



## Responsible Construction, Sustainable Development

Founded in 1998 on the principles of entrepreneurial ingenuity, client service, and industry-leading practices, Marathon is committed to sustainable building, superior project management, and community support. Marathon regenerates our neighborhoods and empowers our residents through the holistic development of sustainable multifamily housing coupled with supportive services.

### Development Areas of Expertise and Focus

Marathon Development builds on our Construction business' long record of success and client satisfaction, and extends our operations into project conception, acquisition, design, and implementation, with a particular focus on expanding housing options. We aim for collaboration with purpose, delivering solutions to some of our communities' toughest challenges.

Leveraging the four decades of expertise, problem-solving, and value engineering of our CEO, Harry Angevine, Marathon is able to develop, finance, and construct projects more economically and often on a shorter timeline than traditional developers. With lower total development costs, we are able to create more affordable inventory to serve a much needed population. This coupled with our trendsetting approach to provide a litany of services to our residents sets us apart from traditional developers and makes our projects a true success story for our constituents.

Marathon Development strongly values its relationships with government agencies, civic groups, and the communities we serve and welcomes new opportunities to meet the needs of our communities.

"Marathon Development is about building stronger communities, connecting with the community from the onset at the neighborhood level. We engage with civic leaders and service providers to provide support and relief for those in need and to create a development that serves the needs of the many."

— Harry Angevine, CEO and President

### Marathon Development Capabilities

#### Innovative Housing Solutions

In this time of economic uncertainty and widespread housing shortages, Marathon Development has stepped forward to deliver fresh, outside-the-box answers. Our success stories include the redevelopment of Rockville Mill, a 13-unit supportive housing complex in Hopkinton, R.I. that includes wrap-around services in partnership with well regarded supportive services providers. The integration of these services have created a community within this development where residents work together to ensure the success of one another and has become a model for future developments.

#### Revitalizing Renowned Properties

Leveraging the depth of experience Marathon Construction has in the historical arena, Marathon Development aims to renew and repurpose existing historical buildings in communities that are lacking housing. By taking otherwise blighted properties and bringing life to them both through new residents as well as service providers/commercial tenants we are able to make these neighborhoods vibrant once again.

#### Industry-Leading Practice

Marathon is well versed in every facet of project development, general contracting, and construction management, cultivated over two decades with a tight-knit group of select, industry-leading subcontractors operating with the utmost knowledge and capabilities. Marathon is committed to sustainable building, superior project management, and second-to-none creativity.

#### Partnering with Marathon

Every development should be an asset to each neighborhood we build in. From preserving historic buildings to delivering new homes, we want to leave a lasting legacy. In the development world, this experience allows MDC to develop and construct projects more economically than traditional developers. With lower total development costs, MDC is able to create more affordable inventory to serve a much needed population.

#### MARATHON DEVELOPMENT

580 Harrison Avenue, Suite 3A  
Boston, MA 02118  
617.536.3500 Office  
[www.MarathonNE.com](http://www.MarathonNE.com)

# MARATHON LEADERSHIP



**HARRY ANGEVINE**  
*Chief Executive Officer and President*

Harry Angevine is CEO of Marathon Construction & Development, responsible for all aspects of the business from project selection to on-site management, overseeing the development and construction of projects totaling over \$750 million.

Mr. Angevine has always loved understanding how buildings are constructed and, having worked in the construction and development industry since 1979, his birdseye view of the building process allowed him to see what improvements could be made regarding both client and subcontractor relationships. Angevine's unique, personalized approach of having the key players of projects in the room at all times has paid dividends over the years in terms of longstanding relationships and many successful projects.

Mr. Angevine is passionate about developing more affordable housing coupled with supportive services to ensure constituents have the best chance at lifelong success. He is most proud of Marathon's development of the Rockville Mill Supportive Housing Project, which provided housing to 13 families and 21 children two weeks before Christmas at the height of the pandemic in 2020.

"My vision is that we can provide housing at an affordable level and also provide services such as education, job training, counseling services, and childcare to give families the best chance for success."

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**FRANK ANGEVINE**  
*Chief Financial Officer*

As CFO of Marathon Construction and Development, Frank Angevine leads the development of business strategies and processes to maximize the growth and efficiency of the firm.

Frank consistently delivers construction and housing products at competitive costs ahead of deadlines. He brings a data driven mindset to solving business problems and innovating breakthrough solutions in the affordable housing space.

