

**Comprehensive Permit  
Site Approval Application  
61 Beach Road  
Map 9, Block B, Lot 18  
Vineyard Haven, MA  
June 21, 2019**



**Submitted by:**

**Harborwood LLC.  
Applicant  
Mayflower Lane  
Vineyard Haven, MA 02568  
508.696.1900**

**Dean E. Harrison  
Consultant  
59 Lockwood Ave.  
Attleboro, MA 02703  
508.813.1388**

**Comprehensive Permit Site Approval Application  
61 Beach Road  
Vineyard, MA 02568**

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Site Approval Application  
61 Beach Road

Cover Letter

**Dean E. Harrison  
59 Lockwood Avenue  
Attleboro, MA, 02703  
(508) 813.1388**

June 21, 2019

Michael Busby  
40B Specialist  
Masshousing  
One Beacon Street, 5th Floor,  
Boston, MA 02108

RE: Site Approval Application  
61 Beach Road,  
Vineyard Haven, MA 02568

Dear Mr. Busby:

Harborwood LLC is pleased to submit to Masshousing our application for a Comprehensive Permit Site Approval.

The property is identified as Assessors Map 9, Block B, Lot 18 containing approximately 1.75 +/- acres. We are proposing 68 homeownership of which 17 will be affordable for families at/or below 80% of AMI.

The Sponsor has previously met with the Town's Officials on October 4, 2018. The Sponsor discussed their proposed plans for the site. In addition, the Sponsor had additional one-on-one meeting with the 3 Selectpersons along with numerous meetings with the Martha's Vineyard Commission and Sewer Advisory Board.

The Sponsor would like to request a waiver that MassHousing commission an appraisal for the property. The Sponsor acquired this property through an order from the Federal Bankruptcy Court. Just prior to our acquisition of the property the Federal Bankruptcy Court ordered an appraisal from a certified Appraiser. The Sponsor have included a copy of the Executive Summary of the appraisal dated July 11, 2017.

We are hopeful that the Masshousing will look favorable upon the application and approve our request for Site Approval. Feel free to contact us if you have any questions. Thank you for your attention to this matter. We look forward to hearing from you soon.

Sincerely,



Dean E. Harrison  
Consultant

cc: Melinda F. Loberg, Chairperson, Board of Selectman, Town of Vineyard Haven  
Janelle Chan, Undersecretary, DHCD.  
Robert Sawyer, Harborwood LLC  
Sam Dunn, Harborwood LLC



Site Approval Application  
61 Beach Road

Application for Homeownership



## **Comprehensive Permit Site Approval Application/**Homeownership****

[www.masshousing.com](http://www.masshousing.com) | [www.masshousingrental.com](http://www.masshousingrental.com)

## Comprehensive Permit Site Approval Application/Homeownership

Attached is the Massachusetts Housing Finance Agency ("MassHousing") application form for Project Eligibility/Site Approval ("Site Approval") under the state's comprehensive permit statute (M.G.L. c. 40B, Sections 20-23 enacted as Chapter 774 of the Acts of 1969) known as "Chapter 40B". Developers seeking a comprehensive permit to construct affordable housing under Chapter 40B and intending to use a MassHousing financing program or financing through the New England Fund ("NEF") program must receive Site Approval from MassHousing. This approval (also referred to as "project eligibility approval") is a required component of any comprehensive permit application to be submitted to the local Zoning Board of Appeals of the municipality in which the development is to be located.

As part of its review of your application, MassHousing will conduct an inspection of the site and will solicit comments from the relevant municipality. MassHousing will consider any relevant concerns that the municipality might have about the proposed project or the developer. The applicant is encouraged, therefore, to make contact with the municipality prior to submitting the Site Approval application in order to ensure that the applicant understands any concerns that the municipality may be likely to raise regarding the proposed development.

In order for a project to receive Site Approval, MassHousing must determine that (i) the applicant has sufficient legal control of the site, (ii) the applicant is a public agency, non-profit organization or limited dividend organization, and (iii) the applicant and the project are generally eligible under the requirements of the MassHousing program selected by the applicant, subject to final eligibility review and approval. Furthermore, MassHousing must determine that the site of the proposed project is generally appropriate for residential development (taking into consideration municipal actions previously taken to meet affordable housing needs) and that the conceptual project design is generally appropriate for the site. In order for MassHousing to be able to make these findings (required by 760 CMR 56.04 (4)), it is important that you answer all questions in the application and include all required attachments.

**Please note that MassHousing requires that all applicants meet with a member of our 40B Department staff before submitting their application. Applications for any projects that have not been the subject of a required pre-application meeting will not be accepted or processed.**

Upon completion of its analysis, MassHousing will either issue a Site Approval Letter that approves, conditionally approves or denies the application. If the application is approved, the applicant should apply to the Zoning Board of Appeals within two years from the date of the Site Approval Letter (unless MassHousing extends such term in writing).

Please note that Site Approval from MassHousing does not constitute a loan commitment by MassHousing or any other financing program. All potential MassHousing financing is subject to further review and underwriting by MassHousing's Rental Lending Department.

Please be sure you have familiarized yourself with all of the applicable requirements set forth in the Chapter 40B regulations and guidelines, which can be found at

<http://www.mass.gov/hed/economic/eohed/dhcd/legal/regs/760-cmr-56.html> and  
[www.mass.gov/hed/docs/dhcd/legal/comprehensivepermitguidelines.pdf](http://www.mass.gov/hed/docs/dhcd/legal/comprehensivepermitguidelines.pdf).

Instructions for completing the Site Approval Application are included in the application form which is attached. The completed application form and all additional documentation should be sent, after your pre-application meeting has been held, to:

**Gregory Watson, Manager of Comprehensive Permit Programs**  
**MassHousing, One Beacon Street, Boston, MA 02108**

We look forward to working with you on your proposed development. Please contact Gregory Watson at 617-854-1880 or [gwatson@masshousing.com](mailto:gwatson@masshousing.com) to discuss scheduling your pre-application meeting or if there is any assistance that we can provide in the meantime to make your application process a smooth and efficient one.

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### **Our Commitment to You**

MassHousing recognizes that applicants seek some measure of predictability regarding the timeframe for our processing of their applications. Our staff will endeavor to adhere to the following schedule for reviewing applications for site approval:

Within two (2) business days of receipt of your application (provided that you have attended a required pre-application meeting) a member of our staff will notify you of any of the items listed on the checklist at the end of the application form that were missing from your application package. Please note that our acknowledgement of receipt of an item does not indicate that any substantive review has yet taken place.

**If your application package is missing any of the items indicated on the checklist by an asterisk, we will not be able to continue processing your application until such items are received.**

If we have received the information which is crucial to the commencement of our review process, we will proceed to (i) give the municipality a period of thirty (30) days in which to submit comments relating to your proposal, (ii) schedule and conduct a site visit, and (iii) solicit bids for and commission and review an "as is" appraisal of your site.

If during our review of your application package we determine that additional information or clarification is needed, we will notify you as soon as possible. Depending on when we receive such additional information, this may affect the amount of time required for MassHousing to complete the site approval process.

Assuming that your application package was complete and that you respond in a timely manner to requests for additional information or clarification, we would expect to issue or deny your site approval within 60 days of our receipt of your application package.



**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Homeownership Projects**

*Please be sure to answer ALL questions. Indicate “N/A”, “None” or “Same” when necessary.*

**Section 1: GENERAL INFORMATION** (also see Required Attachments listed at end of Section 1)

Name of Proposed Project: \_\_\_\_\_

Municipality: \_\_\_\_\_

Address of Site: \_\_\_\_\_

Cross Street (if applicable): \_\_\_\_\_

Zip Code: \_\_\_\_\_

Tax Parcel I.D. Number(s) (Map/Block/Lot): \_\_\_\_\_

**Name of Proposed Development Entity** (typically a single purpose entity): \_\_\_\_\_

Entity Type: Limited Dividend Organization \_\_\_\_\_ Non-Profit\* \_\_\_\_\_ Government Agency \_\_\_\_\_

*\* If the Proposed Development Entity is a Non-Profit, please contact MassHousing regarding additional documentation that must be submitted.*

Has this entity already been formed? Yes \_\_\_ No \_\_\_

**Name of Applicant** (typically the Proposed Development Entity or its controlling entity or individual): \_\_\_\_\_

Applicant's Web Address, if any: \_\_\_\_\_

Does the Applicant have an identity of interest with any other member of the development team or other party to the Proposed Project? Yes \_\_\_ No \_\_\_ If yes, please explain: \_\_\_\_\_

**Primary Contact Information** (required)

Name of Individual: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

Name of Company (if any): \_\_\_\_\_

Street Address: \_\_\_\_\_

City/Town/Zip: \_\_\_\_\_

Telephone (office and cell) and Email: \_\_\_\_\_

**Secondary Contact Information** (required)

Name of Individual: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

Name of Company (if any): \_\_\_\_\_

Street Address: \_\_\_\_\_

City/Town/Zip: \_\_\_\_\_

Telephone (office and cell) and Email: \_\_\_\_\_

**Additional Contact Information** *(optional)*

Name of Individual: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

Name of Company *(if any)*: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/Town/Zip: \_\_\_\_\_

Telephone *(office and cell)* and Email: \_\_\_\_\_**Anticipated Financing:** MassHousing \_\_\_\_ NEF Bank \_\_\_\_

Name of NEF Bank: \_\_\_\_\_

Total Number of Units \_\_\_\_ # Affordable Units \_\_\_\_ # Market Rate Units \_\_\_\_

Age Restricted? Yes ☐ No ☐ If Yes, 55+ ☐ or 62+ ☐**Brief Project Description (150 words or less):****Required Attachments Relating to Section 1****1.1 Location Map**

Provide a USGS or other form of map clearly marked to show the site's location, and an approximate property boundary.

**1.2 Tax Map**

Provide a copy of municipal tax map (assessor's plan) with subject parcels and parcel ID #'s clearly identified.

**1.3 Directions**

Provide detailed written directions to the site, noting the entrance to the site, relevant boundaries and any prominent landmarks that can be used for identification purposes.

## Application for Chapter 40B Project Eligibility/Site Approval for MassHousing-Financed and New England Fund (“NEF”) Homeownership Projects

### Section 2: EXISTING CONDITIONS / SITE INFORMATION (also see Required Attachments listed at end of Section 2)

*In order to issue Site Approval, MassHousing must find (as required by 760 CMR 56.04 (4)) that the site is generally appropriate for residential development.*

Name of Proposed Project: \_\_\_\_\_

#### Buildable Area Calculations

Sq. Feet/Acres (enter “0” if applicable—do not leave blank)

Total Site Area	
Wetland Area	
Flood/Hazard Area	
Endangered Species Habitat (animal and/or plant)	
Conservation/Article 97 Land	
Protected Agricultural Land	
Other Non-Buildable (Describe)	
Total Non-Buildable Area	
Total Buildable Site Area	

Current use of the site and prior use if known:

Is the site located entirely within one municipality? Yes \_\_\_\_ No \_\_\_\_

If not, in what other municipality is the site located? \_\_\_\_\_

How much land is in each municipality? (the Existing Conditions Plan must show the municipal boundary lines) \_\_\_\_\_

Current zoning classification and principal permitted uses:

#### Previous Development Efforts

Please list (on the following page) any previous applications pertaining to construction on or development of the site, including (i) type of application (comprehensive permit, subdivision, special permit, etc.); (ii) application filing date; (iii) date of denial, approval or withdrawal. Also indicate the current Applicant’s role, if any, in the previous applications. Note that, pursuant to 760 CMR 56.03 (1), a decision of a Zoning Board of Appeals to deny a Comprehensive Permit, or (if the Statutory Minima defined at 760 CMR 56.03 (3) (b or c) have been satisfied) grant a Comprehensive Permit with conditions, shall be upheld if a related application has previously been received, as set forth in 760 CMR 56.03 (7).

To the best of your knowledge, has this site ever been rejected for project eligibility/site approval by another subsidizing agency or authority? \_\_\_\_\_

Existing Utilities and Infrastructure	Yes/No	Description
Wastewater- private wastewater treatment		
Wastewater - public sewer		
Storm Sewer		
Water-public water		
Water-private well		
Natural Gas		
Electricity		
Roadway Access to Site		
Sidewalk Access to Site		
Other		

Describe surrounding land use(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Surrounding Land Use/Amenities	Distance from Site	Available by Public Transportation?
Shopping Facilities		
Schools		
Government Offices		
Multi-Family Housing		
Public Safety Facilities		
Office/Industrial Uses		
Conservation Land		
Recreational Facilities		
Houses of Worship		
Other		



List any public transportation near the Site, including type of transportation and distance from the site:

### **Site Characteristics and Development Constraints**

*Please answer "Yes", "No" or "Unknown" to the following questions. If the answer is "Yes" please identify on Existing Conditions Plan as required for Attachment 2.1 and provide additional information and documentation as an attachment as instructed for Attachment 2.4, "Documentation Regarding Site Characteristics/Constraints."*

Are there any easements, rights of way or other restrictions of record affecting the development of the site? \_\_\_\_\_

Is there any evidence of hazardous, flammable, or explosive material on the site? \_\_\_\_\_

Is the site, or any portion thereof, located within a designated flood hazard area? \_\_\_\_\_

Does the site include areas designated by Natural Heritage as endangered species habitat? \_\_\_\_\_

Are there documented state-designated wetlands on the site? \_\_\_\_\_

Are there documented vernal pools on the site? \_\_\_\_\_

Is the site within a local or state Historic District or listed on the National Register or Historic Places? \_\_\_\_\_

Has the site or any building(s) on the site been designated as a local, state or national landmark? \_\_\_\_\_

Are there existing buildings and structures on site? \_\_\_\_\_

Does the site include documented archeological resources? \_\_\_\_\_

Does the site include any known significant areas of ledge or steep slopes? \_\_\_\_\_

## Required Attachments Relating to Section 2

### 2.1 Existing Conditions Plan

Please provide a detailed Existing Conditions Plan showing the entire site, prepared, signed and stamped by a Registered Engineer or Land Surveyor. Plans should be prepared at a scale of 1"=100' or 1"=200' and should include the following information:

- a. Reduced scale locus map
- b. Surveyed property boundaries
- c. Topography
- d. Wetland boundaries (if applicable)
- e. Existing utilities (subsurface and above ground).
- f. Natural features including bodies of water, rock outcroppings
- g. Existing easements and/or rights of way on the property
- h. Existing buildings and structures, including walls, fences, wells
- i. Existing vegetated areas
- j. Existing Site entries and egresses

Please provide one (1) set of full size (30"x40") plans along with one (1) set of 11"x17" reproductions and one electronic set of plans. Please note that MassHousing cannot accept USB flash drives.

### 2.2 Aerial Photographs

Please provide one or more aerial photograph(s) of the Site (such as those available on-line) showing the immediate surrounding area if available. Site boundaries and existing site entrance and access points must be clearly marked.

### 2.3 Site/Context Photographs

Please provide photographs of the Site and surrounding physical and neighborhood context, including nearby buildings, significant natural features and land uses. Please identify the subject and location of all photographs.

### 2.4 Documentation Regarding Site Characteristics/Constraints

Please provide documentation of site characteristics and constraints as directed including narratives, summaries and relevant documentation including:

- Flood Insurance Rate Map (FIRM) showing site boundaries
- Wetlands delineation
- Historic District Nomination(s)

### 2.5 By-Right Site Plan *(if available)*

MassHousing will commission, at your expense, an "as-is" appraisal of the site in accordance with the Guidelines, Section B (1). Therefore, if there is a conceptual development plan which would be permitted under current zoning and which you would like the appraiser to take into consideration, or if permits have been issued for alternative development proposals for the site, please provide two (2) copies of a "by-right" site plan showing the highest and best use of the site under current zoning, and copies of any existing permits. These will assist the appraiser in determining the "as is" value of the Site without any consideration being given to its potential for development under Chapter 40B.

