation Center in the form of the “History Café,” a mixed-use space within the Nawn Factory that is, at once, a hub for the instruction and celebration of Roxbury history, and an orientation center where residents and visitors can connect with the many more places within Roxbury that can be visited and enjoyed.

Within that space will be

- static and changing exhibitions and history activities whose themes and methods are developed with the guidance of a community advisory committee of leaders in local history and culture.
- digital applications that bring the most engaging and dynamic content about Roxbury history to all ages of residents and visitors.
- an audio/visual studio for filming, recording and podcasting that can be used as an oral history center.
- informal, formal and special event meeting spaces for lectures, socials, tours and discussion groups.

While HBI commits to the development and activation of this space and its first generation of content and programming, HBI proposes to work closely with the community to identify and build the capacity of an appropriate nonprofit organization from within the neighborhood to undertake the long term management of the space and its activities.

### Preservation Strategy for the Nawn Factory

The Nawn Factory was built in 1880 as a utilitarian, multi-use industrial building. While it is not especially architecturally distinct, it is significant in that it represents the conversion of lower Roxbury from a rural to an industrial area. It is the last building north of the Burying Ground to represent a once densely populated industrial and working class district with craftsmen’s shops, warehouses, tenements, stables and sheds. The Nawn Factory’s redevelopment, along with plans for a corner park with interpretation of the remaining foundations of the 18<sup>th</sup> century Cunningham and Doggett Houses, and the forthcoming development of Parcel 8 and the new Benjamin Franklin Institute, this edge of Roxbury will bustle with activity once again. The Nawn Factory’s preservation and the acknowledgement of the Cunningham and Doggett Houses former locations will serve as a long term reminder of Roxbury’s past as the neighborhood grows and changes.

The existing Nawn building will be restored in accordance with the US Secretary of the Interior’s Standards for Historic Rehabilitation. The Washington Street façade will be restored to its original 1880s appearance as seen in the circa 1894 photograph, which shows recessed, wood paneled double doors in the center, a window to the left and a single door to the right that was likely a direct entrance to the stair leading to the second floor. While it will be important to retain the Washington Street entrance to preserve the retail street wall, activate the building and welcome visitors, the building’s main entrance to all spaces, including the Wellness Center, will be located at the center of the fully rebuilt length of the building’s Northside, where handicapped accessibility to the building will also be accommodated.

Handicap accessibility at the Washington Street retail entrance cannot easily be achieved because of interior steps and the narrowness of the the historic building; a variance will likely be needed to allow for the two entrances.

Historic Boston intends to construct a new two-story addition at the rear of the remaining historic Nawn Factory, over the existing capped basement. The addition re-constructs the dimensions of the former building, but will be distinctly new in order preserve the original scale but distinguish old from new. HBI plans to utilize both State and Federal Historic Rehabilitation Tax Credits, so will need to seek design approvals from the Massachusetts Historical Commission and the National Park Service, as well as the Boston Landmarks Commission for all conceptual designs and treatments of building and landscapes.

HBI's design team has noted that the foundation wall of the existing Nawn Factory and rear basements appear to also be the wall to the adjacent burying ground. Construction of the building's rear additions will likely require some reconstruction of the shared wall, and legal agreements with the Boston Parks and Recreation Department delineating ownership and future maintenance responsibilities of the wall.

HBI's design team has also reviewed ways to accommodate handicapped accessibility from the Nawn parcel into the burying ground. While HBI is committed to achieving this goal, we believe it would be premature to propose an exact location for access at this time. Grade changes, burial and tomb locations, and convenience to the public all need to be considered carefully and reviewed in conjunction with the Parks and Recreation Department. HBI commits to working with the Parks Department and adjacent property owners to determine together where best to provide this access.

### BPDA/ DND Scope Alignment

HBI's preservation-focused redevelopment plan for the Nawn Factory calls for a combination of uses including a Roxbury History and Orientation Center, food & retail, and commercial uses. The HBI proposal is in line with the vision, development objectives and the use guidelines set by DND and the Plan Nubian Square framework established by the BPDA:

### History and Visitor Orientation Use

HBI recognizes the importance of the Nawn Factory's location and historical context, and the community's desire to have a history and welcome center in this location as a point of pride and identity for residents and visitors. The proposed Roxbury History and Orientation Center at the Nawn Factory is conceived as a multipurpose space dedicated for history and interpretation, café, community meeting and event space, and museum style retail. The mix of uses span over 2400 square feet, largely on the first floor of the building and extending into the basement. As part of its development cost, HBI will commission Augmented Reality, Virtual Reality and Digital experiences, to tell the different stories of the Roxbury History and the Nawn Factory Site. HBI is also committed to working with the Parcel 8 designee to work on extending the historic interpretation to the historic foundations on the Parcel 8 site.



## Historic Preservation

HBI has a deep experience in, and a successful history of, adaptively reusing historic buildings for new uses while ensuring future preservation through sustainable financial model. HBI has demonstrated success with the application of rigorous preservation standards to restoring the public faces of historic structures while, at the same time, creatively renewing building interiors to suit new uses.

The Nawn Factory redevelopment plan submitted by HBI proposes a restoration of the existing historic structure and the recreation of the building's original massing, while respecting the original proportions of the building. Preservation efforts for the historic Nawn Factory building preservation will be guided by the Secretary of the Interior's standards for historic buildings. HBI's plans include restoring the front façade to its original appearance as seen in the circa 1894 photograph. The photograph shows recessed wood double doors in the center, a window to the left and a single door to the right that was likely a direct entrance to the stair leading to the second floor. The proposed plan also calls for the construction of the two-story addition at the rear of the currently existing Nawn Factory. HBI will be pursuing both Federal and State Historic Tax credits for this project, and will seek design approvals Massachusetts Historical Commission and the National Park Service, as well as the Boston Landmarks Commission.

## Development Schedule

The development team aims to open the doors to the redeveloped Nawn Factory by the end of June 2023. Opening on or prior to August 2023 is important to access the \$ 500,000 in the Whittier Choice Grant. Given the distressed condition of the building and the substantial fundraising required to complete the project HBI endeavors to embark on design and pre development upon tentative designation, if designated. A nine-month design phase, running concurrently with due diligence related to property transfer will allow HBI to pursue Part 1 and Part 2 applications with Massachusetts Historical Commission and National Parks Service, which are pre-requisites to apply for historic tax credits. A six-month period is projected to receive the approvals, following which, we anticipate a nine-month window for approvals and a twelve-month construction schedule.

## Parking Plan

The Wellness Collaborative anticipates the majority of its visitors to arrive by public transportation, car, and by foot. Given the limited public parking available in Nubian Square, TWC will seek to rent up to 15 parking spaces from the Parcel 8 designated developer for use by the Nawn Factory visitors and will seek city approval for one HC parking space and one 15-minute space in close proximity to the Nawn Factory's primary entrance. HBI has had some preliminary conversations with the Benjamin Franklin Institute about possible HC parking space use once their development (current Harrison Supply site) is complete. The majority of visitors who arrive to the site by car will park on Washington Street or in the public parking that will nearby at the completed Blair Lot.



## Operations Plan

### Operations Summary

After project completion and the tax credit compliance periods, HBI will own the Nawn Factory building and, along with The Wellness Collaborative, will be responsible for the operations and maintenance of the building.

The success of a long-term preservation strategy is contingent on an active and financially sustainable use of the building. By identifying the prospective tenant early in the development process, the vacancy risk is greatly reduced. This, in turn, ensures a well-managed building with seamless transition from the developer to the tenant. HBI and TWC have executed a Letter of Intent to enter into a mutually beneficial lease agreement before occupancy, which will include options to renew and an option for the tenant to purchase the building from HBI. HBI and TWC will contract with a professional property management group to carry out the maintenance of the property.

The operating expenses for the building will be covered by the rent paid by TWC. HBI and TWC have agreed that the lease for TWC's occupancy of the Nawn Factory will be on a NNN basis. TWC's business plans project adequate revenue to cover the projected lease payments and operational costs. Further, the tenant will contribute to a lease reserve, held by HBI, prior to lease commencement. This will guarantee rental and operating payments, even in an economic downturn.

Although the building is being planned with TWC as the end user, the building is designed to provide flexibility of separation of different areas in the event TWC's plans change going forward. This flexibility will allow for multiple tenants and shorter re-leasing times for the commercial spaces in the event space becomes available, thereby reducing the overall risk.

As part of its redevelopment proposal HBI will develop and install a first generation of static and digital exhibitions and experiences. The Roxbury History and Interpretation Center is envisioned as a flexible community space and commercial café. The café operations and retail spaces will be leased to a commercial operator for sustained revenue with lease terms clearly delineating use/hours, décor and brand, exhibition spaces and programming hours. The retail and café planning and lease negotiations will support the overall goal of presenting and maintaining this as a place to learn about Roxbury history and current affairs. HBI and TWC will work together to identify the right local operator/ vendors for the café and the retail.

At project completion and to ensure smooth and stable operations for the Roxbury History and Orientation Center, HBI will identify and collaborate with a nonprofit history organization responsible for ongoing interpretation, programming and "history operations". In the event that a suitable community history operator cannot be identified to manage the history space and its component parts, responsibility for maintenance of the first generation of digital and tangible exhibition material will become the maintenance responsibility of HBI until it either sells or transfers the building.

## Executed Letter of Intent Between Historic Boston Inc. and The Wellness Collaborative

HBI and TWC have executed a Letter of Intent (LOI) to work together on the redevelopment of the Nawn Factory as partners. The LOI that follows addresses shared fundraising goals, fundamental lease terms between HBI as landlord and TWC as tenant, and the long term intent to transfer the property to TWC.

**Letter of Intent by and between  
The Wellness Collaborative Inc. and  
Historic Boston Inc.**

February <sup>16<sup>th</sup></sup> 2020

This Letter of Intent (“LOI”) is intended to set forth our mutual understanding and intention with respect to the acquisition, development and rehabilitation, and use of the real property commonly known as Nawn Factory Building (“Building or Project”), with an address of 2080 Washington Street, Roxbury, MA (the “Property”) by and between The Wellness Collaborative Inc., a Massachusetts Ch. 180 non-profit corporation (TWC), and Historic Boston Inc., a Massachusetts Ch. 180 non-profit corporation (“HBI”), (TWC and HBI, collectively, the “Parties”).

**WHEREAS**, HBI seeks to purchase from the City of Boston the Property;

**WHEREAS**, TWC seeks to rent from HBI a portion of the Property and to occupy the same;

**WHEREAS**, HBI shall grant to TWC an Option to Purchase the Property based upon mutually agreed upon terms and conditions;

**WHEREAS**, HBI and TWC agree that the Parties will work together and collaborate on the design, development, budgets, fundraising, and milestones. Within 30 days of notice from the City of Boston that HBI is identified as the designated developer and purchaser of the Property, the Parties shall execute a mutually agreed upon Memorandum of Understanding. The Parties acknowledge that achieving the goals and objectives will involve working closely together in a variety of roles. At all times, the Parties agree to work cooperatively and in good faith in all regards and to openly communicate and share all relevant information and ideas.

**NOW THEREFORE** in consideration of the foregoing, the Parties hereby state and agree:

1. The Parties shall submit to the City of Boston a Request for Proposals (RFP) for the Property in accordance with the terms and conditions set forth in the RFP.
2. Parties agree that all times to comply with Secretary of the Interior's Standards for the Treatment of Historic Properties in the design and rehabilitation of the Property.
3. TWC shall be a triple net tenant with a price per square foot to be mutually agreed upon and set based upon area commercial price per square foot and shall use a portion of the Property as its headquarters and program center, subject to City of Boston Use & Occupancy for the same.
4. HBI shall rely upon the proposed commercial lease terms in connection with securing its financing for the building, in addition to pursuing tax credits for the project.
5. Both parties anticipate a requirement for fundraising due to a gap in the total development costs and available funds. Both parties agree to be jointly and equally responsible for the fundraising to eliminate the gap.
6. In consideration of Parties undertaking the substantial expenditure of time, effort and expense in connection with the various investigations and due diligence necessary to effect the proposed transaction and in connection with the RFP either Party shall advise the other in writing that it is terminating negotiations with respect to the Property. TWC understands that HBI shall rely upon its commitment to rent a portion of the Property. Therefore, while either party may withdraw from this LOI by providing written notice to the other at any time; if HBI notifies TWC that it has submitted an application for construction loan financing TWC must provide 45 days written notice should TWC seek to withdraw.

7. Upon termination, the party seeking to terminate shall deliver to the remaining party all of its due diligence, analysis, and other work product related to redevelopment of the Property and/or the Site including copies of all relevant contracts and other documents, Except as may be required by law or court order, all information so obtained, not otherwise already in the public domain.

8. The Parties hereto shall agree with respect to the form, content and timing of any public announcements concerning the proposed transaction.

9. HBI and TWC shall each be responsible for and bear all of its own costs and expenses incurred in connection with the RFP and/or the development of the Property, including expenses of its representatives incurred at any time in connection with pursuing or consummating the RFP and proposed transaction.

10. This letter of intent is an expression of intention only and does not constitute a binding legal commitment on the part of HBI and/or TWC, provided that the obligations set forth in Sections 8 of this letter shall be legally binding upon the respective parties when this letter is executed and delivered by all Parties hereto. If the RFP is not awarded to HBI, for any reason, no party shall have any liability to any other party hereto based upon, arising from or relating to this LOI.

11. Except as and to the extent required by law, without the prior written consent of the other party, neither shall, and each shall direct its representatives not to, directly or indirectly, make any public comment, statement or communication with respect to, or otherwise disclose or permit the disclosure of the existence of discussions regarding, a possible

transaction between the parties or any of the terms, conditions or other aspects of the transaction proposed in this LOI.

The terms of this LOI are hereby agreed to by the parties on this 19th day of February, 2020.

The Wellness Collaborative Inc.

Historic Boston Inc.

\_\_\_\_\_  
By: Robin Reed  
Title: Executive Director

  
\_\_\_\_\_  
By: Kathy Kottaridis  
Title: Executive Director

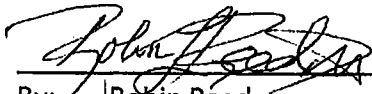


transaction between the parties or any of the terms, conditions or other aspects of the transaction proposed in this LOI.

The terms of this LOI are hereby agreed to by the parties on this 10 th day of February, 2020.

The Wellness Collaborative Inc.

Historic Boston Inc.



By: Robin Reed  
Title: Executive Director

By: Kathy Kottaridis  
Title: Executive Director

## Developer Qualifications

### Qualifications

Historic Boston Incorporated (HBI) redevelops at-risk historic buildings in order to help Boston's neighborhoods thrive.

With the ability to devote its own technical and financial resources to projects, attract capital from conventional lenders and philanthropic sources, and utilize state and federal tax credit programs, HBI continues to be a patient non-profit investor and developer in the preservation and re-use of important historic buildings that the market has disregarded.

Founded in 1960 to save Downtown Boston's Old Corner Bookstore building, HBI has redeveloped dozens of historic buildings throughout Boston's neighborhoods.

HBI typically plays the role of at-risk developer of historic properties that the market has disregarded and that for-profit developers would find impossible to undertake. HBI will acquire a property, rehabilitate it and sell its interest in the asset after placing a preservation easement on the property. Proceeds from sales are reinvested in new projects.

By charter, HBI works only within the municipal boundaries of the city of Boston with focus on protecting historic places and strengthening urban neighborhoods.

HBI has four staff skilled in real estate finance and development, project management and historic preservation. Its board of directors is made up of 15 volunteers who represent various segments of HBI's mission including historic preservation, law, development or community interests.

### Past Experiences and Project Descriptions

HBI's most recent projects include

- the \$2.5 million redevelopment of the **1859 Eustis Street Fire House in Nubian Square**, Boston's oldest remaining fire house structure, for two non-profit office suites, including HBI's new headquarters (2011);
- the \$5.8 million rehabilitation of the **1875 Hayden Building in Chinatown** into four market rate apartments and a retail space (2013);
- the \$3.8 million restoration of the **1834 Alvah Kittredge House**, a Greek Revival period mansion in Roxbury's Highland Park for Affordable Housing (2014);

- the \$1.4 million redevelopment of the **1868 Vertullo Building in Hyde Park** for five small businesses and four apartments.
- the \$4.8 million rehabilitation of the **1911 Roslindale Substation** in Roslindale Village as a restaurant/bar space (2017).
- the \$3.7 million transformation of the **1786 Fowler Clark Epstein Farm in Mattapan** for a demonstration farm and training center for the Urban Farming Institute of Boston (2018);
- the \$1.9 million rehabilitation of the **1912 Upham’s Corner Comfort Station** for Comfort Kitchen, a community café and pop up restaurant in Dorchester scheduled to open in the summer of 2020.

Upon completion, HBI typically manages these properties for 5-7 years (the usual investor hold periods for historic and New Markets Tax Credit programs) through a third-party property manager. Those costs are factored into the projected operating costs. HBI will sell or transfer its interests in that property with historic preservation restrictions thereafter.

## Alvah Kittredge House

10 Linwood Street, Roxbury, 1834

### Total Development Costs

\$3.7 million

### Project Size

6352 square feet

### Status

Completed 2014

### Building Uses

- Five new two bedroom rental apartments
  - Three market rate units
  - Two affordable units at 70% AMI

### HBI Role

Owner and Developer

### Designations

- Boston Landmark
- National Register of Historic Places

### Capital Sources Summary

State Historic Tax Credit	\$600,797
Federal Historic Tax Credit	\$497,836
Permanent Debt	\$550,000
City of Boston	\$400,000
HBI Equity	\$127,000
Fundraising	\$950,588
Tenant build-out contribution	\$337,000
Deferred Development Fee	\$232,861
<b>TOTAL SOURCES</b>	<b>\$3,969,083</b>

### Development Cost Summary

Acquisition Costs	\$210,000
Hard Costs	\$2,289,647
Soft Costs	\$842,082
Financing Costs	\$54,118
Development Fee	\$232,861
Reserves	\$17,375
HBI Project Management Fee	\$50,000
<b>TOTAL COSTS</b>	<b>\$3,969,083</b>



The rehabilitated Alvah Kittredge House, completed 2014

### Background

Built for Roxbury alderman and Eliot Church deacon Alvah Kittredge (1798–1876), the Kittredge House is one of a handful of high style Greek Revival period wood frame houses remaining in Boston. Originally positioned in the center of a large rural estate, the Kittredge House was also once home to prominent 19th century Boston architect Nathaniel Bradlee.

In the 1970s and 80s, it was home to Roxbury Action Program (RAP), a social service and advocacy organization that organized and delivered programming directed at to Roxbury's African American community. The house was abandoned from 1991 - 2011.

### Community Impact

- Reactivates abandoned building
- Reverses blighted property
- Supported neighborhood's work at adjacent Alvah Kittredge Park
- Creates new housing units including 2 affordable units
- Supports HBI partnerships with neighborhood organizations



Neighbors and friends of the Alvah Kittredge House joined Mayor Thomas Menino and local officials for a community photograph in the summer of 2011.



The Kittredge House sits in the heart of the Highland Park neighborhood in Roxbury.

## Anna Clapp Harris Smith House

65 Pleasant Street, Dorchester, 1636, 1804

### Total Development Costs

\$330,681

### Project Size

2800 square feet

### Status

Project work completed 2013 and property sold to first-time homebuyer for interior fit-out

### Building Uses

Two residential units

### HBI Role

Owner and Developer in partnership with North Bennet Street School

### Designations

- Pending Boston Landmark
- Eligible for the National Register of Historic Places

### Capital Sources Summary

Fundraising	\$330,681
<b>TOTAL SOURCES</b>	<b>\$330,681</b>

### Development Cost Summary

Acquisition	\$195,000
Hard Costs	\$100,681
Soft Costs	\$55,000
<b>TOTAL COSTS</b>	<b>\$330,681</b>

### Community Impact

- Restored an empty, at-risk building for residential use
- Provided preservation carpentry trade training for North Bennet Street School
- Uncovered neighborhood history with Dorchester Historical Society
- Demonstrated the potential of preservation on an overlooked building



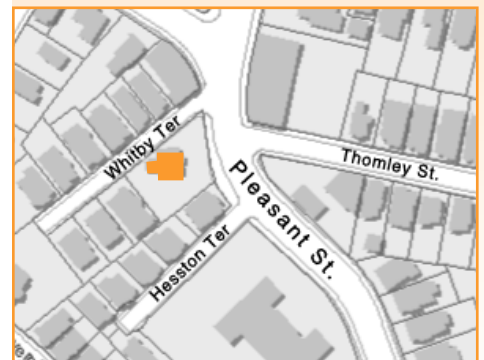
HBI and North Bennet Street School were partners on the preservation of the 1804 Anna Clapp Harris Smith house.

### Background

The Anna Clapp Harris Smith House in Boston's Dorchester neighborhood, is the first property to be addressed by the Handmade Houses partnership of Historic Boston Inc. and North Bennet Street School. Built in 1804 on a foundation said to have been constructed in 1636, the Clapp House may very well be the oldest functioning foundation in the entire city. Once located on a larger plot, the house was the country home of the founder of the Animal Rescue League, Anna Clapp Harris Smith. The house was substantially changed in the early 20<sup>th</sup> century and turned into four apartments. With significant seed funding from the 1772 Foundation, HBI and North Bennet Street stabilized and improved this at-risk post-and-beam house while also training students in preservation carpentry. The house was then sold to a private owner for completion.



The Anna Clapp Harris Smith house before restoration.



The property lies at the base of Jones Hill and is located near the MBTA Red Line.



## Eustis Street Fire House

20 Eustis Street, Dudley Square, Roxbury 1859

### Total Development Costs

\$2.5 million

### Project Size

2520 square feet

### Status

Completed in July 2011

### Building Uses

- Headquarters for Historic Boston Inc.
- Headquarters for the Timothy Smith Technology Network

### HBI Role

Developer and Lessee  
(99 year lease from the City of Boston)

### Designations

- Individually listed on the National Register of Historic Places
- Contributing site to the Eustis Architectural Conservation District

### Capital Sources Summary

State Historic Tax Credit	\$246,510
Federal Historic Tax Credit	\$265,238
New Markets Tax Credits	\$514,424
Permanent Debt (City of Boston)	\$435,000
Fundraising	\$547,850
HBI Cash Equity	\$550,524
<b>TOTAL SOURCES</b>	<b>\$2,559,546</b>

### Development Cost Summary

Acquisition Costs	\$31,976
Hard Costs	\$1,525,134
Soft Costs	\$840,022
Financing Costs	\$162,414
<b>TOTAL COSTS</b>	<b>\$2,559,546</b>

### Community Impact

- Preserved a Boston Landmark
- Re-activated a blighted and abandoned building
- Created new office space for Dudley Square
- Built stewardship of adjacent historic buildings and 1630 Cemetery



The oldest remaining fire house building in Boston, the Eustis Street Fire House was built for the Town of Roxbury in 1859.

### Background

Boston's oldest remaining fire house structure, the Eustis Street Fire House was designed by Roxbury architect John Roulestone Hall in 1859. The Eustis Street station originally housed a steam pumper that was pulled by firefighters of Torrent Six of the Roxbury Fire Department before the deployment of horse drawn fire apparatuses for which the town added a stable in 1869. From the time Roxbury was annexed to Boston in 1868 until 1873, Ladder Company 4 was installed at this station, a unit that served with distinction during the Great Fire of 1872. Chemical Engine Company 10 operated from this station from 1889 to 1916 and finally disbanded in 1922. With its fire uses over, the Fire House became home to the local chapter of Spanish American War Veterans, from 1919 to 1950. By the late 1980s, the Fire House was in serious disrepair and leaned precariously toward the cemetery.

### Energy Performance

LEED Silver



HBI's 2011 rehabilitation of the Eustis Street Fire House included a sculptural fence depicting the site's earliest engine.



The Eustis Street Fire House is one of several new developments in the Dudley Square neighborhood of Roxbury.



## Fowler Clark Epstein Farm

487 Norfolk Street, Mattapan, House (1786-1806); Barn (c. 1860)

### Total Development Costs

\$3.67 million

### Project Size

- Farmhouse: 2,900 square feet
- Barn/Stable: 3,000 square feet
- Site area: 30,000 square feet

### Status

Completed 2018

### Building Uses

- Working urban farm with greenhouse and farmstand
- Training center for the Urban Farming Institute
- Farm Manager residence

### HBI Role

Owner and Developer



Fowler Clark Epstein Farm today.

### Designations

- Boston Landmarks
- National Register of Historic Places

### Capital Sources Summary

State Historic Tax Credit	\$400,500
Federal Historic Tax Credit	\$398,000
Permanent Debt	\$750,000
City of Boston	\$150,000
Fundraising	\$1,823,863
HBI Cash Equity	\$200,000
<b>TOTAL SOURCES</b>	<b>\$3,722,363</b>

### Development Cost Summary

Acquisition Costs	\$250,447
Hard Costs	\$2,461,062
Soft Costs	\$612,147
Financing Costs	\$56,019
Development Fee	\$342,688
<b>TOTAL COSTS</b>	<b>\$3,722,363</b>

### Project Partners

- The Urban Farming Institute (UFI)
- The Trust for Public Land (TPL)
- North Bennet Street School (NBSS)

### Background

The Fowler Clark Epstein Farm remains among the earliest, intact, vernacular examples of agricultural properties in Boston and in urban centers across the Commonwealth.

Built between 1786 and 1806, the original farmhouse was once part of a large Dorchester estate encompassing over 330 acres. It has primarily been owned by three families, beginning with Samuel Fowler, a Dorchester yeoman in the late 18th century.

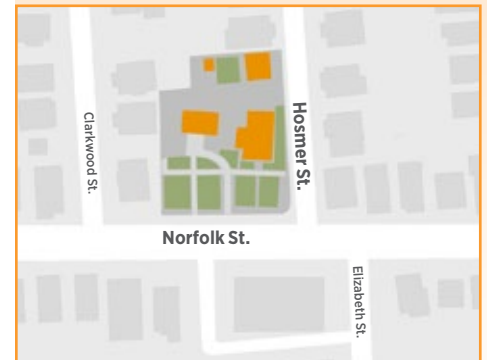
In 1837, the land was sold to the Clark family and later subdivided into parcels as advancements in transportation hastened the development of Mattapan as a “streetcar suburb” of Boston. The original house and barn were sold to Jorge Epstein in 1941 where it remained in family possession until falling vacant in 2013.

### Community Impact

- Reactivates derelict buildings
- Repurposed as headquarters for urban farm and training center
- Provides health and wellness programs for community
- Created green collar jobs
- Provides locally grown produce for Mattapan



The Fowler Clark Epstein Farm before rehabilitation.



The Fowler-Clark-Epstein farm is located on the corner of Norfolk and Hosmer streets in Mattapan, within walking distance from Blue Hill Ave, Morton Street and the Fairmount Line.



## Golden Building

1510 Dorchester Avenue, Fields Corner, Dorchester, circa 1895

### Total Development Costs

\$333,500

### Project Size

10,000 square feet

### Status

Completed in 2011

### Building Uses

- 4 retail storefronts
- One non-profit agency

### HBI Role

- Owner's Representative and Project Manager
- Primary Financing Agent

### Designations

- Evaluate for consideration in a National Register District within the Fields Corner Main Street District

### Capital Sources Summary

HBI loan to building owner	\$210,000
Owner Equity	\$23,700
City of Boston	\$92,300
Tenant Contribution to HVAC	\$7,500
<b>TOTAL SOURCES</b>	<b>\$333,500</b>

### Development Cost Summary

Hard Costs	\$282,558
Soft Costs	\$50,942
<b>TOTAL COSTS</b>	<b>\$333,500</b>

### Community Impact

- Restored façade of high profile building
- Stimulated two other nearby improvement projects
- Improved space and energy efficiency program for Dorchester Youth Collaborative
- Better storefront presentation for small businesses
- More sustainable leases for property owners and businesses
- Maintenance agreements with businesses and property owner

### Project Partners

- City of Boston
- Fields Corner Main Street
- The Stephen Golden Family



Covered in layers of metal siding and poor signage, the Golden Building was restored by its original face in 2011.

### Background

The Golden Building was built in the 1890s and for many years has been a prominent retail location for the bustling district of Fields Corner.

Over the decades, the building suffered fires and cosmetic changes but its decorative wooden cornice and other historic features remained, hinting at a more attractive past beneath cladding of modern metal siding, changed windows, and muddled storefronts. HBI produced a rendering of a conceptual rehabilitation project based on glimpses of the building found in old photographs, and met with the Fields Corner Main Street program and the building owner to discuss the idea of completing a model preservation rehabilitation project. Owner Stephen Golden was captivated by the project idea and worked with HBI on a redesign of the building face, interior and systems improvements. HBI helped Golden with technical assistance, project management and financing.



The Golden Building, pictured above before rehabilitation, dates to about 1890 and is situated at the corner of Dorchester Avenue and Park Street.





## Hayden Building

681 Washington Street, Chinatown, 1875

### Total Development Costs

\$5.8 million

### Project Size

8580 square feet

### Status

Completed 2013

### Building Uses

- Four market rate rental housing units
- One ground level retail space

### HBI Role

Owner and Developer

### Designations

- Boston Landmark
- Individually Listed on the National Register of Historic Places

### Capital Sources Summary

State Historic Tax Credit	\$945,000
Federal Historic Tax Credit	\$981,388
Permanent Debt	\$1,500,000
Fundraising	\$200,000
HBI Cash Equity	\$1,330,767
Deferred Developer Fee	\$779,380
<b>TOTAL SOURCES</b>	<b>\$5,736,535</b>

### Development Cost Summary

Acquisition Costs	\$0
Hard Costs	\$3,900,758
Soft Costs	\$799,475
Financing Costs	\$10,447
Deferred Development Fee	\$779,380
Reserves	\$146,475
HBI Project Management Fee	\$100,000
<b>TOTAL COSTS</b>	<b>\$5,736,535</b>

### Community Impact

- Catalytic project for Lower Washington Street renewal
- Four new units of market rate housing
- Activated empty upper story space
- Future revenue supported Historic Boston's mission city-wide

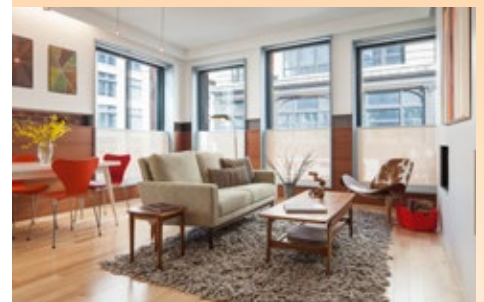


Preservation of the Hayden Building in 1993 helped change the face of Lower Washington Street.

### Background

The Hayden Building is the only remaining commercial building in Boston designed by renowned 19th century American architect Henry Hobson Richardson. It was purchased by HBI in 1993 when the building was threatened with condemnation after a fire had devastated the roof and the entire building was structural unstable. HBI invested \$1 million at the time in structural stabilization, envelope repairs and activation of the first floor and an adjacent non-historic building for commercial activity.

The Hayden Building's turnaround helped Lower Washington Street's renewal in the 1990s and 2000s. HBI sold its interests in the next-door Penang restaurant location and re-invested in the Hayden Building's long-empty upper stories in order to create housing units and an on-going revenue source for HBI's preservation activities.



Interior of one of the four apartments in the Hayden Building.