Leveraging his background in financial markets and interest in real estate, Frank brings an edge to everything Marathon delivers to their stakeholders. His passion for solving the housing affordability crisis has led to the inception of the development sector of the family business.

"The only way we are going to solve the affordable housing crisis is through disrupting the industry. We intend to do this by accelerating the pace at which units are brought to market, and by providing wrap-around supportive services to support tenant success."

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**MIKE LIBERATORE**  
*Director of Development*

Michael Liberatore is the Director of Development for Marathon Construction and Development. He has worked in real estate finance, sales and development spanning market rate and affordable properties utilizing conventional finance, public subsidies, and tax credits since 2003.

Mike's passion lies in developing real estate to empower people to live independently. He believes development is like a puzzle waiting to be solved for his clients. His role is to assemble the land, capital, and people to get the development off the ground and operating to the benefit of residents, investors, and public partners.

Mike holds both an undergraduate degree in finance and an MBA, which helped him understand the principles of real estate finance, but also leans on his personal and professional experiences to teach him the skills he utilizes today. He approaches each project with attention and compassion.

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# KEYNOTE DEVELOPMENT PROJECTS



**PROJECT:** Rockville Mill

**LOCATION:** Hopkinton, RI

**YEAR:** 2020

**UNITS:** 14

**STATUS:** Completed

This was a unique partnership between Marathon Development and supportive service agencies, a redevelopment opportunity that delivered major benefits for the community and for families in need.

Marathon was awarded a grant and, within five months, was able to house 14 families (including 21 children) previously experiencing homelessness. The property had been vacant for 9 years and, with the help of the town's building and zoning department, Marathon had it renovated and ready for occupancy ahead of the proposed deadline for Christmas 2020.



**PROJECT:** Copley Chambers I

**LOCATION:** Providence, RI

**YEAR:** Est. Completion 2022

**UNITS:** 26

**STATUS:** In-Process

Copley Chambers was constructed in 1913 as one of the first apartment homes in the City of Providence. As such, the building has rich historical significance. Marathon is reverting the 22,000 sq. ft. building from its current vacant state back into residential and commercial uses. The redevelopment plan is to convert the vacant building into a mixed-use property consisting of six studios, eighteen one-bedrooms and three two-bedrooms, including two ADA units. The first floor will feature 1,350 sq. ft. of commercial space plus a community room, laundry room and office space.

In partnership with RIHousing, PHA, AdoptionRI, and local supportive service providers, the development will offer housing to individuals aging out of the foster care system.

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## KEYNOTE CONSTRUCTION PROJECTS



**PROJECT:** Mayflower Spa and Inn

**LOCATION:** Washington, CT

**YEAR:** 2008

**STATUS:** Completed

The Mayflower Inn is renowned as one of the northeast's most lauded luxury hideaways, a lavish English country house and three standalone cottages. Marathon provided the design and development consulting services, budget development and management, as well as the construction of a 10,000 square foot hotel addition, as well as adding a brand new 10,000 square foot 5 star spa facility.

Impressed by the Mayflower's lofty goal of providing the ultimate spa experience in the Northeast, Marathon overcame timeline, cost and design obstacles to deliver a best-in-class spa facility.



**PROJECT:** The Arcade

**LOCATION:** Providence, RI

**YEAR:** 2015

**STATUS:** Completed

The Arcade is the most exceptional historical restoration project Marathon has encountered to date. Constructed in 1828 as America's first enclosed shopping center, Marathon was tasked with repurposing this notably historic building into a modern residential and commercial facility thereby preserving its historical significance as well as exemplifying Marathon's expertise in historical preservation.

What challenges did we overcome? As one would anticipate with any renovation there were significant coordination issues with the conversion of the top two floors to a first of its kind microloft residences. This coupled with the requirements by both the State and Federal government agencies relating to the design made this project a challenge on a daily basis. Whereas the operational glass roof structure was also a crucial part of the original structure this presented unique challenges both from a heat gain standpoint and had to be tempered to prevent excessive heat gain.