## Application for Chapter 40B Project Eligibility/Site Approval for MassHousing-Financed and New England Fund (“NEF”) Homeownership Projects

### Section 3: PROJECT INFORMATION (also see Required Attachments listed at end of Section 3)

*In order to issue Site Approval, MassHousing must find (as required by 760 CMR 56.04 (4)) that the proposed project appears generally eligible under the requirements of the housing subsidy program and that the conceptual project design is generally appropriate for the site.*

Name of Proposed Project: \_\_\_\_\_

Project Type (mark both if applicable): New Construction \_\_\_\_\_ Rehabilitation \_\_\_\_\_ Both \_\_\_\_\_

Total Number of Dwelling Units: \_\_\_\_\_

Total Number of Affordable Units: \_\_\_\_\_

Number of 50% AMI Affordable Units: \_\_\_\_\_

Number of 80% AMI Affordable Units: \_\_\_\_\_

#### Unit Mix: Affordable Units

Unit Type	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number of Bathrooms					
Square Feet/Unit					

#### Unit Mix: Market Rate

Unit Type	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number of Bathrooms					
Square Feet/Unit					

Percentage of Units with 3 or More Bedrooms\*: \_\_\_\_\_

*\* Note that the January 17, 2014 Interagency Agreement Regarding Housing Opportunities for Families with Children requires that at least 10% of the units in the project must have three (3) or more bedrooms. Evidence of compliance with this requirement must be provided at Final Approval.*

Number of Handicapped Accessible Units: \_\_\_\_\_ Market Rate: \_\_\_\_\_ Affordable: \_\_\_\_\_

Gross Density (units per acre): \_\_\_\_\_

Net Density (units per buildable acre): \_\_\_\_\_

### Residential Building Information

Building Type and Style <i>(single family detached, townhouse, multi-family)</i>	Construction or Rehabilitation	Number of Stories	Height	GFA	Number Bldgs. of this type

### Non-Residential Building Information

Building Type and Style	Construction or Rehabilitation	Number of Stories	Height	GFA	Number Bldgs. of this type

Will all features and amenities available to market unit residents also be available to affordable unit residents?  
If not, explain the differences.

### Parking

Total Parking Spaces Provided: \_\_\_\_\_

Ratio of Parking Spaces to Housing Units: \_\_\_\_\_

### Lot Coverage *(Estimate the percentage of the site used for the following)*

Buildings: \_\_\_\_\_

Parking and Paved Areas: \_\_\_\_\_

Usable Open Space: \_\_\_\_\_

Unusable Open Space: \_\_\_\_\_

Lot Coverage: \_\_\_\_\_

Does project fit definition of "Large Project" (as defined in 760 CMR 56.03 (6))? Yes/No \_\_\_\_\_

## **Required Attachments Relating to Section 3**

### **3.1 Preliminary Site Layout Plan(s)**

Please provide preliminary site layout plans of the entire Site prepared, signed and stamped by a registered architect or engineer. Plans should be prepared at a scale of 1"=100' or 1"=200', and should show:

- Proposed site grading
- Existing lot lines
- Easements (existing and proposed)
- Access to a public way must be identified
- Required setbacks
- Proposed site circulation (entrances/egresses, roadways, driveways, parking areas, walk ways, paths, trails)
- Building and structure footprints (label)
- Utilities (existing and proposed)
- Open space areas
- Schematic landscaping and screening
- Wetland and other restricted area boundaries and buffer zones

Please provide one (1) set of full size (30"x40") plans along with one (1) set of 11"x17" reproductions and one (1) electronic set of plans. Please note that MassHousing cannot accept USB flash drives.

### **3.2 Graphic Representations of Project/Preliminary Architectural Plans**

- Typical floor plans
- Unit plans showing dimensions, bedrooms, bathrooms and overall unit layout
- Exterior elevations, sections, perspectives and illustrative rendering.

### **3.3 Narrative Description of Design Approach**

Provide a narrative description of the approach to building massing, style, and exterior materials; site layout, and the relationship of the project to adjacent properties, rights of way and existing development patterns. The handbook called [Approach to Chapter 40B Design Reviews](#) prepared by the Cecil Group in January 2011 may be helpful in demonstrating the nature of the discussion that MassHousing seeks in this narrative.

### **3.4 Tabular Zoning Analysis**

Zoning analysis in tabular form comparing existing zoning requirements to the waivers that you will request from the Zoning Board of Appeals for the proposed project, showing required and proposed dimensional requirements including lot area, frontage, front, side and rear setbacks, maximum building coverage, maximum lot coverage, height, number of stories, maximum gross floor area ratio, units per acre, units per buildable acre; number of parking spaces per unit/square foot and total number of parking spaces (proposed and required).

### **3.5 Completed Sustainable Development Principles Evaluation Assessment Form** *(see attached form)*

## Application for Chapter 40B Project Eligibility/Site Approval for MassHousing-Financed and New England Fund ("NEF") Homeownership Projects

### Section 4: SITE CONTROL (also see Required Attachments listed at end of Section 4)

*In order to issue Site Approval, MassHousing must find (as required by 760 CRM 56.04 (4)) that the Applicant controls the site.*

Name of Proposed Project: \_\_\_\_\_

Describe current ownership status of the entire site as shown on the site layout plans (attach additional sheets as necessary if the site is comprised of multiple parcels governed by multiple deeds or agreements):

Owned (or ground leased) by Development Entity or Applicant \_\_\_\_\_

Under Purchase and Sale Agreement \_\_\_\_\_

Under Option Agreement \_\_\_\_\_

*Note: The Grantee/Buyer on each document must be either the Applicant or the Proposed Development Entity, or you must attach an explanation showing direct control of the Grantee/Buyer by the Applicant or the Proposed Development Entity.*

Grantor/Seller: \_\_\_\_\_

Grantee/Buyer: \_\_\_\_\_

Grantee/Buyer is (check one):

Applicant \_\_\_\_\_ Development Entity \_\_\_\_\_ Managing General Partner of Development Entity \_\_\_\_\_

General Partner of Development Entity \_\_\_\_\_ Other (explain) \_\_\_\_\_

Are the Parties Related? \_\_\_\_\_

#### For Deeds or Ground Leases

Date(s) of Deed(s) or Ground Lease(s): \_\_\_\_\_

Purchase Price: \_\_\_\_\_

#### For Purchase and Sale Agreements or Option Agreements

Date of Agreement: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

If an extension has been granted, date of extension: \_\_\_\_\_

If an extension has been granted, new expiration date: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

Will any easements or rights of way over other properties be required in order to develop the site as proposed?

Yes \_\_\_\_\_ No \_\_\_\_\_

If Yes, please describe current status of easement:

Owned (or ground leased) by Development Entity or Applicant \_\_\_\_\_

Under Purchase and Sale Agreement \_\_\_\_\_

Under Option Agreement \_\_\_\_\_

*Note: The Grantee/Buyer on each document must be either the Applicant or the Proposed Development Entity, or you must attach an explanation showing direct control of the Grantee/Buyer by the Applicant or the Proposed Development Entity.*

Grantor/Seller: \_\_\_\_\_

Grantee/Buyer: \_\_\_\_\_

Are the Parties Related? \_\_\_\_\_

#### **For Easements**

Date(s) of Easement(s): \_\_\_\_\_

Purchase Price: \_\_\_\_\_

#### **For Easement Purchase and Sale Agreements or Easement Option Agreements**

Date of Agreement: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

If an extension has been granted, date of extension: \_\_\_\_\_

If an extension has been granted, new expiration date: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

### **Required Attachments Relating to Section 4**

#### **4.1 Evidence of Site Control *(required)***

Copies of all applicable, fully executed documents (deed, ground lease, purchase and sale agreement, option agreement, land disposition agreement) showing evidence of site control, including any required easements, along with copies of all amendments and extensions. Copies of all plans referenced in documents must be included.

## Application for Chapter 40B Project Eligibility/Site Approval for MassHousing-Financed and New England Fund (“NEF”) Homeownership Projects

### Section 5: FINANCIAL INFORMATION – Site Approval Application Homeownership 40B

*In order to issue Site Approval, MassHousing must find (as required by 760 CMR 56.04 (4)) that an initial pro forma has been reviewed and that the Proposed Project appears financially feasible and consistent with the Chapter 40B Guidelines, and that the Proposed Project is fundable under the applicable program.*

Name of Proposed Project: \_\_\_\_\_

**Initial Capital Budget** (please enter “0” when no such sales/revenue or cost is anticipated)

#### Sales / Revenue

Market	_____
Affordable	_____
Related Party	_____
Other Income	_____
<b>Total Sales/Revenue</b>	_____

#### Pre-Permit Land Value, Reasonable Carrying Costs

Item	Budgeted
Site Acquisition: pre-permit land value (to be determined by MassHousing commissioned appraisal) plus reasonable carrying costs.	

#### Costs

Item	Budgeted
<b>Acquisition Cost</b>	
Site Acquisition: pre-permit land value (to be determined by MassHousing Commissioned Appraisal) plus reasonable carrying costs	_____
<b>Subtotal</b> Acquisition Costs	_____
<b>Construction Costs–Residential Construction (Hard Costs)</b>	
Building Structure Costs	_____
Hard Cost Contingency	_____
<b>Subtotal</b> – Residential Construction (Hard Costs)	_____



## Costs

Item	Budgeted
<b>Construction Costs–Site Work (Hard Costs)</b>	
Earth Work	_____
Utilities: On Site	_____
Utilities: Off-Site	_____
Roads and Walks	_____
Site Improvement	_____
Lawns and Planting	_____
Geotechnical Condition	_____
Environmental Remediation	_____
Demolition	_____
Unusual Site Conditions/Other Site Work	_____
<b>Subtotal</b> –Site Work (Hard Costs)	_____
<b>Construction Costs–General Conditions, Builders Overhead and Profit (Hard Costs)</b>	
General Conditions	_____
Builder's Overhead	_____
Builder's Profit	_____
<b>Subtotal</b> – General Conditions Builder's Overhead and Profit (Hard Costs)	_____
<b>General Development Costs (Soft Costs)</b>	
Appraisal and Marketing Study (not 40B "as is" appraisal)	_____
Lottery	_____
Commissions/Advertising–Affordable	_____
Commissions/Advertising–Market	_____
Model Unit	_____
Closing Costs (unit sales)	_____
Real Estate Taxes (during construction)	_____
Utility Usage (during construction)	_____
Insurance (during construction)	_____
Security (during construction)	_____
Inspecting Engineer	_____
Fees to Others	_____
Construction Loan Interest	_____
Fees to Construction Lender	_____
Architectural	_____
Engineering	_____
Survey, Permits, Etc.	_____
Clerk of the Works	_____
Construction Manager	_____

Item	Budgeted
<b>General Development Costs (Soft Costs) – Continued</b>	
Bond Premiums ( <i>Payment/Performance/Lien Bond</i> )	_____
Legal	_____
Title ( <i>including title insurance</i> ) and Recording	_____
Accounting and Cost Certification ( <i>incl. 40B</i> )	_____
Relocation	_____
40B Site Approval Processing Fee	_____
40B Technical Assistance/Mediation Fund Fee	_____
40B Land Appraisal Cost ( <i>as-is value</i> )	_____
40B Final Approval Processing Fee	_____
40B Subsidizing Agency Cost Certification Examination Fee	_____
40B Monitoring Agent Fees	_____
40B Surety Fees	_____
Other Financing Fees	_____
Development Consultant	_____
Other Consultants ( <i>describe</i> )	_____
Other Consultants ( <i>describe</i> )	_____
Soft Cost Contingency	_____
Other General Development (Soft) Costs	_____
<b>Subtotal</b> – General Development Costs (Soft Costs)	_____
<b>Developer Overhead</b>	
Developer Overhead	_____
<b>Subtotal</b> – Developer Overhead	_____
<b>Summary of Subtotals</b>	
Sales/Revenue	_____
Site Acquisition	_____
Residential Construction	_____
Site Work	_____
Builder's Overhead, Profit and General Conditions	_____
General Development Costs	_____
Developer Overhead	_____
<b>Summary</b>	
Total Sales/Revenue	_____
Total Development Costs (TDC)	_____
Profit (Loss) from Sales/Revenue	_____
Percentage of Profit (Loss) Over the Total Development Costs	_____

**Initial Unit/Sales Price**

	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Affordable Units					
Number of Units					
Number of Sq. Ft					
Sales Price					
Condo / HOA Fee					

	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Affordable Units					
Number of Units					
Number of Sq. Ft					
Sales Price					
Condo / HOA Fee					

Describe your approach to calculating any additional fees relating to Condominium Association or a Homeowners Association.

## **Required Attachments Relating to Section 5**

### **5.1 New England Fund Lender Letter of Interest**

Please attach a Letter of Interest from a current Federal Home Loan Bank of Boston (FHLBB) member bank regarding financing for the proposed development. The letter of interest must include, at a minimum, the following:

- Identification of proposed borrower, and brief description of the bank's familiarity with the borrower;
- Brief description of the Proposed Project
- Confirmation that the bank is a current FHLBB member bank and that the bank will specifically use NEF funds for the proposed development.

*NOTE: Binding Financing Commitments (or evidence of closed loans) will be required at the time you apply for Final Approval from MassHousing.*

### **5.2 Market Sale Comparables (required)**

Please provide a listing of market sales being achieved in properties comparable to the proposed project.

### **5.3 Market Study (if requested)**

MassHousing may require a market study for projects located in areas where the need or demand for the type of housing being proposed cannot be clearly demonstrated.

## Application for Chapter 40B Project Eligibility/Site Approval for MassHousing-Financed and New England Fund (“NEF”) Homeownership Projects

### Section 6: APPLICANT QUALIFICATIONS, ENTITY INFORMATION, AND CERTIFICATION

*In order to issue Site Approval MassHousing must find (as required by 760 CRM 56.04 (4)) that the applicant is either a non-profit public agency or would be eligible to apply as a Limited Dividend Organization and meets the general eligibility standards of the program.*

Name of Proposed Project: \_\_\_\_\_

#### Development Team

Developer/Applicant: \_\_\_\_\_

Development Consultant (if any): \_\_\_\_\_

Attorney: \_\_\_\_\_

Architect: \_\_\_\_\_

Contractor: \_\_\_\_\_

Lottery Agent: \_\_\_\_\_

Management Agent: \_\_\_\_\_

Other (specify): \_\_\_\_\_

Other (specify): \_\_\_\_\_

#### Role of Applicant in Current Proposal

Development Task	Developer/Applicant	Development Consultant (identify)
Architecture and Engineering		
Local Permitting		
Financing Package		
Construction Management		
Other		

#### Applicant's Ownership Entity Information

Please identify for each of (i) the Applicant and, if different (ii), the Proposed Development Entity, the following (collectively with the Applicant and the Proposed Development Entity, the “Applicant Entities”): the Managing Entities, Principals, Controlling Entities and Affiliates of each.