### Energy Performance

LEED Platinum



## Ionic Hall and St. Luke's Chapel

150 Roxbury St., Roxbury, 1801; 1893

### Project Development Costs

- St. Luke's Chapel: \$1.6 million
- Ionic Hall: \$7.0 million

### Project Size

- St Luke's Chapel: 1600 sf
- Ionic Hall: 15,000 sf

### Proposed Uses

- Church Uses
- Community Space

### Status

- Pre-Development; (feasibility study complete)
- Fundraising
- Feasibility study completed

### HBI Role

- Consultant to the Episcopal Diocese of Massachusetts and the parish of St. John St. James

### Designations

- Located within the John Eliot Square National Register District

### Community Impact

- Reactivates Roxbury's Oldest Brick Building
- Public access to prominent community building
- Creates new residential opportunities in John Elliot Square

### Owner

- Parish of St. John St. James
- Episcopal Diocese of Massachusetts



St. Luke's Chapel

### Background

The Episcopal parish of St. Johns St. James is a collection of two buildings on the northern edge of Roxbury's John Eliot Square: Ionic Hall and St. Luke's Chapel.

Ionic Hall is Roxbury's oldest brick building, built between 1800-1804. The building was designed in the Federal Style and built by Captain Stoddard of Hingham as a home for his daughter, Sally Hammond. By 1876, the house had been purchased by the Episcopal Diocese of Massachusetts which opened St. Luke's Convalescent Home there. St. Luke's Chapel, a Gothic Revival style chapel, was designed by Ralph Adams Cram and was constructed between 1893-1900. The structure is accented by a wooden reredos and cross decoration by the Boston-based wood carver Johannes Kirchmayer, a frequent Cram collaborator. Ionic Hall was used for worship and meetings. Its upper floors are vacant and have suffered from water damage in recent years. St. Luke's is a greater challenge. It has had severe water penetration through holes in the roof, and the interior has experienced substantial deterioration and damage.

The remaining members of St. James's continued to meet separately after their church was demolished until 1968, when the two parishes "came to recognize the value of combining their resources" and merged as the new Church of St John/St. James. The new parish began worshipping on the former St. Luke's site in a modern addition to the Ionic Hall building.



Ionic Hall





## Roslindale Substation

4228 Washington Street, Roslindale Village, 1911

### Total Development Costs

\$4.8 million

### Project Size

8000 gross square feet

### Status

Completed 2017

### Building Uses

- First Floor Retail
- Turtle Swamp Brewing Beer Garden

### HBI Role

- Property Designation from BRA with Roslindale Village Main Street
- Development and preservation strategy consulting and coordination to owner
- Development partnership with Roslindale Village Main Street and Peregrine Group, LLC

### Designations

- Listed on the National Register of Historic Places

### Capital Sources Summary

State Historic Tax Credits	\$700,000
Federal Historic Tax Credits	\$569,085
Fundraising	\$1,415,000
Investor Equity	\$1,605,793
Deferred Development Fee	\$503,734
<b>TOTAL SOURCES</b>	<b>\$4,793,612</b>

### Development Cost Summary

Acquisition Costs	\$375,000
Hard Costs - Building Shell	\$1,996,842
Soft Costs - Building Shell	\$482,650
Tenant Improvements	\$1,435,386
Development Fee	\$503,734
<b>TOTAL COSTS</b>	<b>\$4,793,612</b>

### Project Partners

- Roslindale Village Main Street
- Boston Redevelopment Authority
- Peregrine Group, LLC
- Rockland Trust



Roslindale Substation Exterior Restoration Fall 2016

### Background

When built in 1911 the Roslindale Substation functioned as part of the Boston Elevated Railway Company's then revolutionary alternating electric current power system. Designed by Robert Peabody of Peabody and Stearns and Stone and Webster Engineering Corporation, the Substation is one of six nearly identical converter substations built in and around Boston at that time. The Substation converted alternating current (AC) transmitted from a new South Boston Power Station via underground cables into direct current (DC) for use by local trolley cars. The Roslindale Substation continued operating until the 1970s but has been vacant and unused since then.

When the adjacent Higgins Funeral parcels became available for purchase in 2012, HBI and Roslindale Village Main Street purchased the land and consolidated it with the substation in order to attract its private partner, Peregrine Group, LLC to redevelop the substation and build 43 new units of housing around it.

### Community Impact

- Activates a long-vacant building in the heart of Roslindale Square
- Public access and pedestrian-oriented uses revives a prominent corner and restores the historic fabric of the neighborhood
- Leverages redevelopment of adjacent property for 43 apartments targeted to young professionals



Turtle Swamp Brewing Beer Garden



## St. James African Orthodox Church

50 Cedar St., Roxbury, 1910

### Total Projected Development Costs

\$5.6 million

### Project Size

8,040 sf building

### Proposed Uses

- To be determined

### Status

Pre-development planning

### HBI Role

Owner and Developer

### Designations

- Boston Landmark
- National Register of Historic Places within the Roxbury Highlands Historic District

### Capital Sources Summary

State Historic Tax Credits	\$480,000
Federal Historic Tax Credits	\$620,849
New Markets Tax Credits	\$1,219,954
Fundraising	\$3,292,675
<b>TOTAL SOURCES</b>	<b>\$5,613,478</b>

### Development Cost Summary

Acquisition Costs	\$400,000
Soft Costs with Contingency	\$884,400
Hard Costs with Contingency	\$3,537,600
Financing Costs	\$194,508
Development Fee	\$596,970
<b>TOTAL COSTS</b>	<b>\$5,613,478</b>

### Background

The church at 50 Cedar Street was originally designed for a Norwegian Evangelical congregation by Boston architect, Edward Thomas Patrick Graham. Graham's design features a blend of Shingle and Late Gothic Revival architectural elements. In its early years, the church served small pockets of Norwegian immigrants in Boston who worked in manufacturing and the fishing industry. By 1955, the demographics of the neighborhood had changed and the African Orthodox



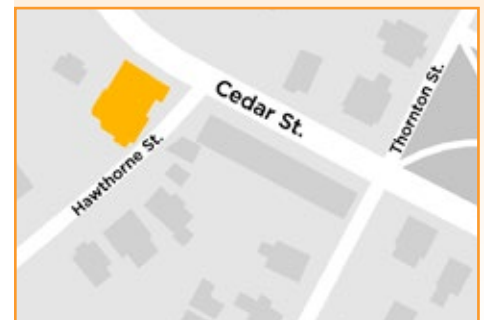
View of St. James African Orthodox Church from Cedar Street

Church purchased the building. The church was founded decades earlier by George Alexander McGuire, the former Chaplain-general of Marcus Garvey's Universal Negro Improvement Association (UNIA). Firmly rooted in the Garvey movement and racial autonomy, the church fostered a sense of self-determinism among the growing Black population of Roxbury throughout the 1960s, 70s, and 80s. By 2011, the church congregation had dwindled and was no longer able to care for the aging building.



### Community Impact

- Reactivates a long vacant historic building in Highland Park for new uses





## Upham's Corner Comfort Station

611 Columbia Road, Dorchester, c. 1912

### Total Development Costs

\$1,384,540

### Project Size

1940 square feet with basement

### Building Uses

Comfort Kitchen Cafe

### Status

Construction completed

### HBI Role

Owner and Developer

### Designations

- North Burying Ground's Boston Landmark and National Register designations
- MBTA's Fairmount Line (Upham's Corner)
- Within the Upham's Corner Main Street District

### Capital Sources Summary

State Historic Tax Credit	\$176,000
City of Boston	\$40,000
Fundraising	\$765,000
Tenant build-out contribution	\$118,000
Permanent Debt	\$161,000
Deferred Development Fee	\$124,540
<b>TOTAL SOURCES</b>	<b>\$1,384,540</b>

### Development Cost Summary

Acquisition Costs	\$100
Hard Costs with Contingency	\$879,890
Soft Costs with Contingency	\$272,858
Financing Costs	\$25,500
Reserves	\$5,387
Development Fee	\$200,805
<b>TOTAL COSTS</b>	<b>\$1,384,540</b>

### Project Partners

- The American City Coalition (TACC)
- Comfort Kitchen Cafe



The Upham's Corner Comfort Station is proposed for re-use as Comfort Kitchen, a locally owned cafe.

### Background

The Comfort Station is a one-story stucco and tile "mission style" structure built as a convenience station in 1912 to support the expanding streetcar system in Boston. It was designed by architect William Besarick who also designed the municipal building at the corner of Columbia Road and Bird Street, as well as many area triple-deckers.

The building sits on what was once part of the Dorchester North Burying Ground which is listed on the State and National Registers of Historic Places and is a Boston Landmark.

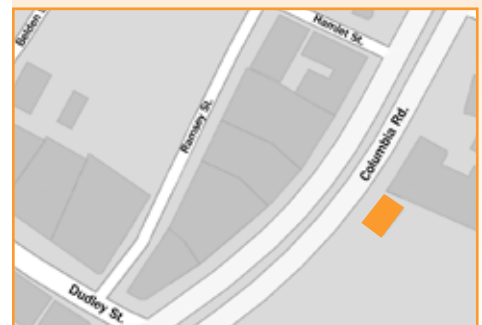
Rehabilitation of the Comfort Station helps tell the story of the City of Boston's 19th century expansion and Dorchester's urbanization and related transportation growth in the 20th century.



Vacant since 1977, the Upham's Corner Comfort Station is shown before restoration.

### Community Impact

- Preserves and reuses a local historic building
- Supports and advances an entrepreneur
- Supports a local business that enhances the overall Upham's Corner business district



The Comfort Station faces Columbia Road and is within walking distance of the Upham's Corner stop on the Fairmount Line.

## Vertullo Building

74-84 Fairmount Avenue, Hyde Park, circa 1868

### Total Development Costs

\$1.38 million

### Project Size

8,462 square feet

### Status

Completed 2015

### Building Uses

- 5 ground floor retail spaces
- 4 rental apartments

### HBI Role

Owner and Developer

### Designations

Determined eligible for the National Register of Historic Places

### Capital Sources Summary

State Historic Tax Credit	\$149,531
Permanent Debt	\$500,000
City of Boston	\$95,000
Fundraising	\$34,452
HBI Cash Equity	\$522,000
Deferred Development Fee	\$72,817
<b>TOTAL SOURCES</b>	<b>\$1,373,800</b>

### Development Cost Summary

Acquisition Costs	\$500,000
Hard Costs	\$582,678
Soft Costs	\$143,380
Financing Costs	\$2,108
Development Fee	\$145,634
<b>TOTAL COSTS</b>	<b>\$1,373,800</b>

### Community Impact

- Preservation of workforce housing
- Restoration of a period building from the earliest commercial development of Hyde Park
- Preservation of transit-oriented rental residential units and retail commerce
- Upgrades to commercial space for five new small businesses and four residential units.



begun in 1868, the Vertullo Building at 74-84 Fairmount Avenue is one of the oldest surviving buildings in the Cleary and Logan Square business districts. The rehabilitation project was completed in 2015.

### Background

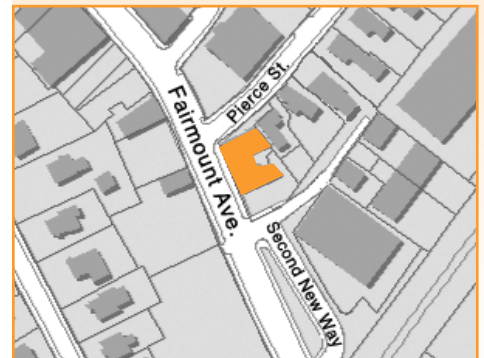
Begun in 1868, the Vertullo Building at 74-84 Fairmount Avenue is likely the oldest and only surviving wooden commercial building in this district. It is a good example of the Second Empire style, popular in the 1860s when Hyde Park was incorporated as a town and the community and local investors began to build civic and commercial buildings along the River Street and Fairmount Avenue corridors near the two major rail lines that traveled through Hyde Park. Located opposite the Riverside Theaterworks and adjacent to the Fairmount Avenue MBTA Commuter station, the Vertullo Building is a highly visible historical anchor to Logan Square. The Vertullo Building has managed to survive largely intact because it has been in the hands of the Vertullo Family and their descendants since 1932. HBI acquired the building in 2011 and completed its rehabilitation in 2015. The property now consists of 5 new small businesses and 4 residential units.

### Project Partners

- City of Boston
- Hyde Park Main Streets
- Blue Hills Bank Charitable Foundation



HBI's rehabilitation of the Vertullo Building restores a Victorian era structure and supports economic development along the Fairmount Avenue commercial corridor.



## Organizational and Project References

### Urban Farming Institute of Boston (UFI)

**Contact:** Patricia Spence  
Executive Director  
[pspence.ufi@gmail.com](mailto:pspence.ufi@gmail.com)  
(617) 680-5378

UFI worked with HBI on the redevelopment of the Fowler Clark Epstein Farm at 487 Norfolk Street in Mattapan from 2015 to 2018. HBI still owns the property through the 5-year compliance period for historic tax credit use. UFI can speak to the process of envisioning and developing plans for a project, and determining the roles and responsibilities in partnerships for completing a project.

### Eastern Bank

**Contact:** Christopher Scoville  
Senior Vice President of Community Development Lending  
[c.scoville@easternbank.com](mailto:c.scoville@easternbank.com)  
(617) 295-0624

Eastern Bank is HBI's chief financial institution for corporate financial management, financing for construction and projects, and management of a line of credit. He can speak to HBI's credit worthiness and the experiences working on many different projects over the last 8 years.

### Massachusetts Housing Investment Corporation

**Contact:** Kathy McGilvray  
Director of Investment  
[mcgilvray@mhic.com](mailto:mcgilvray@mhic.com)  
(617) 850-1008

MHIC is an important source of subsidy programs for economic development and housing in Massachusetts. It helped finance HBI's project at the Eustis Street Fire House in 2011 through the New Markets Tax Credit program, a relationship that lasted 7 years. HBI plans to pursue New Markets Tax Credits for the Nawn Factory redevelopment, and has spoken with MHIC about its new fund, the Neighborhood Commerce Fund, designed to help with tenant fit-out and working capital for projects that are activating streetscapes and creating retail spaces for local businesses, etc. HBI and TWC have also spoken with them about an evolving "Healthy Retail & Commerce Fund" where MHIC would combine low-cost foundation capital with hospital capital for projects that contribute positively to community health (including social determinants of health).

HBI Staff Qualifications



**KATHY L. KOTTARIDIS**

Executive Director  
Historic Boston Inc.  
20 Eustis Street  
Roxbury, MA 02119

**Employment  
6/2007 - present**

**HISTORIC BOSTON INCORPORATED  
Executive Director**

- Management of preservation organization devoted to rehabilitation of threatened historic buildings for new uses.
- Completed 9 projects with development costs of \$24.2 million
- Raised more than \$5 million in capital grants, low interest loans and public subsidies to support project financing gaps.

**2005 -2007**

**NORTHEASTERN UNIVERSITY  
Office of the President  
Associate Director of Public Affairs**

- Responsible for the university's urban mission and community engagement strategy, matching university academic and institutional assets to community-based activities
- Developed a five-university cooperative initiative to partner with 10 Boston Public Schools over five years for learning support and student enrichment activities
- Established Urban Academic Steering Committee composed of all academic deans to increase research and curriculum in support of the university's neighborhood strategies

**2003 - 2005**

**COMMONWEALTH OF MASSACHUSETTS  
OFFICE OF SMALL BUSINESS & ENTREPRENEURSHIP  
Director**

- Established new State office for small business services, policies and programs
- Appointed by Governor as Small Business Advocate to mitigate State regulatory impact
- Established New Markets clearinghouse to increase utilization and allocation of federal tax credits to Massachusetts' entities

**2000 -2002**

**BOSTON REDEVELOPMENT AUTHORITY  
Director of Economic Development**

- Supervised City's development review process for commercial, housing and institutional projects including interagency and community assessments
- Designed nationally recognized *Back Streets* program and related policies to retain and grow Boston's industrial sector
- Expanded small business loan guarantee fund by \$1 million

**1998 – 2000**

**CITY OF BOSTON, MA  
Director, Office of Business Development**

- Consolidated five City of Boston business assistance agencies into new department with 38 employees, two office locations and \$21 million operating budget
- Directed \$10.5 million in development financing to catalytic inner city development projects

**1995 - 1998**

**Director, Boston Main Streets**

- Established first city-wide Main Street commercial district revitalization program
- Managed six-person staff, 19 district managers and \$2.2 million operating budget
- Grew program from 10 to 19 business districts resulting in more than 10,000 annual volunteer hours, 326 new businesses, 2,100 new jobs and 120 storefront projects

<b>1994 – 1995</b>	<b>BOSTONIAN SOCIETY/OLD STATE HOUSE MUSEUM</b> <b>Director of Public Programs and Education</b> <ul style="list-style-type: none"> <li>• Organized 16 neighborhood historical societies’ network and annual conference</li> <li>• Initiated Boston Historic Marker Program to honor key people, events and places</li> <li>• Arranged regular lectures, tours and programs for historical society and museum</li> </ul>	
<b>1991 – 1994</b>	<b>CITY OF BOSTON, MA</b> <b>Senior Planner, Boston Parks and Recreation Department</b>	
<b>1988 – 1991</b>	<b>Project Manager, Historic Burying Grounds Initiative</b> <ul style="list-style-type: none"> <li>• Implemented a \$2.1 million restoration plan for the City’s 16 historic cemeteries</li> <li>• Raised more than \$500,000 from private sources for conservation projects</li> <li>• Organized abutter “Friends” groups for four sites along Freedom Trail</li> </ul>	
<b>1987- 1988</b>	<b>TOWN OF LONGMEADOW, MA</b> <b>Historic Preservation Planning Consultant</b> <ul style="list-style-type: none"> <li>• Completed town-wide historic resources inventory for State Register of Historic Places</li> <li>• Prepared plans for historic district commission to address cultural resources Management, long-term growth and affordable housing in historic districts.</li> </ul>	
<b>1985 -1987</b>	<b>DEDHAM (MA) HISTORICAL SOCIETY</b> <b>Assistant Curator</b> <ul style="list-style-type: none"> <li>• Responsible for collections management, public programs and museum administration</li> <li>• Completed research for exhibit and book titled <i>Building Dedham</i></li> </ul>	
<b>Education</b>	<b>HARVARD UNIVERSITY, Kennedy School of Government</b> MA in Public Administration, 2003	<b>Cambridge, MA</b>
	<b>BOSTON UNIVERSITY</b> MA in Historic Preservation, 1988	<b>Boston, MA</b>
	<b>UNIVERSITY OF NEW HAMPSHIRE</b> BA in History, 1985	<b>Durham, NH</b>
<b>Current Professional &amp; Community Activities</b>	Chair, Boston Industrial Development Finance Authority (BIDFA) Board of Directors, Freedom Trail Foundation	

**Shaurya Batra**  
**Historic Boston Incorporated**  
**Director, Real Estate Development**  
**shaurya@historicboston.org**

## **PROFESSIONAL EXPERIENCE**

**Historic Boston Inc., Boston MA**  
**Director – Real Estate Development**

**January 2018 – Present**

Responsibilities include:

- Guiding overall real estate strategy, project identification and prospecting.
- Performing financial analyses and due diligence, for acquisition of properties
- Preparation of site feasibility analyses, development and operating pro formas and associated schedules for projects
- Carrying out tax credit underwriting including Historic Tax Credits and New Market Tax Credits
- Arranging project financing, including sources of debt, equity and subsidy
- Overseeing asset management and related property budgets of completed properties

Select project experience includes:

- Hayden Building, Chinatown
- Eustis St Fire House, Roxbury
- Fowler Clark Farm, Mattapan
- Upham’s Corner Comfort Station, Dorchester

**King Street Properties, Cambridge MA**

**Development Summer Associate**

**June 2016 - August 2016**

- Analyzed financial performance of previously completed assets to create marketing case studies
- Assisted in acquisitions, development and asset management
- Assessed feasibility of strategic direction for investment in life sciences specific real estate in New York City

**Square One Architecture, New Delhi, India**

**Principal & Partner**

**July 2006 - August 2015**

- Co-founded the firm; delivered over 1.3M SF across office, residential, hospitality and industrial product types
- Spearheaded business development, design development and project management responsibilities
- Represented clients as OPM for multiple projects; oversaw project pre-construction, construction and closeout

- Coordinated project teams as primary liaison with clients, engineering consultants and contractors
- Led negotiations with stakeholders; managed preparation and administration of contracts
- Prepared detailed project budgets, schedule of costs and quantities; managed cost tracking and reporting
- Developed and managed project master level and reporting level schedules

**DIP - Interiors & Constructions, New Delhi, India**

**Principal & Partner**

**July 2009 - August 2015**

- Co-established contracting venture specializing in commercial interiors and single-to-four family houses
- Capitalized on a niche opportunity for small to mid-size bespoke buildouts, exceeding average returns by 10%
- Focused on business development, project management, client and sub-contractor negotiations
- Assisted with preparation and management of control level construction schedules
- Supervised day-to-day management and coordination of construction activities
- Created financial inflow & outflow pro forma; administered payment requisitions and invoice approvals

**Batra Family Properties, New Delhi, India**

**Junior Partner**

**January 2011 - August 2015**

- Led leasing, capital and tenant improvements for a family owned office, retail and residential portfolio
- Spearheaded renovation and repositioning of 110,000 SF of industrial assets for multi-tenant office use
- Responsible for carrying out financial analyses towards asset management, purchase and disposition

**EDUCATION**

**Massachusetts Institute of Technology, Cambridge, MA**

Master of Science in Real Estate Development, 2017

**G.G.S.I.P University, New Delhi, India**

MBA (Executive Program), 2009

**Sushant School of Art and Architecture, Gurgaon, India**

Bachelor of Architecture, 2005

**Lisa Lewis**  
**Historic Boston Incorporated**  
Senior Project Manager  
Lisa@historicboston.org  
(617) 442-1859 X28

## PROFESSIONAL EXPERIENCE

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**HISTORIC BOSTON INCORPORATED**  
*Senior Project Manager*

**Boston, MA**  
*January, 2009–Present*

Oversee the rehabilitation of highly distressed, historically significant properties for new uses, including:

*Fowler Clark Epstein Farm – Mattapan, MA* - \$3.8M rehabilitation of a 18<sup>th</sup> century house and 19<sup>th</sup> century barn into a working urban farm, farmer training center, and apartment

*Eustis Street Fire House, Roxbury, MA* - \$2.5M rehabilitation of the oldest fire house in Boston into 2 offices  
*Hayden Building, downtown Boston, MA* - \$5.8M rehabilitation of H.H. Richardson landmark into rental housing and retail

*Alvah Kittredge House, Roxbury, MA* - \$3.7M rehabilitation of Greek Revival home into 5 rental apartments  
*Vertullo Building, Hyde Park, MA* - \$1.38M rehabilitation of 5 retail storefronts and 4 apartments

*Anna Clapp Harris Smith House, Dorchester, MA* - \$350K acquisition and partial rehabilitation of single family home

*Upham's Corner Comfort Station, Dorchester, MA* - \$912,000 rehabilitation of a former public restroom into full service restaurant (currently in development)

### Responsibilities include:

- Leading development team of consultants in all aspects of project development from conception to completion
- Representing HBI in acquiring project permitting
- Working collaboratively with HBI staff to identify new projects, plan possible uses, develop budgets, obtain financing, develop project schedules, and identify and coordinate with tenants

**THE SALVATION ARMY**  
*Owner's Representative*

**Boston, MA**  
*May–November, 2007*

Assisted the Salvation Army in design and construction planning for the Ray and Joan Kroc Corps Community Center, a new 90,000 square foot building in Uphams/Dudley neighborhood of Dorchester. Developed project budget, worked with architect (and other professionals) to modify schematic design, arranged soil remediation at project site, initiated energy modeling study funded by NSTAR and Keyspan, planned construction workforce development with contractor and local community group.

**BOYS & GIRLS CLUBS OF BOSTON**  
*Project Manager*

**Boston, MA**  
*February, 2000- July, 2007*

Managed the development (design, construction and furnishing) of four clubhouses:

*Blue Hill Club, Dorchester, MA* - \$7.0 million expansion

*Yawkey Club of Roxbury, Roxbury, MA* - \$8.0 million substantial renovation and expansion

*Keane Children's Center, Charlestown, MA* - \$5.3 million substantial rehabilitation of historic building

*Jordan Boys & Girls Club, Chelsea, MA* - \$10.9 million new construction

### Responsibilities included:

- Managing and coordinating activities of development team members: architect, general contractor, consultants, attorneys, utility providers, etc.
- Creating and managing project budgets
- Overseeing design development, including initiating, planning, and implementing sustainable design and renewable energy elements; identified funding sources (utilities, state funds, private foundations)
- Purchasing furniture, coordinating move-in

- Soliciting proposals and hiring consultants
- Negotiating contracts
- Representing owner with City departments and officials
- Planning and conducting neighborhood meetings
- Reviewing and approving contractor requisitions
- Reporting to senior staff, board and committee members on project status and budget
- Preparing materials for fundraising team

**Additional responsibilities:**

- Coordinate major capital repairs at other clubhouses
- Assist in planning annual capital budgets for five clubs
- Administer facilities grant program
- Coordinate furniture donations to clubhouses

**KEEN DEVELOPMENT CORPORATION**

**Cambridge, MA**

***Marketing Director***

***August 1998 – June 1999***

Developed marketing materials including new corporate resume, brochures, proposals, etc. Created marketing strategy for the Smith Lofts, 36 renovated artist live/work apartments in new arts and entertainment district of downtown Providence, RI; conducted outreach to Providence arts community.

***Project Manager***

***1989- 1997***

Managed the development of three buildings:

***West End Place, 150 Staniford Street, Boston, MA*** – 183 unit new construction, mixed-income cooperative with ground floor retail space in downtown Boston. Financed with complex combination of Federal, State, and City subsidies and conventional financing. \$38 million budget. Completed in 1997.

***300 Summer Street, Fort Point, Boston, MA*** – 48 unit artist live/work, limited-equity cooperative with 7 commercial condominiums, café and gallery. Keen Development acted as development consultant and project manager to the Fort Point Arts Community to develop this former warehouse in the Fort Point neighborhood into affordably priced loft space with occupancy restricted to visual artists and arts-related businesses. \$5 million budget. Completed in 1995.

***Payne Elevator, 55-57 Richdale Avenue, Cambridge, MA*** – 18 unit artist condominium. Keen Development was hired as development consultant and project manager by a group of Cambridge-area artists who formed to convert this former elevator factory into live/work lofts. The development was conventionally financed. \$2.2 million budget. Completed in 1995.

**Responsibilities included:**

- Creating development and operating proformas
- Managing and coordinating activities of development team members: architects, contractors, attorneys, management agents, consultants, etc.
- Representing developer with lenders, city officials, and community groups
- Requisitioning funds and monitoring development budget
- Applying for government subsidies
- Preparing submissions as required for city, lender, and environmental approvals
- Developing condominium and cooperative documents
- Planning events (groundbreakings, opening ceremonies, open houses, etc.)

**EDUCATION**

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**WESTFIELD STATE UNIVERSITY**

**Westfield, MA**

*Bachelor of Arts in English, minor in Media Systems and Management, 1984*

# Gabrielle Chapman

[gbrchapman@gmail.com](mailto:gbrchapman@gmail.com)

603.767.7218

Northeastern University, Class of 2017  
B.A. in History, Art History, Spanish  
Master of Arts, Public History, Class of 2019  
Phi Alpha Theta Honors Society

## Selected Professional Experience

### Historic Boston Inc.

July 2018 - Present

*Office Manager and Social Media Coordinator*

- Write and edit content for HBI electronic and printed materials, distributed to +6100 contacts.
- Build and edit existing web pages for new and existing projects, community meetings, and special events.
- Manage HBI Board of Directors and Council of Advisors relations for quarterly meetings and on-site visits.
- Execute administrative work for office operations, property management, and on-going projects.
- Troubleshoot IT, software, and hardware upgrades for computers and programs.

### Invaluable and AuctionZip Online Auctions

Sept. 2017 - Jan. 2018

*Content Marketing and Social Media Intern*

- Composed concise and compelling copy for social media channels: Twitter, Facebook, and Pinterest.
- Drafted 500+ biographies for artist landing pages on Invaluable website using SEO data from SEMRush.
- Wrote and edited buying guides and “how to” articles about art, auctions, and collectibles for *In Good Taste* blog.

### Northeastern University Library and Archives

March - August 2017

*Archivist Assistant*

- Created educational material for interactive online timeline: Boston’s Racial Equity History Project.
- Drafted academic blog posts to highlight archival material and collections for NEU library blog.
- Assisted with outreach and advertising for university-sponsored Lower Roxbury Black History Project.

### National Gallery of Art, Washington, DC

January - June 2016

*Press Office Intern*

- Worked full-time for Chief of Communications on press previews and maintaining press relations.
- Edited press releases for new exhibitions, monthly newsletters, and seasonal information pamphlets.
- Composed 50-page case study analyzing social media tactics of top U.S. museums to inform social media strategy.

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## Selected Projects

**Biography of a Three-Decker** -- Using original blueprints, notes, and architectural drawings from the archives at Historic New England, I conducted research at the Boston City Archives, Boston Public Library, Boston City Assessor’s Office, and the Suffolk County Registry of Deeds to create a comprehensive list of occupants of three-deckers designed by architect Jacob Luippold. Historic New England published a summary of my findings in their Winter 2017 magazine. I presented my research at the Preserving Affordability, Affording Preservation symposium in 2018.

**Boston Uncovered: Eustis Firehouse** -- The City of Boston’s Department of Innovation and Technology team visited the HBI headquarters to shoot footage for a short video about Eustis Street Firehouse for their YouTube series: Boston Uncovered. I researched and presented the building’s history and HBI renovation. The footage was used on the City of Boston’s social media accounts: Instagram, Twitter, and Facebook.

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**Professional Organizations:** Boston Preservation Alliance Young Advisors, Chair; Roxbury Cultural Network, Co-Chair

**Interests:** Historic Preservation, Architecture, Public History, Waste-less/sustainable professional and personal habits

**Skills:** Adobe Photoshop, WordPress, Microsoft Office Suite, Academic Research

**Academic Travel:** Madrid, Spain; Quito, Ecuador

## Community Goals and Benefits

### Boston Resident Jobs Policy

HBI has not yet selected a general contractor for the development. If the organization is awarded the project, it will evaluate potential contractors who have demonstrated experience with historic rehabilitation and a successful track record with the Boston Residents Jobs Policy (BRJP) compliance.

If awarded the Nawn Factory project, HBI anticipates utilizing New Markets Tax Credits (NMTC) through the Mass Housing Investment Corporation (MHIC), which has different (and in some cases more ambitious) goals than the Boston Residents Jobs Policy for MBE and minority worker participation. The HBI team will need to report compliance to both the BRJP office and MHIC through the development process and, in the case of MHIC, for certain employment matters for the seven-year tax credit compliance period. HBI's team will strive to meet participation goals for the combined programs, showing below the higher of the two programs:

51% Boston resident workforce (BRJP)

40% of construction contracts awarded to Minority Business Enterprises (MHIC)

50% worker hours to be people of color (MHIC; exceeds BRJP goal of 40%)

12% worker hours to be women (MHIC)

Once selected, HBI's general contractor will be required to present a plan for soliciting subcontractor bids in order to achieve the MBE and workforce participation goals. The general contractor will meet with the BRJP office to review reporting requirements. Prior to the awarding of subcontracts, the general contractor will be required to report the MBE/WBE status of each subcontractor and the subcontractor will be required to describe proposed method of achieving workforce goals, including hiring needs for meeting the requirements. During construction, the general contractor will be required to maintain a list of all persons and/or firms who walk on the site seeking employment, and will provide HBI with regular access to the list. Workforce participation numbers will be reviewed by the general contractor and HBI at every weekly construction meeting. If goals are not being met, the contractor and subcontractors will be required to prepare a plan for achieving desired participation.