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# Harry Angevine

Boston MA | 1.401.787.1000 | hangevine@marathon-construction.com

## WORK EXPERIENCE

### Marathon Construction, Inc

Boston, MA

*CEO – Commercial Construction*

June 1997 – Present

- Construction of large scale retail centers, commercial box stores, grocery stores, spas, sports complexes, office buildings and data centers
- Grew revenue from \$7M to \$200M annually, at peak
- Expanded geographic reach from New England to New York, New Jersey, Tennessee and California.
- Directly influenced design and construction of prototype projects for Whole Foods and Stop & Shop
- Managed and mentored a staff of 75+ field and office personnel
- Implemented company-wide initiatives and policies
- Developed subcontractor networks throughout geographic reach
- Developed and maintained client base, negotiating 80% of awarded work
- Provided preconstruction services, such as value engineering to clients and potential clients to create and strengthen relationships
- Created estimating model that leveraged subcontractor relationships to provide real-time budget pricing for clients and potential clients

### SmartGrid Construction & Development

Providence, RI

*President – Environmentally Sustainable Construction and Design*

Mar 2011 – May 2014

- Applied for Work Force Training Grant Program with the U.S. Department of Energy to create a net zero training facility and showcase
- Designed the largest net zero energy building in the country with expert design team
- Cultivated strategic partners to develop partnerships with IBM, Siemens, Bloom Energy, and Delta Products
- Constructed high tech demonstration assembly line for Tesla Motor Cars

### Built, Inc

Providence, RI

*President – Commercial Construction and Historical Renovation*

Dec 2007 – June 2012

- Constructed large scale commercial office and retail projects
- Managed historical renovations ranging from oldest enclosed mall in America to historical mill conversions
- Leveraged business development and client retention skills to foster business growth

### Ralston Drywall

Providence, RI

*CEO – Commercial Drywall and Framing*

June 2000 – Jan 2005

- Built business into the largest union drywaller in New England

### Jay Steel

Providence, RI

*CEO – Commercial Steel Erection*

June 2000 – Mar 2005

- Partnered with other professionals to create a startup, filling a void in the structural steel business
- Created company structure and led business development

### ADCS

Providence, RI

*President – Preconstruction Services and Residential Construction*

June 1995 – Dec 2007

- Founded development consulting firm to provide owners with development/budgeting and construction services
- Developed client relationships with developers and established corporations, such as EMC and Data General
- Provided owner's representative services during preconstruction and construction phases
- Provided engineering support and permitting services to clients

### McManus Construction

Northborough, MA

*Project Manager/Field Engineer/Estimator – Sitework and Heavy Highway Construction*

Jan 1986 – June 1995

- Grew revenue \$1M to \$15M within five years
- Estimated and compiled bids for private and public-sector projects
- Sought new clients and cultivated long-lasting relationships
- Performed field survey and engineering duties to support the land development and utility installation process
- Managed large site development and federal highway and bridge projects

# Harry Angevine

Boston MA | 1.401.787.1000 | [hangevine@marathon-construction.com](mailto:hangevine@marathon-construction.com)

## EDUCATION

Worcester Technical College

*Candidate Bachelor of Science in Architectural Design*

Worcester, MA

## QUALIFICATIONS & SKILLS

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- 30 years of experience in preconstruction services and project permitting
- Expert level experience in building design and construction in commercial and residential markets
- Superior understanding of value engineering
- Expert witness in construction litigation causes
- Superior scheduling techniques using Microsoft Project
- Proficient in Microsoft Excel, PowerPoint, Project and Word
- Excellent understanding of historical renovation standards and tax credits
- Expert in sustainable construction
- Advanced knowledge of “green” tax credit programs

# Franklin Angevine

Boston MA | 1.401.787.0965 | fangevine@gmail.com

## WORK EXPERIENCE

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### Plantagenet Capital LLC

Boston, MA

*Managing Member – Systematic Investment Fund*

December 2017 – Present

- Operating a black box trading strategy in the future markets
- Training and maintaining neural network prediction engines for black box strategies using Keras R
- Developing a web scraper in R to acquire data from web sources
- Constructing predictive factors and target series using time series, and signal processing concepts
- Managing and updating a database of prices across 18 assets with multiple temporal frequencies
- Implementing a systematic execution protocol for online model usage
- Creating and maintaining a python script to access Interactive Brokers API to push and pull data
- Automating scripts using Windows Task Scheduler and Batch files to create reliable execution
- Researching and implementing the latest innovations in quantitative finance and predictive analytics
- Developing and implementing a pipeline for model development, production, and maintenance
- Systematically tracking performance, accounting, and operational costs
- Complying and managing regulatory exposure
- Creating a systematic sales process for pursuing and closing on potential investor leads