*Note: For the purposes hereof, “Managing Entities” shall include all persons and entities (e.g. natural persons, corporations, partnerships, limited liability companies, etc., including beneficiaries of nominee trusts) who are managers of limited liability companies, general partners of limited partnerships, managing general partners of limited liability partnerships, directors and officers of corporations, trustees of trusts, and other similar persons and entities which have the power to manage and control the activities of the Applicant and/or Proposed Development Entity.*

*"Principal or Controlling Entities" shall include all persons and entities (e.g. natural persons, corporations, partnerships, limited liability companies, etc., including beneficiaries of nominee trusts) that shall have the right to:*

- (i) approve the terms and conditions of any proposed purchase, sale or mortgage;*
- (ii) approve the appointment of a property manager; and/or*
- (iii) approve managerial decisions other than a decision to liquidate, file for bankruptcy, or incur additional indebtedness.*

*Such rights may be exercisable either (i) directly as a result of such person's or entity's role within the Applicant or the Proposed Development Entity or the Managing Entities of either or (ii) indirectly through other entities that are included within the organizational structure of the Applicant and/or Proposed Development Entity and the Managing Entities of either.*

*In considering an application, MassHousing will presume that there is at least one Principal or Controlling Entity of the Applicant and of the Proposed Development Entity. Any person or persons who have purchased an interest for fair market value in the Applicant and/or Proposed Development Entity solely for investment purposes shall not be deemed a Principal or Controlling Entity.*

*"Affiliates" shall include all entities that are related to the subject organization by reason of common control, financial interdependence or other means.*

## **1. Applicant**

Name of Applicant: \_\_\_\_\_

Entity Type (limited liability company, limited partnership, limited liability partnership, corporation, trust, etc.): \_\_\_\_\_

State in which registered/formed: \_\_\_\_\_

List all Managing Entities of Applicant (*you must list at least one*):

List all Principals and Controlling Entities of Applicant and (*unless the Managing Entity is an individual*) its Managing Entities (*use additional pages as necessary*):

List all Affiliates of Applicant and its Managing Entities (*use additional pages as necessary*):

**Proposed Development Entity**

Name of Proposed Development Entity: \_\_\_\_\_

Entity Type *(limited liability company, limited partnership, limited liability partnership, corporation, trust, etc.):*

\_\_\_\_\_

State in which registered/formed: \_\_\_\_\_

List all Managing Entities of Proposed Development Entity (you must list at least one):

List all Principals and Controlling Entities of Proposed Development Entity and *(unless the Managing Entity is an individual)* its Managing Entities *(use additional pages as necessary)*:

List all Affiliates of Proposed Development Entity and its Managing Entities *(use additional pages as necessary)*:

## Certification and Acknowledgment

I hereby certify on behalf of the Applicant, *under pains and penalties of perjury*, that the information provided above for each of the Applicant Entities is, to the best of my knowledge, true and complete; and that each of the following questions has been answered correctly to the best of my knowledge and belief:

*(Please attach a written explanation for all of the following questions that are answered with a "Yes". Explanations should be attached to this Section 6.)*

Is there pending litigation with respect to any of the Applicant Entities? Yes \_\_\_ No \_\_\_

Are there any outstanding liens or judgments against any properties owned by any of the Applicant Entities? Yes \_\_\_ No \_\_\_

Have any of the Applicant Entities failed to comply with provisions of Massachusetts law related to taxes, reporting of employees and contractors, or withholding of child support? Yes \_\_\_ No \_\_\_

Have any of the Applicant Entities ever been the subject of a felony indictment or conviction? Yes \_\_\_ No \_\_\_

During the last 10 years, have any of the Applicant Entities ever been a defendant in a lawsuit involving fraud, gross negligence, misrepresentation, dishonesty, breach of fiduciary responsibility or bankruptcy? Yes \_\_\_ No \_\_\_

Have any of the Applicant Entities failed to carry out obligations in connection with a Comprehensive Permit issued pursuant to M.G.L. c. 40B and any regulations or guidelines promulgated thereunder (whether or not MassHousing is or was the Subsidizing Agency/Project Administrator) including, but not limited to, completion of a cost examination and return of any excess profits or distributions? Yes \_\_\_ No \_\_\_

Have any of the Applicant Entities ever been charged with a violation of state or federal fair housing requirements? Yes \_\_\_ No \_\_\_

Are any of the Applicant Entities not current on all existing obligations to the Commonwealth of Massachusetts, and any agency, authority or instrument thereof? Yes \_\_\_ No \_\_\_

I further certify that the information set forth in this application (including attachments) is true, accurate and complete as of the date hereof to the best of my/our knowledge, information and belief. I further understand that MassHousing is relying on this information in processing the request for Site Approval in connection with the above-referenced project.

I further certify that we have met with a representative of the 40B Department at MassHousing and understand the requirements for a) completing this application and b) the procedures if and when Site Approval is granted, including the requirement for (i) the use of the standard MassHousing Regulatory Agreement, and (ii) submission to MassHousing, within one hundred eighty (180) days after substantial completion or, if later, within ninety (90) days of the date on which all units are sold, of a cost certification examined in accordance with AICPA attestation standards by an approved certified public accountant.

I hereby acknowledge our commitment and obligation to comply with requirements for cost examination and limitations on profits and distributions, all as found at 760 CMR 56.04(8) and will be more particularly set forth in the MassHousing Regulatory Agreement.



I hereby acknowledge that it will be required to provide financial surety, by means of bond, cash escrow and a surety escrow agreement or letter of credit with the agreement that it may be called upon or used in the event that the Developer fails either to (i) complete and submit the Cost Examination as required by 760 CMR 56.04(8) and the MassHousing Regulatory Agreement, or (ii) pay over to the Municipality any funds in excess of the limitations on profits and distributions as required by 760 CMR 56.04(8) and as set forth in the MassHousing Regulatory Agreement.

Signature:\_\_\_\_\_

Name:\_\_\_\_\_

Title:\_\_\_\_\_

Date:\_\_\_\_\_

## Required Attachments Relating to Section 6

### 6.1 Development Team Qualifications

Please attach resumes for principal team members (Applicant, consultant, attorney, architect, general contractor, management agent, lottery agent, etc.) and list of all relevant project experience for 1) the team as a whole and 2) individual team members. Particular attention should be given to demonstrating experience with (i) projects of a similar scale and complexity of site conditions, (ii) permitting an affordable housing development, (iii) design, and (iv) financing. The development team should demonstrate the ability to perform as proposed and to complete the Project in a competent and timely manner, including the ability to pursue and carry out permitting, financing, marketing, design and construction.

*( If the Applicant (or, if the Applicant is a single purpose entity, its parent developer entity) has received financing from MassHousing within the past five (5) years for a development of comparable size and complexity to the Proposed Project, no resume or list of project experience need be submitted for the Applicant or, as applicable, its parent developer entity. Information regarding the other team members still will be required.)*

### 6.2 Applicant Entity 40B Experience

Please identify every Chapter 40B project in which the Applicant or any Applicant Entity has or had an interest. For each such project, state whether the construction has been completed and whether cost examination has been submitted.

### 6.3 Applicant's Certification

Please attach any additional sheets and any written explanations for questions answered with "yes" as required for Certification.

**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Homeownership Projects**

**Section 7: NOTIFICATIONS AND FEES**

Name of Proposed Project: \_\_\_\_\_

**Notice**

Date(s) of meetings, if any, with municipal officials prior to submission of application to MassHousing: \_\_\_\_\_

Date copy of complete application sent to chief elected office of municipality: \_\_\_\_\_

Date notice of application sent to DHCD: \_\_\_\_\_

**Fees** *(all fees should be submitted to MassHousing)*

MassHousing Application Processing Fee (\$2500) Payable to MassHousing: \_\_\_\_\_

Chapter 40B Technical Assistance/Mediation Fee Payable to Massachusetts Housing Partnership:

a. Base Fee:  
*(Limited Dividend Sponsor \$2500, Non-Profit or Public Agency Sponsor \$1,000)* \_\_\_\_\_

b. Unit Fee:  
*(Limited Dividend Sponsor \$50 per unit, Non-Profit or Public Agency Sponsor \$30 per unit)* \_\_\_\_\_

**Land Appraisal Cost**

*You will be required to pay for an “as-is” market value appraisal of the Site to be commissioned by MassHousing. MassHousing will contact you once a quote has been received for the cost of the appraisal.*

## **Required Attachments Relating to Section 7**

- 7.1** Narrative describing any prior correspondence and/or meetings with municipal officials
- 7.2** Evidence (such as a certified mail receipt) that a copy of the complete application package was sent to the Chief Elected Official of Municipality (may be submitted after the application is submitted to MassHousing)
- 7.3** Copy of notice of application sent to DHCD
- 7.4** Check made out to MassHousing for Processing Fee (\$2500)
- 7.5** Check made payable to Massachusetts Housing Partnership for Technical Assistance/Mediation Fee
- 7.6** W-9 (Taxpayer Identification Number)

## Application Checklist

The documentation listed below must, where applicable, accompany each application. For detailed descriptions of these required documents, please see the relevant sections of the application form.

\* Applications missing any of the documents indicated by an asterisk will not be processed by MassHousing until MassHousing receives the missing item(s).

- ☐ \* Completed application form, and certification under pains and penalties of perjury (one (1) signed original) accompanied by one (1) electronic copy of the completed application package
- ☐ \* Location Map
- ☐ Tax Map
- ☐ \* Directions to the proposed Site
- ☐ \* Existing Conditions Plan
- ☐ Aerial Photographs
- ☐ Site/Context Photographs
- ☐ \* Documentation Regarding Site Characteristics/Constraints
- ☐ \* By Right Site Plan, if applicable
- ☐ \* Preliminary Site Layout Plan(s)
- ☐ \* Graphic Representations of Project/Preliminary Architectural Plans
- ☐ \* Narrative Description of Design Approach
- ☐ \* Tabular Zoning Analysis
- ☐ Sustainable Development Principles Evaluation Assessment Form
- ☐ \* Evidence of site control (*documents and any plans referenced therein*)
- ☐ Land Disposition Agreement, if applicable
- ☐ \* NEF Lender Letter of Interest
- ☐ Market Sales Comparables
- ☐ Market Study, if required by MassHousing
- ☐ \* Development Team Qualifications
- ☐ Applicant's Certification (*any required additional sheets*)
- ☐ Narrative describing prior contact (*if any*) with municipal officials
- ☐ \* Evidence that a copy of the application package has been received by the Chief Elected Official in the municipality (*may follow after initial submission of application package, but site visit will not be scheduled nor request for municipal comments made until such evidence is received by MassHousing*)
- ☐ Copy of notification letter to DHCD
- ☐ \*\$2,500 Fee payable to MassHousing (*once an appraiser has been selected by MassHousing and an appraisal fee quoted, an additional non-refundable appraisal fee will be required*)
- ☐ \*Technical Assistance/Mediation Fee payable to Massachusetts Housing Partnership.

## SUSTAINABLE DEVELOPMENT CRITERIA SCORECARD

Project Name: \_\_\_\_\_

Project Number: \_\_\_\_\_

Program Name: \_\_\_\_\_

Date: \_\_\_\_\_

MassHousing encourages housing development that is consistent with sustainable development designs and green building practices. Prior to completing this form, please refer to the Commonwealth's Sustainable Development Principles (adopted May 2007) available at: [Sustainable Development Principles](#)

### DEVELOPER SELF-ASSESSMENT

(for consistency with the Sustainable Development Principles)

#### Redevelop First

Check "X" below if applicable

*If Rehabilitation:*

- Rehabilitation/Redevelopment/Improvements to Structure ☐
- Rehabilitation/Redevelopment/Improvements to Infrastructure ☐

*If New Construction:*

- Contributes to revitalization of town center or neighborhood ☐
- Walkable to: ☐
  - (a) transit ☐
  - (b) downtown or village center ☐
  - (c) school ☐
  - (d) library ☐
  - (e) retail, services or employment center ☐
- Located in municipally-approved growth center ☐

Explanation (Required)

### Optional – Demonstration of Municipal Support:

Check "X" below if applicable

- Letter of Support from the Chief Elected Official of the municipality\* ☐
- Housing development involves municipal funding ☐
- Housing development involves land owned or donated by the municipality ☐

*\*Other acceptable evidence: Zoning variance issued by ZBA for project; Minutes from Board of Selectman meeting showing that project was discussed and approved, etc.*

### Explanation (Required)

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**Method 2:** Development meets a minimum of **five (5)** of the Commonwealth's *Sustainable Development Principles*, as shown in the next section below.

If the development involves strong **municipal support** (evidence of such support must be submitted as an attachment), the development need only meet **four (4)** of the *Sustainable Development Principles*. However, one (1) of the Principles met must be **Protect Land and Ecosystems**.

Please explain at the end of each category how the development follows the relevant *Sustainable Development Principle(s)* and explain how the development demonstrates each of the checked "X" statements listed under the *Sustainable Development Principle(s)*.

### (1) Concentrate Development and Mix Uses

Support the revitalization of city and town centers and neighborhoods by promoting development that is compact, conserves land, protects historic resources, and integrates uses. Encourage remediation and reuse of existing sites, structures, and infrastructure rather than new construction in undeveloped areas. Create pedestrian friendly districts and neighborhoods that mix commercial, civic, cultural, educational, and recreational activities with open spaces and homes.

Check "X" below if applicable

- Higher density than surrounding area ☐
- Mixes uses or adds new uses to an existing neighborhood ☐
- Includes multi-family housing ☐
- Utilizes existing water/sewer infrastructure ☐
- Compact and/or clustered so as to preserve undeveloped land ☐
- Reuse existing sites, structures, or infrastructure ☐
- Pedestrian friendly ☐
- Other (discuss below) ☐

### Explanation (Required)

## (2) Advance Equity & Make Efficient Decisions

Promote equitable sharing of the benefits and burdens of development. Provide technical and strategic support for inclusive community planning and decision making to ensure social, economic, and environmental justice. Ensure that the interests of future generations are not compromised by today's decisions.

Promote development in accordance with smart growth and environmental stewardship.

*Check "X" below if applicable*

- Concerted public participation effort (beyond the minimally required public hearings) ☐
- Streamlined permitting process, such as 40B or 40R ☐
- Universal Design and/or visitability ☐
- Creates affordable housing in middle to upper income area and/or meets regional need ☐
- Creates affordable housing in high poverty area ☐
- Promotes diversity and social equity and improves the neighborhood ☐
- Includes environmental cleanup and/or neighborhood improvement in an Environmental Justice Community ☐
- Other (discuss below) ☐

Explanation **(Required)**

## (3) Protect Land and Ecosystems

Protect and restore environmentally sensitive lands, natural resources, agricultural lands, critical habitats, wetlands and water resources, and cultural and historic landscapes. Increase the quantity, quality and accessibility of open spaces and recreational opportunities.

*Check "X" below if applicable*

- Creation or preservation of open space or passive recreational facilities ☐
- Protection of sensitive land, including prime agricultural land, critical habitats, and wetlands ☐
- Environmental remediation or clean up ☐
- Responds to state or federal mandate (e.g., clean drinking water, drainage, etc.) ☐
- Eliminates or reduces neighborhood blight ☐
- Addresses public health and safety risk ☐
- Cultural or Historic landscape/existing neighborhood enhancement ☐
- Other (discuss below) ☐



Explanation **(Required)**

**(4) Use Natural Resources Wisely**

Construct and promote developments, buildings, and infrastructure that conserve natural resources by reducing waste and pollution through efficient use of land, energy, water and materials.

Check "X" below *if applicable*

- Uses alternative technologies for water and/or wastewater treatment ☐
- Uses low impact development (LID) or other innovative techniques ☐
- Other (discuss below)

Explanation **(Required)**

**(5) Expand Housing Opportunities**

Support the construction and rehabilitation of homes to meet the needs of people of all abilities, income levels and household types. Build homes near jobs, transit, and where services are available. Foster the development of housing, particularly multifamily and single-family homes, in a way that is compatible with a community's character and vision and with providing new housing choices for people of all means.

Check "X" below *if applicable*

- Includes rental units, including for low/mod households ☐
- Includes homeownership units, including for low/mod households ☐
- Includes housing options for special needs and disabled population ☐
- Expands the term of affordability ☐
- Homes are near jobs, transit and other services ☐
- Other (discuss below) ☐

Explanation **(Required)**

## (6) Provide Transportation Choice

Maintain and expand transportation options that maximize mobility, reduce congestion, conserve fuel and improve air quality. Prioritize rail, bus, boat, rapid and surface transit, shared-vehicle and shared-ride services, bicycling and walking. Invest strategically in existing and new passenger and freight transportation infrastructure that supports sound economic development consistent with smart growth objectives.