### Diversity and Inclusion Plan

#### Developer

Historic Boston Inc. has a staff of four, of whom 50% are people of color and 75% are women. HBI's board of directors is 27% people of color and 40% female.

#### Designers

The primary architect is Stull & Lee, a Roxbury-based MBE. The team for the Nawn Factory is led by President David Lee and Design Principal Kevin Benjamin, who are both African American. TWC's



interior architect, Next Phase Studios, is not an MBE but the senior associate designer for the project is a person of color. The Landscape Architect, Deborah Myers Landscape Architecture, is a WBE.

#### Historic Preservation Consultant

HBI's historic preservation consultant for the project is Tremont Preservation, and a WBE.

#### Occupancy, Operations and Ownership: The Wellness Collaborative

The planned tenant, The Wellness Collaborative (TWC), is both an MBE and WBE, led by three women of color (Native American, Caribbean American, and African American); membership of the Collaborative is currently 100% people of color and 65% women, and also includes veterans and formerly homeless individuals. TWC will manage operations of the facility. TWC is committed to a "community first" focus in all that they do including hiring; they endeavor to serve the community through job creation, wealth creation, and health-fostering activities. It is the intention of both HBI and TWC that TWC will purchase the Nawn Factory at the completion of the tax credit compliance period (7-8 years), at which point it will be owned by a 100% M/WBE organization.

#### Project Financing

Eastern Bank will be financing TWC's business loan and also possibly a mortgage loan to HBI. Eastern is committed to small business funding and through their foundation created the Business Equity Initiative, which helps minority businesses scale and thrive in Boston's competitive business environment. TWC is also currently in discussions for community investment participation with the Ujima Project and MainVest, both of which offer pathways for financial participation at all economic levels.

If designated to develop the Nawn Factory, HBI will be pursuing New Markets Tax Credits through the Massachusetts Housing Investment Corporation (MHIC). MHIC's mission is to be an innovative private financier of affordable housing and community development throughout Massachusetts. One of MHIC's stated core values is that the benefits of expanding community investment should flow to minority workers and minority-owned businesses. This is evidenced by MHIC's contractor and subcontractor participation goals.

#### Development without Displacement

HBI is not proposing to develop housing at the Nawn Factory, so the RFP's specific questions concerning affordable housing rates and design standards do not directly apply to this proposal. Historic Boston has a track record of working with community partners to identify new, sustainable uses for historically significant buildings that will be both economically viable and welcome. For nearly all of the projects HBI takes on, the buildings have long been vacant and uninhabitable, so we have not displaced any residents. HBI's goal is to support neighborhood priorities by preserving buildings valued by the community. One recent example is the Fowler Clark Epstein Farm, a City of Boston landmark in Mattapan that sat vacant and neglected for several years before its redevelopment as an urban farm, community center and housing for resident farmers. Similarly, Roxbury's Alvah Kittredge House was

vacant and perceived as unsafe and a fire hazard by neighbors who supported its redevelopment into five rental apartments, of which two are affordable.

HBI has been working together with The Wellness Collaborative as the future sole tenant and eventual owner of the Nawn Factory. The Wellness Collaborative's (TWC) programs will be designed to assist Roxbury residents in all aspects of their lives, including securing safe, affordable housing and pathways to economic prosperity. TWC will work collaboratively with other developments in Nubian Square to help address the needs of those in residential transition. Through TWC's *Seven Disciplines of Wellness* assessments and partnerships, they will assist enrollees in addressing home environment and stability, employment and skills development, financial literacy and wellness strategies in order to perform optimally at work or in school. The interdisciplinary base of professionals, artists, teachers and healers will mirror the community being served.

## Community Benefits Plan

HBI's planned redevelopment of the Nawn Factory will benefit the Roxbury community in several ways, including the following planned programming:

### Roxbury Heritage Interpretive Cultural Center

Establishment of a public cultural center with multimedia changing exhibits and public programs showcasing a wealth of community stories, visual arts, and experience-based oral histories that capture and illuminate the rich ethnographic historical diversity of the Roxbury community across many generations, from pre-colonial times to the present.

### The Wellness Collaborative Inc.

TWC's approach and organization is grounded in multi-generational, interdisciplinary, strength-based and culturally responsive practice and programming.

There are four core community benefit areas of TWC's tangible work:

- **Education:** ongoing community health and wellness forums, community-driven interactive workshops and experiential opportunities for expanded service and learning, social-emotional learning groups, coaching and consultation services to organizations supporting community wellbeing across the lifespan including young adults and college-age students
- **Research:** action-based and participatory community research opportunities for residents and community based organizations, as well as creative methods for providing current research findings
- **Engagement and Exchange:** provision of a collaborative space, a range of platforms, opportunities for dual direction voices and information leading to better health outcomes
- **Co-Working and Collaborative Space:** low-cost co-working space and networking opportunities for small businesses, non-profits, and nonprofit organizations with health and wellness related missions.

## TWC Health and Wellness Partners

In addition to the services they directly provide, TWC will partner with other organizations to provide an array of programs to benefit the Roxbury community:

- **Meditation and Movement Activities:** yoga, tai chi, capoeira, therapeutic recreation
- **Cafe:** coffee, juice bar, take-and-go food options in the History Cafe, “third-space” seating with Wi-Fi
- **Direct Services:** health and wellness consultation, other physical and mental health therapies, holistic and integrative care, specialized supports for vulnerable citizens
- **Arts and Creative Space:** gallery and performance/practice space at the rear of the building, audio-visual recording studio (for podcasts and oral history), classes
- **Leasable Conference and Community Space:** The central conference rooms, and first floor “performance” space will be available for community groups to lease for organizational and community activities at affordable rates.

## Green Building:

HBI and TWC plan to evaluate several green building programs, including the Living Building Challenge/Petal certification and the WELL Building Standard to determine what level might be achievable at the Nawn site. We will also pursue LEED certification if compliance can be funded through municipal/state grant programs. Pursuing these certifications benefit the community as well as the Nawn site. It is, therefore, a team goal to model sustainability for this site, and become an architectural design destination in and of itself.

The basement serves as a community resource for sheltering during emergencies. The basement of the building will be waterproofed to address issues of rising flood zones, which is not expected to be a reality until after 2070 according to Boston Harbor Map projections. Solutions for Seaport, South Boston and Dorchester’s shores will be implemented prior to that date.

## Good Jobs Strategy Plan

The Wellness Collaborative (TWC) will have fewer than 15 employees, and less than \$2.5 million in annual revenue. TWC will therefore be exempt from the Good Jobs Strategy.

TWC supports the goods job standards, and it is their intention to meet the goals of the standards as much as feasible. They delineate their strategy and policies below in two parts -- TWC itself and their wellness partners who may sublet space in the Nawn Factory:

## The Wellness Collaborative

At least 51% of the total employees employed by TWC will be Boston Residents, with the majority being from areas that have higher unemployment rates, specifically Roxbury and Dorchester, according to 2014 BRA report. TWC will recruit by listing employment opportunities with local partners, employment agencies, training agencies, schools, as well as ad placement in local media, such as the *Bay State Banner*.

At least 51% of the total employees working for TWC will be people of color. Our goal is to have at least 51% of the total employees for TWC and working on the parcel post-construction, be women, but we would not consider a final tally of 45% in any given year a failure.

All employees of TWC will be paid a “good wage”, defined as a salary or hourly wage equal to or greater than the Boston Living Wage, which will be defined as \$17.62 on January 1, 2019 and thereafter increasing annually by the rate of inflation.

At least 75% of all employees working for TWC, and will be full-time employees. “Full time” will mean at least 30 hours per week. Employees who are working 24 hours or more will be offered benefits. Benefit packages may vary over time.

We will attempt to provide schedules at least 2 months in advance so that all employees will have a predictable schedule that is appropriate for the particular field of work. Such a work schedule allows employees to reasonably schedule other family care, educational, and work obligations. As a health and wellness facility the schedule may include “on-call” time for some job categories. The weekly pattern will be consistent; a schedule that does not change more than two times per year will be presumed to be stable.

All full-time TWC employees will be offered benefits, defined as the opportunity to opt into a company sponsored health insurance plan with coverage that meets Massachusetts Minimum Creditable Coverage (“MCC”). In addition, we will collaborate with the Wellness Center to offer free access to “wellness services” for those working 24 hours per week or more.

#### [Wellness Partners as Subtenants in the Nawn Factory](#)

Tenant preference will be for Tenants who are committed to the Good Jobs Standards. Tenants will be required to demonstrate that they are recruiting locally, offering job trainings where appropriate to increase diversity and inclusion, and have a strategy for reaching a target of at least 51% of the total employees will be bona fide Boston Residents.

Likewise, tenant preference will be for those committed to having at least 30% people of color when their doors open, and at least 51% of the total employees will be people of color by the end of 3 years of operation.

Tenant preference is for those committed to hiring at least 25% women, but willing to move towards higher percentage. Some fields attract more male employees, while others are more female dominant. It is our hope to have at least 51% of the total employees working on the parcel be women.

The goal is for all employees to be paid a “good wage”, defined as a salary or hourly wage equal to or greater than the Boston Living Wage, which will be defined as \$17.62 on January 1, 2019 and thereafter

increasing annually by the rate of inflation. However, we accept some industries may have different standards. Our lowest accepted wage for tenants in any industry will be minimum wage.

At least 50% of all employees working on the Property for sub-lessee or tenant will be full-time employees. “Full time” will mean at least 30 hours per week. We will encourage 75% full time.

Given how differently each of the tenant spaces will be utilized, we are unable to commit to the stable shifts mandate for tenants. Many of these vendors are small businesses, or independent and self-employed.

We will encourage health insurance offerings by tenants, but given their small size it may not be economically feasible. There may be an opportunity to offer “wellness services” for employees of tenants in the Nawn Factory that may not be able to access the Health Connector.

### List of Permits and Licenses

<b>City of Boston</b>	<b>Permit or Approval</b>
Boston Planning & Development Agency	Article 80E Small Project Review (design review) BPA Certification of Approval
Boston Landmarks Commission (Eustis Street Architectural Conservation District)	Design review
Board of Appeal	Zoning relief, if necessary
Public Improvement Commission	Approval of streetscape improvements, if any
Boston Water and Sewer Commission	Site plan approval and related approvals
Inspectional Services Department	Building permit Certificate of Occupancy
<b>Commonwealth of Massachusetts</b>	
Massachusetts Historical Commission	Determination of no adverse effect
Massachusetts Department of Environmental Protection	Notice of commencement of asbestos-related activities Notice of commencement of construction

## Community Support

### Partnerships

HBI's proposed redevelopment at the Nawn Factory relies on formal and informal partnerships and collaborations in order to succeed:

#### The Wellness Collaborative

The Wellness Collaborative will be working with HBI on project and operations planning, anticipating that they will be the master lessee of the entire building from HBI at the project's conclusion (See Letter of Intent Between Historic Boston Inc and The Wellness Collaborative). This partnership will be reinforced by a Memorandum of Understanding that sets out roles and responsibilities, timelines and long term management goals for each party.

#### TimeLooper

HBI envisions as much as \$350,000 of design, development and equipment investment in digital experiences to support historical interpretation and visitor information at the Nawn Factory. HBI's chief consultant for the facilitation of priority themes, content, format and marketing is TimeLooper, an international developer of digital experiences. TimeLooper's experiences with public and private sites presents a variety of approaches to deploying technology for dynamic and varied content within an historic context.

TimeLooper's proposal and estimated budget is attached in the **Addendum**.

#### Benjamin Franklin Institute

HBI has been working informally with the Benjamin Franklin Institute to coordinate approaches to development, access, parking, landscape, and transportation. Since HBI is also an abutter to their forthcoming development at the Eustis Street Fire House (20 Eustis Street), the two organizations will be working together to determine best coordination for the block, and best approaches to mitigating the impacts of new development on the block's historic resources.

#### A Community Advisory Group on Roxbury History

HBI will recruit and assemble a group of advisors on Roxbury history and interpretive methods from within the neighborhood and from within appropriate academic disciplines and institutions. This group will work with consultant TimeLooper on the development of content and approach to interpretation and visitor activity at the Nawn Factory.

### A Café Operator

The proposal from HBI and TWC for a History Café at the Roxbury History and Orientation Center relies on a special partnership between a café operator and/or retail manager willing to work alongside a space that is branded with local history and is required by the development team to be an experienced operator from within the Roxbury neighborhood, and employ from within the neighborhood.

### Developer of Parcel 8

It should be noted here that HBI expects to collaborate with the development entity that ultimately acquires and develops the adjacent Parcel 8 on site coordination, landscape functions, and design of the park at the corner of Melnea Cass and Washington Street.

### City of Boston

HBI expects to work closely with the City of Boston on matters that will need good site planning, legal engagements and design coordination. These include working with the Boston Parks Department on access to the Eliot Burying Ground for handicap accessibility and tourism; coordination with the proper City agency for the design and management of the adjacent corner park, including archeological determinations. HBI also anticipates close coordination with the Boston Landmarks Commission on design reviews and construction impacts on all visible and archeological historic resources on the property and adjacent to it.

### Letters of Support





**Office of the President**  
**617-588-1324**  
**abenoit@bfit.edu**

February 14, 2020

Ms. Sheila Dillon, Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston MA 02108

Dear Ms. Dillon:

Benjamin Franklin Institute of Technology (BFIT) is pleased to support Historic Boston Inc.'s (HBI) bid to develop the historic Owen Nawn Factory in Nubian Square. We have enjoyed getting to know HBI through our institution's plans to move its campus to the same block. In our planning, we have been impressed with HBI's work and its advocacy on behalf of good development for the neighborhood.

BFIT is a private, non-profit college of engineering and industrial technologies that educates urban youth and places them in good jobs in growth industries. In 2019, the Institute announced plans to sell its 112-year-old South End campus and move to Roxbury's Nubian Square in order to be closer to the neighborhoods where its students live. The new 85,000 square foot building is slated to open in the autumn of 2022. BFIT offers associate degrees, bachelor's degrees, and certificates in Automotive Technology, Biomedical Engineering Technology, Computer Technology, Construction Management, Electrical Engineering, HVAC, Mechanical Technology, Opticianry, and other fields.

We have been impressed with HBI's knowledge of the neighborhood, their track record in redeveloping challenging buildings, and their commitment to bringing excellence in historic preservation to historic buildings in Roxbury. HBI has already reached out to us to understand potential connections between the restored Nawn Factory and BFIT's campus in order to plan collaboratively for the entire block. BFIT will work with HBI to find solutions to issues related to vehicular access to the Nawn Factory parcel, parking for Nawn Site, and an accessible entrance to the burial ground.

We are also very excited by HBI's plans for re-use of the Nawn Factory. The Wellness Collaborative, with its associated programs, will be a resource to BFIT's student population, and a café in proximity to our building will be an important amenity for our entire campus. Conversely, BFIT brings a built-in market of consumers to these two functions at the Nawn Factory.

BFIT looks forward to beginning its next phase in Nubian Square, and we look forward to working closely with Historic Boston on spaces and buildings that will be an enhancement to our new neighbors in Roxbury.

Please call or write with any questions, and thank you for your consideration.

Sincerely,

Anthony Benoit  
President

# BOSTON

Martin J. Walsh, Mayor

February 14, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

*Sheila*

On behalf of the Boston Parks and Recreation Department, I am writing in support of Historic Boston Inc.'s (HBI) proposal to redevelop the historic Owen Nawn Factory at 2080 Washington Street in Roxbury.

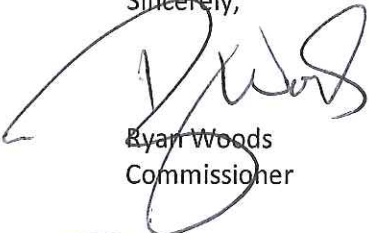
The Boston Department and Parks and Recreation Department owns and maintains 16 historic burying grounds throughout the city of Boston, including the 1630 Eliot Burying Ground. We have undertaken a series of preservation treatments and capital upgrades in this site in recent years in order to support and encourage residents and tourists to visit the burying ground and learn more about local history.

HBI has been supportive of the Parks Department's preservation activities in the Eliot Burying Ground over the last decade since its occupancy of the abutting Eustis Street Firehouse. HBI was very respectful of the burying ground during its restoration of the firehouse, and I have witnessed HBI's commitment to the highest standards of preservation in their work, and we have benefitted as their neighbors.

The restoration and reactivation of the Nawn Factory will allow us to expand the public's access to this fragile and important outdoor museum. HBI plans to reconstruct the missing two thirds of the Nawn Factory which will provide an important buffer to the historic burying ground from the broader urban context. HBI's additional plan of restoring the Nawn Factory for The Wellness Collaborative and a History Center, will bring visitors and residents to the learn more about early Roxbury in the oldest remaining landscape in Nubian Square.

As a boom of development continues around Nubian Square and the city, Historic Boston proposes a plan that will thoughtfully preserve an historic site while helping it to thrive and serve the community through sustainable new uses. The Boston Parks Department supports HBI's plans, and encourages you to select them for this project.

Sincerely,



Ryan Woods  
Commissioner



# BOSTON PRESERVATION ALLIANCE

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Nancy Welsh

## Executive Director

Gregory J. Galer, Ph.D.

February 14, 2020

Ms. Sheila Dillon  
Chief of Housing and  
Director Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Re: Owen Nawn Factory

Dear Ms. Dillon:

I write today in enthusiastic support of Historic Boston Inc.'s application to rehabilitate the historic Owen Nawn Factory at 2080 Washington Street in Roxbury.

As you well know, the Boston Preservation Alliance is Boston's primary, non-profit advocacy organization that protects and promotes the use of historic buildings and landscapes in all of the city's neighborhoods. With 40 Organizational Members, 142 Corporate Members, and a reach of 35,000 friends and supporters we represent a diverse constituency advocating for the thoughtful evolution of the city and celebration of its unique character. We celebrate the city's historic resources for the valuable contributions they make and we encourage new development that harmonizes with the unique character of neighborhoods with thoughtful design that fits the enduring quality of historic places.

The Alliance has worked closely with Historic Boston Inc. for decades, with the shared mission of preserving Boston's historic resources. Through dozens of challenging projects, HBI's has proven their capacity to tackle some of the city's most complex rehabilitation projects like the Fowler Clark Epstein Farm in Mattapan, the Alvah Kittredge House in Roxbury, and the Hayden Building in Chinatown. They've succeeded in challenging projects where others have been unable. We've recognized HBI with our competitive preservation achievement awards many times, indicative of our respect and appreciation of the organization's work.

We look forward to new vibrancy at the Nawn Factory based on the outcomes of HBI's projects in so many other neighborhoods. We know HBI will take on this project with the determination, serious thought, creativity, and focus on both historic preservation and community vibrancy that such a project requires to maximum benefit of the city.

The historic Nawn Factory also shows potential to reactivate a long-vacant space with a thriving, local business and public space for the interpretation of local history. HBI's proposal to reactivate the space with The Wellness Collaborative is the type of sustainable preservation and re-use that the BPA hopes to see for historic structures throughout the city. The Collaborative is poised to offer invaluable community benefits to the surrounding community where their health

The Otis House  
141 Cambridge Street  
Boston, MA 02114  
617.367.2458

[bostonpreservation.org](http://bostonpreservation.org)

and wellness programs are most needed. And we believe HBI's commitment to developing a hub for Roxbury history and visitor orientation will be a source of pride and enjoyment for residents and visitors.

The Boston Preservation Alliance encourages you to select HBI and The Wellness Collaborative to redevelop the Owen Nawn Factory. Thank you for your consideration.

Sincerely,

A handwritten signature in blue ink, appearing to read 'GA', is positioned above the typed name.

Greg Galer  
Executive Director  
Boston Preservation Alliance



**Center for Community  
Health Education,  
Research and Service**

320 Huntington Avenue  
Suite 222  
Boston, MA 02115  
tel 617/373-4591  
fax 617/373-8797

**PARTNERS**

Boston Medical Center

Boston Public Health Commission

Boston University

Bowdoin Street Health Center

Brookside Community Health Center

Codman Square Health Center

The Dimock Center

DotHouse Health

East Boston Neighborhood  
Health Center

Geiger-Gibson Community  
Health Center

Greater Roslindale Medical  
and Dental Center

Harvard Street Neighborhood  
Health Center

Mattapan Community Health Center

Neponset Health Center

Northeastern University

South Boston Community  
Health Center

Southern Jamaica Plain  
Health Center

Upham's Corner Health Center

Whittier Street Health Center

**25**

*years sustaining  
partnerships for  
innovations in  
community health*

February 14, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Sheila:

The Center for Community Health Education, Research and Service, Inc. (CCHERS) is pleased to support the partnership of Historic Boston, Inc. (HBI) with The Wellness Collaborative; Inc. (TWC) in its bid to develop the historic Owen Nawn Factory in Nubian Square. The proposal for a Roxbury history interpretive café to be integrated into a central theme of relational health and wellness is a novel and innovative use for this "gateway" parcel.

CCHERS is a community-based organization that is a community/academic partnership established in 1991 with a \$6 million grant from the W.K. Kellogg Foundation's Community Partnerships in Health Professions Education initiative. The partnership is comprised of Boston Medical Center, the Boston Public Health Commission, Boston University School of Medicine, Northeastern University Bouvé College of Health Sciences and an established network of fifteen community health centers (FQHC) serving the racially and ethnically diverse populations of the City. Northeastern University serves as its host institution and sustaining partner.

I have long been impressed with the leadership of HBI, and particularly their preservation work in Roxbury. HBI's knowledge of the neighborhood, their track record in redeveloping challenging buildings, and their commitment to bringing excellence in historic preservation to Roxbury is nothing short of impressive. I also been involved directly with TWC and helping it grow from its beginning, with its grassroots community involvement from day one. I am impressed with their current work to improve consumer and community health education by hosting the *Reimagining Health Care and Wellness Forums*.

TWC focuses on prevention, social and emotional relationship building, and community engagement. TWC is significant addition to the extended healthcare community in Boston, and a win for this evolving neighborhood.

We offer our support for the HBI proposal for the Nawn redevelopment as an enhancement to for all our neighbors in Roxbury. Thank you for your consideration.

Sincerely,

Elmer R. Freeman  
Executive Director



# Freedom Trail Foundation

February 19, 2020

Ms. Sheila Dillon  
Chief of Housing and Director of Neighborhood Development  
City of Boston  
26 Court Street  
Boston, Massachusetts 02119

Dear Ms. Dillon:

On behalf of the Freedom Trail® Foundation, the purpose of this letter is to support Historic Boston Inc.'s (HBI) application to redevelop the historic Owen Nawn Factory (2080 Washington Street) for new business and historical interpretive uses.

The Foundation's Preservation Fund supports preservation projects with grant funding and marketing for the 16 official historic sites on Boston's 2.5-mile iconic Freedom Trail. The Foundation deeply values Boston's historic assets and works to market, promote and help preserve the Freedom Trail – a signature experience responsible for generating over \$1 billion in annual spending and creating jobs in hospitality, tourism, and education.

HBI is the owner and steward of the Old Corner Bookstore, one of the 16 historic sites on the Freedom Trail. After the building was threatened with demolition in 1960, HBI purchased and restored it to reanimate its colonial architecture and highlight its 19<sup>th</sup>-century literary associations. HBI has proven its dedication to preserving this landmark and has reactivated the building with bustling business. Over 60 years, HBI has continued its important work preserving historic places in Boston's neighborhoods as its core mission.

Boston's rich history may be experienced throughout the city as well as on the Freedom Trail. The development of the Nawn Factory would reactivate a corner that has remained unoccupied for decades. It is an important reminder of Roxbury's 19<sup>th</sup>-century industrial history, as a number of local tradesmen conducted business there, including tanners, blacksmiths, locksmiths, and contractors. HBI's project not only offers a "History Café" for interpreting Roxbury history and offers visitor orientation resources, it also reconstructs two-thirds of the building that were lost to fire in the 1980's. Working with other Roxbury historical organizations, HBI has the opportunity to weave Boston history into the redevelopment of the site.

Historic Boston, Inc. has a long record of measured and respected development in Boston's neighborhoods. As aforementioned, the Foundation supports its proposal for the Owen Nawn Factory redevelopment for new uses while calling attention to Roxbury's strategic importance in Boston history.

Sincerely,



Suzanne S. Taylor  
Executive Director

staylor@thefreedomtrail.org  
(617) 357-8300 extension 201







## HALEY HOUSE

February 14, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

On behalf of Haley House, I'm writing to support Historic Boston Inc.'s proposal to rehabilitate the historic Nawn Factory for use as the headquarters of The Wellness Collaborative and as a center for Roxbury history.

Haley House is a nonprofit organization based in Boston's South End and Roxbury neighborhoods. We are dedicated to helping those made vulnerable by the harshest effects of inequality move toward wholeness and economic independence. We have worked closely with Historic Boston since before they moved their offices to Dudley (now Nubian) Square, and we value both their work and their process.

We know Historic Boston's work originally from its redevelopment of the long neglected Eustis Street Fire House in 2011, a project that restored an important and very distressed building, ultimately used for their offices. HBI's commitment to the highest standards of preservation has made their projects here in the neighborhood an important source of pride in our community.

The proximity of the Nawn Factory to the Eustis Firehouse and 1630 Eliot Burying Ground highlights the rich history of the area. HBI's proposal not only restores the existing factory building to its 1880s appearance, but it also reconstructs the portion of the structure that was lost to fire. Once fully restored, the building will hold 10,000 square feet of space for The Wellness Collaborative, an organization dedicated to individual and community wellness, and will provide a long overdue space devoted to Roxbury's history. With the use of digital technology and collaborative programming, the Nawn Factory will become a hub for residents and visitors to learn about Roxbury's cultural heritage.

We are excited that a long overlooked building will be preserved and re-used for the contemporary needs of the neighborhood. We encourage you to select HBI for developer designation.

Thank you for your consideration.

Sincerely,

Bing Broderick  
Executive Director  
Haley House



OUR COMMUNITY  
WORKING TOGETHER

February 17, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

Nuestra Comunidad Development Corporation is pleased to support Historic Boston Inc. (HBI)'s proposal to rehabilitate and re-use the historic Nawn Factory for the headquarters and operations of The Wellness Collaborative (TWC), and as a hub for Roxbury history.

Nuestra Comunidad is a community development corporation that has served Boston's Roxbury community since 1981 with excellence and innovation in affordable housing, economic development, community action and leadership development. Nuestra has invested heavily in the revitalization of Nubian Square and has undertaken important preservation projects there, including the Sargent Prince Building, the Dartmouth Hotel and Palladio Hall. Through our historic tax credit projects, we've come to understand the challenges associated with historic building rehabilitation and can appreciate HBI's track record of dedication and success in this area. We know Historic Boston's projects at the Eustis Street Fire House and the Alvah Kittredge House, and we also know them to be a good neighbor in Nubian Square where they participate in numerous community and cultural activities. In particular, HBI has advocated for and support local initiatives that honor Roxbury's history and culture, including the Roxbury Cultural District and Nuestra's Oasis@Bartlett arts park.

HBI's proposal for the Nawn Factory restores the existing building and reconstructs the portion of the structure that was once lost to fire, so that the

whole site resembles the proportions of the original building. The planned use for the wellness work of The Wellness Collaborative, and a café and public spaces for an orientation and history center, fulfills the community's long held hope that this place would become a destination that helps to tell Roxbury's rich history. I had the opportunity to meet on several occasions with The Wellness Collaborative principals over the past two years, and am happy that their innovative wellness business will have a home in Nubian Square.

We are excited that the long neglected Nawn Factory building will be preserved and re-used for a community-oriented center. We encourage you to select HBI to restore this site.

Sincerely,

A handwritten signature in black ink that reads "David Price". The signature is written in a cursive style with a large, looped "D" and "P".

David Price  
Executive Director



February 12, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

On behalf of Preservation Massachusetts (PM), I am writing to endorse Historic Boston Inc.'s (HBI) proposal to rehabilitate the long-overlooked Owen Nawn Factory in Roxbury, in conjunction with the The Wellness Collaborative (TWC).

HBI plans to restore the surviving portion of the building to its original appearance, and to re-construct the portion that was lost to fire and deterioration more than 25 years ago. They will activate the building with a tenant whose mission in health and wellness serves the immediate community. HBI and TWC will also set aside nearly 2000 square feet of retail space as a Roxbury history and orientation space that will deploy technology applications and platforms for interpreting the rich history of the neighborhood through time.

Preservation Massachusetts (PM) is the statewide non-profit historic preservation organization dedicated to preserving the Commonwealth's historic places and cultural heritage. We are an advocacy and education organization that works collaboratively with public and private partners across the state to protect and enhance the Commonwealth's historic character and quality of life through good public policy and preservation investments.

HBI is one of the Commonwealth's most successful preservation organizations. Through its many direct project investments, the organization has demonstrated over and over again that even the most distressed historic buildings can be rehabilitated for new uses, and that those places can continue to be sources of pride for their communities as they also provide new housing units, office and retail spaces, and homes for nonprofit organizations. PM was particularly proud to present HBI with an award for their work at Mattapan's Fowler Clark Epstein Farm last year, another example of the organization's high quality work and collaborative process.

We are excited that the distressed Nawn Factory building will be preserved and re-used for a use that will also provide important services to the Roxbury neighborhood. We encourage you to select HBI to restore this site.

Thank you for your consideration.

Sincerely,

  
James Igoe  
President



Jeri Robinson  
4 Lingard Street  
Dorchester, MA 02125

February 14, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:


As a lifelong resident of Roxbury and Dorchester, I am pleased to support Historic Boston Inc.'s (HBI) bid in partnership with The Wellness Collaborative, Inc (TWC) to develop the historic Owen Nawn Factory in Nubian Square. TWC's vision for an interdisciplinary approach to health and wellness will provide a long overdue and greatly needed set of supports for Boston's under resourced communities, where many members continue to combat consistent health disparities.

Although I recently retired after forty-five years at the Boston Children's Museum, I remain actively involved as a board member of several local social service and education nonprofits including Project Hope, Vital Village, Family Nurturing Center and the Boston School Committee. All of these organizations serve our extremely diverse Boston children and families. I am sure that they will welcome the opportunity to engage with culturally sensitive and relevant service providers in a beautiful new location in their own neighborhood.

I am excited by HBI's re-use plans for the Nawn Factory. Creating a local hub of wellness with organizations whose missions and activities will complement each other and engage with other neighboring organizations will provide residents with additional opportunities for positive community engagement and collaboration.

For decades Dudley, now Nubian Square has been the heart of the black community, but years of blight and neglect told a different story. As the area gentrifies, long-term residents fear being pushed out. The arrival of new community focused organizations bring hope that all can be welcomed and co-exist in the next period of development of this wonderful neighborhood.

The potential inclusion of the arts and history café excites me and I look forward to lending my skills in museum education and development to this project. In closing, thank you for your consideration and please let me know if you have any questions.