### Rambler Investment Fund (Loyola University of Chicago)

Chicago, IL

*Investment Committee and President – Student Managed Fund*

August 2015 – December 2017

- Managed an \$800,000.00 equities, fixed income and alternatives portfolio
- Lead the Investment Committee in operational and strategic aspects of the fund
- Generated macroeconomic, valuation and security research reports
- Mentored and managed a team of junior analysts
- Managed alumni relations and event planning for the fund's bi-annual investment pitches

### DSC Quantitative Group

Chicago, IL

*Associate – Quantitative Index Strategies*

November 2016 – May 2017

- Accomplished automation of a statistical database using VBA
- Constructed an R Shiny app to display product/index analytics on an intranet
- Created bespoke analytics reports to assist in the sales process
- Executed data requests using the Bloomberg Terminal
- Created and managed an Ubuntu Linux server using bash commands to run intranet

### Loyola University Chicago, Quinlan School of Business

Chicago, IL

*Research Assistant – Financial Research*

June 2016 – August 2017

- Analysis and text mining of 13D Securities and Exchange Commission filings
- Aggregation and organization of data points within Excel
- Development and testing of a text mining program using R in conjunction with EDGAR

## TECHNICAL, PROGRAMMING, and SOFTWARE SKILLS

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**Languages:** R | Python | VBA | Linux Bash | Windows Command Prompt | HTML | XML

**Software:** Anaconda | Microsoft Office | Windows Task Scheduler | Bitbucket | Bloomberg Terminal

**Proficiencies:** Forecasting | Classification | Clustering | GPU Computing | Keras | R Shiny GUI | Text Processing and Mining | Linear and Non-Linear Optimization | Web Scraping | Data Cleaning | Data Visualization | Feature Engineering | Database Engineering | Signal Processing | Time series Analysis

## EDUCATION

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### Loyola University Chicago, Quinlan School of Business

Chicago, IL

*Bachelor of Business Administration | Major in Finance*

August 2015 – December 2017

**GPA:** 3.59 *Cum Laude*

**Relevant Coursework:** Business Statistics, Business Analytics, Managerial Accounting, Macroeconomics, Microeconomics, Investments, Intro to Options, Portfolio Management and Fixed Income Securities



# Completed Projects Summary

June 2020

**Marathon Construction Inc.**

580 Harrison Avenue, Suite 3A, Boston, MA 02118

Phone: 617.536.3500

## Projects Completed

1995 - 2019

Project Name & Location	Owner's Name & Location	Architect's Name & Location	Contract Amount
<b>RETAIL</b>			
Bread & Circus Supermarket 320 River Street Cambridge, MA 02141	Whole Foods Supermarket and Glanz Properties, Inc. 1018 Beacon Street Brookline, MA 02446	Sumner Schein A Division Of Carter & Burgess, Inc. 23 East Street Cambridge, MA 02141	\$10,310,385.00
Bread & Circus Supermarket University Plaza Providence, RI 02904	Whole Foods Supermarket and Glanz Properties, Inc. 1018 Beacon Street Brookline, MA 02446	Sumner Schein A Division Of Carter & Burgess, Inc. 23 East Street Cambridge, MA 02141	\$2,286,946.00
Bread & Circus Supermarket Cheese Dept Upgrade Rte 9 Framingham, MA 01701	Whole Foods Market Northeast Regional Office Three Charles River Place Needham, MA 02494	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$28,008.00
Bread & Circus Supermarket Rte 9 Framingham, MA 01701	Whole Foods Supermarket and Glanz Properties, Inc. 1018 Beacon Street Brookline, MA 02446	Sumner Schein A Division Of Carter & Burgess, Inc. 23 East Street Cambridge, MA 02141	\$982,899.00
Bread & Circus Bakery Facility 300 Middlesex Street Medford, MA 02153	Whole Foods Supermarket and Glanz Properties, Inc. 1018 Beacon Street Brookline, MA 02446	Sumner Schein A Division Of Carter & Burgess, Inc. 23 East Street Cambridge, MA 02141	\$2,741,533.00
Bread & Circus Supermarket 220 Main Street Madison, NJ 07940	Whole Foods Supermarket and Glanz Properties, Inc. 1018 Beacon Street Brookline, MA 02446	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$2,384,913.00
Bread & Circus Supermarket 2101 Northern Boulevard Monsey Park, NY 11030	Whole Foods Market 905 River Road Edgewater, NJ 07020	James Debarbieri Architect 355 Murray Hill Parkway East Rutherford, NJ 07073	\$113,264.00
Bread & Circus Supermarket Millburn, NJ	Whole Foods Market Northeast Regional Office Three Charles River Place Needham, MA 02494	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$446,580.00
Bread & Circus Supermarket Newtonville, MA	Whole Foods Market Northeast Regional Office Three Charles River Place Needham, MA 02494	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$951,412.00
Bread & Circus Supermarket Wayland, MA	Whole Foods Market Northeast Regional Office Three Charles River Place Needham, MA 02494	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$485,972.00
Bread & Circus Supermarket Prospect Street Cambridge, MA	Whole Foods Market Northeast Regional Office Three Charles River Place Needham, MA 02494	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$306,519.00
Bread & Circus Supermarket Bedford, MA.	Whole Foods Market Northeast Regional Office Three Charles River Place Needham, MA 02494	Hatch Partnership LLP 702 San Antonio Street Austin, TX 78701	\$1,030,919.00
Bull Moose Music 20 East Avenue Lewiston, ME	Redstone Investments 5050 Belmont Youngstown, OH	Alpha Architects 21 Chestnut Street Portland ME 04101	\$185,300.00
Center for Shopping Improvements Sanford, ME	Redstone Investments 5050 Belmont Youngstown, OH	Alpha Architects 21 Chestnut Street Portland ME 04101	\$1,036,000.00