*Check "X" below if applicable*

- Walkable to public transportation ☐
- Reduces dependence on private automobiles (e.g., provides previously unavailable shared transportation, such as Zip Car or shuttle buses) ☐
- Increased bike and ped access ☐
- For rural areas, located in close proximity (i.e., approximately one mile) to a transportation corridor that provides access to employment centers, retail/commercial centers, civic or cultural destinations ☐
- Other (discuss below) ☐

Explanation **(Required)**

## (7) Increase Job and Business Opportunities

Attract businesses and jobs to locations near housing, infrastructure, and transportation options. Promote economic development in industry clusters. Expand access to education, training and entrepreneurial opportunities. Support growth of local businesses, including sustainable natural resource-based businesses, such as agriculture, forestry, clean energy technology and fisheries.

*Check "X" below if applicable*

- Permanent jobs ☐
- Permanent jobs for low- or moderate-income persons ☐
- Jobs near housing, service or transit ☐
- Housing near an employment center ☐
- Expand access to education, training or entrepreneurial opportunities ☐
- Support local businesses ☐
- Support natural resource-based businesses (i.e., farming, forestry or aquaculture) ☐
- Re-uses or recycles materials from a local or regional industry's waste stream ☐
- Support manufacture of resource-efficient materials, such as recycled or low-toxicity materials ☐
- Support businesses that utilize locally produced resources such as locally harvested wood or agricultural products ☐
- Other (discuss below) ☐

**Explanation (Required)**

**(8) Promote Clean Energy**

Maximize energy efficiency and renewable energy opportunities. Support energy conservation strategies, local clean power generation, distributed generation technologies, and innovative industries. Reduce greenhouse gas emissions and consumption of fossil fuels.

*Check "X" below if applicable*

- Energy Star or equivalent\* ☐
- Uses renewable energy source, recycled and/or non-/low-toxic materials, exceeds the state energy code, is configured to optimize solar access, and/or otherwise results in waste reduction and conservation of resources ☐
- Other (discuss below) ☐

\*All units are required by MassHousing to be Energy Star Efficient. Please include in your explanation a description of how the development will meet Energy Star criteria.

**Explanation (Required)**

**(9) Plan Regionally**

Support the development and implementation of local and regional, state and interstate plans that have broad public support and are consistent with these principles. Foster development projects, land and water conservation, transportation and housing that have a regional or multi-community benefit. Consider the long term costs and benefits to the Commonwealth.

*Check "X" below if applicable*

- Consistent with a municipally supported regional plan ☐
- Addresses barriers identified in a Regional Analysis of Impediments to Fair Housing ☐
- Measurable public benefit beyond the applicant community ☐
- Other (discuss below) ☐

**Explanation (Required)**

*For further information regarding 40B applications, please contact Greg Watson, Manager, Comprehensive Permit Programs, at (617) 854.1880 or [gwatson@masshousing.com](mailto:gwatson@masshousing.com)*

Site Approval Application  
61 Beach Road

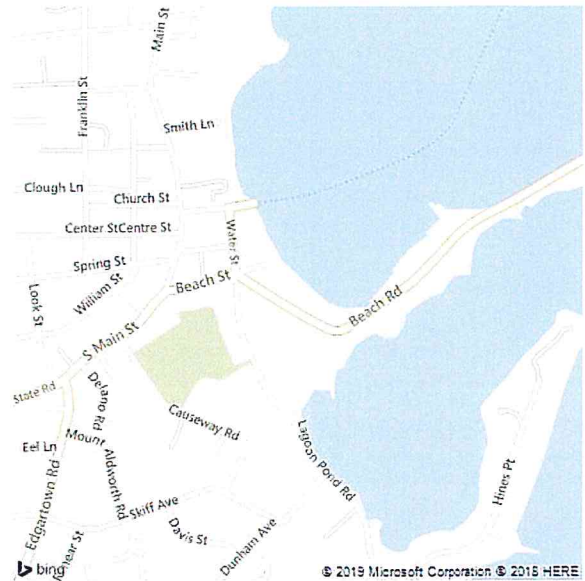
Application Attachments – Sections 1 - 7

**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 1 – General Information**

## 1.1 Location Map

61 Beach Road, Vineyard Haven

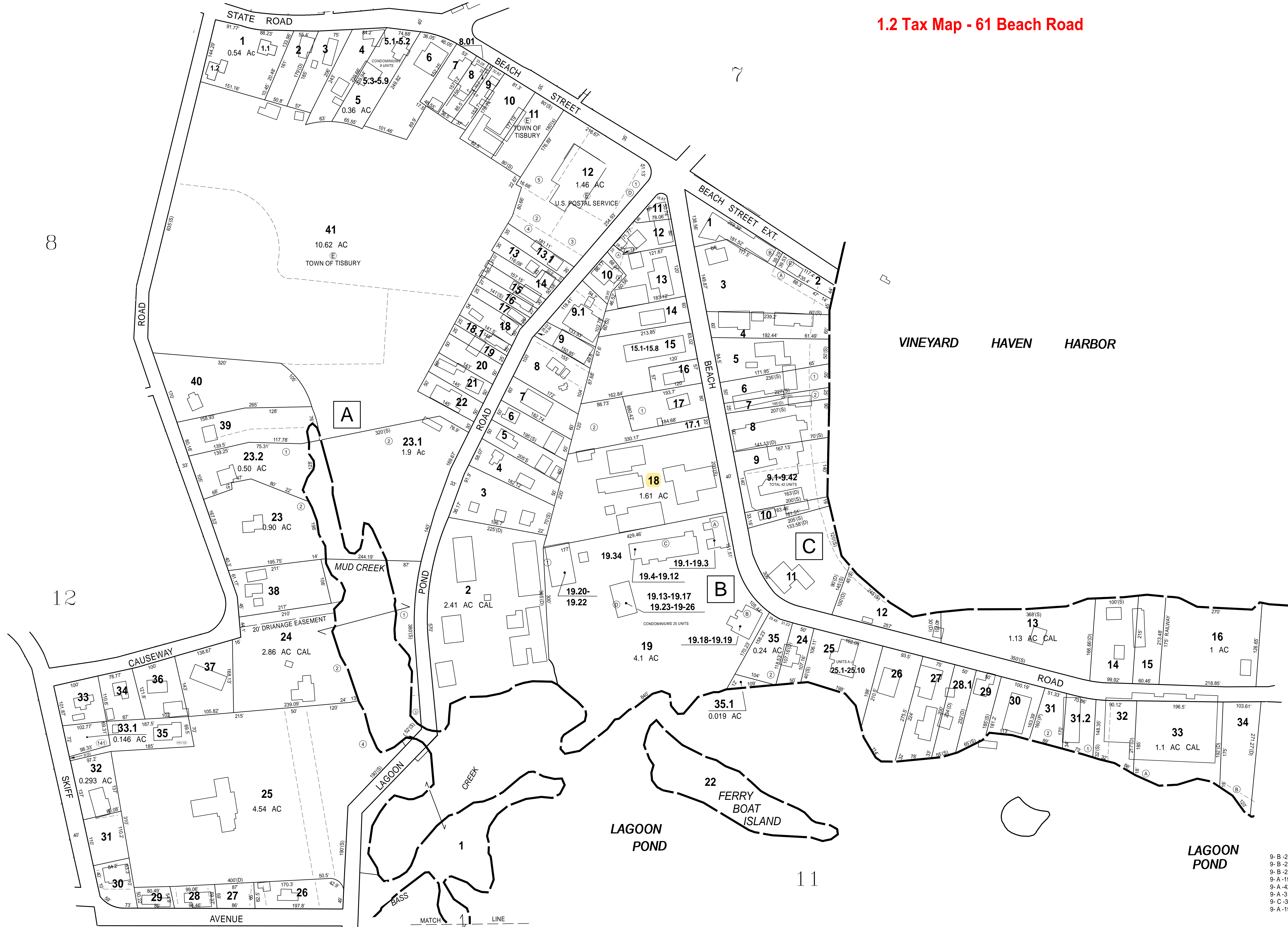








1.2 Tax Map - 61 Beach Road



9-B-20 DROPPED 1988  
9-B-21 DROPPED 1988  
9-B-23 DROPPED 1988  
9-A-19 DROPPED 1987  
9-A-42 DROPPED 1972  
9-A-31.1 DROPPED 1987  
9-A-19 DROPPED 1987

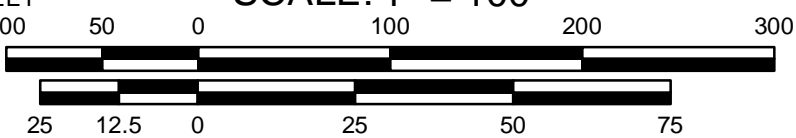
THIS MAP IS FOR ASSESSMENT PURPOSES. IT IS NOT VALID FOR LEGAL DESCRIPTION OR CONVEYANCE.  
THE HORIZONTAL DATUM IS THE MASSACHUSETTS STATE PLANE COORDINATE SYSTEM, NAD 83.  
ORIGINAL MAPS PREPARED & DATED 4-29-70 BY GENERAL MAPPING INC. YOUNGWOOD, PA.  
MAPS RECOMPILED TO AVAILABLE MASSGIS ORTHOIMAGERY BY CAI TECHNOLOGIES, DECEMBER 2011.

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LEGEND	
AREA SURVEYED	AC CAL
AREA CALCULATED	AC CAL
RECORD DIMENSION	100'
SCALED DIMENSION	100(S)
MATCH LINE	
WATER	
EXEMPT PROPERTY	
SUBDIVISION LOT NO.	
RIGHT OF WAY/ACCESS	
COMMON OWNERSHIP	
ADJACENT SHEET NO.	
BLOCK LETTER	

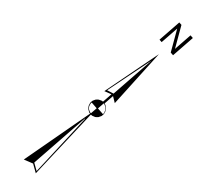
SCALE: 1" = 100'



REVISED TO: JANUARY 1, 2018

TOWN OF TISBURY

BOARD OF ASSESSORS  
VINEYARD HAVEN, MASSACHUSETTS



MAP NO.  
9





# Property Card: 61 BEACH RD

Town of Tisbury, MA

## Parcel Information



**Parcel ID:** 9-B-18

**Vision ID:** 1059

**Owner:** HARBORWOOD LLC

**Mailing Address:** PO BOX 1408

VINEYARD HAVEN, MA 02568

## General Information

**Map:** 9  
**Block:** B  
**Lot:** 18

**Use Description:** LUMBER YRD MDL-96  
**Zone:** C  
**Land Area in Acres:** 1.61000918

## Assessed Value

**Land:** \$1,583,800  
**Buildings:** \$934,100  
**Extra Bldg Features:**  
**Outbuildings:**  
**Total:** \$2,517,900

## Sale History

**Book/Page:** 1474/ 838  
**Sale Date:** 8/21/2018  
**Sale Price:** \$99

## Building Details: Building # 1



**Model Description:** Commercial

**Living Area:** 4752

**Approx Year Built:** 1924

**Style:** Warehouse

**Stories:** 2

**Occupancy:** 1

**No. Total Rooms:**

**No. Bedrooms:** 00

**No. Baths:** 2

**No. Half Baths:**

**Bathroom Desc:**

**Roof Cover Desc:** Asph/F Gls/Cmp

**Roof Structure Desc:** Gable/Hip

**Heat Type:** None

**Heat Fuel:** None

**A/C Type:** None

**Kitchen Desc:**  
**Interior Wall Desc 1:** Minim/Masonry  
**Interior Wall Desc 2:**  
**Exterior Wall Desc 1:** Wood Shingle  
**Exterior Wall Desc 2:**



[www.cai-tech.com](http://www.cai-tech.com)

Data shown on this report is provided for planning and informational purposes only. The municipality and CAI Technologies are not responsible for any use for other purposes or misuse or misrepresentation of this report.

### Building Details: Building # 2



**Kitchen Desc:**  
**Interior Wall Desc 1:** Minim/Masonry  
**Interior Wall Desc 2:**  
**Exterior Wall Desc 1:** Pre-finish Metl  
**Exterior Wall Desc 2:**

**Model Description:** Commercial  
**Living Area:** 4000  
**Approx Year Built:** 1978  
**Style:** Pre-Eng Whse  
**Stories:** 1  
**Occupancy:** 1  
**No. Total Rooms:**  
**No. Bedrooms:** 00  
**No. Baths:** 1  
**No. Half Baths:**  
**Bathroom Desc:**

**Roof Cover Desc:** Metal/Tin  
**Roof Structure Desc:** Gable/Hip  
**Heat Type:** None  
**Heat Fuel:** None  
**A/C Type:** None

### Building Details: Building # 3



**Kitchen Desc:**  
**Interior Wall Desc 1:** Drywall/Sheet  
**Interior Wall Desc 2:**  
**Exterior Wall Desc 1:** Wood Shingle  
**Exterior Wall Desc 2:**

**Model Description:** Commercial  
**Living Area:** 3172  
**Approx Year Built:** 1950  
**Style:** Store  
**Stories:** 1  
**Occupancy:** 1  
**No. Total Rooms:**  
**No. Bedrooms:** 00  
**No. Baths:** 2  
**No. Half Baths:**  
**Bathroom Desc:**

**Roof Cover Desc:** Asph/F GlS/Cmp  
**Roof Structure Desc:** Gable/Hip  
**Heat Type:** Forced Air-Duc  
**Heat Fuel:** Oil  
**A/C Type:** Central

### Building Details: Building # 4



**Model Description:** Commercial  
**Living Area:** 1500  
**Approx Year Built:** 1950  
**Style:** Warehouse  
**Stories:** 2  
**Occupancy:** 1  
**No. Total Rooms:**  
**No. Bedrooms:** 00  
**No. Baths:** 0  
**No. Half Baths:**  
**Bathroom Desc:**



[www.cai-tech.com](http://www.cai-tech.com)

Data shown on this report is provided for planning and informational purposes only. The municipality and CAI Technologies are not responsible for any use for other purposes or misuse or misrepresentation of this report.

**Kitchen Desc:**  
**Interior Wall Desc 1:** Minim/Masonry  
**Interior Wall Desc 2:** Drywall/Sheet  
**Exterior Wall Desc 1:** Wood Shingle  
**Exterior Wall Desc 2:**

**Roof Cover Desc:** Asph/F Gls/Cmp  
**Roof Structure Desc:** Gable/Hip  
**Heat Type:** None  
**Heat Fuel:** None  
**A/C Type:** None



[www.cai-tech.com](http://www.cai-tech.com)

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## 1.3 Directions

 bing maps

**A** MassHousing, One Beacon Street, Boston, MA 02108

**B** 61 Beach Rd, Tisbury, MA 02568

3 hr 50 min, 83 miles  
 Heavy traffic (1 hr 21 min delay)  
 Via RT-3 S, RT-28 S  
 · Takes ferry

61 Beach Road, Vineyard Haven

Directions to site.