Sincerely,  
  
Ms. Jeri Robinson  
Boston School Committee Member  
Former Vice President Early Learning Experiences-Boston Children's Museum  
Jerirob49@me.com



February 12, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

The Roxbury Heritage State Park and the Dillaway /Thomas house is excited to support the partnership of Historic Boston, Inc. (HBI) with The Wellness Collaborative Inc. (TWC) in their bid to develop the historic Owen Nawn Factory in Nubian Square. Nubian Square has always been the center of the Roxbury community and a hub of its arts, culture and history. It is a National Register District and has recently been named a cultural district by the state. We want to celebrate and showcase these positive assets to both the community and the region to help change the narrative of Nubian Square and Roxbury.

The Owen Nawn Factory historic site is central gateway to Roxbury and as such essentially aligned with work and programming of Roxbury Heritage Park and the Dillaway /Thomas house. Their proposal for an interdisciplinary model of relational health and wellness includes Roxbury's history as a central "voice". This will be an innovative contribution to Roxbury's preservation and historic programming.

We believe their goals to improve direct care and health outcomes for those at highest risk for experiencing disparities by developing a best-practices think tank and organizational collaborations is a vital way to include historic education into the community wellness platform. I believe this will be an essential addition....

We offer our support for the HBI/TWC proposal for the Nawn redevelopment.

Thank you for your consideration.

Sincerely,

*Leonard M. Lee*

General Manager/Curator

COMMONWEALTH OF MASSACHUSETTS · EXECUTIVE OFFICE OF ENERGY & ENVIRONMENTAL AFFAIRS

Roxbury Heritage State Park/Dillaway /Thomas house  
Department of Conservation and Recreation  
183 Roxbury Street.  
Roxbury, MA 02119  
617-445-0062  
[www.mass.gov/dcr](http://www.mass.gov/dcr)



Charles D. Baker  
Governor

Karyn E. Polito  
Lt. Governor

Kathleen Theoharides, Secretary, Executive  
Office of Energy & Environmental Affairs

James Montgomery, Commissioner  
Department of Conservation & Recreation



328 Warren St.  
Roxbury, MA 02119  
617.445.6262  
www.rpcsic.org



February 13, 2020

**Rev. Liz Walker,**  
Executive Director

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

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Dr. Thea James

Colette Phillips

Rev. Dr. Gloria White  
Hammond

Nancy Kilburn

Marjorie Powell

Dear Ms. Dillon:

Roxbury Presbyterian Church-Social Impact Center is pleased to support The Wellness Collaborative Inc.'s (TWC) bid in partnership with Historic Boston Institute to develop the historic Owen Nawn Factory in Nubian Square (formerly Dudley Square). We have been impressed with TWC vision for an interdisciplinary approach to health and wellness that supports and aligns with our approach to Post Traumatic Stress through relational healing and community support.

I see an alignment in our theory of change that recognizes the healing power of sharing one's story. And having a culturally sensitive and safe space to do that is central. The RPC-Social Impact Center's Cory Johnson Program for Post-Traumatic Healing is a community-based approach to addressing the epidemic of PTSD in urban neighborhoods, fostering connection and empowering individuals to take an active role in helping themselves and others heal. Our "CAN WE TALK?" weekly Community Conversation on Trauma, provides a safe, supportive space in which to share your story, or listen to others.

The renovation and repurposing of The Nawn Factory into a vibrant mixed use center of wellness that includes the preservation of Roxbury history through an interactive multimedia history café, oral history listening booths and audiovisual recordings will be a welcomed addition to the RPC-Social Impact Center community.

I am excited with the prospect of a Roxbury based initiative whose plan includes a diverse range of direct supports and preventative educational programs. Specific programs that target the many upstream influences that may lead to societal and environmental trauma are needed to interrupt the long term effects of chronic stress and trauma. TWC's asset/strength based approach to build on the power of community residents, organizations and businesses in an intentional co-creative process to identify best practices and offer unique wellness opportunities across the lifespan is one such program.

Thank you for your consideration,

*Rev. Liz Walker*

Rev. Liz Walker  
Executive Director  
The Social Impact Center of  
Roxbury Presbyterian Church

*Non-profit tax ID # 04-3506648. No goods or services were provided for this donation.*



**TIMOTHY SMITH NETWORK**

February 10, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

The Timothy Smith Network (TSN) is very pleased to support Historic Boston Inc.'s application and plans for redevelopment of the Owen Nawn Factory at 2080 Washington Street in Roxbury.

The Timothy Smith Network is a Fund for "Old Roxbury", which was established in 1996 by Mayor Thomas M. Menino and the City of Boston. The fund, managed by TSN, became a vehicle to bring the benefits of computer technology to as wide a population within the target area as possible. Grants from the Timothy Smith Fund enabled 39 agencies to establish and equip their centers with state-of-the-art computers and equipment.

Once restored, the building's 10,000 square feet of space will be devoted to The Wellness Collaborative and its important public health and wellness work, and to a café and public spaces devoted to interpreting local history, and orienting visitors to Roxbury and the many activities in the neighborhood. With the use of digital technology and collaborative programming, the Nawn Factory will become a hub for Roxbury history and wellness.

The prospective redevelopment at the Nawn Factory presents an opportunity to bring more economic opportunities to Nubian Square. Eight years ago, the Timothy Smith Network moved into the first floor space of the Eustis Street Firehouse, which has served as our headquarters ever since. Our organization has directly benefited from the redevelopment and rehabilitation of a historic building, and we know first-hand the high quality of HBI's projects and their ongoing management.

Historic Boston has a long record of thoughtful development in Boston's neighborhoods. The Timothy Smith Network supports HBI's proposal for redevelopment of the Owen Nawn Factory and looks forward to the rich history they will be told from its walls.

Thank you for your consideration.

Sincerely,

  
Milton Irving  
Executive Director

February 12, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

I am very pleased to support Historic Boston Inc.'s (HBI) proposal to the City for designation to redevelop the historic Nawn Factory in Nubian Square. HBI is uniquely qualified to carry out a high quality project at a difficult site that can become a landmark entrance to the district,

Urbanica, Inc. is a Boston-based design/development company known for its high quality design-oriented development projects. We have recently developed the Melnea Hotel and Melnea Residences across the Nawn Factory. We have moved our office to the first floor of Melnea Residences. Because of our extensive work in Roxbury, we have gotten to know HBI and its work, and have come to appreciate its unique role in neighborhood development. HBI undertakes challenging but valuable projects that private development will find difficult, bringing traditional and non-traditional sources of financing to bear on their success.

HBI's presence in Nubian Square We know Historic Boston's projects at the Eustis Street Fire House and the Alvah Kittredge House, but we also know them to be a good neighbor in Nubian Square where they participate in community and cultural activities. HBI's proposal for the Nawn Factory restores the existing building and reconstructs the portion of the structure that was once lost to fire, so that the whole site resembles the proportions of the original building. The planned use for public health and wellness work of The Wellness Collaborative, and a café and public spaces for an orientation and history center, fulfills the community's long held hope that this place would help to tell Roxbury's rich history.

We are excited that the long neglected Nawn Factory building will be preserved and re-used for a community-oriented center. We encourage you to select HBI to restore this site.

Thank you for your consideration.

Sincerely,



Kamran Zahedi  
President

# The Roxbury Historical Society

DILLAWAY-THOMAS HOUSE  
ROXBURY HERITAGE STATE PARK

183 Roxbury Street  
Roxbury, MA 02119

February 18, 2020

Ms. Sheila Dillon  
Chief of Housing and Director  
Department of Neighborhood Development  
26 Court Street  
Boston, MA 02119

Dear Ms. Dillon:

The Roxbury Historical Society is very pleased to support Historic Boston Inc. (HBI) and The Wellness Collaborative (TWC) as they propose to rehabilitate and re-use the historic Nawn Factory for the Collaborative's headquarters and operations, and as center of Roxbury history.

The Roxbury Historical Society preserves and interprets the Roxbury's past, and provides a wide variety of events and activities that help residents see themselves in the continuum of nearly four centuries of local history. The Historical Society supports efforts to preserve historic places in the neighborhood, and we work collaboratively with other organizations to highlight Roxbury's rich past.

We are very pleased that the historic Nawn Factory's existing structure will be restored and that HBI will recreate the portion of the building that was lost to fire.

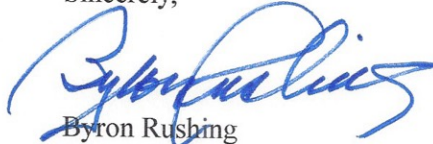
This enhances the gateway to Nubian Square from the north, and gives residents and visitors an historic anchor as the district around it grows and changes.

HBI's plan to create an innovative retail space as a history and orientation center is also an important addition to this neighborhood. We are also very happy to support

the Nawn Factory's use for wellness and health-related purposes, recognizing substantial community need for those services and the relationship between art, history, and culture to an individual's and a community's well-being.

The Roxbury Historical Society is excited by the potential for restoration and re-use of the Nawn Factory and we believe the team of HBI and TWC will make it not only useful, but a place of which the community will be very proud. Thank you for your consideration.

Sincerely,

A handwritten signature in blue ink, appearing to read "Byron Rushing", written in a cursive style.

Byron Rushing  
President

## Additional Data

### A Framework for Planning the Roxbury History and Orientation Center

HBI and TWC propose a space within the Nawn Factory that is, at once, a hub for the instruction and celebration of Roxbury history, and an orientation center where residents and visitors can connect with the many more places within Roxbury that can be visited and enjoyed.

The two organizations are not, by mission, prepared to manage a traditional “museum” devoted to the ongoing interpretation of Roxbury history, but both organizations are committed to engaging professional services for the purposes of working with the Roxbury community to develop the most imaginative mixed-use space for telling the rich stories of Roxbury over time.

This framework presents the methods by which the development team will create a space and place that achieves the RFP’s goals.

The HBI team proposes a “Roxbury History Center” at the Owen Nawn Factory that

- celebrates Roxbury’s past and present through static and changing exhibitions, public programs, and technology;
- creates a first generation of exhibitions and history activities for installation at the Nawn Factory, whose themes and methods are developed with the guidance of a community advisory committee of leaders in local history and culture.
- is planned with the assistance of professional public historians and technology managers in the development of digital applications that bring the most engaging and dynamic content about Roxbury history to all ages of residents and visitors.
- will eventually be managed by a non-profit organization whose mission features Roxbury history and whose capacity to undertake and effectively manage such a space in a sustainable fashion will be supported by HBI in the 2 to 3-year predevelopment period of the building’s redevelopment.

With or without a local “history nonprofit” operator, HBI’s plans propose the following:

- HBI and TWC will set aside 2400 square feet of mixed use/shared space that includes a locally owned café and retail space, an oral history and podcast recording studio, and space for formal dialogue and programming, informal study, information and special events about Roxbury history.
- Creates a flexible community space and commercial café, a significant portion of which will be leased to a commercial operator for sustained revenue with lease terms clearly delineating uses/hours, décor, exhibition space, branding, and programming schedule undertaken as part of an overall plan to present it as a place to learn about Roxbury history and current affairs.



- If there is an identified nonprofit history organization responsible for ongoing interpretation, programming and “history operations,” a relationship document (lease, sublease) will be executed between the appropriate parties, delineating roles, responsibilities and obligations negotiated with tenants and HBI as owner.
- A first generation of static and digital exhibitions and experiences will be part of the development budget assumed by HBI, and maintenance of equipment and content of those digital or tangible exhibition-related materials will be the responsibility of HBI until a suitable community-based nonprofit history operator is prepared to manage them.
- In the event that a suitable community history organization cannot be identified to manage the history space and its component parts, responsibility for maintenance of the first generation of digital and tangible exhibition material will become the responsibility of HBI until it either sells or transfers the building.
- HBI’s build-out will include Augmented Reality (AR) and Virtual Reality (VR) installations from inside the building that place the site in context, and use the building as a geographical node for digital walking tours that visitors can choose from a downloadable Nawn Factory/Roxbury history application. The app will be maintained by HBI with regular input and direction from either the community advisory committee and/or the ultimate nonprofit history organization/operator.

With the goal of creating a financially sustainable building that is devoted to community life and presents itself as an authentic place of Roxbury, the first generation of exhibition infrastructure will contain the following:

- An oral history and podcast video and audio recording studio for use by TWC and the special programs of local organizations. The archive of recorded story/interviews will be stored at an appropriate local institution through a written agreement.
- AR tablet installations at the northern and southern first floor windows of the History Café space that will present historic imagery and specially commissioned conjectural video content that presents views from the past overlaid onto today’s Roxbury landscape viewed from the Nawn Factory.
- Digital touch screens in three public interior locations that have several digital (visual and audio) thematic exhibits in documents and photographs of Roxbury history, thereby giving visitors and residents opportunities to explore Roxbury history generally, learn about different aspects of the neighborhood’s history, and put their location at the Nawn Factory into an historical perspective.
- Digital screens in the Café will be available for dynamic, ever-changing listings of activities, special events and institutions in the neighborhood that can be visited, along with information

on the Roxbury Walking Tour App with hours of operation and geo-coded directions on how to get to those places.

- A place for retail sales of Roxbury-made and themed items, books and pamphlets will be specially set aside in the café, either to be operated by the café or by a local entrepreneur as subtenant to The Wellness Collaborative.

#### Exterior space

- The exterior landscape will be designed in conjunction with plans for the public park at the corner of Melnea Cass and Washington.
- Plans for the Nawn property will consider the historic archeological remains of the Doggett and Cunningham Houses at that corner on Parcel 8
- TWC and the History Café will have areas for seasonal outdoor seating.
- HBI will commission way-finding and interpretive signage for the exterior space that helps tell the visitor about the building, the location, and Roxbury's place in the Boston context. Content, images, and placement will be undertaken with the community advisory committee or the history non-profit operator – whichever is best prepared to participate in planning (to reach the August 2023 goal).
- Signage at the exterior of the Nawn Factory will identify the apps and instructions for utilizing the AR, VR and walking tour apps using visitor's own smart phones.
- HBI will commission a VR installation for the exterior of the Nawn Factory that allows a visitor to use their own smart phone and low-cost/free cardboard VR headsets to immerse themselves in the evolution of the Roxbury and Boston landscape over time – from the Native American path along Roxbury Neck, to the Revolutionary War redoubt along Eustis Street, to the filling in of the South End and South Bay, and to the plans for I-695.
- All Roxbury digital walking tours (already noted), and the AR and VR experiences will be accessible by a specific application within the Nawn Factory or out-of-doors, thereby making the historic interpretive features available 24/7.

## Development Concept and Design

### Development Concepts

The newly rehabilitated and expanded Nawn Factory will be approximately 10,000. The specific program uses are outlined in the following schedule, which also projects anticipated staffing requirements:

### Proposed Program and Uses

Program Space	Flr	Area	Description	Job Creation
<p><b>Wellness Center</b> (Direct Care) <i>For-Profit</i></p> <p><i>Hours:</i> 8 am - 8 pm T – Th., 8 am -12 noon F, S, Su. By appointment other days.</p>	2 (A)	794 sf	(1) Reception / Waiting Area (1) Enclosed Office (2) Examination Rm (2) Consultation Rm / (1) w/ Body Scanner (1) Locker Rm (1) Lavatory (patient/staff) (1) Lab Area	(1) Receptionist (1) Nurse/NP (1) PA (1) MD
<p><b>Conference Room</b> <i>For-Profit</i></p> <p><i>Leasable Hours:</i> 8 am - 8 pm</p>	2 (A)	190 sf	(1) Large glass enclosed conference area seating (18) people (min 600 sf) (1) Storage Area	Managed by TWC Coop Staff
<p><b>Shared Public Area</b></p>	2 (A)	000 sf	Lounge Area / Stairs / Elevator (2) Lavatories (1) Lactation Room	
<p><b>The Wellness Collaborative</b> (TWC Co-op)</p>	2 (E) (A)	1259 sf	Co-op Management: Co-work Spaces / Museum Shops / Retail Shops / Other Lease Areas (2) Enclosed Offices	(1) Office Staff (1) Program Mgr.

<p>w/ additional Conference Room Non-Profit</p> <p>Hours: 8 am – 8 pm M – F Digital Access 24/7</p>			<p>(20) Co-Working Single Spaces (1) Co-Work Group Table w/ (8) Chairs (1) Conference Area (1) Copy/Printing Area (1) Closet / Storage (1) Lavatory (key-code entry) (1) Kitchenette in Open area</p>	
<p><b>Performance Venue Studio:</b> <b>Dance / Music / Arts / Oral</b> For-Profit</p> <p>Leasable Hours: 8 am – 11 pm</p>	<p><b>1</b> <b>(A)</b></p>	<p><b>747</b> <b>sf</b></p>	<p>Community Arts Performance Area and History/Interpretive Lecture Presentations Removable Stage Area on Wooden Floor throughout Capacity (50) people (1) Equipment Storage Rm</p>	<p>Managed by TWC Co-op Staff</p>
<p><b>Roxbury History Center &amp; Community Conference Center</b> Non-Profit</p> <p>Hours: Open Access – Self-Tour Staffed: 9 am – 4 pm T – Th., 12 pm – 4 pm, Sat, Sun. Docents &amp; Lectures available by arrangement</p>	<p><b>1</b> <b>(A)</b></p>	<p><b>860</b> <b>sf</b></p>	<p>Roxbury History &amp; Orientation Center Gallery Area &amp; Community Lobby -Educational Interactive Gallery -Open Staircase Gallery -Interactive Video Kiosks/Displays</p>	<p>(2 - 4) Volunteer Staff (TBD)</p>
<p><b>Shared Public Area</b></p>	<p><b>1</b> <b>(A)</b></p>	<p><b>000</b> <b>sf</b></p>	<p>Shared Open Roxbury History Gallery Stairs / Elevator / Service Area (3) Lavatories</p>	<p>(2 FTE) Staff Security employed by TWC</p>

Program Space	Flr	Area	Description	Job Creation
<b>Roxbury History Café</b> <i>Non-Profit</i> (Coffee/Juice Bar/Bakery) (Co-op Retail Shops)	1 (E)	*1191 sf	-Roxbury History Orientation Center -Educational Interactive Gallery -Lounge, Worktable -Open Staircase Gallery -Interactive Video Kiosks/Displays	TBD
<b>Coffee / Juice Bar Vegetarian/Vegan Bakery</b> <i>For-Profit</i> *(Roxbury History Café)  <i>Hours:</i> 7 am – 6 pm M – F, 8 am – 3 pm Sat, Sun.	1 (E)		Furniture / Equipment / Serving Area / Seating Area / Standing Area w/ Counter / Storage.	(4) Staff employed by vendor
<b>Co-op Retail Shop Kiosks</b> <i>Non-Profit</i> *(Roxbury History Café)	1 (E)		Artist & History Cafe Products (1) Retail Counter (3) Display Areas – Rack, Shelves Yoga Mats for Sale	(1) Staff – retail Employed by TWC
<b>Roxbury History Center</b> <i>Non-Profit</i>	B (A)	391 sf	-Roxbury History Orientation Center -Educational Interactive Gallery -Lounge, Worktable -Open Staircase Gallery -Interactive Video Kiosks/Displays -Oral History Recording Room	See museum info for Floor-1(A)
<b>Body Scanner / Locker Room</b> <i>For-Profit</i>	B (A)	110 sf	Tech Professional	TBD – probably Wellness Center staff cross trained.
<b>Shared Public Area</b>	B (A) (E)	000 sf 000 sf	Locked Storage (History Café/ Retail Shops storage, equipment)	

			& materials) Stairs / Elevator / Mech Rm (3) Lavatories	
<b>Practice Rooms</b> <i>Non-Profit</i>	<b>B</b> <b>(E)</b>	<b>276 sf</b>	(2) Piano Room / Recording Studio w/ digital entry locks	Managed by TWC Co-op Staff
<b>Yoga &amp; Exercise Studio</b> <i>For-Profit</i>  <i>Hours:</i> <i>7 am – 8 pm M – F</i> <i>8 am – 4 pm Sat, Sun.</i> <i>Sublet open timeslots to</i> <i>class instructors by</i> <i>Wellness Center.</i>	<b>B</b> <b>(A)</b>	<b>747 sf</b>	Yoga, Exercise, PT area w/ wooden flr. Shoe cubby Free weight rack Yoga assist blocks and belts. Equipment Storage - 4 treadmills - 2 bikes - 2 recumbent bikes - 2 upper body ergometers - 1 rowing machine - 2 yoga mats for instructor use only	Self-employed Instructors Trainers  (1) PT or Exercise Supervisor  (1) Facilities Staff Person  (0.25 FTE) Staff (contracted) Evening Events

## Proposed Uses' Community Benefits

### The Roxbury History and Orientation Center

The Roxbury History and Orientation Center will bring significant urban, public outdoor amenities and activity to the Roxbury community. While being an educational resource, this space will also serve the community a location to engage and collaborate. Further, the café will also act as a venue for entertainment, performance and the arts.

### The Wellness Collaborative

In addition to the historic interpretation, café and retail uses of the Roxbury History and Orientation Center, the remainder of the space in the building is dedicated for a commercial use. HBI is working with The Wellness Collaborative (TWC) as a tenant for the building. TWC is in the early stages of operation and will expand into the Nawn Factory upon redevelopment of the building. TWC's occupancy is expected to create up to 25 employment opportunities across the retail, food and commercial uses.



The Wellness Collaborative’s mission is to advance the understanding of a holistic, proactive and wellness approach to health care, specifically for the Roxbury community. TWC’s focus on health, wellness and community wellbeing will provide significant benefits to the community in education and health. Through partnership with other vendors the space in the Nawn factory will also be used for classes in Yoga, Tai Chi, Dance, Music and meditation.

A portion of the Space in the Nawn factory is devoted for co-working use, allowing the entrepreneurs and professionals in the community to access office space at affordable costs. Conference space/ meeting rooms will be made available to the community to lease for events and meetings.

#### Construction and Permanent Jobs

We anticipate temporary construction jobs will number around thirty – some part time and some full time. This doesn’t include construction manufacturing, supply and delivery jobs, and GC and subcontractor office staff.

Please see the matrix above labeled **Proposed Program and Uses** for detailed projected employment types and numbers.

## Design Submission

### Design concept

HBI proposes a commercial & retail redevelopment for the historic Nawn Factory building. The HBI redevelopment proposal restores the historic structure and recreates the original building massing while respecting the original volume and proportion of the building. The development vision for the Nawn Factory includes a Roxbury History and Orientation center woven together with a health-focused café and museum-style retail at the street front side of the building. The rear portion of the first floor and the entirety of the second floor and basement are conceptualized as commercial spaces. The remainder of the site is designed as a landscaped plaza acting as a forecourt to the Nawn Factory building.

The access to the Roxbury History and Orientation Center and Café will be from the Washington Street, respecting the historic entrance, and creatively opening the side facade of the building to the landscaped plaza for handicap access and outdoor space activation. The access from the side will also enable the extension of the historic interpretation use from the indoor space to the outdoors, and further extend to the permanent open space at the corner of Melnea Cass Boulevard and Washington Street. The access to the building's commercial spaces will also be from the side of the building, in order to create an active plaza and to encourage pedestrian and bike connection between Harrison Avenue and Washington Street.

HBI has identified The Wellness Collaborative (TWC) as its tenant partner for the project. The Wellness Collaborative, a health and wellness focused social enterprise, will be the sole occupant of the commercial spaces in the building.

### Goals and guiding principles for the project:

The following Goals and Guiding Principles will form the basis for HBI's proposed design, reuse, redevelopment, and long-term maintenance and preservation of the historic Nawn Factory building and site.

#### Goals:

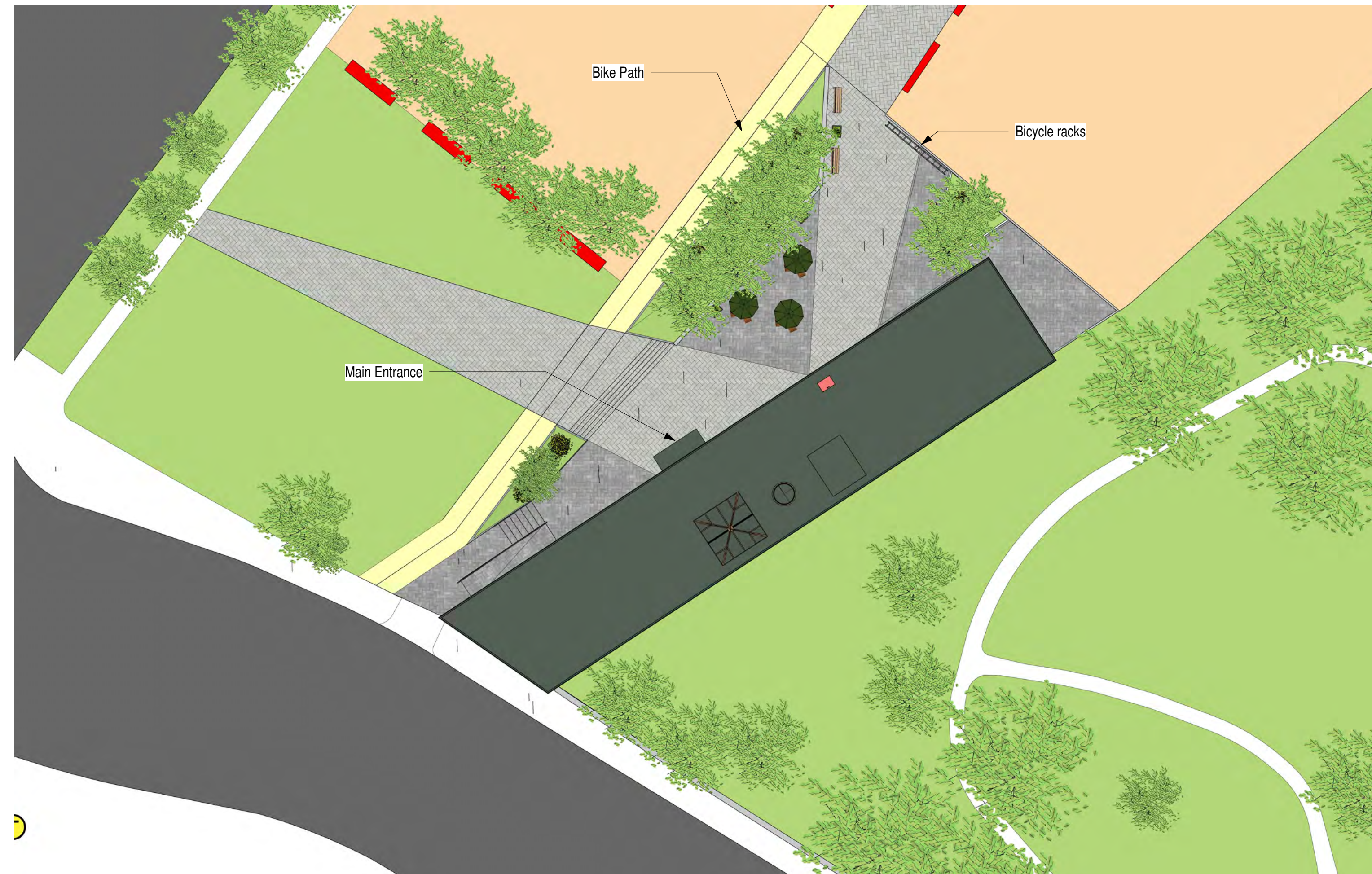
- To preserve and reuse the existing historic structure
- To recreate the built mass of the original Nawn Factory
- To create a Roxbury and City of Boston Destination, celebrating Roxbury history

#### Guiding Principles:

- The project will comply with the *US Secretary of the Interior's Standards for the Treatment of Historic Properties* with mandatory approvals from Boston Landmarks Commission (BLC), Massachusetts Historical Commission (MHC), and the National Park Service. This will be a Federal and a MA Historic Rehabilitation Tax Credit project.
- Restore and maintain the existing structure.
- Restore, wherever applicable, the significant features and historic fabric detail as originally built.
- Recreate the original massing of the building, to be sympathetic to the historic scale and proportions of the building.