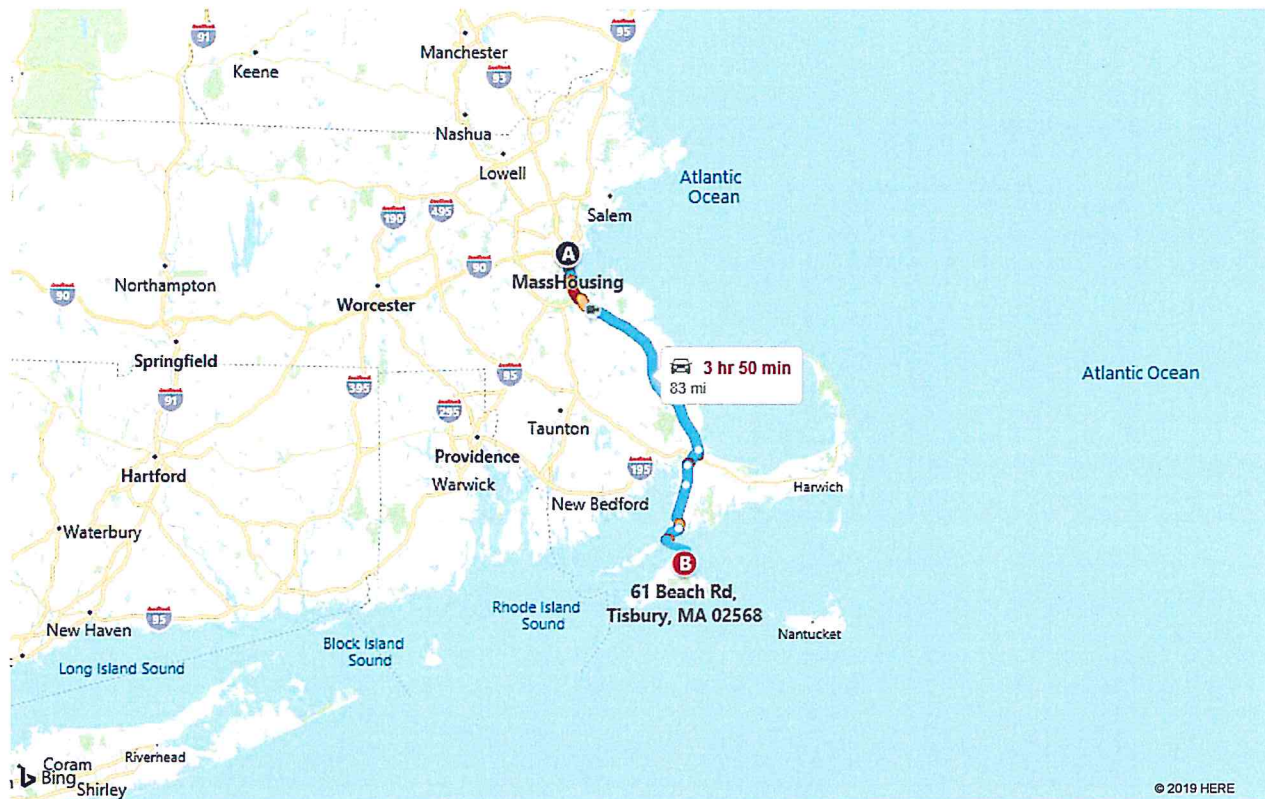
**A** MassHousing

↑	1. Depart <b>Beacon St</b> toward Tremont St	125 ft
↑	2. Road name changes to <b>School St</b>	0.1 mi
↩	3. Turn <b>left</b> onto <b>Washington St</b>	95 ft
↘	4. Turn <b>right</b> onto <b>Water St</b>	463 ft
↘	5. Turn <b>right</b> onto <b>Congress St / Post Office Sq</b>	0.3 mi
	6. Take ramp <b>right</b> for <b>I-93 South</b> toward <b>Quincy</b> Pass Shell on the right in 7.3 mi	9.6 mi
↑	7. Keep <b>left</b> onto <b>RT-3 S</b>	27.5 mi, 47 min
↑	8. Keep <b>straight</b> onto <b>US-44 E / RT-3 S</b>	0.9 mi
↑	9. Keep <b>straight</b> onto <b>RT-3 S</b> Pass McDonald's on the right in 1.7 mi	14.2 mi, 18 min
↑	10. Keep <b>straight</b> onto <b>US-6 E</b>	1.2 mi
↘	11. At exit <b>1C</b> , take ramp <b>right</b> toward <b>Sagamore</b>	0.2 mi
↗	12. Bear <b>right</b> onto <b>Mid Cape Connector</b>	0.3 mi
↩	13. Turn <b>left</b> onto <b>RT-6A / Sandwich Rd</b>	3.0 mi

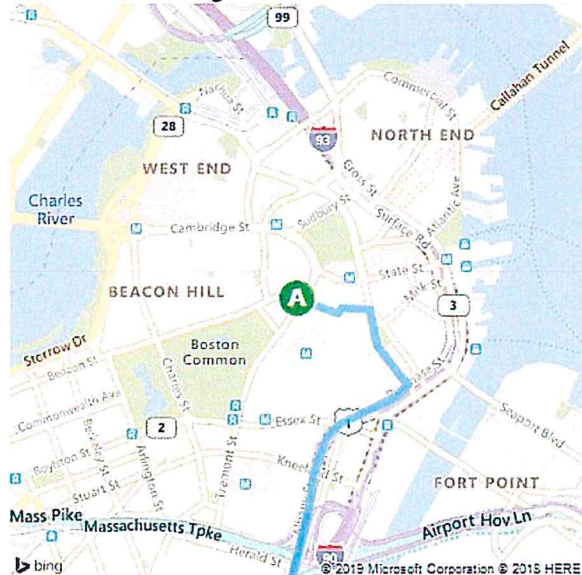


	14. At roundabout, take <b>3rd</b> exit onto <b>RT-28 S / Gen MacArthur Blvd / MacArthur Blvd</b> Pass McDonald's in 1.9 mi	4.1 mi
	15. At roundabout, take <b>2nd</b> exit Pass Shell in 8.9 mi	9.5 mi
	16. Keep <b>straight</b> onto <b>N Main St</b>	0.1 mi
	17. Road name changes to <b>Locust St</b>	0.4 mi
	18. Road name changes to <b>Woods Hole Rd</b>	3.3 mi
	19. Bear <b>left</b> onto <b>Crane St</b> , and then immediately turn <b>right</b> onto <b>Cowdry Rd</b>	0.1 mi
	20. Keep <b>left</b> onto <b>road</b>	312 ft
	21. Take <b>Woods Hole-Vineyard Haven Ferry</b> • Check the time table	8.0 mi
	22. Take <b>Union St</b>	210 ft
	23. Turn <b>left</b> onto <b>Water St</b> Stop & Shop on the corner	0.1 mi
	24. Bear <b>left</b> onto <b>Beach Rd</b> CITGO on the corner	0.1 mi
	25. Arrive at <b>Beach Rd</b> If you reach Hospital Rd / Linton Ln, you've gone too far	

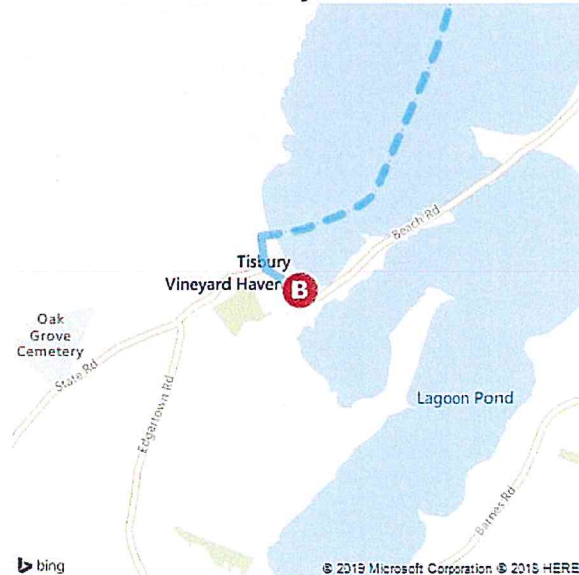
**B** 61 Beach Rd, Tisbury, MA 02568



**A** MassHousing, One Beacon Street, Boston,...



**B** 61 Beach Rd, Tisbury, MA 02568



These directions are subject to the Microsoft® Service Agreement and are for informational purposes only. No guarantee is made regarding their completeness or accuracy. Construction projects, traffic, or other events may cause actual conditions to differ from these results. Map and traffic data © 2019 HERE™.

**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 2 – Existing Condition/Site Information**







## Section 2.2 & 2.3 Aerial and Site/Context Photographs

### **Description of Project Site, Surrounding Buildings & Features**

Multi-Use Housing Development  
61 Beach Road, Vineyard Haven, MA

**Survey & Plot Plan:** These can be found as other exhibits to the application.

**Property Description:** The property is located on Beach Road, a busy commercial artery across the street from Vineyard Haven harbor. The site measures approximately 76,200 square feet and is trapezoidal in shape.



**Surrounding Property Description:** The existing buildings on Beach Road within sight of the Harborwood parcel are a *smorgasbord* of commercial structures, including the ferry terminal, a smattering of smaller retail buildings in various states of repair, large metal warehouses and tanks associated with marine industries, a small shopping center, a motel, and a gas station.

**Abutters:** The immediate abutter to the east of the subject property (on the left of the subject property in the above photo) is Tisbury Market, a 35 unit commercial condominium developed by the applicant. This is an outlier for the area. It is actually a functional and attractive center containing shops and offices, a fish market, two restaurants and a movie theater. This waterfront property essentially

turns its back on Harborwood, as it is designed to take advantage of the view onto Lagoon Pond.

The abutters across Beach Road on the waterfront to the north are a flat-roofed motel of indeterminate architectural roots and a marine store in a metal building.

The abutter to the west is a parking lot containing one small building housing a pizza take-out.

There are two abutters to the south. One is Prime Marina, containing large metal boat storage sheds and several aging rental cottages, the other is owned by the applicant and contains a commercial building with an apartment above, and a small and undistinguished house from the early 1900s.

***Additional Aerial Photos:***





***Eye/Street Level Photos:***



Photo taken from the back middle of the subject property facing Beach Road. Existing structures in the photo will be razed.



Photo of the motel directly across the street from the subject property on Beach Road.



Photo of the abutting property to the west of the subject property – a parking lot and take-out pizza establishment.



Photo of the east side of the subject property, looking at the backside of the Tisbury Market shopping & business center.

## Section 2.4 Site Characteristics/Context and Flood Map

### **Site Characteristics and Constraints**

Mixed-Used Housing Development  
61 Beach Road, Vineyard Haven, MA

**General.** The 76,198 square foot site fronts on Beach Road in Vineyard Haven, Massachusetts, across the street from Vineyard Haven Harbor. It was owned and occupied for over 100 years by the Hinckley Lumber Yard. Until recently it was a bustling enterprise which included not only the sale of lumber and other building materials, but a hardware store, plumbing supply house and a showroom. The site contained four major buildings – three wood frame structures and a large steel building -- in addition to sheds, lumber racks and storage trailers. Since taking possession of the property the applicant has demolished the derelict main structure on Beach Road and removed all of the miscellaneous trailers, sheds, racks and the like.

**Site Features.** The site is generally flat, denuded and featureless. Elevations vary from about 3' to about 6' above sea level. The average grade is about 5', slightly above Beach Road. Owing to some portions of the property being actually below Beach Road, it receives storm runoff from the roadway, resulting in standing water in places for several days after a storm. The applicant has removed asphalt paving in these areas, which has allowed the water to percolate into the ground.

There are few trees on the site but virtually no other plant material. Two prominent and mature honey locust trees along Beach Road will be retained.

Pursuant to the construction plans of the subject project, all of the remaining buildings will be demolished, and the site cleared of all paving and other vegetation.

**Zoning.** The property is currently in the Waterfront Commercial District. See the accompanying Tabular Zoning Analysis for details on this.

**Wetlands.** There are no wetlands on the property.

**FEMA Flood Zones.** The 100-year flood elevation in the front half of the property is 12' above sea level. The flood elevation for the remainder of the property is 11'. Since the bottom of the first floor of any residential structure must be at or above these levels the floor elevation of the lowest apartment level in the project is 13' above sea level. The parking level will be in the flood plain at approximately 5'.

The commercial space on Beach Road will be in the flood plain in a qualifying concrete structure. These spaces will contain mezzanines above the flood level.



# National Flood Hazard Layer FIRMette



## Legend

SEE FIS REPORT FOR DETAILED LEGEND AND INDEX MAP FOR FIRM PANEL LAYOUT

SPECIAL FLOOD HAZARD AREAS		Without Base Flood Elevation (BFE) Zone A, V, A99
		With BFE or Depth Zone AE, AO, AH, VE, AR
		Regulatory Floodway
OTHER AREAS OF FLOOD HAZARD		0.2% Annual Chance Flood Hazard, Areas of 1% annual chance flood with average depth less than one foot or with drainage areas of less than one square mile Zone X
		Future Conditions 1% Annual Chance Flood Hazard Zone X
		Area with Reduced Flood Risk due to Levee. See Notes. Zone X
		Area with Flood Risk due to Levee Zone D
OTHER AREAS		NO SCREEN Area of Minimal Flood Hazard Zone X
		Effective LOMRs
		Area of Undetermined Flood Hazard Zone D
GENERAL STRUCTURES		Channel, Culvert, or Storm Sewer
		Levee, Dike, or Floodwall
OTHER FEATURES		20.2 Cross Sections with 1% Annual Chance Water Surface Elevation
		17.5
		Coastal Transect
		Base Flood Elevation Line (BFE)
		Limit of Study
		Jurisdiction Boundary
		Coastal Transect Baseline
MAP PANELS		Digital Data Available
		No Digital Data Available
		Unmapped



The pin displayed on the map is an approximate point selected by the user and does not represent an authoritative property location.

This map complies with FEMA's standards for the use of digital flood maps if it is not void as described below. The basemap shown complies with FEMA's basemap accuracy standards

The flood hazard information is derived directly from the authoritative NFHL web services provided by FEMA. This map was exported on **6/17/2019 at 8:31:16 AM** and does not reflect changes or amendments subsequent to this date and time. The NFHL and effective information may change or become superseded by new data over time.

This map image is void if the one or more of the following map elements do not appear: basemap imagery, flood zone labels, legend, scale bar, map creation date, community identifiers, FIRM panel number, and FIRM effective date. Map images for unmapped and unmodernized areas cannot be used for regulatory purposes.

41°27'24.07"N



USGS The National Map: Orthoimagery. Data refreshed April, 2019.

0 250 500 1,000 1,500 2,000 Feet 1:6,000

41°26'57.11"N

70°35'37.86"W







**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 3 - Project Information**

## Section 3.3 Narrative Description of Design Approach and Landscape and Hardscape Notes

### **Narrative Design Approach**

Multi-use Housing Development  
61 Beach Road, Vineyard Haven, MA

**Location and Context.** The property is located on a busy commercial road across the street from Vineyard Haven Harbor, and within easy walking distance of the Main Street of Vineyard Haven. The existing buildings on Beach Road within sight of the subject parcel are a *smorgasbord* of commercial structures, including the ferry terminal, a smattering of smaller retail buildings in various states of repair, large metal warehouses and tanks associated with marine industries, a small shopping center, a motel, and a gas station. It is safe to say that the area in general is considered a bit of an eyesore. As a result there is little coherent architectural context to draw from.



***The Subject Property is in the Foreground***

**Abutters.** The immediate abutter to the east (right in the picture above) is Tisbury Market, a 35 unit commercial condominium developed by the applicant. This is an outlier for the area. It is actually a functional and attractive center containing shops and offices, a fish market, two restaurants and a movie theater. This waterfront property essentially turns its back on the subject property, as it is designed to take advantage of the view onto Lagoon Pond.



The abutters across Beach Road to the north are a flat-roofed motel of indeterminate architectural roots and a marine store in a metal building.

The abutter to the west is a parking lot containing one small building housing a pizza take-out.

There are two abutters to the south. One is Prime Marina, containing large metal boat storage sheds and several aging rental cottages, the other is owned by the applicant and contains a commercial building with an apartment above, and a small and undistinguished house from the early 1900s.

There is almost no sense of “neighborhood” here. The few houses along Lagoon Pond Road are mostly converted to commercial uses and most residential components are garage apartments and the like.