- Work with neighbors and other stakeholders to provide a handicap accessible entrance to the adjacent Eliot Burying Ground from an ideal location along the burying ground boundary wall.
- Create a Roxbury History and Orientation Center focused flexible community space that provides;
  - a location for interpretation of history of Roxbury,
  - updates on activities and events taking place in Roxbury,
  - space for programming, lectures, and meetings to the residents of Roxbury





**PRIMARY ARCHITECT**  
**Stull and Lee Inc.**  
 103 Terrace street  
 Boston, MA 02129  
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 www.stullandlee.com

**TENANT ARCHITECT**  
**Next Phase Studios**  
 344 Boyston street  
 Boston MA 02119  
 T 617-375-9300  
 www.NPS-Architects.com

**OWNER**  
**Historic Boston Inc**  
 20 Eustis Street  
 Roxbury, MA  
 617-442-1859  
 111.historicboston.org

**HBI** **HISTORIC BOSTON INCORPORATED**



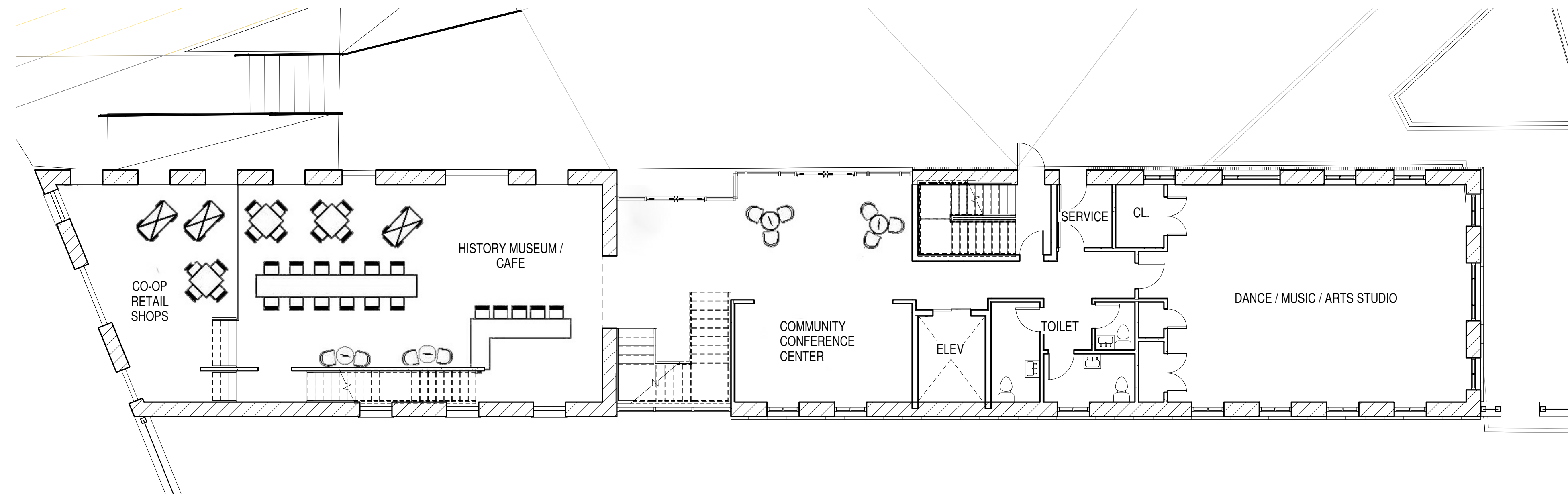
**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

Site Plan

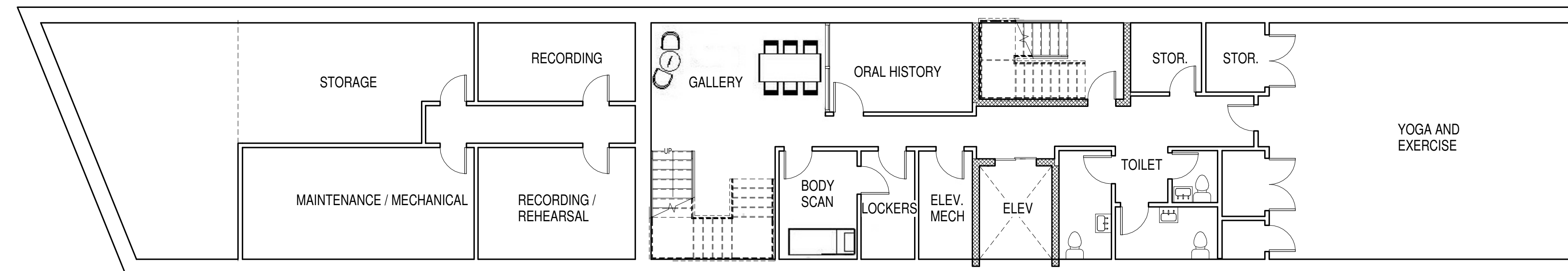
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Checked by	KB
<b>A002</b>	
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② FIRST FLOOR PLAN  
1/8" = 1'-0"



① BASEMENT PLAN  
1/8" = 1'-0"



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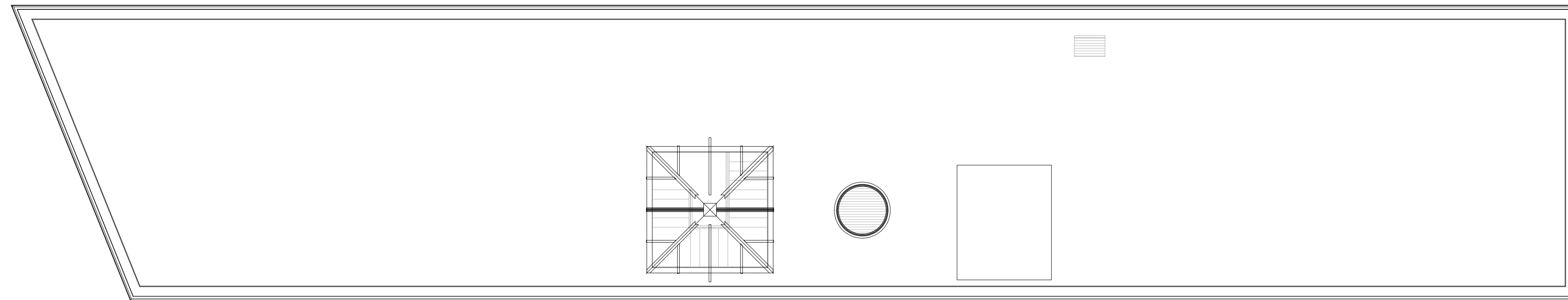
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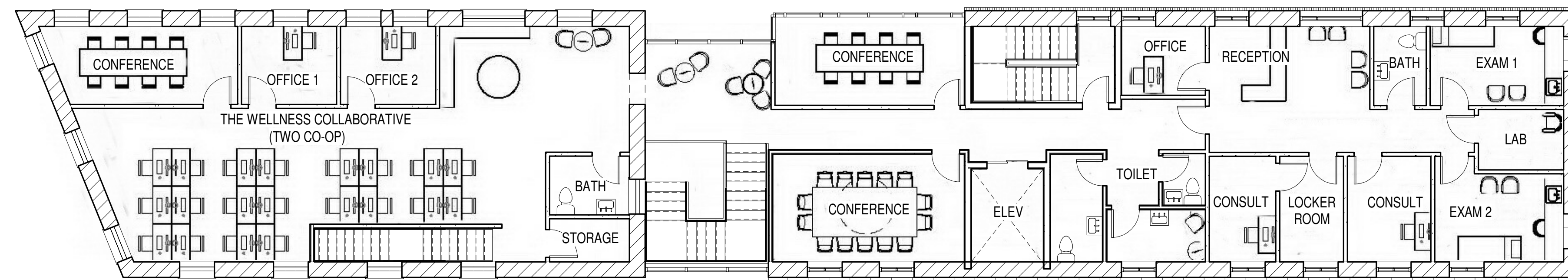
**NAWN FACTORY  
DEVELOPMENT PROPOSAL**

**Basement and First  
Floor Plan**

Project number	3015
Date	Issue Date
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Checked by	?
<b>A100</b>	
Scale	1/8" = 1'-0"



② ROOF RIDGE  
1/8" = 1'-0"



① LEVEL 2 PLAN  
1/8" = 1'-0"



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**HBI** **HISTORIC BOSTON INCORPORATED**

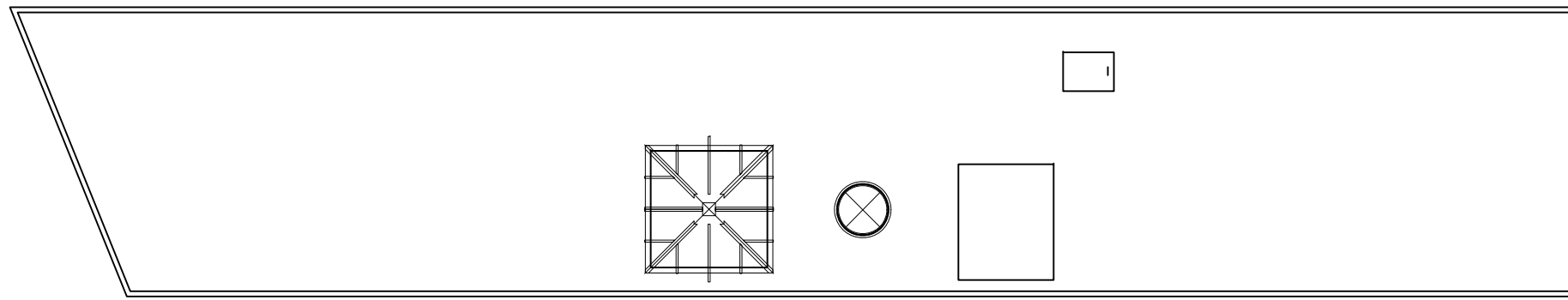


**NAWN FACTORY DEVELOPMENT PROPOSAL**

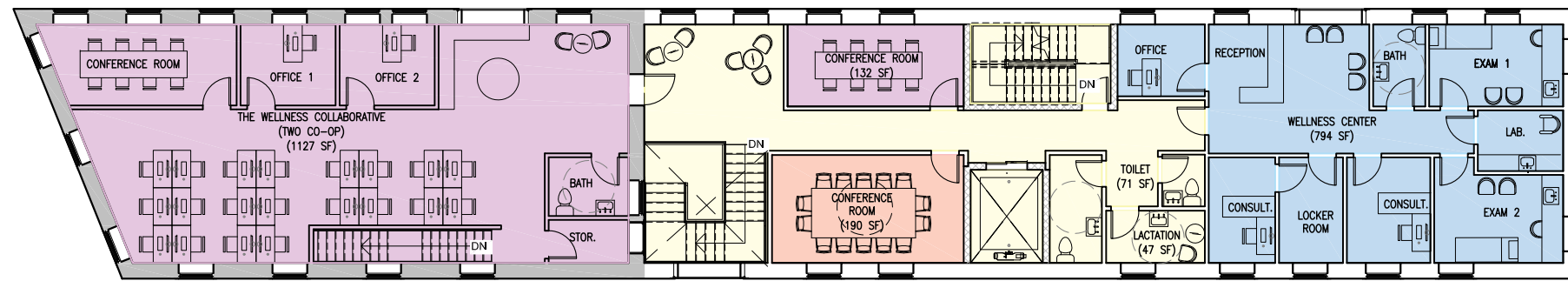
**Second Floor and Roof Plan**

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Date	Issue Date
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Checked by	RA /KC
<b>A101</b>	
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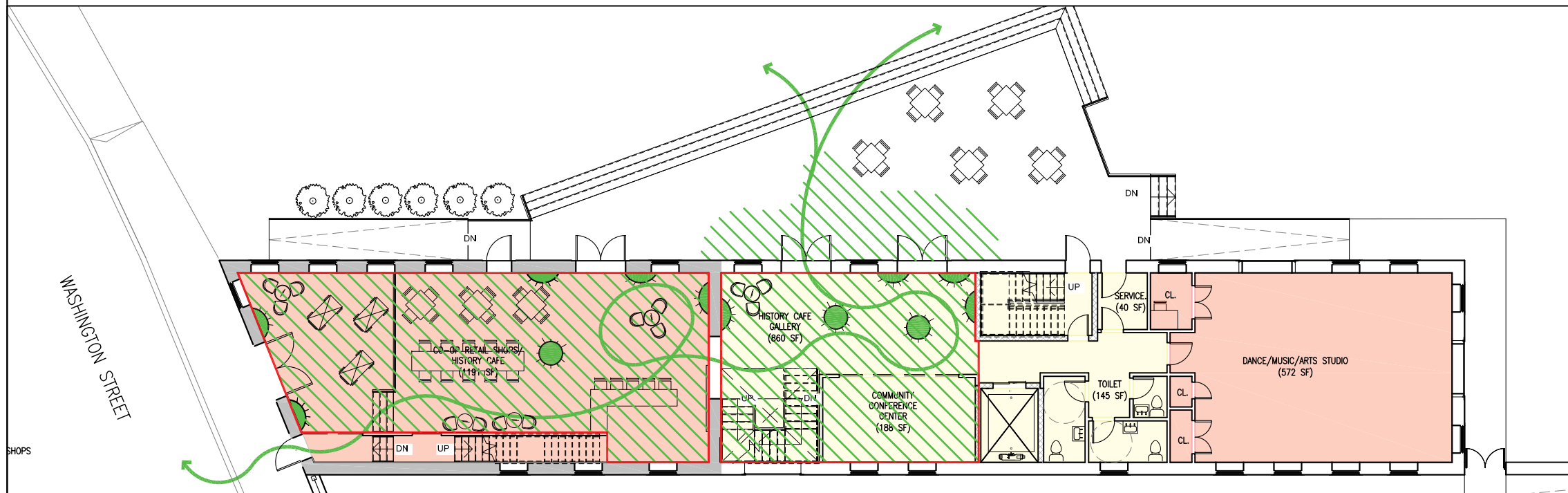




ROOF PLAN 1/16" = 1'-0" 4



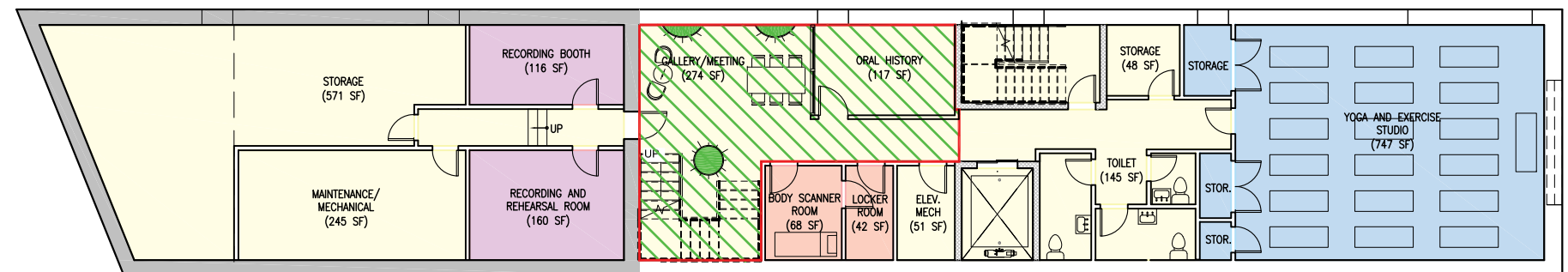
SECOND FLOOR PLAN 1/16" = 1'-0" 3



KEY

- LEASEBLE (2248 SQFT)
- WELLNESS CENTER (1541 SQFT)
- SHARED (3634 SQFT)
- WELLNESS COLLABORATIVE (1519 SQFT)
- ROXBURY HERITAGE INTERPRETIVE CENTER (2181 SF)
- INTERACTIVE DISPLAY
- SEATING
- RETAIL CARTS

FIRST FLOOR PLAN 1/16" = 1'-0" 2



BASEMENT 1/16" = 1'-0" 1

NEXT PHASE STUDIOS  
 344 BOYLSTON STREET  
 BOSTON, MA 02116  
 T 617-375-9500  
 F 617-522-9812  
 WWW.NPS-ARCHITECTS.COM

**OWEN NAWN FACTORY**  
**WELLNESS CENTER**  
 THE WELLNESS COLLABORATIVE

DATE: 2/7/2020  
 SCALE: AS NOTED  
 DRAWN BY: AH  
 CHECKED BY: RA + KC  
 PROJECT #: 20004

REVISIONS

NO.	DESCRIPTION

PROPOSED FLOOR PLANS  
 OPTION I

**A100**

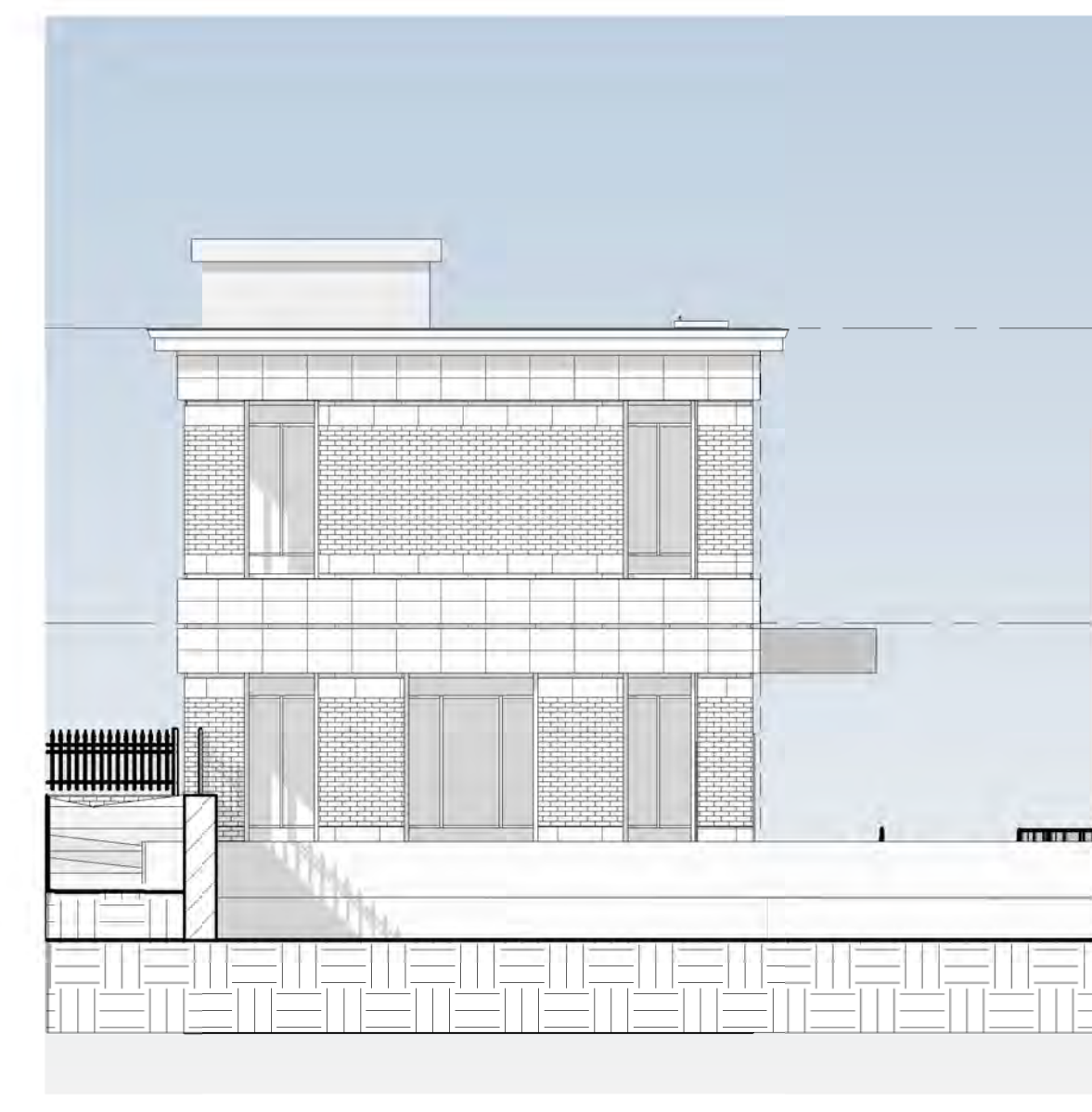




② SOUTH ELEVATION  
1/8" = 1'-0"



① WASHINGTON STREET ELEVATION  
1/8" = 1'-0"



③ EAST ELEVATION



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**OWNER**  
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Roxbury, MA  
617-442-1859  
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**NAWN FACTORY  
DEVELOPMENT PROPOSAL**

Proposed Elevations

Project number	3015
Date	02/18/2020
Drawn by	AH
Checked by	RA/KC
<b>A200</b>	
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① NORTH ELEVATION material study



② NORTH ELEVATION Copy 1

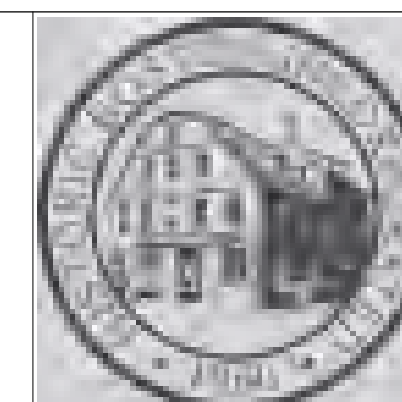


**PRIMARY ARCHITECT**  
**Stull and Lee Inc.**  
 103 Terrace street  
 Boston, MA 02129  
 vox 617 426-0406  
 www.stullandlee.com

**TENANT ARCHITECT**  
**Next Phase Studios**  
 344 Boyston street  
 Boston MA 02119  
 T 617-375-9300  
 www.NPS-Architects.com

**OWNER**  
**Historic Boston Inc**  
 20 Eustis Street  
 Roxbury, MA  
 617-442-1859  
 111.historicboston.org

**HBI** **HISTORIC BOSTON INCORPORATED**



**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Proposed Elevations**

Project number	3015
Date	02/18/2020
Drawn by	AH
Checked by	RA
<b>A201</b>	
Scale	

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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Transportation Plan**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A304</b>	
Scale 1" = 40'	



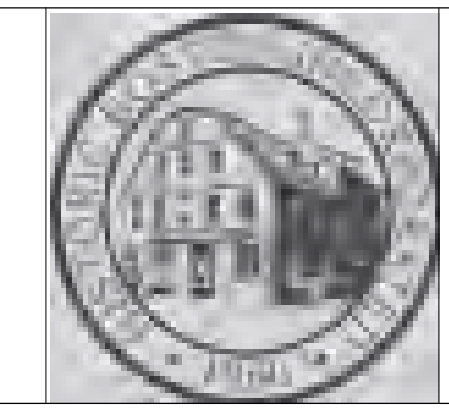


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**NAWN FACTORY DEVELOPMENT PROPOSAL**

**Neighborhood Plan and Elevation**

Project number	3015
Date	02/18/2020
Drawn by	AO
Checked by	KB
<b>A305</b>	
Scale	

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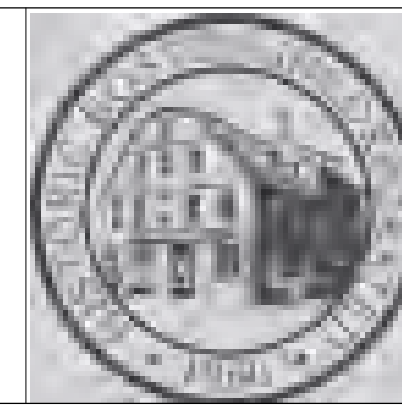


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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Aerial View from  
 NorthWest**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A306</b>	
Scale	





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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Aerial View from  
 Southeast**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A307</b>	
Scale	



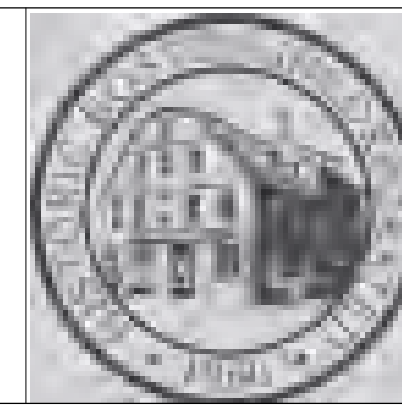


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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Aerial View from  
 Northeast**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A308</b>	
Scale	





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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Northeast View**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
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Scale	



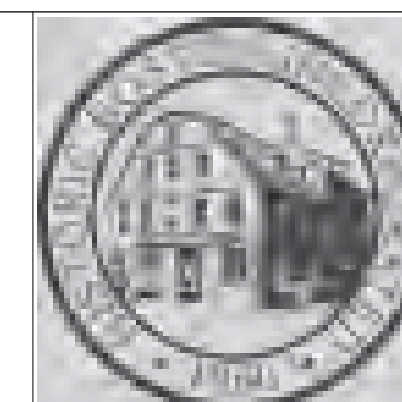


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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

View from Northwest

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A310</b>	
Scale	





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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**Washington Street View**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A311</b>	
Scale	

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**NAWN FACTORY  
 DEVELOPMENT PROPOSAL**

**View from Burying  
 Ground**

Project number	3015
Date	02/18/2020
Drawn by	Author
Checked by	Checker
<b>A312</b>	
Scale	



...ROXBERRY, WHICH IS A FAIRE AND HANDSOME COUNTRY-TOWNE...  
1634



### WHAT TO SEE IN ROXBURY

- |                    |                     |
|--------------------|---------------------|
| APRIL 15 - 1634    | MAY 15 - 1634       |
| JULY 15 - 1634     | SEPTEMBER 15 - 1634 |
| NOVEMBER 15 - 1634 | JANUARY 1635        |
| MARCH 1635         | MAY 1635            |
| JULY 1635          | SEPTEMBER 1635      |
| NOVEMBER 1635      | JANUARY 1636        |
| MARCH 1636         | MAY 1636            |
| JULY 1636          | SEPTEMBER 1636      |
| NOVEMBER 1636      | JANUARY 1637        |
| MARCH 1637         | MAY 1637            |
| JULY 1637          | SEPTEMBER 1637      |
| NOVEMBER 1637      | JANUARY 1638        |
| MARCH 1638         | MAY 1638            |
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| NOVEMBER 1638      | JANUARY 1639        |
| MARCH 1639         | MAY 1639            |
| JULY 1639          | SEPTEMBER 1639      |
| NOVEMBER 1639      | JANUARY 1640        |
| MARCH 1640         | MAY 1640            |
| JULY 1640          | SEPTEMBER 1640      |
| NOVEMBER 1640      | JANUARY 1641        |
| MARCH 1641         | MAY 1641            |
| JULY 1641          | SEPTEMBER 1641      |
| NOVEMBER 1641      | JANUARY 1642        |
| MARCH 1642         | MAY 1642            |
| JULY 1642          | SEPTEMBER 1642      |
| NOVEMBER 1642      | JANUARY 1643        |
| MARCH 1643         | MAY 1643            |
| JULY 1643          | SEPTEMBER 1643      |
| NOVEMBER 1643      | JANUARY 1644        |
| MARCH 1644         | MAY 1644            |
| JULY 1644          | SEPTEMBER 1644      |
| NOVEMBER 1644      | JANUARY 1645        |
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| JULY 1645          | SEPTEMBER 1645      |
| NOVEMBER 1645      | JANUARY 1646        |
| MARCH 1646         | MAY 1646            |
| JULY 1646          | SEPTEMBER 1646      |
| NOVEMBER 1646      | JANUARY 1647        |
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| JULY 1647          | SEPTEMBER 1647      |
| NOVEMBER 1647      | JANUARY 1648        |
| MARCH 1648         | MAY 1648            |
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| NOVEMBER 1648      | JANUARY 1649        |
| MARCH 1649         | MAY 1649            |
| JULY 1649          | SEPTEMBER 1649      |
| NOVEMBER 1649      | JANUARY 1650        |
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| NOVEMBER 1650      | JANUARY 1651        |
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| JULY 1652          | SEPTEMBER 1652      |
| NOVEMBER 1652      | JANUARY 1653        |
| MARCH 1653         | MAY 1653            |
| JULY 1653          | SEPTEMBER 1653      |
| NOVEMBER 1653      | JANUARY 1654        |
| MARCH 1654         | MAY 1654            |
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| MARCH 1655         | MAY 1655            |
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| NOVEMBER 1655      | JANUARY 1656        |
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| NOVEMBER 1657      | JANUARY 1658        |
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| JULY 1658          | SEPTEMBER 1658      |
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| MARCH 1659         | MAY 1659            |
| JULY 1659          | SEPTEMBER 1659      |
| NOVEMBER 1659      | JANUARY 1660        |
| MARCH 1660         | MAY 1660            |
| JULY 1660          | SEPTEMBER 1660      |
| NOVEMBER 1660      | JANUARY 1661        |
| MARCH 1661         | MAY 1661            |
| JULY 1661          | SEPTEMBER 1661      |
| NOVEMBER 1661      | JANUARY 1662        |
| MARCH 1662         | MAY 1662            |
| JULY 1662          | SEPTEMBER 1662      |
| NOVEMBER 1662      | JANUARY 1663        |
| MARCH 1663         | MAY 1663            |
| JULY 1663          | SEPTEMBER 1663      |
| NOVEMBER 1663      | JANUARY 1664        |
| MARCH 1664         | MAY 1664            |
| JULY 1664          | SEPTEMBER 1664      |
| NOVEMBER 1664      | JANUARY 1665        |
| MARCH 1665         | MAY 1665            |
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| NOVEMBER 1665      | JANUARY 1666        |
| MARCH 1666         | MAY 1666            |
| JULY 1666          | SEPTEMBER 1666      |
| NOVEMBER 1666      | JANUARY 1667        |
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| NOVEMBER 1667      | JANUARY 1668        |
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| NOVEMBER 1668      | JANUARY 1669        |
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| JULY 1669          | SEPTEMBER 1669      |
| NOVEMBER 1669      | JANUARY 1670        |
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| NOVEMBER 1672      | JANUARY 1673        |
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| NOVEMBER 1674      | JANUARY 1675        |
| MARCH 1675         | MAY 1675            |
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| NOVEMBER 1675      | JANUARY 1676        |
| MARCH 1676         | MAY 1676            |
| JULY 1676          | SEPTEMBER 1676      |
| NOVEMBER 1676      | JANUARY 1677        |
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| NOVEMBER 1679      | JANUARY 1680        |
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| NOVEMBER 1680      | JANUARY 1681        |
| MARCH 1681         | MAY 1681            |
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| NOVEMBER 1681      | JANUARY 1682        |
| MARCH 1682         | MAY 1682            |
| JULY 1682          | SEPTEMBER 1682      |
| NOVEMBER 1682      | JANUARY 1683        |
| MARCH 1683         | MAY 1683            |
| JULY 1683          | SEPTEMBER 1683      |
| NOVEMBER 1683      | JANUARY 1684        |
| MARCH 1684         | MAY 1684            |
| JULY 1684          | SEPTEMBER 1684      |
| NOVEMBER 1684      | JANUARY 1685        |
| MARCH 1685         | MAY 1685            |
| JULY 1685          | SEPTEMBER 1685      |
| NOVEMBER 1685      | JANUARY 1686        |
| MARCH 1686         | MAY 1686            |
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| MARCH 1699         | MAY 1699            |
| JULY 1699          | SEPTEMBER 1699      |
| NOVEMBER 1699      | JANUARY 1700        |



## Financial Submission

Development Program

Development and Operating Pro forma

Ten Year Operating Pro forma



**NAWN FACTORY DEVELOPMENT PROFORMA**

**2078 - 2080 Washington Street, Roxbury**

**History and Interpretation Center, Café, Retail, & Commercial**

Summary Sources and Uses

Square Footage: 2nd Floor	3690 GSF
1st Floor	3690 GSF
Lower Level	3690 GSF
<b>Total Area</b>	<b>11070 GSF</b>

2/19/2020

<b>Development Uses</b>				<b>Development Sources</b>			
Acquisition Costs			\$ 200	HBI Cash Equity			\$ -
Soft Costs with Contingency	\$ 149 /SF		\$ 1,646,614	State Historic Tax Credit Proceeds			\$ 504,000
Hard Costs With Contingency	\$ 487 /SF		\$ 5,390,441	Federal Historic Tax Credit Proceeds			\$ 629,000
Financing Costs			\$ 415,664	New Markets Tax Credit Proceeds			\$ 2,560,000
Tax Credit Unwind Costs			\$ 57,834	Permanent Debt LTV= 75% 5.00% 20 YR			\$ 1,019,575
Developer Overhead			\$ 372,636	<b>Total Debt and Tax Credit Sources</b>			<b>\$ 4,712,575</b>
Developer Fee			\$ 372,636	Fundraising and Subsidies			\$ 3,543,450
<b>Total Development Uses</b>	<b>\$ 746 /SF</b>		<b>\$ 8,256,025</b>	<b>Total Development Sources</b>			<b>\$ 8,256,025</b>



## NAWN FACTORY DEVELOPMENT PROFORMA

Projected Operating Expenses

Schedule B

2/19/2020

<b>Building Information</b>		<b>SQFT</b>	<b>% of RSF</b>	
Total Rentable SQFT		7,749	100%	
Office Rentable SQFT		6,549	85%	
Retail Rentable SQFT		1,200	15%	
<b>PROJECTED ANNUAL OPERATING EXPENSES-</b>				
<b>EXPENSE CATEGORY</b>	<b>Expenses Paid by Landlord</b>	<b>Retail Share of Expenses</b>	<b>Commercial Share of expenses</b>	<b>Forecasted Expense Growth</b>
<b>Common Area Maintenance</b>				
Office/Accounting	\$ -	\$ -	\$ -	
Legal Costs	\$ -	\$ -	\$ -	
Trash Removal	\$ 3,000	\$ 465	\$ 2,535	
Lobby & Corridor Cleaning	\$ 4,000	\$ 619	\$ 3,381	
Chimney	\$ -	\$ -	\$ -	
Snow Removal	\$ 2,400	\$ 372	\$ 2,028	
Sidewalk Cleaning	\$ 1,000	\$ 155	\$ 845	
Landscaping	\$ 3,000	\$ 465	\$ 2,535	
Pest Control	\$ 1,000	\$ 155	\$ 845	
Submetered Utility Monitoring	\$ 1,500	\$ 232	\$ 1,268	
Alarm Testing and Monitoring	\$ 2,000	\$ 310	\$ 1,690	
<b>TOTAL</b>	<b>\$ 17,900</b>	<b>\$ 2,772</b>	<b>\$ 15,128</b>	
<b>Repair and Maintenance</b>				
R&M HVAC Contract	\$ 2,000	\$ 310	\$ 1,690	
R&M HVAC Repair	\$ 500	\$ 77	\$ 423	
R&M electric	\$ 500	\$ 77	\$ 423	
R&M Plumbing	\$ 500	\$ 77	\$ 423	
R&M Alarm	\$ 1,600	\$ 248	\$ 1,352	
R&M Other	\$ 500	\$ 77	\$ 423	
R&M Corridor and Lobby Maintenance and Supplies	\$ 800	\$ 124	\$ 676	
Misc.	\$ 2,000	\$ 310	\$ 1,690	
<b>TOTAL</b>	<b>\$ 6,900</b>	<b>\$ 1,069</b>	<b>\$ 5,831</b>	
<b>Common Area Utilities</b>				
Gas	\$ -	\$ -	\$ -	
Electric	\$ 3,000	\$ 465	\$ 2,535	
Water and Sewer	\$ 1,500	\$ 232	\$ 1,268	
<b>TOTAL</b>	<b>\$ 4,500</b>	<b>\$ 697</b>	<b>\$ 3,803</b>	
<b>Property Taxes</b>				
Land + Building - Tentative	\$ -	\$ -	\$ -	
<b>TOTAL</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Other Expenses</b>				
AR, VR, Digital maintenance	\$ 10,000			
Property Management	\$ 9,749	\$ 1,509.69	\$ 8,239.11	
Property Insurance	\$ 12,500	\$ 1,935.73	\$ 10,564.27	
<b>TOTAL</b>	<b>\$ 32,249</b>	<b>\$ 3,445</b>	<b>\$ 18,803</b>	
<b>ANNUAL OPERATING EXPENSES</b>	<b>\$ 61,549</b>	<b>\$ 7,983</b>	<b>\$ 43,566</b>	<b>2.50%</b>

# NAWN FACTORY DEVELOPMENT PROFORMA

Capital Sources Summary Calculations  
 Schedule C  
 2/19/2020

Subsidy Sources		
<b>Historic Tax Credits</b>		
<b>Qualified Costs</b>		
Soft Costs W/Contingency @ 1/2	\$	823,307
Hard Costs W/Contingency - Existing	\$	2,460,000
Financing Costs @ 1/2	\$	207,832
Developer Fee + OH @ 1/3	\$	248,424
Site Work		NA
<b>Total Qualified Costs</b>	<b>\$</b>	<b>3,739,563</b>
<b>Total Approved Qualified Costs</b>	<b>100%</b>	<b>\$ 3,739,563</b>
<b>Total Development Costs</b>		<b>\$ 8,256,025</b>
<b>Tax Credit Value</b>		
State Tax Credit Value	15.0%	\$ 560,000
Federal Tax Credit Value	20.0%	\$ 740,000
New Markets Tax Credit Value	39.0%	\$ 3,200,000
<b>Total Tax Credit Value</b>		<b>\$ 4,500,000</b>
<b>Sales Proceeds to HBI</b>		
State Tax Credit Sale	0.90	\$ 504,000
Federal tax Credit Sale	0.85	\$ 629,000
NMTC Sale	0.80	\$ 2,560,000
<b>Total Tax Credit Proceeds</b>		<b>\$ 3,693,000</b>
<b>Grant and Subsidy Equity</b>		
Developer Contribution		
Other Funds		
<b>Total Subsidy or Grants</b>		<b>\$ -</b>

Market Rate Sources	
<b>Market Rate Debt- Permanent</b>	
Year 1 NOI (adjusted to annual amt)	\$ 100,931
Debt Service Coverage Ratio	1.25
Payment Amount	\$ 80,745
Loan Rate	5.000%
Amortization Period	20
Term	10
Loan Amount	\$1,019,575
<b>Loan to Value Check</b>	
Year 1 Cash Flow Before Debt	\$ 100,931
Cap Rate	7.00%
Developed Building Value	\$1,441,873
Loan to Value	75.0%
Maximum Loan amount	\$ 1,081,405
Payment Amount	\$86,775
<b>Line of Credit- Used for Financing Cost Calculations</b>	
LOC Rate	5.50%
<b>Historic Boston Incorporated Equity</b>	
Cash Equity for Acquisition	\$ -
Additional Cash Equity	\$ -
<b>Total HBI Equity</b>	<b>\$ -</b>



**NAWN FACTORY DEVELOPMENT PROFORMA**

Detailed Development Costs  
 Schedule E  
 2/19/2020

Bldg. Rentable Sf 11070

Acquisition	Total	\$/GSF	% Of TDC Cost
Purchase Price	\$ 200	\$ 0	0%
<b>Total</b>	<b>\$ 200</b>		

Soft Costs			
RFP Response / Feasibility Study	\$ 25,000	\$ 2.26	0.3%
Pre-development Code Consulting	\$ 3,000	\$ 0.27	0.0%
Precon Services and Cost Estimating	\$ 20,000	\$ 1.81	0.2%
Market Study	\$ -	\$ -	0.0%
Architecture / LA / MEP / Structural	\$ 468,734	\$ 42.34	5.7%
LEED Certifiable Review	\$ 5,000	\$ 0.45	0.1%
CD Peer Review	\$ -	\$ -	0.0%
Survey	\$ 10,000	\$ 0.90	0.1%
Civil Engineering / Site Design	\$ 30,000	\$ 2.71	0.4%
Environmental Testing/Phase I ESA	\$ 10,000	\$ 0.90	0.1%
Environmental Contamination Testing	\$ 5,000	\$ 0.45	0.1%
Contamination Remediation	\$ -	\$ -	0.0%
Materials testing during construction	\$ 5,000	\$ 0.45	0.1%
Historic Consultant	\$ 35,000	\$ 3.16	0.4%
Fundraising Consultant	\$ 75,000	\$ 6.78	0.9%
Legal Services	\$ -	\$ -	0.0%
Approvals - City of Boston and ZBA	\$ 20,000	\$ 1.81	0.2%
Disposition/ Conveyance Agreement	\$ 15,000	\$ 1.36	0.2%
Tax Credits and Finance Structuring	\$ 200,000	\$ 18.07	2.4%
Title	\$ 10,000	\$ 0.90	0.1%
Closings	\$ 20,000	\$ 1.81	0.2%
Permanent Financing Closing Costs - Appraisal and Legal	\$ 25,000	\$ 2.26	0.3%
Marketing, PR, web site	\$ 50,000	\$ 4.52	0.6%
Construction Period Property Taxes	\$ -	\$ -	0.0%
Insurance (Builder's Risk, Vacant Building, Property & Liability)	\$ 45,000	\$ 4.07	0.5%
Accounting - Cost Certification	\$ 30,000	\$ 2.71	0.4%
Security	\$ -	\$ -	0.0%
Site Maintenance and Utilities	\$ 25,000	\$ 2.26	0.3%
Brokerage Fees	\$ -	\$ -	0.0%
Back Charges, Permits, Applications	\$ 25,000	\$ 2.26	0.3%
Property Management Consulting	\$ 5,000	\$ 0.45	0.1%
AR, VR, Digita Experience- Timelooper	\$ 350,000		4.2%
Misc.	\$ 20,000	\$ 1.81	0.2%
<b>Total</b>	<b>\$ 1,531,734</b>		<b>18.6%</b>

\$ 290,000 Total Legal

Hard Costs			
Base Scope + Contractor Contingency			
<b>Historic Rehab Construction</b>			
Basement	\$ 400	3,690 SF	\$ 1,476,000
First Floor	\$ 400	1,230 SF	\$ 492,000
Second Floor	\$ 400	1,230 SF	\$ 492,000
			\$ 2,460,000 \$ 400.00 per SF
<b>New Construction</b>			
First Floor	\$ 300	2,472 SF	\$ 741,690
Second Floor	\$ 300	2,472 SF	\$ 741,690
Site	\$ 40	10,850 SF	\$ 434,000
TI Allowance	\$ 40	7,749	\$ 309,960
			\$ - 0.0%
<b>Total</b>			<b>\$ 4,687,340 56.8%</b>

\$ 1,483,380 \$ 300.00 per SF

\$ 3,943,380

Financing Costs			
Line of Credit Bridge Financing- See Schedule G	\$ 415,664	\$ 37.55	5.0%

Escrow of Federal Investor Preferred Return			
5 Year Preferred Return with Put Option Cost	\$ 57,834	\$ 5.22	

Contingency					
Soft Cost Contingency	7.5%	\$ 114,880	\$ 10.38	1.4%	\$ 1,646,614
Developer Hard Cost Contingency	15.0%	\$ 703,101	\$ 63.51	8.5%	\$ 5,390,441
<b>Total</b>		<b>\$ 817,981</b>			

Developer Fee and Overhead for Tax Credits					
Developer Overhead (TDC- Net of Acquisition & Offsite)	5%	\$ 372,636	\$ 33.66	4.5%	
Developer Fee (TDC- Net of Acquisition & Offsite)	5%	\$ 372,636	\$ 33.66	4.5%	

<b>Total Development Cost (TDC)</b>	<b>\$ 8,256,025</b>	\$ 746
<b>Total Economic Development Cost (net of developer fee)</b>	<b>\$ 7,510,753</b>	\$ 678

## Preliminary Market Study

Current rental values as listed in the pro forma are based on information from primary and secondary sources. HBI as the other commercial location on the block gets market information from potential tenants, brokers and other landlords active in the area.

## Financing Commitments

HBI will use its available line of credit with Eastern Bank to bridge the tax credit and philanthropic capital sources on this project. The line of credit is secured by HBI's ownership of the Old Corner Bookstore at Downtown Crossing. HBI has also discussed the possibility of a construction to permanent loan for this project from Eastern Bank, who is the lender for other HBI projects.

## Owner/Developer Equity and Fundraising

HBI's ability to take short and long term risks is supported by the organization's continued ownership of the Old Corner Bookstore in downtown Boston which today is debt free and a "100% corner" by retail leasing standards. The property commands significant lease revenue which supports HBI's overhead and operations, and HBI maintains a \$3.5 million line of credit, secured against the Bookstore, which frequently bridges the flow of tax credit equity and debt through the end of project construction.

As project developer, HBI will deploy its own available cash as equity, work with conventional lenders to borrow as much debt as the project's lease revenue can support, and utilize State and Federal tax credit programs. There is an inevitable financing gap with most HBI projects; the organization will gauge potential for raising funds charitably or through public sources in order to complete a project's budget.

HBI has had considerable success in filling financing gaps on its projects through fundraising, largely supported by charitable foundations, government sources, and individual donors who care about historic preservation, architecture, neighborhood stability, entrepreneurship, affordable housing or other end-uses that meet community priorities.

The following lists the owner equity and charitable fundraising requirements of each of HBI's recent projects:

Eustis Street Fire House (2011), TDC of \$2,559,546

Owner Equity: \$550,524

Fundraising: \$547,850

Hayden Building (2013): TDC of \$5,736,535

Owner Equity: \$1,330,767

Fundraising: \$200,000

Alvah Kittredge House (2014): TDC of \$3,696,083  
Owner Equity: \$337,000  
Fundraising: \$1,477,00

Vertullo Building (2014): TDC of \$1,373,800  
Owner Equity: \$522,000  
Fundraising: \$129,452

Roslindale Substation (2017): TDC \$4,793,612  
Fundraising: \$160,000

Fowler Clark Epstein Farm (2018): TDC of \$3,722,363  
Owner Equity: \$200,000  
Fundraising: \$1,823,863

Upham's Corner Comfort Station (2020): TDC of \$1,384,540  
Fundraising: \$765,000

## Required Forms

Statement of Proposer's Qualifications Form  
One Stop Application for Development Budget  
Preliminary Development Budget Form  
Preliminary Operating Budget Form  
Development Timetable Form  
Construction Employment Statement Form  
Property Affidavit Form  
Affidavit of Eligibility Form  
Chapter 803 Disclosure Statement Form

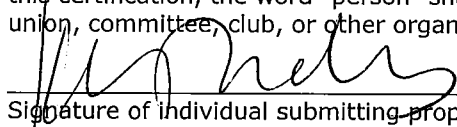
## STATEMENT OF PROPOSER'S QUALIFICATIONS FORM

All questions must be answered. All information must be clear and complete. Attach additional pages, if needed.

1. Name of proposer: Historic Boston Incorporated
2. Names and titles of principals: Kathy Kottaridis, Executive Director
3. Names of authorized signatories: Kathy Kottaridis
4. Permanent main office address: 20 Eustis St, Roxbury MA 02119  
  
Phone: 617-442-1859 Fax: 617-442-2243 Email: hbi@historicboston.org
5. Date organized: 10/25/1960
6. Location of incorporation: Boston, MA
7. Number of years engaged in business under your present name: 60 years
8. List at least three private or public agencies that you have supplied/provided with similar services to that in this solicitation:
  - a. Department of Neighborhood Development: Eustis St Firehouse
  - b. BPDA, Eminent Domain Taking : Alvah Kittredge House
  - c. Corporate Counsel, City of Boston: Fowler Clark Epstein Farm

Has organization ever failed to perform any contract?  YES  NO  
If YES, attach a written declaration explaining the circumstances.

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

  
Signature of individual submitting proposal

Executive Director

Title

Historic Boston Inc.

Legal Name of Organization

2/19/2020

Date





**Uses of Funds**

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

**Direct Construction:**

105 . Who prepared the estimates?

Name Signature

106 . Basis for estimates?

DV	Trade Item	Amount	Description
107 .	3	Concrete	
108 .	4	Masonry	
109 .	5	Metals	
110 .	6	Rough Carpentry	
111 .	6	Finish Carpentry	
112 .	7	Waterproofing	
113 .	7	Insulation	
114 .	7	Roofing	
115 .	7	Sheet Metal and Flashing	
116 .	7	Exterior Siding	
117 .	8	Doors	
118 .	8	Windows	
119 .	8	Glass	
120 .	9	Lath & Plaster	
121 .	9	Drywall	
122 .	9	Tile Work	
123 .	9	Acoustical	
124 .	9	Wood Flooring	
125 .	9	Resilient Flooring	
126 .	9	Carpet	
127 .	9	Paint & Decorating	
128 .	10	Specialties	
129 .	11	Special Equipment	
130 .	11	Cabinets	
131 .	11	Appliances	
132 .	12	Blinds & Shades	
133 .	13	Modular/Manufactured	
134 .	13	Special Construction	
135 .	14	Elevators or Conveying Syst.	
136 .	15	Plumbing & Hot Water	
137 .	15	Heat & Ventilation	
138 .	15	Air Conditioning	
139 .	15	Fire Protection	
140 .	16	Electrical	
141 .		Accessory Buildings	
142 .		Other/misc	
143 .		<b>Subtotal Structural</b>	\$0
144 .	2	Earth Work	
145 .	2	Site Utilities	
146 .	2	Roads & Walks	
147 .	2	Site Improvement	
148 .	2	Lawns & Planting	
149 .	2	Geotechnical Conditions	
150 .	2	Environmental Remediation	
151 .	2	Demolition	
152 .	2	Unusual Site Cond	
153 .		<b>Subtotal Site Work</b>	\$0
154 .		<b>Total Improvements</b>	\$0
155 .	1	General Conditions	\$0
156 .		<b>Subtotal</b>	\$0
157 .	1	Builders Overhead	\$0
158 .	1	Builders Profit	
159 .		<b>TOTAL</b>	\$4,690,675

160 Total Cost/square foot:

Residential Cost/s.f.:

**Development Budget:**

	Total	Residential	Commercial	Comments
161 . Acquisition: Land	\$0			
162 . Acquisition: Building	\$0			
163 . Acquisition Subtotal	\$0	\$0	\$0	
164 . Direct Construction Budget	\$4,690,675	\$4,690,675		(from line 159)
165 . Construction Contingency	\$703,601	\$234,534		15.0% of construction
166 . Subtotal: Construction	\$5,394,276	\$4,925,209	\$0	

**General Development Costs:**

167 . Architecture & Engineering	\$562,068			
168 . Survey and Permits	\$35,000			
169 . Clerk of the Works	\$0			
170 . Environmental Engineer	\$15,000			
171 . Bond Premium	\$0			
172 . Legal	\$290,000			
173 . Title and Recording	\$10,000			
174 . Accounting & Cost Cert.	\$30,000			
175 . Marketing and Rent Up	\$0			
176 . Real Estate Taxes	\$20,000			
177 . Insurance	\$45,000			
178 . Relocation	\$0			
179 . Appraisal	\$0			
180 . Security	\$0			
181 . Construction Loan Interest	\$415,906			
182 . Inspecting Engineer	\$5,000			
183 . Fees to: Museum Con	\$350,000			
184 . Fees to: Fundrasing C	\$75,000			
185 . MIP	\$0			
186 . Credit Enhancement Fees	\$0			
187 . Letter of Credit Fees	\$0			
188 . Other Financing Fees	\$0			
189 . Development Consultant	\$0			
190 . Other: Utilities, Site	\$127,835			
191 . Other: Feasibility	\$25,000			
192 . Soft Cost Contingency	\$114,905			5.7% of soft costs
193 . Subtotal: Gen. Dev.	\$2,120,714	\$0	\$0	

194 . Subtotal: Acquis., Const and Gen. Dev.	\$7,514,990	\$4,925,209	\$0
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195 . Capitalized Reserves	\$0		
196 . Developer Overhead	\$372,858		
197 . Developer Fee	\$372,858		

198 . Total Development Cost	\$8,260,705	\$4,925,209	\$0	TDC per unit	#DIV/0!
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199 . TDC, Net	\$8,260,705	\$4,925,209	\$0	TDC, Net per unit	#DIV/0!
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**Additional Detail on Development Pro-Forma:**

200 . Gross Syndication Investment	\$3,693,000
<b>Off-Budget Costs:</b>	
<b>Syndication Costs:</b>	
201 . Syndication Legal	\$200,000
202 . Syndication Fees	
203 . Syndication Consultants	
204 . Bridge Financing Costs	
205 . Investor Servicing (capitalized)	
206 . Other Syndication Expenses	
207 . Total Syndication Expense	\$200,000
208 . Current Reserve Balance	
<b>Reserves (capitalized):</b>	
209 . Development Reserves	
210 . Initial Rent-Up Reserves	
211 . Operating Reserves	
212 . Net Worth Account	
213 . Other Capitalized Reserves	
214 . Subtotal: Capitalized Reserves	\$0
215 . Letter of Credit Requirements	
216 . Total of the Above	\$0

**Check: Line 214 is the same as line 195.**

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

**Unit Sales (For Sale Projects Only):**

217 . Gross Sales From Units	\$
218 . Cost of Sales (Commissions, etc.)	\$
219 . Net Receipt from Sales	\$0

**Debt Service Requirements:**

220 . Minimum Debt Service Coverage	1.25
221 . Is this Project subject to HUD Subsidy Layering Review?	No

*Optional user comments*

## PRELIMINARY DEVELOPMENT BUDGET FORM

**PROPOSER'S NAME:** HISTORIC BOSTON INCORPORATED

Complete this Preliminary Development Budget or you may substitute another form that provides substantially equivalent information. Note: Total of Uses of Funds should equal Total of Sources of Funds.

USES OF FUNDING	AMOUNT
Acquisition - Land	\$200.00
Site Prep/Environmental	\$15,000.00
Construction	\$4,690,675.00
Construction Contingency	\$703,601.00
Architect(s) and Engineer(s)	\$562,068.00
Development Consultant	\$
Survey and Permits	\$35,000.00
Legal	\$290,000.00
Title and Recording	\$10,000.00
Real Estate Taxes	\$20,000.00
Insurance	\$45,000.00
Construction Loan Interest	\$415,906.00
Construction Inspection Fees	\$5,000.00
Other: Fundraising Consultant	\$75,000.00
Other: Museum/ Interpretation AR VR Content Creation	\$350,000.00
Other: RFP Response & Feasibility	\$25,000.00
Other: Tax credit accounting and cost certification	\$30,000.00
Other: Misc + Site Maintenance + Marketing + Utilities	\$127,835.00
Soft Cost Contingency	\$114,905.00
Developer Overhead	\$372857.5
Developer Fee	\$372,857.50
<b>TOTAL: ALL USES</b>	<b>\$8,260,905.00</b>



SOURCES OF FUNDING	AMOUNT
Sponsor Cash In Hand	\$
Additional Sponsor Fundraising	\$
Philanthropic Funding Fundrasing	\$3,548,330.00
Philanthropic Funding	\$
Bank Loans	\$1,019,575.00
Donated Materials/Services:	
Other: Historic Tax Credits (Federal and State)	\$1,133,000.00
Other: New Market Tax Credits	\$2,560,000.00
<b>TOTAL ALL SOURCES:</b>	<b>\$8,260,905.00</b>

Committed

- 
- 
- 
- 
- 
- 
- 
- 

If any of the above-listed funding sources are already in hand or have been committed subject to designation/conveyance by DND, check off the right-hand box under "Committed".

Explanatory notes:

## Section 4 OPERATING PRO-FORMA

Operating Income				
<b>Rent Schedule:</b>	<i>Contract</i>	<i>Utility</i>	<i>Total</i>	<i>No. of</i>
	<i>Rent</i>	<i>Allowance</i>	<i>Gross Rent</i>	<i>Units</i>
222 . Low-Income (Rental Assisted):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
223 . Low-Income (below 50%):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
224 . Low-Income (below 60%):				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
225 . Other Income (User-defined)				
SRO			\$0	0
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
226 . Market Rate (unrestricted occupancy):				
SRO				0
0 bedroom				0
1 bedroom				0
2 bedrooms				0
3 bedrooms				0
4 bedrooms				0
<b>Commercial Income:</b>				
227 . Square Feet:	11,070	@	(average) \$15.45 /square foot =	\$171,032
<b>Parking Income:</b>				
228 . Spaces:	0	@	(average) /month x 12 =	\$0





Operating Expenses				
Annual Operating Exp.:	Total	Residential	Commercial	Comments
250 . Management Fee	\$9,749			
251 . Payroll, Administrative	\$0			
252 . Payroll Taxes & Benefits, Admin.	\$0			
253 . Legal	\$0			
254 . Audit	\$0			
255 . Marketing	\$0			
256 . Telephone	\$0			
257 . Office Supplies	\$0			
258 . Accounting & Data Processing	\$0			
259 . Investor Servicing	\$0			
260 . DHCD Monitoring Fee	\$0			
261 . Other: Common Area Maintenance	\$8,500			
262 . Other: Repair and Gen. Maintenance	\$6,400			
263 . <b>Subtotal: Administrative</b>	<b>\$14,900</b>	<b>\$0</b>	<b>\$0</b>	
264 . Payroll, Maintenance	\$0			
265 . Payroll Taxes & Benefits, Admin.	\$0			
266 . Janitorial Materials	\$500			
267 . Landscaping	\$3,000			
268 . Decorating (inter. only)	\$0			
269 . Repairs (inter. & ext.)	\$0			
270 . Elevator Maintenance	\$0			
271 . Trash Removal	\$3,000			
272 . Snow Removal	\$2,400			
273 . Extermination	\$1,000			
274 . Recreation	\$0			
275 . Other:	\$0			
276 . <b>Subtotal: Maintenance</b>	<b>\$9,900</b>	<b>\$0</b>	<b>\$0</b>	
277 . <b>Resident Services</b>	<b>\$0</b>			
278 . <b>Security</b>	<b>\$0</b>			
279 . Electricity	\$3,000			
280 . Natural Gas	\$0			
281 . Oil	\$0			
282 . Water & Sewer	\$1,500			
283 . <b>Subtotal: Utilities</b>	<b>\$4,500</b>	<b>\$0</b>	<b>\$0</b>	
284 . <b>Replacement Reserve</b>	<b>\$0</b>			
285 . <b>Operating Reserve</b>	<b>\$0</b>			
286 . Real Estate Taxes	\$0	Seeking exemption		
287 . Other Taxes	\$0			
288 . Insurance	\$12,500			
289 . MIP	\$0	\$0		
290 . Other: Museum AR VR Digital Main	\$10,000			
291 . <b>Subtotal: Taxes, Insurance</b>	<b>\$22,500</b>	<b>\$0</b>	<b>\$0</b>	
292 . <b>TOTAL EXPENSES</b>	<b>\$61,549</b>	<b>\$0</b>	<b>\$0</b>	



**Other Operating Expense Assumptions**

**Trending Assumptions for Expenses**

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

**Reserve Requirements:**

296 . Replacement Reserve Requirement .....		per unit per year
297 . Operating Reserve Requirement .....		per unit per year

**Debt Service:**

		Annual Payment
298 . MHFA	MHFA Program 1	N/A
299 . MHFA	MHFA Program 2	N/A
300 . MHP Fund Permanent Loan		N/A
301 . Other Permanent Senior Mortgage		\$80,745
Source:	N/A	
302 . Other Permanent Senior Mortgage		N/A
Source:	N/A	
303 . <b>Total Debt Service (Annual)</b>		\$80,745
304 . <b>Net Operating Income</b>		\$109,483 (in year one)
305 . <b>Debt Service Coverage</b>		1.36 (in year one)

**Affordability: Income Limits and Maximum Allowable Rents**

306 . County  MSA

This MSA does not match the county you have chosen

307 . **Maximum Allowed Rents, by Income, by Unit Size:** Income Limits last updated on

	Maximum Income			Maximum Rent (calculated from HUD income data)		
	50%	60%	0%	50%	60%	0%
SRO						
0 bedroom						
1 bedroom						
2 bedrooms						
3 bedrooms						
4 bedrooms						

Area median income for a family of

308 . **H.U.D. "Fair Market Rents" (Maximum):**

0 bedroom	
1 bedroom	
2 bedrooms	
3 bedrooms	
4 bedrooms	
5 bedrooms	

FMR Information last updated on

Operations before this transaction:				Operations after:			
Type	Number	Current Rent	Annualized Income	Number	Future Rents	Market Rent GPR	
309 . SRO	0	0	0	0	0	0	0
310 . 0 bedroom	0	0	0	0	0	0	0
311 . 1 bedroom	0	0	0	0	0	0	0
312 . 2 bedrooms	0	0	0	0	0	0	0
313 . 3 bedrooms	0	0	0	0	0	0	0
314 . 4 bedrooms	0	0	0	0	0	0	0
315 . Gross Potential Rental Income			0				0
316 . Vacancy		0%	0	Vacancy	%		0
317 . Other Income			0	Other Income		171,032	
318 . Effective Gross Income			0	Effective Gross Income		171,032	
<b>Operating Expenses</b>				<b>Year</b>	<b>Reason</b>	<b>% Change</b>	<b>Year</b>
319 . Management fee			0				9,749
320 . Administration			0				14,900
321 . Maintance/Operations			0				9,900
322 . Resident Services			0				0
323 . Security			0				0
324 . Utilities			0				4,500
325 . Replacement Reserve			0				0
326 . Operating Reserve			0				0
327 . Real Esate Taxes			0				0
328 . Insurance			0				22,500
329 . Total Expenses			0				61,549
330 . Net Operating Income			0	Net Operating Income			109,483

331 . Transaction Description:

Optional user calculations




## PRELIMINARY OPERATING BUDGET FORM

**PROPOSER'S NAME:** HISTORIC BOSTON INCORPORATED

Provide a Preliminary Operating Budget on the form provided below. You may substitute another form that provides substantially equivalent information.

SOURCES OF FUNDS: ANNUAL OPERATING INCOME	AMOUNT
Rent	\$ 162,480.00
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
<b>ANNUAL OPERATING INCOME: ALL SOURCES</b>	<b>\$ 162,480.00</b>

Committed

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
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<input type="checkbox"/>
<input type="checkbox"/>

If any of the above-listed funding sources are already in hand or have been committed subject to completion of the new facility, check off the right-hand box under "Committed".

USES OF FUNDS: ANNUAL OPERATING COSTS	AMOUNT
Common Area Maintenance (Trash removal, snow removal, landscape, alarm testing, alarm monitoring, extermination, sidewalk cleaning)	\$17,900.00
	\$
	\$
Repair and Maintenance (HVAC contract, General R& M for electric, plumbing, alarm, Common Area Utilities)	\$6,900.00
	\$4,500.00
Musueum AR VR Digital Maintenance	\$10,000.00
Property Management	\$9,749.00
Insurance	\$12,500.00
	\$
	\$
	\$
	\$
	\$
	\$
	\$
<b>ANNUAL OPERATING COSTS: ALL SOURCES</b>	<b>\$61,549.00</b>

*Continued on next page*

Explanatory notes:



## DEVELOPMENT TIMETABLE FORM

**PROPOSER'S NAME:** Historic Boston Incorporated

Assuming that you are designated on 9/15/2020 , indicate below your target dates for achieving these key development milestones.

MILESTONE	DATE
Designs Complete	9/15/2021
Apply for Permit(s)	10/1/2021
Zoning Relief Anticipated?	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
All Development Financing Committed	3/2022
Permit(s) Issued	5/2022
Financing Closed	6/2022
Construction Begins	7/2022
Construction Complete	6/2023

# CONSTRUCTION EMPLOYMENT STATEMENT FORM

**PROPOSER'S NAME:** Historic Boston Incorporated

How many full time employees does your firm currently have?

Under 25       25 -99       100 or more

Are you a Boston-based business?  YES  NO

*Boston Based: where the principal place of business and/or the primary residence of the Proposer is in the City of Boston.*

Are you a Minority-owned Business Enterprise?  YES  NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)?  YES  NO

Are you a Woman-owned Business Enterprise?  YES  NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)?  YES  NO

## **RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT**

DND encourages MIHI builders to seek to achieve the following construction employment goals:

<b>Boston Residents</b>	<b>50% of project hours</b>
<b>Minority</b>	<b>25% of project hours</b>
<b>Female</b>	<b>10% of project hours</b>

These are targets, not requirements, but proposals that provide better evidence of their ability to achieve these targets will be more highly ranked. Explain what actions you will undertake to promote employment of these groups:

General Contractor selection will be determined in part by their record in achieving Boston Residents Jobs goals on other projects; evidence will be required. HBI will ensure MBE sub-contractors will be included in bidding and that chosen sub-contractors have access to Boston resident, minority and female workers. Compliance will be reviewed at weekly construction meetings and if goals are not met, sub-contractors will be required to submit a plan to achieve the goals. General contractor will accept applicants at on-site construction office.

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with "Supplementary Construction Employment Statement" and the Proposer's name. *Note: if you are, according the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND's employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City's Office of Jobs & Community Services, please list the most recent here: \_\_\_\_\_



**City of Boston (COB) – Property Affidavit Form**

**Instructions:** List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest. If there are any past due amounts owed to the Department of Neighborhood Development, the Inspectional Services Department, the Treasury Department and/or the Boston Water and Sewer Commission, such **must be paid in full** before: (1) a vote request can be presented to the City of Boston Public Facilities Commission concerning the sale of property to the applicant or any other business entity in which the applicant has an ownership or beneficial interest; OR (2) the commitment of funding to the applicant or any other business entity in which the applicant has an ownership or beneficial interest. Public Facilities Commission votes are not to be requested until the Property Affidavit has been approved and the Legal Unit has signed the Property Clearance Form.

Upon approval, the Property Affidavit will be valid for ninety (90) calendar days from the date it is signed by the Applicant.

For any additional properties that do not fit on this form, attach a spreadsheet. Do not use another property affidavit form. Only one signature page is to be submitted. All entries made on this form must be typed in the form fields provided below.

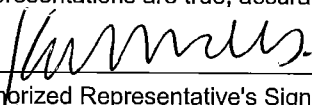
**Applicant:** Historic Boston Incorporated

List Addresses of Boston Properties Owned:	PARCEL ID NUMBER
277 Washington Street	02883-000
283-285 Washington Street	02861-000
Boston Properties Previously Foreclosed Upon by COB:	PARCEL ID NUMBER

I declare under pains and penalties of perjury that the foregoing representations are true, accurate, complete and correct in all respects.