Design Approach. The last thing wanted was for the project to look like a typical apartment block, and monotony was to be avoided at all costs. Given the lack of any immediate architectural context, the approach was to draw on the wider Vineyard vernacular. Perhaps the most common building type on Martha’s Vineyard is a two and a half story residence with gable roofs and dormers. It is this imagery that the design has adopted.



*Interior Streetscape*

The buildings contain three floors, with the top floor partially contained within gables and dormers. The height is generally 30 feet with tops of gables and intersecting roof elements extending as much as 5 additional feet. The massing is highly fragmented by using a series of 20-foot-wide, attached, three-story elements, staggered in plan, each appearing as a single family dwelling. All ground floor units facing the street have private entrances, as would be seen in single family dwellings.

Claddings are a mix of familiar materials – shingles, clapboards and board-and-batten siding, separated by trim bands. Traditional double hung windows are interspersed with French doors leading to balconies. Muted colors will be used in places. Overall, there will be a great deal of variety in the facades, with few repeating elements.

Siting. The site is flat and featureless. The 200 foot width of the site suggested a central access road with buildings on both sides. There will be a sense of entering a neighborhood. Sidewalks on both sides should be frequently used as all required services are with walking distance. A small park and playground area will enhance this, and the hope is for a friendly neighborhood feeling with a good deal of street life.

Flood Plain and Parking. The site is in a flood zone with a maximum flood height of 12 feet above sea level. Since the site is at an elevation of approximately 5 feet, the lowest habitable level is some 8 feet above the ground. At first glance this suggests an awkward and unsightly condition requiring buildings on stilts. However, because the property is wide enough to accommodate a central access road with buildings on both sides it is possible, using retaining walls and fill, to bring the access road up to the elevation of the buildings, creating a level relationship between buildings and the street fronting them. A huge bonus to this configuration is the opportunity to park numerous cars underneath the buildings completely out of sight.



***The Access Road Rises to Meet the Buildings at Grade. Parking is Below.***

The interior of the project presents itself as familiar two and a half story buildings. However from Beach Road, due to the flood plain, it looks more like 4 stories. This is without question the look of the future, as all structures in this area, from now on, will essentially be a story higher than they were a few years ago. Nevertheless, to mitigate this the project will employ a tiered massing approach, with floors stair-casing back from the street.

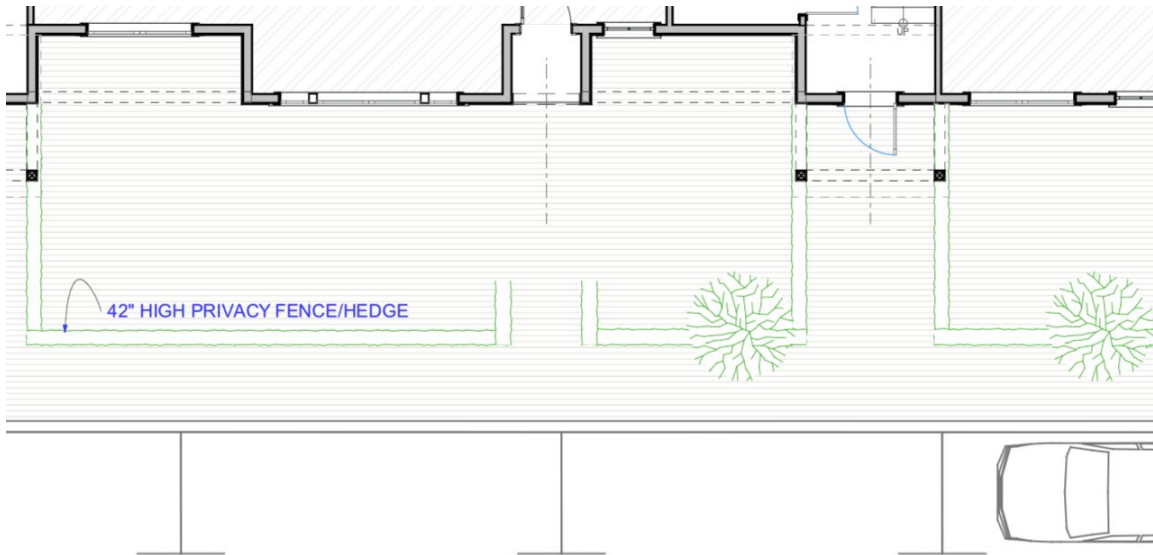
***The Beach Road Facades Will be Tiered***



**Landscape and Hardscape Notes**

Multi-use Housing Development  
61 Beach Road, Vineyard Haven, MA

**Hardscape Concept.** The area fronting the ground floor units will be used as outdoor space for the units, and for walkways to the common entrances. The transition between the access road and these entrances will be done with composite decking. This material is felt to be appropriate for a number of reasons. It can be installed dead level and at the precise elevation of the entrances, making them seamlessly accessible to the handicapped. It makes a familiar, attractive and level surface for private outdoor living space and, since parking exists below these areas the use of decking is a logical, lightweight construction method. Finally, decking is a material of choice in the waterfront area, found in boardwalks, docks, walkways and transitions to buildings constructed above the flood plain (seen at next door Tisbury Market, for example), and thus will feel familiar and appropriate.



***Detail of Typical Entrance Environments***

Other hardscape features will be benches near common entrances, street lamps, landscape lighting and tasteful signage and house numbering.

**Landscaping Concept.** Honey locust trees, found along Beach Road and in nearby projects, will be installed in planters, approximately one per 30 feet, along both sides of the access road. This highly sculptural street tree looks good in all seasons and is the perfect visual filter to screen and soften the buildings. Because it is frequently found nearby its use here will add coherence and identity to the neighborhood. The separation between common areas and private decks will be achieved with narrow, linked fiberglass planters holding varieties of beach grasses – green in summer, a tawny gold in winter -- that will grow high and thick enough to create a unique privacy hedge. These will be lit from below at night.



***Mature Honey Locust on Beach Road***



**Separations Between Decks.** In the few instances where decks to adjacent units above the ground floor are immediately side-by-side, a similar planting scheme be employed to achieve privacy.



*View from Above Illustrating Landscape and Hardscape Concept*

**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 4 – Site Control**

Section 4.1 Evidence of Site Control  
(Deed)  
(3 pages)  
Bk: 01474 Pg: 838

MARTHA'S VINEYARD LAND BANK FEE  
☐ PAID \$ 5  
☒ EXEMPT \$ 59146  
NO. 812118 DATE MAH CERTIFICATION



2018 00004658  
Bk: 1474 Pg: 838 Doc: DEED  
Page: 1 of 3 08/21/2018 11:24 AM

QUITCLAIM DEED

We, Larkin B. Reeves and Grace A. Reeves, Trustees of the Larkin B. Reeves Family Trust, u/d/t dated July 12, 1991 and recorded with the Dukes County Registry of Deeds in Book 610, Page 594, a certificate of which is recorded herewith, of Aquinnah, MA 02535

for consideration paid of less than one hundred dollars

grant to HARBORWOOD LLC, a Massachusetts Limited Liability Company with a mailing address of c/o P.O. Box 1408, Vineyard Haven, MA 02568.

WITH QUITCLAIM COVENANTS

The land in that part of Tisbury, Dukes County, Martha's Vineyard Massachusetts, known as Vineyard Haven, together with the buildings thereon and consisting of two parcels of land on the Southerly side of Beach Road bounded and described as follows:

PARCEL 1

Beginning at a concrete bound in the Southwesterly line of Beach Road in said Tisbury at the corner of the house lot of Benjamin C. Cromwell;

- THENCE Southeasterly by said Beach Road two hundred (200) feet to a concrete bound;
- THENCE Southwesterly two hundred fifty-two and 70/100 (252.70) feet to a concrete bound; and in the same course to the waters of the Bass Creek, so called, and forming an angle of 90°;
- THENCE Commencing again at the first mentioned concrete bound;
- THENCE Southwesterly one hundred ninety-two and 75/100 (192.75) feet, and in the same course to waters of Bass Creek, so called, and forming an angle of 90°;
- THENCE by the waters of said Bass Creek. Southeasterly to the point where the 252.70 foot line projected reaches said water.

Subject to the rights of the Cape & Vineyard Electric Co. to Bass Creek above described as it existed prior to the fill hereinafter mentioned.

EDMOND G. COOGAN  
LAW OFFICE, P.C.  
4A CAUSEWAY ROAD  
P. O. BOX 1839  
VINEYARD HAVEN  
MASSACHUSETTS 02568  
TEL: 508-693-3200  
FAX: 508-693-7318

61 Beach Rd. Tisbury, MA 02568

Being premises conveyed to Grantor from Herbert C. Hinckley, by deed dated April 29, 1924, and recorded with the Dukes County Registry of Deeds in Book 163, Page 56.

**PARCEL II**

All the right, title and interest of the Grantor in and to fill lying southerly of the above described premises and consisting of a parcel of land described as follows:

Beginning at a point marked M on a plan annexed to a license of the Commonwealth of Massachusetts Department of Public Works as hereinafter set forth, in the high water line of the waters of Bass Creek and in the northerly boundary line of the property above set forth and running southerly in the present high water line, two hundred (200) feet, more or less, to a point marked N in the southerly boundary line of the property above described; thence running southwesterly one hundred sixty (160) feet, more or less, to a point marked C; thence running northerly two hundred twenty-five (225) feet, more or less, to a point marked L; thence running northeasterly one hundred twenty (120) feet, more or less, to the point of beginning, marked M.

See license issued to the Grantor with accompanying plan, dated May 2, 1929, recorded with the Dukes County Registry of Deeds in Book 179, Page 93.

Subject to and together with the benefit of any easements and/or restrictions of record insofar as the same are in force and applicable.

Grantor hereby certifies under the pains and penalties of perjury that the premises herein conveyed is not homestead property.


For title see deed dated July 31, 2018 and recorded with the Dukes County Registry of Deeds in Book 1473, Page 125.

**No Title research was completed for purposes of the preparation of this deed.**



WITNESS our hands and seals this 15<sup>th</sup> day of August, 2018.

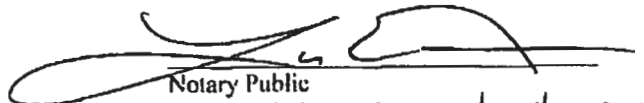
  
Larkin B. Reeves, Trustee

  
Grace A. Reeves, Trustee

STATE OF MA

COUNTY: DUKES

On this 15<sup>th</sup> day of August, 2018, before me, the undersigned notary public, personally appeared Larkin B. Reeves and Grace A. Reeves, Trustees of the aforementioned Trust, who proved to me through satisfactory evidence of identification which was Person known (source of identification) to be the people whose names are signed on the preceding or attached document, and acknowledged to me that they signed it voluntarily for its stated purpose, and who swore or affirmed to me that the contents of the document are truthful to the best of his/her/their knowledge and belief.

  
Notary Public  
My commission expires: 8/28/2020



ATTEST: Paulo C. DeOliveira, Register  
Dukes County Registry of Deeds

EDMOND G. COOGAN  
LAW OFFICE, P.C.  
4A CAUSEWAY ROAD  
P.O. BOX 1639  
VINEYARD HAVEN  
MASSACHUSETTS 02588  
TEL: 508-893-3200  
FAX: 508-893-7318

**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 5 – Financial Information**



February 21, 2019

Robert Sawyer  
Harborwood LLC  
P. O. Box 1408  
Vineyard Haven, MA 02568

Re: Harborwood LLC  
61 Beach Road, Vineyard Haven, MA  
68-Unit Affordable Housing Project

This letter is to serve as a Letter of Interest to provide construction financing for the planned 68-unit affordable housing project on 61 Beach Road, Vineyard Haven, MA. As an FHLBB and N.E. Fund member bank, the Cape Cod Five Cents Savings Bank is proud of the work that we have done with the proposed borrowers and are pleased to have this opportunity to work together again on this important project.

We understand that Harborwood LLC will create 68 units of housing. Most studies suggest the Vineyard needs at least one thousand new year-round dwelling units of housing. The project will make significant progress against this huge deficit. The Massachusetts 40B law mandates that 25% of the dwelling units, or about 17, will be affordable to those earning no more than 80% of AMI (Annual Median Income). Between 8-10 of the units will be targeted to another largely ignored demographic, the "empty nester," seniors who are ready to downsize and move into a low-maintenance residence within walking distance of services. The remaining approximately 41-43 units will provide desperately needed year-round housing to teachers, nurses, policemen, doctors, town employees and so many more -- in short, the rank-and-file working folks who are the backbone of the Martha's Vineyard community.

We are prepared, subject to further due diligence and Board approval, to provide construction financing. It is estimated that the construction period is approximately 18 months, with sales and then take out by the NEF funds. We look forward to your success and the opportunity to assist your organization with this project.

**THE PROPOSED TERMS AND CONDITIONS ARE PROVIDED FOR DISCUSSION PURPOSES ONLY AND TO NOT CONSTITUTE A FORMAL OFFER, AGREEMENT, CONTRACT OR COMMITMENT BY THE CAPE COD FIVE CENTS SAVINGS BANK TO LEND. THE ACTUAL TERMS, CONDITIONS AND REQUIREMENTS UNDER WHICH THE BANK MIGHT EXTEND CREDIT TO THE BORROWER ARE SUBJECT TO SATISFACTORY COMPLETION OF DUE DILIGENCE INCLUDING, BUT NOT LIMITED TO, A FORMAL CREDIT APPROVAL AND SATISFACTORY REVIEW OF DOCUMENTATION AND OTHER SUCH TERMS AND CONDITIONS AS DETERMINED BY THE BANK.**

Very truly yours,

A handwritten signature in blue ink, appearing to read "Stephen J. Spitz".

Stephen J. Spitz  
Vice President

### **Section 5.1. Comparable Sales**

<b>Town</b>	<b>Date Sold</b>	<b>Address</b>	<b>Type</b>	<b>Area</b>	<b>BR</b>	<b>BTH</b>	<b>Price</b>	<b>psf</b>
EDG	12/15/18	3 Bernard Way	S/F	589	2	1	\$380,000	\$645.16
OB	2/7/19	130 Wing Road	S/F	768	2	1	\$435,000	\$566.41
OB	1/31/19	2 Pennacook Ave.	condo - 101	1077	2	2	\$500,000	\$464.25
VH	1/29/19	32 Boxberry Ave	S/F	1528	4	2	\$585,000	\$382.85
VH	1/31/19	168 Lake Street	S/F	1768	3	2.5	\$700,000	\$395.93
VH	5/13/19	124 Skiff	condo -0 C 11	754	2	1	\$400,000	\$530.50

OB = Oak Bluffs

VH = Vineyard Haven

EDG = Edgartown

**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 6 – Applicant Qualifications**

**Dean E. Harrison**  
59 Lockwood Avenue  
Attleboro, MA 02703  
508.813.1388 (cell)

## **SKILL SUMMARY**

Senior manager with extensive experience in real estate development. Skilled in securing federal, state, and local regulatory land-use approvals. Experienced in obtaining financing for multi-family housing and mixed-use developments from financial institutions and investment partners. Excellent background in design, construction, scheduling, and budgeting.

## **EXPERIENCE**

(2015 – Present)

### **Women's Development Corporation, Providence, RI** ***Director of Real Estate Development***

- Directs daily operations of Wdc's Development Department which involves the oversight and management of housing and commercial acquisition, development management, financial feasibility, program management as well as federal and state reporting.
- Responsible for all phases of project development from site search and acquisition, to securing funding sources and permitting, through to construction and occupancy
- Reports to the Executive Director regarding the overall Real Estate division, staff management, operational budgets, strategic planning, and reporting to the Real Estate Committee of the Board of Directors
- Secures federal, state and local regulatory land-use approvals.