Kathy Kottaridis, Executive Director

Print Name and Title

  
Authorized Representative's Signature

2/19/20

Date

617-442-1859 X24

Applicant Contact (If different from above)

Telephone Number

**OFFICIAL USE ONLY (Fax the completed form to DND at 635-0262. Delinquency Reported: (If Yes (Y) state the amount owed):**

**Boston Water & Sewer Commission**

Y\$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Department of Neighborhood Development**

Y\$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Public Works Department**

Y\$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Treasury Department**

Y\$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

DND Contact

Division

Program

Phone: ext.

**AFFIDAVIT OF ELIGIBILITY FORM**

Developer's Name: Historic Boston Incorporated

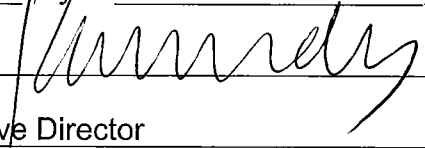
Any person submitting an application for under this RFP must truthfully complete this Affidavit and submit it with their application.

1. Do any of the principals owe the City of Boston any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?  
No
  
2. Are any of the principals employed by the City of Boston? If so, in what capacity?  
(Please include name of principal, name of agency or department, and position held in that agency or department).  
No
  
3. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?  
No
  
5. Have any of the principals ever been convicted of any arson-related crimes, or currently under indictment for any such crime?  
No
  
6. Have any of the principals been convicted of violating any law, code, statute or ordinance regarding conditions of human habitation within the last three (3) years?  
No



Signed under the pains and penalties of perjury this

18th \_\_\_\_\_ day of February, 20 20 \_\_\_\_\_

SIGNATURE:  \_\_\_\_\_

TITLE: Executive Director \_\_\_\_\_

ORGANIZATION: Historic Boston Incorporated \_\_\_\_\_

ADDRESS: 20 Eustis St, Roxbury MA 02119 \_\_\_\_\_

## CHAPTER 803 DISCLOSURE STATEMENT FORM

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this 18th day  
of February, 2020

Month

Year

  
\_\_\_\_\_  
Proposer Signature

\_\_\_\_\_  
Co-Proposer Signature (If Applicable)



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

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

(1) REAL PROPERTY:

**City of Boston Assessing Parcels 02426010 (SR-26) and 02426020 (38-2-C) (the "Property")**

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

**Response to City of Boston Request for Proposals for sale of the Property**

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

**Historic Boston Incorporated, a Massachusetts non-profit corporation**

(4) ROLE OF PARTY (Check appropriate role):

\_\_\_\_ Lessor/Landlord \_\_\_\_ Lessee/Tenant

\_\_\_\_ Seller/Grantor \_\_\_\_ Buyer/Grantee

Other (Please describe): **Proposed purchaser/developer**

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

NAME

RESIDENCE

N/A

N/A

**Historic Boston is a non-profit corporation engaged in the redevelopment of at-risk historic buildings in Boston, and has no stockholders.**

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

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

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

(8) This statement is hereby signed under penalties of perjury.

DATE 2/18/20 Historic Boston Inc.  
(PARTY'S NAME DISCLOSED IN PARAGRAPH 3)

  
AUTHORIZED SIGNATURE

Kathy Kottaridis  
PRINT NAME

Executive Director  
TITLE



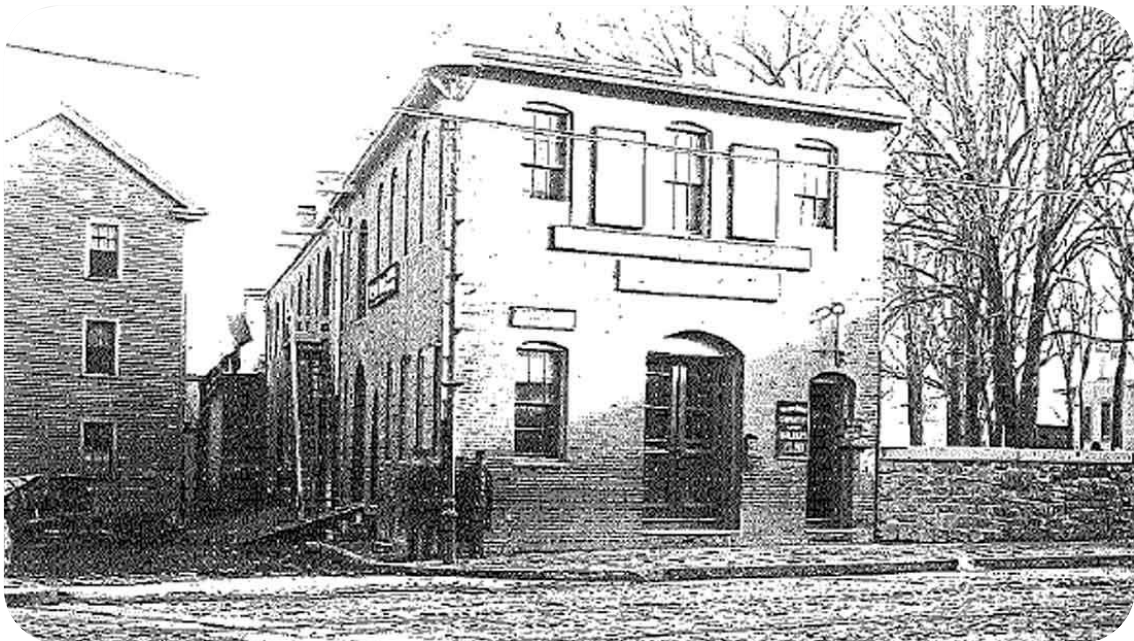
# Addendum

## Proposal and Qualifications of Timelooper

# timelooper™

## OWEN NAWN FACTORY RFP MATERIALS

*FEBRUARY, 2020*







OWEN NAWN FACTORY RFP MATERIALS

FEBRUARY, 2020

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## **ABOUT TIMELOOPER**

TimeLooper is a global digital storytelling company that specializes in the design, production, and distribution of immersive augmented and virtual reality content for historic sites, museums, and cultural institutions. TimeLooper's core business is to partner with history centers, cultural gathering spots, museums, heritage sites, government institutions, and educational NGOs to design content that seamlessly integrates into the on-site customer journey and enables site visitors to take a trip through time and history. The company has developed an impressive roster of clients (which TimeLooper calls "partners").

TimeLooper collaborates with its partners to deliver bespoke experiences - be it helping to visualize a physical world that does not exist (past or future), re-tell immersive stories that made their location great, or to increase visitation. TimeLooper's global reach and turn-key customer delivery solution enables customers around the globe to consume world-class immersive content through unique creation abilities and technical delivery know-how.

Leveraging 21st century technology to tell age old stories should not be burdensome for historic sites and cultural institutions. With this in mind, TimeLooper designed a partnership engagement model that takes the best of a partner's expertise (its history and storytelling aspirations) and leaves the rest to TimeLooper. TimeLooper provides front-end interpretive consultancy to help design a comprehensive experience that accomplishes the partner's goals, manages the entire content production process, provides marketing and sales support, and a range of content delivery options, from scalable mobile devices with disposable headsets up through high-end head-mounted devices.

TimeLooper's core business is to bring tangible and intangible heritage to life, thereby making cultural assets worldwide more approachable, immersive, engaging, relevant and seamlessly accessible to everyone in a manner that makes the delivery of these experiences manageable for its partners.

## **INTERPRETIVE DESIGN PROCESS**

Possession of an up-to-date interpretive plan that serves as the "true north" for experience development is the most important step in the development process. In those instances where TimeLooper is being plugged into an existing exhibition with very specific and well-defined customer needs, the interpretive planning process can be short-circuited or eliminated altogether. In other instances, partner institutions rely on TimeLooper's expertise to manage interpretive planning. Typically, partners rely on TimeLooper to facilitate an interpretive design process when any of the following needs are unmet:

- Identify or clarify your main stories
- Tell your stories more effectively

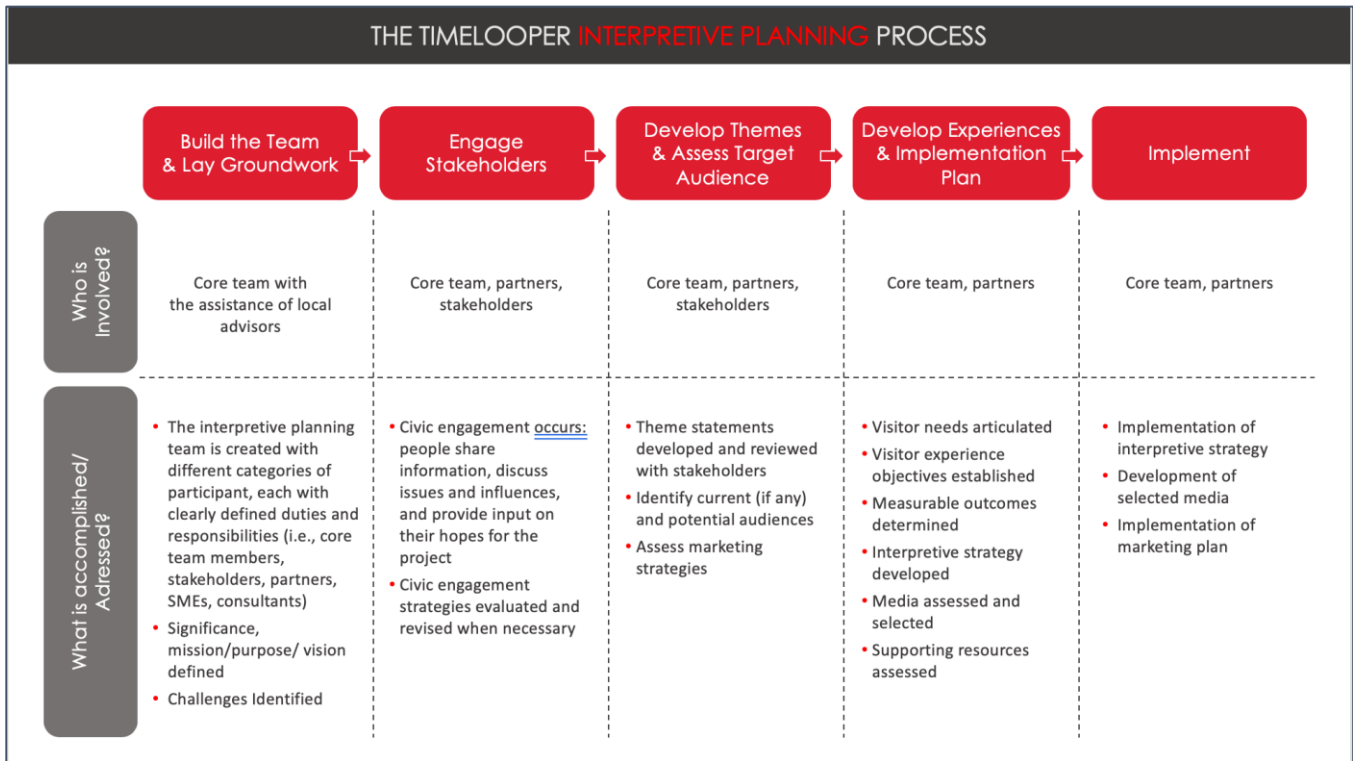


- Identify gaps in existing programming and products
- Learn more about your existing audience
- Seek new audiences
- Help audiences form stronger connections to your place or stories
- Work more effectively with other sites, communities, or partners
- Support your marketing efforts
- Identify common goals, outcomes, and principles across a region of connected sites
- Prioritize
- Demonstrate initiative and preparedness to potential funders

TimeLooper's interpretation development process recognizes that organizations are *stewards* not *owners* of history and that key stakeholders, frequently those whose voices have been underrepresented, must be engaged throughout a highly inclusive community-oriented process. Engaging a broad collection of perspectives, which requires more than token engagement and instead includes one or more opportunities for key stakeholders and audiences to have input and review the plan document, confers a series of benefits on the client organization, including:

- Expand your audience
- Optimize local resources
- Encourage support from the community by including citizens in the process
- Promote better understanding throughout the community of the site and region
- Communicate more effectively with partners
- Increase political support
- Develop a regional context for the plan
- Be able to leverage human and financial resources more effectively

The interpretation plan development process is as follows:



In the case of the Owen Nawn Factory project, history of the building and Roxbury Neck and potential use cases of the 1,200 square feet history center café auger for a robust community engagement process. Roxbury’s complex history and diverse network of stakeholders, many of whose voices have been underrepresented in the past, require community engagement for at least the following reasons:

- Educate community on Historic Boston’s redevelopment plan
- Highlight public benefits outlined in the RFP
- Empower the local community to serve as a leader in the ideation and selection process of how to represent Roxbury’s history inside of the physical space
- Empower the local community to help shape the narrative of historical memory and remembrance both inside of the space but also in any digital interpretation that takes place out in the community
- Ensure Historic Boston’s plan not only serves to educate and engage the local community and visitors, but also ensure sustained economic benefit for the community-based businesses

## **DEVELOP EXPERIENCE AND IMPLEMENTATION PLAN**

Once the interpretive themes have been developed, it is critical to develop a multi-layered media deployment strategy that recognizes the availability of 1,200 square feet for a history café / resource area



that the RFP clearly states “will bring the history of Roxbury to life for both visitors and Roxbury residents.” The final strategy will require the seamless integration of the physical space and all that it offers, including traditional interpretive panels, station-based digital experiences, and the broader community beyond the Nawn Factory, where there is much to interpret. Certain interpretive themes, such as the geographic and economic importance of Roxbury Neck, might be best interpreted out on the streets of Roxbury via digital and permanent interpretive wayfinding, whereas it might be determined through community engagement that the 1200 square feet be designed as a community meeting spot with historic interpretation as a secondary focus.

Regardless of the final interpretive strategy, TimeLooper’s cutting edge experience design comes from three pillars of expertise; storytelling, cinematography and game design. TimeLooper employs a global team of interdisciplinary storytellers, from historians and local experts to full-time and independent filmmakers, cinematographers, production specialists, developers, and even game designers. Combining these fields in non-traditional ways allows for a broad spectrum of storytelling techniques to tell history in realistic and affecting ways.

The result of the process is not simply a collection of interpretive panels, films, and virtual or augmented reality clips, but a cohesive “narrative-based experience.” TimeLooper is pushing the boundaries and assisting partners to move towards user-centric content *engagement*, marrying the most cutting-edge strategies from film production and gaming to place the end visitor in the center of the experience. With TimeLooper, visitors are responsible for driving the experience rather than passively watching it. TimeLooper’s unique content development workflow and production techniques allow it to produce content faster and better than anyone in the market.

## **AR / VR CONTENT DISTRIBUTION METHODOLOGY**

In the world of AR and VR experience design, the “what” (i.e., content) must be considered in concert with the “how” (i.e., playback engine).

TimeLooper has invested over a million dollars to move beyond a simple 360° player and establish a bespoke playback engine with interactivity. TimeLooper’s engine, when married with the full technical capabilities of TimeLooper’s in-house development team, allows for the distribution of the most immersive and interactive experiences on the market. TimeLooper’s CTO leads all application R&D and development. The team builds all applications on Unity’s 3D platform due to its enhanced capabilities in real time 3D and virtual reality delivery. The core language platform is supported by native developers in Java and Objective-C for mobile devices and back end development for online interactivity.

TimeLooper’s partners have the choice to embed their experiences within their unique channel on TimeLooper’s shared global platform, which is distributed at over two dozen sites around the world to tens of thousands of end users per month, on their own white label platform, or to undertake a hybrid approach. In a hybrid approach, partners’ content can be found on their own app, conferring upon them all of the benefits of their own branded app while at the same time providing the partner access to additional marketing and revenue streams via all TimeLooper users acquired at other sites around the globe.

#### Content Distribution Considerations

- The software platform should be compatible with all VR/AR hardware platforms including Android/iOS apps, Oculus (Facebook) and Samsung so that you have the option to distribute to a wider audience while integrating into on-site locations and classrooms.
- Choose a platform with functionalities that are already built and optimize your budget for content development. Building a new app and/or new functionalities will increase the total cost or reduces the share of budget that is allocated to content development, which is what your customers will “value.”
  - Ensure the platform, be it third party or bespoke, includes *ongoing* operating costs of the technology. Budgeting to build an app is one thing. Who will maintain it?
- Using a third-party platform means the platform will be up to date all the time. Also, this will give access to new technologies for future content development rather than forcing additional investment.

#### **HARDWARE CHOICE:**

VR/AR content can be consumed via Android/iOS mobile devices (smartphones and tablets) and VR/AR headsets (Oculus, Samsung Gear VR, HTC Vive, Magic Leap, Microsoft Hololens). The hardware choice depends on the on-site content interpretive strategy, implementation model, and outreach program.

VR headsets (Oculus, Samsung Gear VR, HTC Vive) deliver a more immersive experience due to their lens quality. They are best used for exhibition integration, similar to digital screens, and for VR arcade implementation (similar to movie screening rooms). AR headsets (Magic Leap, Microsoft Hololens) are still in development and not generally considered to be in the market for on-site implementation yet.

Mobile devices can be used, similar to audio guides that run on Android software in museums, for multiple stop content delivery in VR, AR, audio, video and text format. The devices can be made available to users by the history café or visitors can be asked to download an application to their own smartphones. Mobile devices can also be utilized also used for outreach programs by providing access to history café content outside the institution, such as inside classrooms.



Each hardware option has its own native software platform and the VR / AR player needs to be coded for each.

**SOFTWARE CHOICE:**

TimeLooper’s software platform is compatible with each of the hardware options in the market, allowing partners to avoid making compromises in their interpretation goals and user experiences for different audiences, e.g. regular visitors, school groups, classrooms.

*VR/AR Headset Software:*

TimeLooper provides offline executable files for VR/AR headsets (referred to as an Android Package File, or “APK”). APKs are designed specifically for each hardware platform and enable the hardware to play all the functionalities of TimeLooper feature set. Partners have the option to buy headsets directly from the manufacturers and download TimeLooper’s APKs or TimeLooper can provide predownloaded headsets.

When a partner implements high-end hardware with TimeLooper’s software, it has the choice to allow users to start and stop experiences as they choose or to leverage TimeLooper’s synchronous start mechanism that allows for all visitors to start and finish a given experience at the same time. This software program is typically used for multi-user setups so the operation runs smoothly.

*Mobile Devices Software:*

TimeLooper provides two software platform options, hosting on TimeLooper platform and / or developing a dedicated white-label app.

1. Custom Page on the TimeLooper Mobile Platform

TimeLooper creates a custom-branded channel for partners within TimeLooper’s platform (app, available via iTunes and Android) through which content will be distributed. Access to the content can be governed in the following ways, among others:

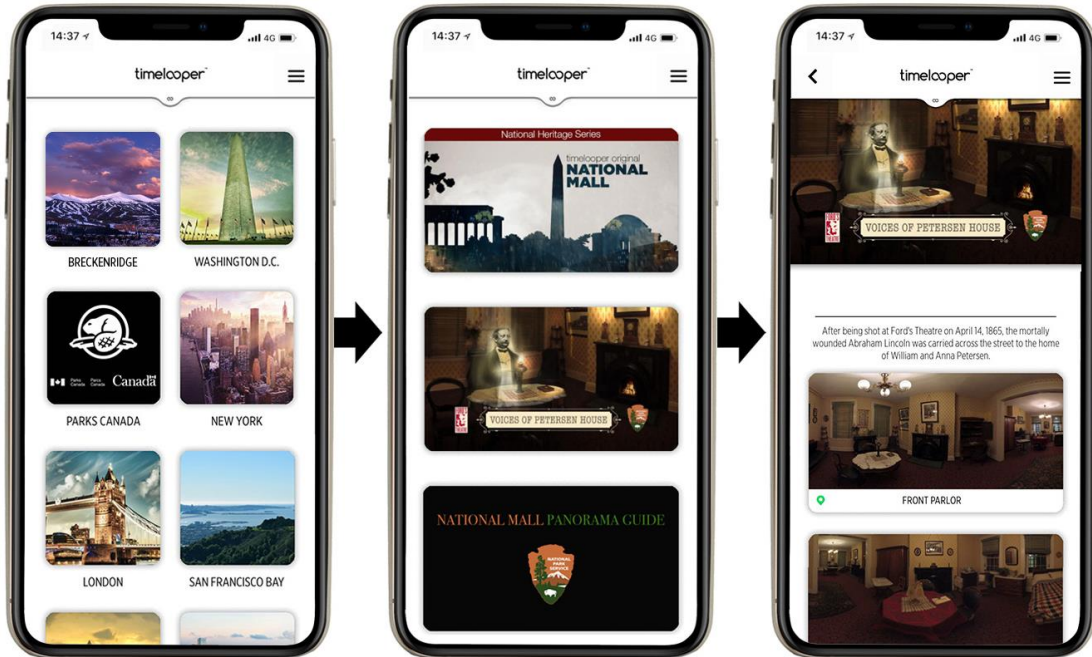
- Provide free access to anybody, anywhere at any time
- Provide free access to people who enter a specific geographic zone by GPS triggering or the scan of a physical marker / QR code (such as a partner or specific consumption point within the history cafe)
- Govern access behind a paywall to those who enter a specific unlock membership code (for example, only those individuals who pay for a specific product such as a walking tour would receive an access code with their ticket)
- Enable remote access through in-application payment via iTunes and Google Play

By utilizing the TimeLooper platform to distribute content directly to its visitors, partners will benefit in the following ways:

- A turnkey solution to facilitate off-site distribution through guided tours or, should partners so allow, self-directed exploration, without having to manage and track rentable hardware
- Proven immersive experience platform. The TimeLooper platform is currently live and in-use at 25+ locations around the world. TimeLooper will be able to share user experience insights during the consultative content design and implementation processes. TimeLooper knows what works and what doesn't. The platform currently hosts 60+ experiences that range from audio, video, virtual reality, augmented reality, images, text, and all combinations of the aforementioned.
- Cross-platform Marketing. All users on the TimeLooper platform (if partners so choose) can have access to the content (or perhaps a limited subset) as a marketing and distribution channel that's completely organic.
- A "future-proof" solution. As TimeLooper continues to expand and develop its platform, partners will receive access to the additional features and updates. These updates will include basic updates like compatibility with Android and iOS software updates, as well as more sophisticated capabilities like augmented and extended reality when partners choose to further extend the scope of their offering.
- More and better content. TimeLooper's platform is an existing solution, so almost all of the budget can go directly to content design, thus offering more experiences and more immersive experiences to their users.

The below highlights a sample user interface from TimeLooper app to show the partner a prospective layout.





- 1) Because the TimeLooper app knows the visitor’s GPS location, they will be placed directly into the museum channel if they launch the app at the partner. For the user who discovers the partner remotely, they will select the partner’s channel from the TimeLooper homepage. The above are illustrative examples from our Washington D.C. content (created for Ford’s Theatre with National Park Service).
- 2) Visitors will then see the experience – one for each of the underlying narratives selected (in the above example, two different content packages for two different tours – National Mall and Petersen House). Visitors will be able to see images on interpretation panels, read about the history, then actually step inside those stories. In the future as the partner expands its virtual and augmented content library, the partner can organize these packages thematically.
- 3) Once the visitor selects an experience, they will see the different points of interest with a map-based user interface. At each Point of Interest (POI), users will also have access to images, written text, and audio orienting them to the POI.
- 4) Visitor will then click “Start” to initiate the immersive experience. Experiences may consist of 360-degree images that use the phones compass to align perfectly on top of the ambient environment if onsite or augmented reality content that aligns to the visitor’s general direction. VR content will be designed for use without a cardboard headset but can also be used with a cardboard headset if the user so chooses; AR content will be designed for use without a headset.

5) Once the visitor is in the VR / AR interface, TimeLooper will deliver a plethora of different content all towards the end goal of immersing the user in the narrative of the institution.

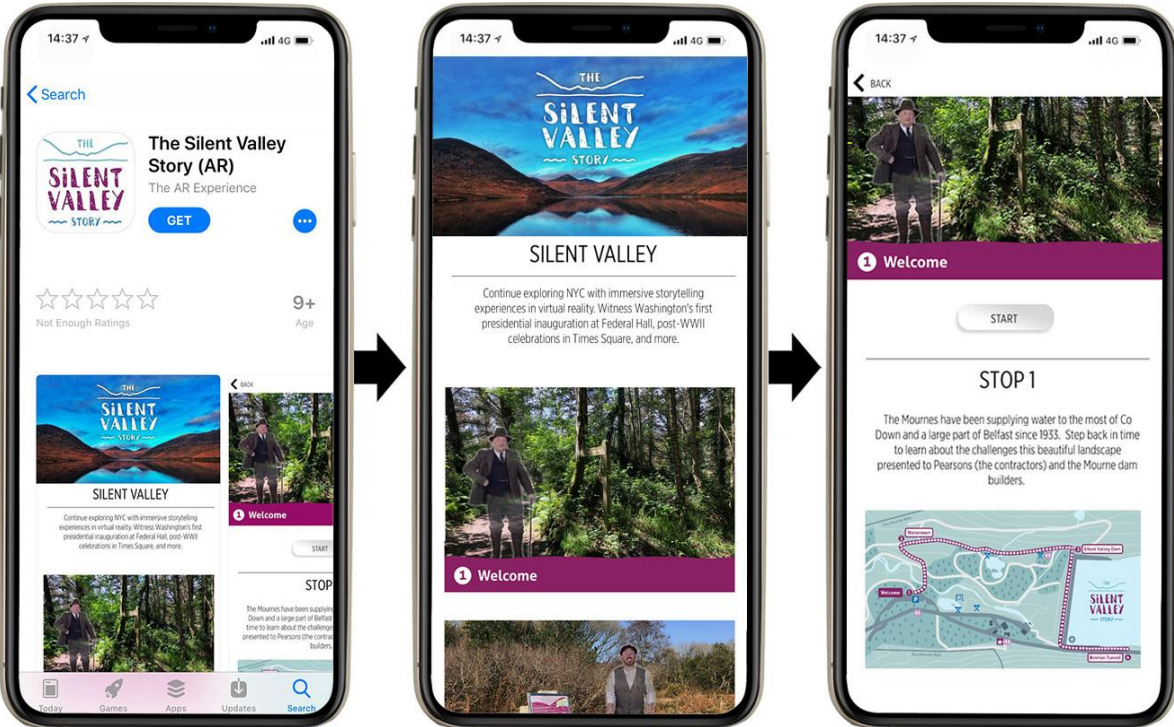
Should the institution choose to make use of TimeLooper’s shared distribution platform, content hosting, maintenance and all proprietary technology licensing will be included at no additional cost for a period of 12 months from project launch.

2. White Label Platform Mobile App

Partners that want a completely customized user experience can ask TimeLooper to develop their own app, compatible with Google Play and Apple. There are two UI options:

A. TimeLooper-style UI:

Partners can have their custom page as it would look inside of the TimeLooper app as a standalone app. All the functionalities can be available in this option. The below is illustrative examples from our Silent Valley app (created by Tourism Northern Ireland and the Mourne Heritage Trust).





B. Tap to Scan UI

TimeLooper also develops seamless tap to scan visitor experience apps. This UI is ideal for multi-stop customer journey design. The technology minimizes the interaction with the mobile device by delivering the interpretive content with a single tap on the screen. The below is illustrative screenshots of this UI.



ENHANCED ACCESSIBILITY FEATURE

The Web Content Accessibility Guidelines (WCAG) are generally recognized as a global standard for digital accessibility with several existing precedents setting that expectation: WCAG is an ISO standard, is the standard of the European Union, and is the standard of Canada. From a legal standpoint, precedent has been set many times, most notably in a landmark 2017 case: A Federal Court in Florida identified the WCAG guidelines as the "industry standard" for website accessibility and found that Winn Dixie Store, Inc., violated the Americans with Disabilities Act by failing to render its website accessible to the sight impaired<sup>5</sup>.

The WCAG guidelines are written specifically for websites, or more specifically, content served over the web using HTML, which is almost always a web-page, meaning WCAG is written with websites or browser-based software applications in mind.

WCAG was written for websites, or more specifically, content served over the web using HTML. The WCAG rules themselves usually refer to content written in markup language. Markup language is either HTML, XML, or XHTML, which means that WCAG is written with websites or browser-based software applications in mind.

Native smartphone applications, of course, use entirely different programming language and none of the content is served by web pages. This means that context and nuance are required to apply WCAG to smartphone applications to determine/distill the concepts of WCAG that can be applied to smartphone application environments.

Mixed-reality applications, of which this product will be, deliver a hybrid combination of virtual reality (virtual objects in a virtual world) and augmented reality (virtual objects in a physical world). Mixed reality combines the two, meaning that users can physically interact with virtual objects.

TimeLooper, regardless of its own platform or custom applications for customers, build on the Unity gaming engine, which provides an incredibly visually-rich and feature-rich experience for the average able-bodied consumer. Unity is the platform of choice for immersive applications and many video games for exactly that reason. However, Unity has one core drawback; because it is non-native (meaning it is not written in the common programming language of the specific operating systems), it cannot take advantage of the native accessibility features of smartphones, such as screenreading software. Additionally, it is difficult to build accessibility features into Unity due to its structure and purpose.

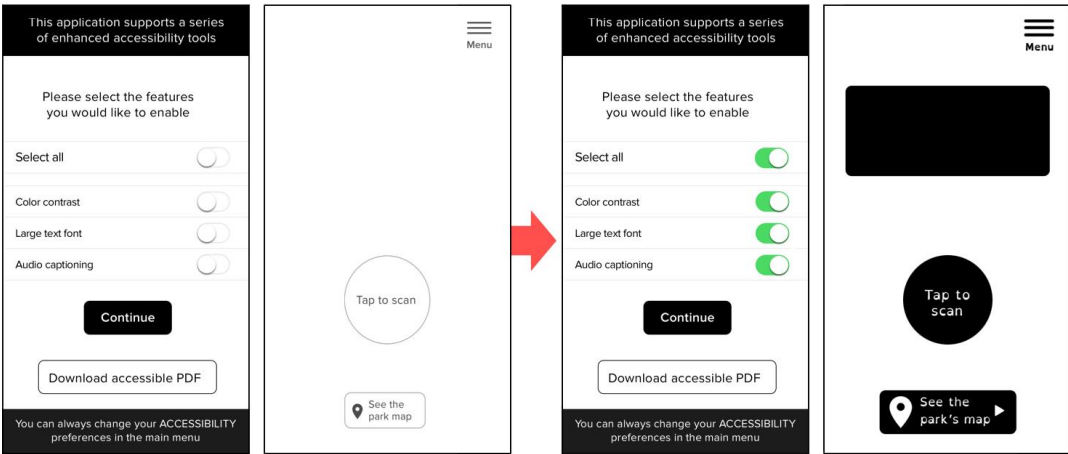
TimeLooper can, however, deploy a series of features that it has developed on Unity to dramatically enhance accessibility, allowing partner institutions to more fully enhance accessibility to those with a spectrum of visual, auditory, motor, and cognitive impairments. Optional integrated features include:

Feature	Accessibility Impact
Black and white color contrast and specialized font	Enable text processing by those with visual impairments such as dyslexia
Large-font text	Enable text processing by those with difficulty reading small text
Audio narration of visual experiences	Enable interpretive knowledge transmission through auditory description of augmented, virtual, and traditional video by those with visual impairments, including blindness



Open / Closed Captioning

Enable interpretive knowledge transmission through captioning for those with auditory impairments, including deafness



**SALES AND MARKETING**

TimeLooper is not a typical “vendor”—we are a collaborative partner in all processes. As such, app and content development are not the extent of our collaboration. We leverage TimeLooper’s deep experience in the complexities of marketing the sophisticated offering that is virtual reality and offer to lead or support campaign design, including strategies and assets.