(2009 -2015)

### **The Neighborhood Corporation, Taunton, MA** ***Executive Director***

- Responsible for the overall administration of the Corporation.
- Directing its daily operation, and executing the directives and policies of the Board.
- Serves as the chief program administrator and project manager, which includes overall management of CDC finance administration, staff management, operational budgets, strategic planning, fundraising and reporting to the Board of Directors.
- Duties include housing and commercial acquisition, development management, financial feasibility, program management as well as federal and state reporting.

(2004 –2015)

### **Dean E. Harrison, Consultant, Warwick, RI** ***Owner***

- Acquire and permit real estate developments in the Commonwealth.
- Negotiate, analyze, and underwrite real estate transactions with various Local, State agencies and financial institutions.
- Provide consulting services to developers, and governmental bodies regarding zoning, financing and monitoring of affordable housing using various State Housing programs.

- Provide consulting to newly form 501 (c) (3) regarding the planning development and financing housing and commercial opportunities.

(1994-2004)

**The Gatehouse Companies, Mansfield, MA**

***Vice President of Development***

- Managed and monitored ongoing real estate division regarding the developing and financing of multi-family housing totaling over \$206 million.
- Negotiated, analyzed, and underwrote real estate transactions for various investment partners and financial institutions.
- Underwrote financing of multifamily housing developments utilizing multiple federal and state housing subsidies.
- Generated narrative and financial reports for distribution to State agencies, financial institutions and equity partners.

(1988-1994)

**Rhode Island Housing and Mortgage Finance Corporation, Providence, RI**

***Assistant Development Officer***

- Review, analyze, and underwrite tax credit proposals seeking resources through the state's competitive funding cycle under its Qualified Allocation Plan.
- Provide technical assistance to developers, property managers, and other quasi-public agencies and governmental bodies regarding program guidelines and industry practices.
- Compile and complete required IRS documentation to ensure accurate and timely compliance with Section 42 of the Internal Revenue Code.
- Perform administrative tasks associated with monitoring program activity to protect the state's annual tax credits allocation.

**EDUCATION**

**UNIVERSITY OF RHODE ISLAND, Kingston, RI**

**Bachelor of Resource Development - May 1987**

Major: Landscape Architecture

**G.P.A. 3.00**

**COMPUTER  
SKILLS**

**Microsoft Word, Excel, and PowerPoint**

Development List\*

<u>Name/Location</u>	<u>Development Type</u>	<u># of Units</u>	<u>Financing</u>	<u>Development Cost</u>
Anawan School Apts. Rehoboth, MA (Comprehensive Permit)	Multi-family Senior	36	Massachusetts Housing Partnership Commonwealth of Massachusetts	\$11,500,000
Baron Lofts Apts. Taunton, MA	Mixed-use	6 residential/ Office space/Art Gallery	Neighborhood Stabilization Funds GATHC HOME Funds Bristol County Saving Bank	\$1,500,000
Barrington Cove Apts. Barrington, RI	Multi-family Senior	60	Rhode Island Housing and Mortgage Finance Corp.	\$6,422,028
Brook Ave Cooperatives Boston, MA	Multi-family Family	36	MHIC/MHP Commonwealth of Massachusetts City of Boston	\$7,150,000
Cedar Forest Apts. Tampa, FL	Multi-family Family	200	Neighborhood Landing Partners, Inc. Florida Housing Finance Corporation Hillsborough County	\$14,597,773
Cherry Hill II Plymouth, MA	Mixed-use	35 Elderly Residential/ 5,000 sqft Office	Massachusetts Housing Partnership Commonwealth of Massachusetts Rockland Trust Bank. Verizion Capital	\$12,162,045
Chestnut Farm Apartments Raynham, MA (Comprehensive Permit)	Multi-family Family	240	MassMutual Commonwealth of Massachusetts John Hancock	\$32,365,000
The Crossings at Indian Run Stuart, FL	Multi-family Family	344	Florida Housing Finance Agency First Union National Bank	\$23,551,018
Dean Street Studios Providence, RI	Enhanced SRO Under Construction	51	Rhode Island Housing Coastway Bank Federal Home Loan Bank	\$9,036,326
Franklin Commons Apartments Franklin, MA (Comprehensive Permit)	Multi-family Family	96	MHIC/MHP Commonwealth of Massachusetts John Hancock	\$14,315,000
The Groves Middleborough, MA (Comprehensive Permit)	Multi-family (Condominiums)	52	Rockland Trust Bank.	\$11,846,421
Nantucket Bay Apartments Temple Terrace, FL	Multi-family Senior	180	First Housing Development Corp. Florida Housing Finance Corp. Hillsborough County	\$12,488,918
Newport Landing Apartments Tampa, Florida	Multi-family Family	122	Neighborhood Lending Partners, Inc. Florida Housing Finance Corporation Hillsborough County	\$11,614,343
The Preserve Walpole, MA (Comprehensive Permit)	Multi-family Family	300	MassHousing Commonwealth of Massachusetts	\$44,859,138
The Residences at the Grove Middleborough, MA (Comprehensive Permit)	Multi-family Family	36	Massachusetts Housing Partnership Commonwealth of Massachusetts Rockland Trust Bank. J.P Morgan	\$7,485,000
The Rosemary Village Scattered Sites West Palm Beach, FL	Family (Single Family Homes)	53	First Housing Development Corp. City of West Palm Beach	\$6,247,838
Sajda Gardens West Boylston, MA (Comprehensive Permit)	Multi-family Family	80	Massachusetts Housing Partnership Middlesex Saving Bank	\$10,889,366
Shannock Falls Scattered Sites Richmond/Charlestown, RI	Multi-family Family (Under construction)	43	Rhode Island Housing Citizens Bank CREA Equity	\$15,607,223
Shoe Shop Place Middleborough, MA (Comprehensive Permit)	Multi-family Family (Under construction)	25	Massachusetts Housing Partnership Commonwealth of Massachusetts Bank of America	\$9,615,930
Somerset Woods Dighton, MA (Comprehensive Permit)	Multi-family Mixed Income (Permitted)	240	Massachusetts Housing Partnership	\$10,854,366
Springbrook Commons Apts. West Palm Beach, FL	Multi-family Family	144	Boston Capital Mortgage Corp. Florida Housing Finance Agency	\$10,569,860



Williams Landing Apartments Tampa, FL	Multi-family Family	144	Neighborhood Lending Partners, Inc. Florida Housing Finance Corporation Hillsborough County	\$11,323,337
Willis Apartments New Bedford, MA	Multi-family Veterans (Under construction)	30	Commonwealth of Massachusetts CEDAC	\$9,129,511
Willow Trace Apartments Plainville, MA (Comprehensive Permit)	Multi-family Family	88	First Union National Bank Commonwealth of Massachusetts	\$10,506,202
		<hr/>		<hr/>
<b>Totals</b>		<b>2,641</b>		<b>\$315,636,643</b>

#### HISTORIC PROPERTIES

<u>Name/Location</u>	<u>Resident Profile</u>	<u># of Units</u>	<u>Financing</u>	<u>Development Cost</u>
Barrington Cove Apartments Barrington, RI	Multi-family Senior	60	Rhode Island Housing and Mortgage Finance Corp	\$ 6,422,028
Carlton Court Apts Providence, RI	Multi-family Senior	46	Rhode Island Housing and Mortgage Finance Corp	\$ 2,492,979
Clarke School Apartments Newport, RI	Multi-family Senior	56	Rhode Island Housing and Mortgage Finance Corp	\$ 5,499,605
		<hr/>		<hr/>
<b>Total</b>		<b>162</b>		<b>\$14,414,612</b>

Note: \*Involved in the various phase of development - acquisition, permitting, financing and construction of the development.

#### COMPLETED SITE APPROVALS - Consultant

<u>Name/Location</u>	<u>Resident Profile</u>	<u># of Units</u>	<u>Subsidizing Agency</u>
Brookview Estates Mendon, MA	Homeownership	18	MassHousing
Burns Ave Walpole, MA	Homeownership	36	MassHousing
Geoffrey Park Holliston, MA	Homeownership	24	MassHousing
Goodridge Brook Estates Lancaster, MA	Homeownership	56	MassHousing
Goodridge Brook Estates Lancaster, MA	Rental	96	MassHousing
Southmeadow Village Sterling, MA	Homeownership	18	MassHousing
		<hr/>	
		<b>248</b>	

#### SPECIALIZED HOUSING - NON-PROFIT

The Arc of Fall River Scattered Sites	Special needs	19	MassHousing, DMH, DMR	\$ 1,645,000
Cape Head injured Person's Housing Hyannis, MA	Head Injury	20	MassHousing, HIF, AHTF Bank North	\$ 1,956,000
		<hr/>		<hr/>
		<b>39</b>		<b>\$3,601,000</b>

#### MASSACHUSETTS HOUSING PARTNERSHIP 40B Technical Assistances

<u>Community</u>	<u>Retained by:</u>	<u>Community Type</u>
Northborough	MHP	Condominiums
Scituate	MHP	Condominiums
Hingham - 2 projects	MHP - 1, Town - 1	Condominiums
Grafton - 3 projects	MHP - 1, Town - 2	Condominiums
Duxbury	MHP	Condominiums
Douglas	MHP	Condominiums
Yarmouth	MHP	Condominiums
Berkley	MHP	Condominiums
North Dartmouth	MHP	Condominiums
Hamilton	Town	Condominiums
Lynnfield	Town	Condominiums

# ***Real Estate Expert Qualifications***

## **Robert M. Sawyer**

**Instructor • Consultant • Writer • Broker • Developer • Expert Witness**

A real estate professional, possessing substantial knowledge and experience in all aspects of conventional real estate finance, development, brokerage and management.

**LICENSED REAL ESTATE INSTRUCTOR:** Licensed by the Commonwealth of Massachusetts to teach all continuing education, both licensing courses, and instructor licensing course. Formerly taught real estate at two small colleges.

**CONSULTANT:** Maintains an active practice advising buyers, sellers, licensees and investors on all facets of real estate and finance.

**WRITER:** Author of Massachusetts Real Estate Principles, Practices, and Law originally published by Cengage-South-Western (formerly Thomson). This book is the most comprehensive reference on Massachusetts real estate law and practice published today. Written myriad articles, courses and assembled countless property packages for lenders and developers.

**REVIEWER:** Massachusetts Real Estate Practice & Law, Seventh Edition, published by Dearborn Real Estate Education.

**BROKER:** Extensive experience in all types of conventional residential and commercial real estate transactions. Considerable experience in large and complex commercial brokerage including numerous § 1031 transactions and assemblages.

**ADVISOR:** Advisor to the Commonwealth of Massachusetts Board of Registration for Real Estate Brokers and Salespersons for 14 years. Has written and edited a majority of all of the state-approved continuing education courses.

**TEST WRITER:** Designated a National Subject Matter Expert by Pearson VUE, a nationally recognized leading provider of assessment services to regulatory agencies and national associations, Mr. Sawyer has been a member of their National Real Estate Committee. He has reviewed and critiqued the national licensing examination and is periodically contracted to write test questions for the national licensing exam.

Has also served, for many years, as member of the Massachusetts Item Writing Committee charged with reviewing and writing questions for the Massachusetts state-licensing exam.

**DEVELOPER:** Extensive experience in both commercial and residential development. Mr. Sawyer was one of the first in the Nation to develop small residential condominium conversions. He has, developed a myriad of commercial projects and is today owner and developer of numerous commercial properties in Martha's Vineyard MA.

**EXPERT WITNESS:** Qualified Expert in many facets of brokerage relationships, license law and real estate finance. Appeared and qualified in Court as Expert Witness in a number of relevant litigation matters.

**MORTGAGE & CREDIT:** Experienced in all types of conventional residential and commercial real estate mortgage loans and credit issues. Mr. Sawyer has continuously packaged and arranged residential and commercial mortgage loans for clients for many years.

**MEMBER:** Real Estate Educators Association (REEA)  
National Association of Realtors (NAR) *(former)*  
Massachusetts Association of Realtors (MAR) *(former)*  
Greater Boston Real Estate Board (GREB) *(former)*

**REID A. (SAM) DUNN**

**79 Beach Road**

**Vineyard Haven, MA**

**202.437.7679**

**[samdunn@rcn.com](mailto:samdunn@rcn.com)**

**Recent Development Experience - (Some projects were built in Partnership with other entities)**

Reid A. (Sam) Dunn is an architect and builder with over 40 year's experience in architecture and real estate development. Dunn has built dozens of small to medium-sized projects in Washington, DC, Santa Monica, CA and in resort areas of Massachusetts and Colorado, running the gamut from luxury detached homes to residential condominiums, retail and office buildings and mixed use complexes. His approach has been to identify and execute projects with a high potential for creative solutions and architectural focus. Mr. Dunn was educated at the University of Virginia (Bachelor of Civil Engineering, 1964) and Stanford University (Master of Architecture, 1968) where he graduated first in his class. He also served as an officer in the U.S. Navy. He is an experienced blue water sailor and pilot, having owned and flown a variety of aircraft for business and pleasure. He is married and has three grown sons and five grandchildren.

**Selected Projects:**

- **Four Residential Units** – Santa Monica CA. (Currently under construction). This project in the heart of Santa Monica's highly sought after Ocean Park neighborhood will transform four bungalows dating from the 1920s into a modernized and sparkling oasis for today's buyers. Only a few blocks from the Pacific, most units will enjoy ocean views. The 5500 sf of finished space should bring a sellout in the \$6 million range.
- **Bowling Alley, Restaurant and Bar** – Oak Bluffs, MA. This 15,000 sf facility contains 10 bowling lanes, a 62 seat restaurant, full bar, ping pong tables, event room and 32 car parking lot. It opened in early 2015 and has become an Island institution. This business is owned and operated. Its value is in the \$8-10 million range.
- **Tisbury Marketplace Expansion** – Vineyard Haven, MA. This 6000 SF mixed use condominium building occupies a site directly on Lagoon Pond. All units have panoramic views of the water. The project is located in a highly successful shopping and office area that contains 20 successful businesses and three restaurants. Construction was completed in 2013 and the units promptly sold. The sellout was about \$2 million.
- **Martha's Vineyard Film Center** – Vineyard Haven, MA. This 200 seat movie theater is leased to the Martha's Vineyard Film Society, a successful non profit Vineyard "art house" of some 15 year's standing. In addition to year round film offerings the Society conducts a renowned International Film festival in September. The theater is also available for musical events, lectures, convention activities and performances. The theater contains a stage with performance lighting, state-of-the-art stadium seating, digital projection and high-end surround sound. Completed in 2013, its value is about \$2 million.

- **2000 Massachusetts Avenue** – Washington, DC. This 25,000 square foot National Landmark building, located on Dupont Circle, was built in 1882 by Senator and presidential candidate James Blaine. The Queen Anne mansion was completely restored, including all new finishes and mechanical systems. An unabashedly modern six-story, 20,000 square foot addition of zinc and glass was connected to the mansion, making for a dazzling contrast between old and new. Opened in 2009, the mixed-use complex contains two restaurants, offices, large two-story condominiums, a rooftop pool and underground parking. The sellout was about \$26 million.
- **Saltwater Restaurant** – Vineyard Haven, MA. This high-end waterfront restaurant is located in the resort community of Vineyard Haven, Massachusetts. The main dining room has a soaring sky-blue barrel vaulted ceiling and a curved glass wall exposing all of the 90 seats to an expansive water view. Other features include a sealed concrete bar, a screened patio for outdoor dining and a unique décor featuring ink prints of local fish. It opened in 2008 and has since established itself as the premier Vineyard Haven Restaurant. This business was owned and operated for seven years and sold in 2014. It is valued at \$2 million.
- **Rosedale Conservancy** – is a six-acre estate in the heart of Washington, DC's Cleveland Park neighborhood. The Centerpiece of Rosedale is a 1670 farmhouse-the oldest house in the city and a National Landmark. The project consisted of the preservation of this historic house, demolition of three large 1960's brick dormitories which despoiled the grounds, raising over \$4 million from surrounding neighbors to donate a three-acre "viewshed" of the historic house to the Conservancy to be used as a neighborhood park, and the subdivision of the remainder of the property into ten unique and extremely desirable building lots, all of which sold immediately at prices of up to \$2.5 million each. The project was completed in 2006 with a total value of approximately \$20 million.
- **Woodland Center** - is a 1970's shopping area on Martha's Vineyard Island. It was completely renovated and converted to retail condominiums 2006. In 2007 a 10,000 square foot new building was constructed. The project contains 21 retail establishments and two restaurants. The renovation transformed this well located but low-end property into one with lush landscaping and new shingle style porches fronting the buildings. A total sellout of \$7 million was accomplished.
- **4319-21 Fessenden Street, NW** is the site of four new high-end shingle style houses of more than 4,000 square feet each. This leafy Washington, D.C. neighborhood is within walking distance of the commercial areas and metro stops of both Friendship Heights and Tenley Town. The sales of these houses totaled more than \$5.5 million.
- **1531 31<sup>st</sup> Street, NW** - in Georgetown, Washington DC was converted to four sunny and charming condominium apartments in 2005. The Victorian era building is graced with bays and turrets that make for unique and complex interior

spaces. The many windows provided by its corner location made these high-ceilinged apartments as bright and airy as can be found in Georgetown. A sellout approaching \$3 million was realized.

- **Whiskey Creek Golf Club**, Urbana, Maryland. Whiskey Creek is an upscale, daily fee golf course close to the 1-270 corridor. The golf course was designed by The IMP Design Group, with U. S. Open Champion Ernie Els serving as Design Consultant. It opened in June 2000 and was immediately selected by local publications as one of the best in the Mid-Atlantic region and by Golf Magazine as one of the best new courses nationwide. Accolades received since include a 4.5 star (out of 5) Golf Digest Rating, Number 2 in Maryland by the Zagat Survey, and Top 40 Nationwide by Golf and Travel Magazine. Value equals \$11 million.
- **18 Custom Houses** - surrounding Whiskey Creek Golf Course, Urbana, Maryland. A small number of houses on large lots planned, designed and built to a single design vision using stone, stucco and wood shingles. These houses each have special views of the golf course, creeks, or surrounding mountains. Because of their isolation, quality of design and construction, and careful layout, these lots and houses have become the most sought-after and expensive in Frederick County. This project has a total value of \$16 million.
- **Blue Mesa Lodge and Condominiums** – Telluride, CO. This 60,000 square foot complex in the heart of the new mountain village at the confluence of three of Telluride's ski lifts contains 10,000 feet of retail space, a 28-room ski lodge, seven large residential condominiums, a restaurant featuring the actual Victorian bar that Butch Cassidy frequented and a heated underground parking garage. Designed in a Southwest motif of Stucco, stone, and red tile, the building enjoys magnificent vistas of the San Juan mountains. The complex was constructed in two phases in the 1990's. It had a total sellout of about \$10 million.
- **Five Luxury Condominium Townhouses** – Dupont Circle, Washington, DC. These large townhouses with a common underground parking garage were created out of a complex of historic buildings in Washington's venerable Dupont Circle neighborhood. Current value: About \$10 million.
- **Mixed-use building** - Washington, DC. This 54,000 square foot building in the heart of the Georgetown waterfront district contains 19 residential condominiums, 18,000 square feet of commercial condominium space, and an underground parking garage. An historic canal warehouse was retained as part of the design. Value: \$18 million.
- **20,000 square foot condominium retail and office complex** - Vineyard Haven, Massachusetts. This project contains 26 shops and offices. The two-story, wood-shingled buildings are located in a waterfront setting just outside Vineyard Haven on Martha's Vineyard Island. Built and sold in the 1980's, the current value of the units is \$9 million.

**Larkin B. Reeves**  
**Real Estate Experience**

Since 1965 "Barry" Reeves has continually acquired, developed and managed well over 100 residential rental units with a market value of approximately \$40,000,000

As Barry is fond of saying, "I'm a buyer, not a seller." His formula has been to buy, improve and hold. Consequently, as the years went by his holdings steadily grew in number. But this was nothing compared to the exponential increase in value of the properties over time.

Today, he is the developer and an owner of the largest restaurant, bowling center and function facility on Martha's Vineyard.

Additionally, he is part owner and developer in numerous commercial properties in Oak Bluffs, West Tisbury, Aquinnah and Vineyard Haven MA.



## Josh Dunn

312-420-3937   [yoshidunn@gmail.com](mailto:yoshidunn@gmail.com)   11 Runaway Ln West Tisbury, MA 02568

### Profile

Josh Dunn is a design-build professional with over 20 years experience working in diverse fields, from furniture making to large scale commercial projects. He is a carpenter by trade, and self taught as a designer. After graduating from college with a degree in english, he taught himself drafting, and ultimately came to architecture "through the back door." He is very hands-on in all of his projects, and can address every aspect of a building project – architectural design, permitting, construction, interior design and even furniture making.

### Experience

#### **DESIGNER/PROJECT MANAGER/BUILDER, MARTHA'S VINEYARD, MA - CURRENT**

Designing, permitting and constructing a guest house and studio in Chilmark, MA.  
Designing, permitting and building a commercial kitchen, Oak Bluffs, MA. Planning for construction of a 68 unit affordable housing project in Vineyard Haven, MA.

#### **BUILDER, MARTHA'S VINEYARD, MA - 2017-2018**

Executed numerous projects, including the design and renovation of a large agricultural barn in West Tisbury, MA, a high end kitchen renovation in Vineyard Haven, MA, and the design and construction of restaurant furnishings and fixtures for a restaurant in Oak Bluffs, MA.

#### **DESIGNER/PROJECT MANAGER/BUILDER, HIGHLAND PL, WASHINGTON DC - 2015-2016**

Designed and built a top-to-bottom renovation of a historic house in the Cleveland Park neighborhood of Washington, DC.

**BUILDER/PROJECT MANAGER, THE BARN BOWL & BISTRO, MARTHA'S VINEYARD, MA – 2014-2015**

Managed the interior design and construction of The Barn, a 15,000 sf bowling alley and bistro in Oak Bluffs, MA. Designed and crafted interior features including soffits a horseshoe-shaped bar, booths, dining tables and intricate glass walls separating areas of the facility.

**DESIGNER/BUILDER/PROJECT MANAGER, MARYLAND INSTITUTE COLLEGE OF ART, BALTIMORE, MD. - SUMMER 2014**

Redesigned and renovated the sculpture department's storage facility at The Maryland Institute College of Art. Used CAD and CNC technology to fabricate a modular tool room constructed entirely of plywood.

**FURNITURE MAKER, FRIENDS AND FAMILY NY, NY - 2013-2014**

Worked for Friends and Family, a high-end New York City studio, designing and building custom furniture and built-ins for a variety of projects, including a hotel, salon, various restaurants and clothing store.

**BUILDER, SUZUME RESTAURANT, BROOKLYN, NY 2012-2013**

Crafted the interior of a Brooklyn, NY bar and restaurant, including the construction of a unique epoxy bar-top and built-in furnishings.

**PROJECT MANAGER/BUILDER, 2013 V ST, WASHINGTON DC, 2012**

Designed and built a high-end apartment in a Washington, DC residence. Designed and built furnishings and built-ins for the main house.



**DESIGNER/PROJECT MANAGER/BUILDER, KEENE, NY 2012**

Designed, constructed, and collaborated on an experimental artists camp in the Adirondack Mountains. The project included the erection of a 35 foot tall mediative tree house, an outdoor kitchen, and various outbuildings.

**BUILDER/PROJECT MANAGER, SUNNYVALE, CA 2011-2012**

Managed the renovation of a high-end residence in Silicon Valley.

**BUILDER, GALENA, IL 2010-2011**

Constructed a 2500 sq ft timber frame home in northern Illinois. Participated in all elements of construction, from hand chisel work, to mortise and tenon assembly and timber raising.

**BUILDER, CHICAGO, IL 2009-2010**

Designed and built numerous small scale projects, ranging from kitchen renovations, to custom built-ins, and furniture pieces.

**DESIGNER/BUILDER/PROJECT MANAGER, MARTHA'S VINEYARD, MA - 2008-2009**

Designed and built a passive solar guest house in West Tisbury, MA. This project featured a number of intersecting geometric elements including a round stair tower, a barrel-vaulted ceiling and trapezoidal windows.

**DESIGNER/PROJECT MANAGER/BUILDER, CHICAGO, IL -2003-2008**

Designed and renovated four speculative projects in the Ukrainian Village neighborhood of Chicago, including two apartments , a three story single family home, and a large loft conversion.

## Education

American University, BA 1995

## Licensing

Construction Supervisor Licensing in progress

## References

References available on request

## **Section 6.1.e Team Qualifications**

### **Michael A. Sawyer**

Michael Sawyer is a real estate professional devoted to managing & developing real estate.

#### **Experience:**

##### **Developer, CHARLESTOWN, MA**

Acquired, gutted, fully remodeled & flipped 3 bedroom waterfront condominium unit

##### **Developer, MEDFORD, MA**

Acquired, remodeled and flipped very old single-family waterfront home

##### **Property and Improvement Manager, MARTHA'S VINEYARD, MA**

Assistant Property Manager for 20-unit commercial building supervising all improvements

##### **Developer and Construction Manager MARTHA'S VINEYARD, MA**

Acquired and remodeled three-unit mixed use property, including the transformation of a commercial garage into a yoga studio & wellness center

##### **General Manager, THE BARN BOWL & BISTRO, MARTHA'S VINEYARD, MA**

General Manager of The Barn, a 15,000 square foot bowling alley, bar, bistro and private event facility located in Oak Bluffs, MA. Overseeing all day to date operations, building maintenance & improvements, and managing a staff of 40 personnel.

##### **Developer, MARTHA'S VINEYARD, MA**

Acquired, designed and managed substantial improvement project including full kitchen remodel, new hardwood flooring, and creation of a large back yard with extensive retaining walls and irrigation

##### **Broker, MARTHA'S VINEYARD, MA**

Extensive experience as licensed real estate broker in a myriad of commercial and residential transactions.

*Education:* Union College, BA 2005

*Licensing:* Massachusetts Real Estate Broker's License

*References:* References available on request

**Comprehensive Permit Site Approval Application  
Harborwood LLC**

**Section 7 – Notifications and Fees**

**See Application Form (Page 25) and Tab 5 and 6**

## **HARBORWOOD ATTACHMENT 7**

7.1 Narrative describing any prior correspondence and/or meetings with municipal officials. **The Sponsor has meet with Town's Officials on October 4, 2018. The Sponsor discussed their proposed plans for the site. In addition, the Sponsor had additional one-on-one meeting with the 3 Selectpersons along with numerous meetings with the Martha's Vineyard Commission and Sewer Advisory Board.**

7.2 Evidence (such as a certified mail receipt) that a copy of the complete application package was sent to the Chief Elected Official of Municipality (may be submitted after the application is submitted to MassHousing). **To be submitted under separate cover.**

7.3 Copy of notice of application sent to DHCD. **Attached.**

7.4 Check made out to MassHousing for Processing Fee (\$2500). **Attached**

7.5 Check made payable to Massachusetts Housing Partnership for Technical Assistance/Mediation Fee. **Attached.**

7.6 W-9 (Taxpayer Identification Number). **Harborwood LLC – 83-1701988**

# Section 7.6 W-9

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

## Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type.  
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Harborwood LLC</b>	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) <b>P</b> <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions)	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. <b>P. O. Box 1408</b>	Requester's name and address (optional)
6 City, state, and ZIP code <b>Vineyard Haven, MA 02568</b>	
7 List account number(s) here (optional)	

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

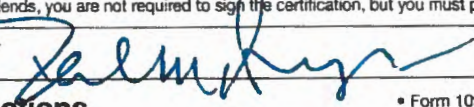
Social security number								
			-				-	
or								
Employer identification number								
8	3	-	1	7	0	1	9	8

### Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person 	Date <b>2-5-19</b>
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
  - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
  - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
  - Form 1099-S (proceeds from real estate transactions)
  - Form 1099-K (merchant card and third party network transactions)
  - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
  - Form 1099-C (canceled debt)
  - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Site Approval Application  
61 Beach Road

Transmittal Letter to the Town of Vineyard Haven

**Dean E. Harrison**  
**59 Lockwood Avenue**  
**Attleboro, MA, 02703**  
**(508) 813.1388**

June 21, 2019

Board of Selectman  
Melinda F. Loberg, Chairperson  
Town of Vineyard Haven  
PO Box 1239  
51 Spring St.  
Vineyard Haven, MA 02568

RE: Comprehensive Site Approval Application  
Harborwood  
61 Beach Road, Vineyard Haven, MA 02568

Dear Chairperson Loberg:

Harborwood LLC is pleased to provide a copy of our application that was submitted to Masshousing for a Comprehensive Permit Site Approval.

In addition to the information submitted to you herewith, it is our intention to provide a presentation of our plans at future meetings with the Town of Vineyard Haven. As you can see from the attached information, this development will be consistent with the affordable housing needs of the Town.

The property is identified as Assessors Map 9, Block B, Lot 18 containing approximately 1.75 +/- acres. We are proposing 68 homeownership of which 17 will be affordable for families at/or below 80% of AMI.

We look forward to meeting with the Town of Vineyard Haven to discuss this project and working with the Zoning Board of Appeals in successful conclusion and the issuance of a Comprehensive Permit which we believe will be an asset to the Town.

Very truly yours,



Dean E. Harrison  
Consultant for Harborwood LLC

Cc: Michael Busby, Masshousing  
Robert Sawyer, Harborwood LLC  
Sam Dunn, Harborwood LLC



Site Approval Application  
61 Beach Road

Transmittal Letter to the Department of Housing and Community  
Development

**Dean E. Harrison**  
**59 Lockwood Avenue**  
**Attleboro, MA, 02703**  
**(508) 813.1388**

June 21, 2019

Janelle Chan,  
Undersecretary,  
Department of Housing and Community Development  
100 Cambridge Street, Suite 300  
Boston, Massachusetts 02114

RE: Comprehensive Site Approval Application  
Harborwood  
61 Beach Road, Vineyard Haven, MA 02568

Dear Ms. Chan:

Harborwood LLC is pleased to provide a copy of our application that was submitted to Masshousing for a Comprehensive Permit Site Approval.

The property is identified as Assessors Map 9, Block, Lot 18 containing approximately 1.75 +/- acres. We are proposing 68 homeownership of which 17 will be affordable for families at/or below 80% of AMI.

We look forward to working with Masshousing and the Town of Vineyard Haven in the issuance of a Comprehensive Permit for a development which we believe will be an asset to the Town.

Very truly yours,



Dean E. Harrison  
Consultant for Harborwood LLC

Cc: Michael Busby, Masshousing  
Melinda F. Loberg, Chairperson, Board of Selectman, Town of Vineyard Haven  
Robert Sawyer, Harborwood LLC  
Sam Dunn, Harborwood LLC

Site Approval Application  
61 Beach Road

Application Fees

61 Beach Road 40B  
PEL Application Fees

Vineyard Haven		68 HO
MassHousing Application Processing Fee - <b>Payable to MassHousing:</b>	\$	<b>2,500</b>
Chapter 40B Technical Assistance - <b>Payable</b> <b>to Massachusetts Housing Partnership</b>	\$	<b>5,900</b>
Base Fee:	\$	2,500
Unit Fee: \$50 per unit	\$	<u>3,400</u>
Total 40B TA	\$	5,900
<b>Total PEL Fee -</b>	<b>\$</b>	<b>8,400</b>