Examples of campaigns and assets created for partners include:

*Tower Bridge, London*



TimeLooper created promotional videos (see [here](#)) and VR trailers (see Surviving London Experience within the TimeLooper App) to highlight the City of London’s history and promote visitation through all social/digital outlets and to customers acquired through partnerships in, for examples, New York City.



Please refer to this video featuring Chris Earlie’s comments ([here](#)) on TimeLooper (from 1:00).

*National Mall, National Park Service*

TimeLooper is promoted within the National Park Service’s Map and made available to all 30 million visitors to the National Mall. TimeLooper’s in-house design team worked with NPS to design assets highlighting points of experience consumption and to promote the collaboration.



Washington: The Nation's Capital

## Plan Your Visit

**System Map**

Washington Metropolitan Area Transit Authority (WMATA) | 1100 Pennsylvania Avenue, NE | Washington, DC 20002 | 202-637-7000 | www.wmata.com

## National Mall Digital Experiences

**TimeLooper**  
The Immersive Memorials Tour App

TimeLooper and the National Park Service bring you a FREE, self-directed, virtual and augmented reality tour of National Mall Memorials. Unlock history and be inspired as you visit the sites across the National Mall, including:

- WASHINGTON MONUMENT
- LINCOLN MEMORIAL
- LOCKKEEPER'S HOUSE
- THOMAS JEFFERSON MEMORIAL
- MARTIN LUTHER KING, JR. MEMORIAL
- PETERSEN HOUSE AT FORD'S THEATER

Optional virtual reality viewers can be bought at Eastern National Bookstores.

**Vietnam Veterans Memorial Fund**  
Mobile Tour Experience

Interact with the Vietnam Veterans Memorial in a completely immersive way. The tour uses augmented reality and geolocation technology to educate users through videos, stories, a game, and a 360° tour of the National Mall.

**World War II Memorial**  
Mobile Tour

Use your mobile device to tour the World War II Memorial with image recognition and geolocation. The experience includes video war stories, veteran interviews, memorial facts, and a trivia game.

All experiences are available from the Apple iTunes and Google Play stores.

**Emergencies:**  
Call U.S. Park Police  
(202) 610-7500

**Park Regulations**

**Memorial Regulations**

Please respect your National Monuments, Memorials, and Museums. Help keep the National Mall clean.

### VISIT THE VR EXPERIENCE

RELIVE INCREDIBLE MOMENTS IN AMERICAN HISTORY AT THE NATION'S MOST ICONIC MONUMENTS

**timelooper**

Available on the App Store and Google Play

STEP INSIDE HISTORY AT THE TIMELOOPER ACCESSIBLE TENT BY THE REFLECTING POOL

#TimeLooper #TimeLooperDC

### WHILE AT THE NATIONAL MALL EXPERIENCE HISTORY THROUGH VIRTUAL REALITY

Available on the App Store and Google Play

### WHILE AT THE NATIONAL MALL EXPERIENCE HISTORY THROUGH VIRTUAL REALITY

Available on the App Store and Google Play

### STEP INSIDE HISTORY IN VR

Donated by **timelooper**

#### timelooper USER GUIDE

**WHERE**

**HOW**

- Download the app
- Point to the monument
- Point your phone at the monument
- Play the history

#### timelooper NATIONAL HISTORY EXPERIENCE

Use the nation's most iconic monuments as a backdrop to relive incredible moments that shaped American history.

- WOMEN'S SUFFRAGE
- A SOLDIER'S MOMENT
- SERVICE & SACRIFICE
- THE PRIDE OF FREEDOM
- DC OVER TIME
- U.S. AT WAR





After the success of the initial NPS Mall project, NPS collaborated directly with TimeLooper to create supplementary on-site interactive experiences for Petersen House at Ford's Theatre. NPS is in further conversations with TimeLooper to launch additional experiences in Washington, D.C., this summer, including at the Lock Keeper's House (17th & Constitution) and a new Washington Monument experience.

## **TIMELOOPER QUALIFICATIONS**

### **Description of experience in planning, building, and deploying mobile apps & virtual reality experiences.**

At TimeLooper, our technical team consists of veteran game designers, developers and artists, each with well over a decade of experience. TimeLooper excels in real-time 3D experiences developed in a gaming engine to allow for maximum interactivity and immersion. TimeLooper experiences are always developed in stereo 3D, featuring the highest quality models, renderings and technology will allow, but with an eye towards practical implementation. For example, TimeLooper might create an incredibly accurate model of Pearl Harbor in 1941 and create interactive content in 4K quality video. Yet, taking the limitations of today's mobile devices into account, such experiences might be rendered to the

consumer in HD quality and pushed out in monoscopic 2D to maximize the number of consumers whose phones can support a baseline experience. TimeLooper's development team has extensive experience in optimization, both for visuals and coding to stretch the limits of mobile graphics.

Narration and interactivity are equally important and must be in perfect harmony to fully deliver a final experience. Unlike other companies, TimeLooper starts prototyping the product even before the assets are complete and learns as it develops in scrums, allowing for rapid iteration in both the development and content creation spheres. TimeLooper relies heavily on its partners' insights and provides them with access to prototypes as frequently as possible. Once the core experience is roughly complete, TimeLooper's development team will finalize it by extensive testing and polishing visuals.

**List the depth of your development and graphics departments that will be assigned to this project and provide supporting resumes.**

Our core development team has a long history of developing applications for a range of industries, including digital marketing, e-learning, game design, virtual and of course, more recently, augmented reality experiences. The team is comprised of multi-disciplinary veterans who combine their individual specialties under one roof to form the ultimate team of problem-solving professionals. At TimeLooper, the end user experience is central to everything we do.

## **KEY BIOGRAPHIES**

### **ANDREW FEINBERG, PRINCIPAL. PRINCIPAL, LEAD PROJECT MANAGER.**

Andrew has 15 years of global experience in strategy, operations, commercialization and interpretive experiential design. Andrew is a co-founder and principal at TimeLooper, Inc. where he leads client engagements, including interpretive planning, operational strategy and execution, commercialization and project management. Prior to starting TimeLooper, Andrew was the CEO of Courtroom Connect, a streaming media and advanced technology company. Andrew has also served as the Chief Strategy Officer of the Consumer Financial Protection Bureau. Andrew holds a B.A. in history from Middlebury College and an MBA from Harvard Business School.

### **YIGIT YIGITER, PRINCIPAL. LEAD CUSTOMER ENGAGEMENT STRATEGIST.**

Yigit has 17 years of global experience in marketing, strategy, product development, user experience and interpretive experiential design. Yigit is a co-founder and principal at TimeLooper, Inc. where he leads client engagements, including interpretive planning, operational strategy and execution, commercialization and project management. Prior to starting TimeLooper, Yigit was the Chief Strategy and Marketing Officer of Pronet, a smart home automation company. Yigit has also served as the



Global Marketing Strategy Manager at Dell, Inc. and European Brand Manager at Unilever. Yigit holds an MBA from Harvard Business School.

**TONY LANDAIS, VFX SUPERVISOR**

Tony is the company's VFX Supervisor across all major projects.

With a strong footprint in VFX industry, Tony has a vision and capability to identify and master new technologies, including virtual reality. Tony has helped lead the way in virtual reality, by creating content for several key VR projects, such as Visualise's Rotary project, The Washington Mall, Ellis Island Museum in New York, Angkor Wat in Cambodia and Tower Bridge in London.

After studying Fine Art in Paris, Tony began his career in broadcast, where he cut his teeth creating 3D characters for TV. In 2003, Tony moved to London, where he was part of a team who was responsible for porting the classic video game, Worms, from 2D to 3D. Tony quickly moved on from video games to work for the renowned VFX house, Glassworks. While there, Tony crafted visual effects and animation for several major feature films and adverts. He was soon leading 3D teams on high profile music videos (Robbie Williams's Radio), commercial campaigns (BMW, Ford, Nissan), and feature film's such as Tarsem Singh's highly-acclaimed, The Fall.

**TURHAN YIGITBASLI, CTO, LEAD DEVELOPER. COMPUTER ENGINEER**

Turhan has been a game development professional for 20 years. He ran his own game studio for 8 years before joining TimeLooper in his current role as the Chief Technical Officer. Turhan is a regular guest lecturer on the university circuit on alternative realities, artificial intelligence and game design.

**ALPER ÖZYURTLU, CHIEF CREATIVE OFFICER**

Alper is on the founding team of TimeLooper. Prior to working at TimeLooper, Alper worked in advertising as a freelance designer. He built on his post production, motion graphics and visual effects experience by turning to feature films and commercials. In 2008, he began directing music videos. In 2009, together with his brother Caner Ozyurtlu, he established a film production company called AC Film. In 2010, AC film produced its first feature film 'Ev', with many more since then. Alper has directed and produced many acclaimed feature films and TV projects. He's won multiple awards in various European film competitions.

**CEREN GULTEKIN, HEAD OF ART AND DESIGN**

Ceren has 15 Years of global experience in communication design, art direction, marketing and advertising design and corporate identity design. Prior to joining TimeLooper, Ceren served as the head of art and senior art director at top global agencies like TBWA, Publicis, Lowe, and EuroRSCG in Istanbul, Amsterdam and Singapore. Ceren is a 2 times best art direction winner Crystal Apple awards, corporate design winner GKM awards and best campaign winner Epica Awards. Top 3 in Young Cannes

Lions for best campaign design. Top 3 in Young Cannes lions for best web site design. Ceren is also a guest lecturer in Bogaziçi University in communications, marketing, and advertising.



## **PARTNERSHIP EXAMPLES**

### **PEARL HARBOR**

**Project:** Pearl Harbor (Honolulu, HI, USA)

**Delivery TimeLine:** 8 months

**Contact:** Tom Gerrish, Head of Digital Engagement and Technology, Pacific Historic Park / [tgerrish@pacifichistoricparks.org](mailto:tgerrish@pacifichistoricparks.org) / +1 808-983-9583

Visitors to Pearl Harbor are able to learn about the events of December 7 and even view the USS Arizona from the Memorial above the waterline in the harbor. Visitors are not, however, able to understand the grandeur and power of the USS Arizona as it was prior to its bombing and subsequent sinking. Moreover, visitors to the Memorial oftentimes inquire about the current physical state of the USS Arizona—which currently serves as a living memorial—as it presently rests on the harbor floor.

TimeLooper, the National Park Service, and Pacific Historic Parks collaborated to develop an on-site experience that enables visitors to experience the triumph and tragedy of the USS Arizona before and after December 7. The first experience, *Walk the Deck*, takes the user on a guided tour of a historically accurate virtual USS Arizona, allowing the user to explore every inch of the ship, from stern to bow. The Arizona was created in an accurate portrayal of the Harbor at 7:55am on December 7. The user is surrounded by Japanese dive bombers and bombed nearby ships, such as the USS Vestal, USS West Virginia, and USS Nevada.



The second experience is a shipwreck dive, taking the user on a detailed tour of the USS Arizona as it lies presently on the Harbor floor in the *Underwater*. TimeLooper utilized a scatter plot scan of the harbor to ensure historical accuracy of the Arizona's footprint. Thereafter, it completely rebuilt the superstructure of the ship on top of the GIS scan and textured the environment as it looks based in underwater photographs.



Pearl Harbor markets its VR experience as an upsell option to visitors. While there is no admission fee for the museum, the visitors can purchase tickets for the VR zone and watch the experiences via preloaded VR headsets. 18% of park visitors choose to pay to access the VR experience during their visit.



## **TOWER BRIDGE, LONDON**

**Project:** The Tower Bridge Exhibition (London, UK)

**Delivery TimeLine:** 4 months

**Contact:** Chris Earlie, Head of Tower Bridge / Christopher.Earlie@cityoflondon.gov.uk +44 (020) 7940 3969

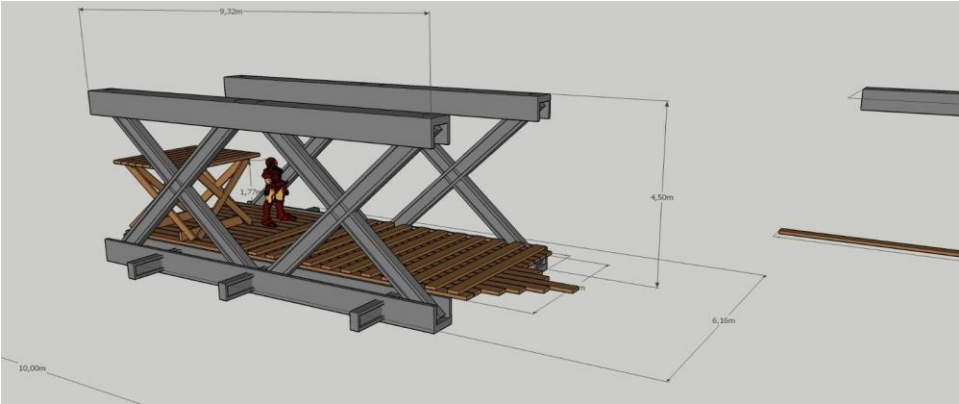
The Tower Bridge Exhibition hired TimeLooper to create immersive experiences for its museum section, with the goal increasing visitor numbers, controlling visitor matriculation, increasing revenue and integrating Tower Bridge into city-wide campaigns.

TimeLooper's Tower Bridge experience enables visitors to see the City of London at different periods in history and The Bridge at different stages of operation. Visitors can view the Great Fire of 1666 spread throughout the city, re-live the construction of the bridge from the catwalk in 1891, and watch the steam engines grind into action in the engine room for a bridge lift in the early 20<sup>th</sup> century (before the bridge's electrical overhaul).

To begin designing the experiences, TimeLooper worked directly with Dirk Bennett (Head of Interpretation) and Adam Blackwell (Head Exhibition Manager). The process began with an extensive research period and documentation study at their direction to understand the time period and content focus. Tower Bridge supplied TimeLooper with a breadth of historical primary sources highlighting the Victorian Period in London and the construction of Tower Bridge.

These resources allowed the TimeLooper team to begin remodeling the construction of the Bridge and the surrounding area of London in 1892.

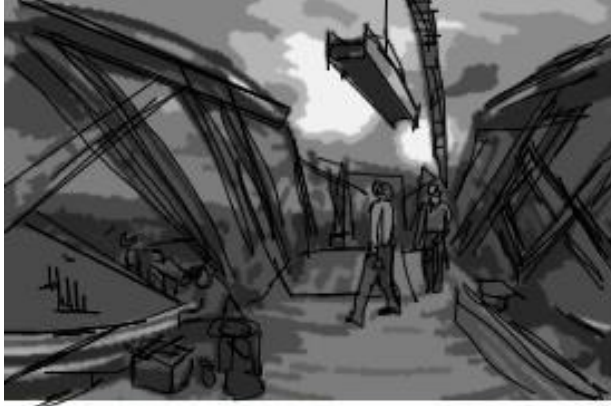








Once the historical recreation of the surrounding environment was agreed upon, the TimeLooper team then moved into the production phase to begin capturing live action in the studio and bring the stories to life.



To view the end product, please visit the TimeLooper App  
(London > Tower Bridge > Tower Construction).

The viewership data from the Tower Bridge <> TimeLooper partnership lends credence to the anecdotal feedback that's outlined below.

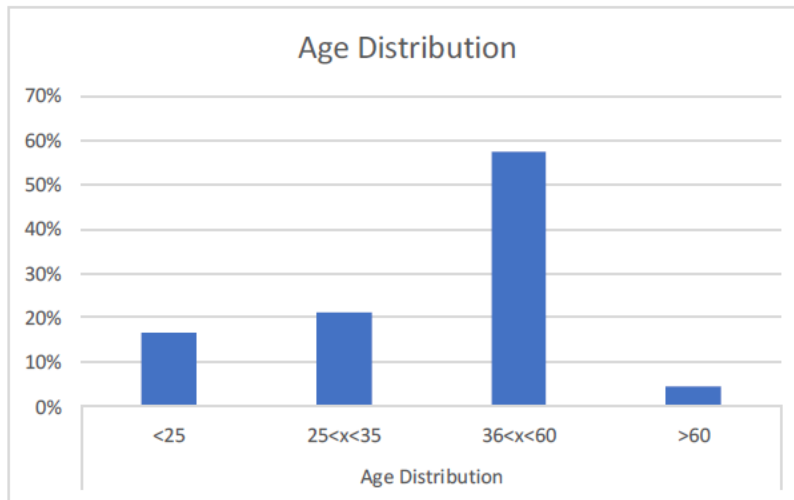
When the on-site experience is facilitated, experience penetration rates are in excess of 14.6%. Of these 14.6% of Tower Bridge's 850,000 annual visitors, the average view rates for the content is 1.4x. This



means visitors find the content so compelling they're viewing it multiples times before matriculating onward in the exhibition.

Who are these 124,100+ annualized visitors that are interacting with TimeLooper?

TimeLooper's largest demographic is families with kids. Of all family groups entering the exhibition, 40.6% purchase TimeLooper. This creates a purchasing demographic that is 50% 35-60 years old (mostly parents/grandparents purchasing for the family).



"It was an amazing experience, revolutionary really" -Sam, 32, English

"I have to show this to my grandson. I can't wait to bring him back here" -Francois , 65, France

"I've always wanted to try VR. I came here for this experience. It was even better than I thought"-  
Silvano, 13, Switzerland

**Tower Bridge Staff Feedback**

Tower Bridge Staff love the TimeLooper experiences. The staff sees the joy and engagement that comes from these immersive mediums. It not only helps the site tell it's story, but also facilitates the types of interactions the staff have with visitors – through intentional thought provocation. The virtual reality content engages a wider audience and in deeper way. Visitors interact with staff more frequently and the quality of those interactions are better. Below is some of the staff feedback.

"I think Timelooper really adds a lot to what we offer here at Tower Bridge. I'd love to see more of this type of content." Male , 60s

“I think having Timelooper here really gets people interested in the history of the place. I see more and more people enthusiastic about Tower Bridge after viewing the VR experiences. It connects them with the history in a new and powerful way, which makes people curious. It provokes more engaging and better questions when they come to speak with us. All in all, I think it’s a really good change.”

Male , 40s

“I’ve seen the experiences and they’re great. Seriously. It’s a good add-on to Tower Bridge. It’s a nice thing to offer to our visitors as well. It helps you really get and experience not only the history of the bridge but also the whole city of London.” Male, 60s



## NATIONAL MALL, WASHINGTON DC

**Project:** The National Mall (Washington DC, USA)

**Delivery TimeLine:** 5 months

**Contact:** Paul Ollig, Chief of Interpretation and Education / National Mall & Memorial Parks National Park Service / [paul\\_ollig@nps.gov](mailto:paul_ollig@nps.gov) / +1 202-603-8974

Visitors to the National Mall in Washington, DC easily take in the beauty of the monuments and memorials of the National Mall, but the Mall's limitations in terms of exhibition development leave a large gap between the history the monuments represent and what visitors actually learn about the people / moments behind them.

TimeLooper and NPS collaborated to develop an on-site experience that highlights the history of seven iconic landmarks at the National Mall through immersive virtual reality storytelling. TimeLooper collaborated with NPS's interpretation team to ensure historical accuracy of all content. The National Parks service opened up their historical archives and provided insight and direction for the collaboration.

KOREAN WAR VETERANS MEMORIAL



FRANKLIN D. ROOSEVELT MEMORIAL



MARTIN LUTHER KING MEMORIAL



To view the end product, please visit the TimeLooper App  
(Washington, DC > National Mall Heritage Series).

**ANGKOR WAT, CAMBODIA**

**Project:** Angkor Wat (Siem Reap, Cambodia)

**Delivery TimeLine:** 6 months

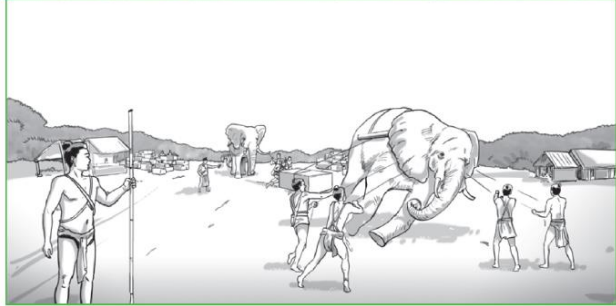
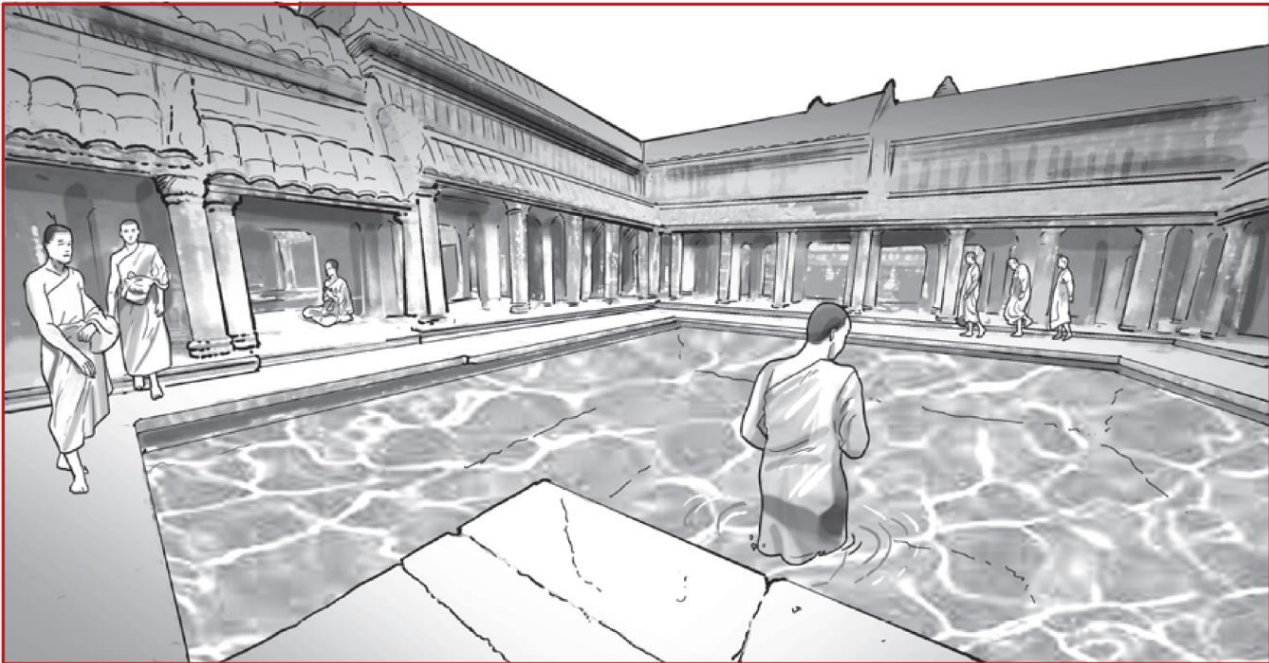
TimeLooper recently launched a partnership with Ministry of Tourism in Cambodia, which sought a partner to help design immersive experiences for their nearly 3 million annual visitors to Angkor Wat UNESCO Heritage Site. Their aspiration was to bring the stories of the Khmer Empire to life in a new and engaging way.

In addition to creating a “wow” factor for visitors that reaffirmed the Ministry’s commitment to modernizing the on-site experience, conservation of the assets and culture was of the utmost importance. The Ministry connected TimeLooper with the Apsara Heritage Authority to help design the experiences and preserve the pedagogical and historical accuracy of the Khmer capital city.



The experience is available for all visitors to purchase as a top up to their ticket price. The revenue from the sales is shared between TimeLooper and The Cambodian Government, with portion of all revenue carved off for site preservation.





To view the end product, please visit the TimeLooper App  
(Siem Reap > Angkor Wat).

## CLIENT REFERENCES



### NATIONAL PARK SERVICE

TimeLooper has been a great pleasure to work with. Their team of extremely talented designers and developers has provided our visitors with a way to experience the National Mall that is new and innovative. What once may have been an abstract, opaque experiences are now deeply personal, understandable and memorable. We look forward to working with them on future projects.

GLENN KLAUS

Interpretive Media Specialist, National Mall & Memorial Parks  
900 Ohio Drive, SW, Washington, DC 20024 Cell: (202) 853-2433



### EXPERIENCE THE RIDE

To Whom It May Concern:

When The Ride, LLC. decided to create a virtual reality experience to add to its portfolio of critically acclaimed and award-winning productions, as CEO/CCO, I commenced a search for a partner of extraordinary creative vision, technological expertise and the ability to bring the past vividly, accurately and emotionally alive through VR. We found that partner in TimeLooper and its amazing team. Since our launch of The Downtown Experience in April 2017, we have had ongoing conversations with them on a variety of joint opportunities. The Ride, LLC. considers TimeLooper to be first in class of its competition. Our collaboration has the reviews and viral acclaim to prove it.

Sincerely,

RICHARD HUMPHREY

CEO/CCO The Ride, LLC"

545 8th Ave., Ste 1450, New York NY 10018

646-661-7699 x152 Cell: 908-510-6765





## **TOWER BRIDGE**

I am delighted to endorse TimeLooper for your project based on the City of London's experience working with them to integrate a VR experience for visitors to Tower Bridge. From the outset of ideas through to implementation, their team were both hugely innovative and incredibly practical in terms of delivering the desired product, and quite often in the face of the extreme technological and logistical issues which a Victorian bridge on one of London's busiest transport network presents!

TimeLooper provided a unique approach to our working partnership: investing themselves fully in the heritage of the Bridge, which is evident in the accuracy and quality of the VR provided, resulting in both a respectful and engaging immersive experience, and also investing themselves in our partnership and considering the impact on the visitor in relation to the wider visitor experience at Tower Bridge.

I would thoroughly recommend them to any world class visitor provision seeking a world class VR experience.

**CHRIS EARLIE**

Head of Tower Bridge

Tower Bridge, London SE1 2UP

Cell: 020 7940 3969 Web: [www.towerbridge.org.uk](http://www.towerbridge.org.uk) / [Christopher.Earlie@cityoflondon.gov.uk](mailto:Christopher.Earlie@cityoflondon.gov.uk)

**PROJECT SCOPE AND BUDGET FOR THE OWEN NAWN FACTORY, ROXBURY/BOSTON**

Development of a detailed budget is difficult at this stage because projects are typically divided into a two-phased approach—first interpretive plan development followed by a production budget that is predicated upon the interpretive journey and media designed articulated within the interpretive plan. The principles of caveat emptor apply to the following, particularly phase II.

TimeLooper envisions a two-phased approach:

- Phase I: Interpretive plan development, including laying the groundwork, extensive community engagement, theme development and audience definition, and experience and implementation plan development.
- Phase II: Production of all interpretive assets, back end technology, marketing assets, and installation.

**PHASE I**

Phase I is projected to include the following activities and deliverables:

Interpretive Step	Activities	Key Deliverables
Lay the Groundwork	<ul style="list-style-type: none"> <li>○ TL + HB identify key stakeholders, internal and external</li> <li>○ Leadership roundtables / workshops</li> </ul>	<ul style="list-style-type: none"> <li>○ Mission / Vision Statements</li> <li>○ Program Goals Statement</li> <li>○ List of target external organizational stakeholders</li> </ul>
Engage Stakeholders	<ul style="list-style-type: none"> <li>○ Facilitate workshops with key community groups to understand their desires and expectations for public and history cafe</li> <li>○ Compile and analyze feedback</li> </ul>	<ul style="list-style-type: none"> <li>○ Statement of preferences from stakeholders on uses for physical space</li> <li>○ Statement of preferences from stakeholders on key interpretive themes</li> <li>○ Identification of representatives from stakeholder groups who will participate in theme development</li> </ul>
Develop Themes and Assess Target Audience	<ul style="list-style-type: none"> <li>○ Identify and sort stories</li> <li>○ Link stories and physical world</li> <li>○ Identify meanings</li> <li>○ Define broad concepts</li> <li>○ Prioritize</li> <li>○ Develop concepts</li> <li>○ Wordsmith</li> </ul>	<ul style="list-style-type: none"> <li>○ Defined themes</li> <li>○ Interpretive matrix</li> </ul>



	<ul style="list-style-type: none"> <li>○ Engage stakeholders to explore possible audience and goals for each audience</li> </ul>	<ul style="list-style-type: none"> <li>○ Defined audiences</li> </ul>
Develop Experiences and Implementation Plan	<ul style="list-style-type: none"> <li>○ Plot experience types (cognitive, emotional, participatory, sensory)</li> <li>○ Develop visitor experience objectives (what do we want visitors to do, see, and experience?)</li> <li>○ Define experience engagement types, person to person and media-based (interpretation panel, video, AR, VR)</li> </ul>	<ul style="list-style-type: none"> <li>○ Interpretation plan</li> </ul>

Once the interpretive plan has been authored, socialized, and finalized, TimeLooper will proceed onto implementation.

**PHASE II**

Phase II, implementation, will depend upon the outcomes of the engagement and interpretive planning process. A hypothetical comprehensive implementation could look as follows:

- Installation of four permanent interpretive panels within / adjacent to the history cafe
- Installation of four augmented reality viewing windows from key vantage points that show the Roxbury Neck landscape at key points in time
- Creation of a walking augmented reality map that as the user walks the streets of Roxbury, they can overlay the land / sea footprint at a key moment in time
- Installation of an interpretive panel in the park across from the Nawn Factory that details the former structure; interpretive panel will also call to action to launch an experience that, utilizing augmented reality, will deploy a “virtual” reconstruction of the former building that sat on that location.

**ESTIMATED BUDGET:**

Phase I: Planning			
Principal Rate	\$215		
Project Manager Rate	\$150		
Phase	Principal Hours	Project Manager Hours	Total Cost
Lay the Groundwork	4	12	\$2,660
Engage Stakeholders	32	48	\$14,080
Develop Themes & Assess Target Audiences	20	40	\$10,300
Develop Experiences & Implementation Plan	20	40	\$10,300
		Sub-Total-->	\$37,340
Phase II: Development			
Asset	Cost / Unit	Estimated Units	Total Cost
In-Building Interpretive Panel Design	\$2,500	4	\$10,000
In-Building Interpretive Fabrication Design	\$250	4	\$1,000
Park Interpretive Panel Design	\$2,500	1	\$2,500
Park Interpretive Panel Fabrication	\$900	1	\$900
AR Windows	\$22,500	4	\$90,000
AR Window Tablets	\$300	4	\$1,200
Roxbury Neck AR Map	\$17,500	1	\$17,500
Park AR Model of Previous Structure	\$19,000	1	\$19,000
		Sub-Total-->	\$142,100
		Estimated Total-->	\$179,440
Contingency	15%		\$26,916
		<b>Estimated Grand Total</b>	<b>\$206,356</b>
Optional White-Label H.B. Mobile Application			
Item			Estimated Cost
UX / UI Design, Including Accessible UX / UI			\$10,000
Back End Development			\$27,500
Front End Standard Implementation			\$10,000
Front End Accessibility Implementation			\$10,000
		Sub-Total-->	\$57,500
Contingency of 20%			\$11,500
		<b>Estimated Grand Total--&gt;</b>	<b>\$69,000</b>
Estimated On-Going O&M			
Item	Rate / Month		
White Label Offline Application Software License & Support	\$1,500		
TimeLooper Mobile App Software Licensing	\$350		
TimeLooper On-Site Software Licensing	\$350		