Dollar General Mansfield, MA	Carpianato Group 1 Commerce Way Johnston RI 02919	RBB Architects 50 Holden Street Providence, RI 02908	\$1,370,000.00
Dollar General Dartmouth, MA	Carpianato Group 1 Commerce Way Johnston RI 02919	Studio 401 5 Division Street East Greenwich, RI 02818	\$1,716,414.00
Dollar Tree Providence, RI	Gogri and Gogri Robin Road Southwick, MA	Chaffin Associates 121 Chestnut St. Springfield, MA	\$1,719,000.00
Kids R Us 50 Green Acres Mall Road Valley Stream, NY 11580	Toys R Us, Inc. 461 From Road Paramus, NJ 07652	SBLM Architects PC 636 Broadway, 9th Floor New York, NY 10012	\$815,637.00
Jordan's Furniture Route 9 Natick, MA	Jordan's Furniture 100 Stockwell Drive Avon, MA 02322	Robert Luchetti and Associates Boston, MA.	\$4,150,162.00
Jordan's Mezzanine 100 Stockwell Drive Avon, MA 02322	Jordan's Furniture 100 Stockwell Drive Avon, MA 02322	Sutphin Associates, Inc. 35 Medford Street, Suite 301 Somerville, MA 02143	\$588,812.00
Franklin Village Expansion Franklin, MA 02038	Calarese Development Corp. 1000 Franklin Village Drive Franklin, MA 02038	Landry Design Group 395 Main Street, Units 7 & 8 Salem, NH 03079	\$1,017,048.00
Milford Square Retail Facility 138 South Main Street Milford, MA 01757	Calarese Development Corp. 1000 Franklin Village Drive Franklin, MA 02038	Landry Design Group 395 Main Street, Units 7 & 8 Salem, NH 03079	\$662,617.00
Stop & Shop Supermarket 25 Faunce Corner Road Dartmouth, MA 02747	RELDAR LLC – RELP C/o R. D. Management 810 Seventh Avenue New York, NY 10019	Landry Architects 389 Main Street Salem, NH 03079	\$6,413,333.00
Dartmouth Retail Facility 25 Faunce Corner Road Dartmouth, MA 02747	RELDAR LLC – RELP C/o R. D. Management 810 Seventh Avenue New York, NY 10019	Landry Architects 389 Main Street Salem, NH 03079	\$741,002.00
Dartmouth Canopy 25 Faunce Corner Road Dartmouth, MA 02747	RELDAR LLC – RELP C/o R. D. Management 810 Seventh Avenue New York, NY	Landry Architects 389 Main Street Salem, NH 03079	\$162,745.00
Stop & Shop Supermarket 7 Garfield Avenue Cranston, Rhode Island 02920-7805	Cranston / BVT Associates P.O. Box 1270 149 Colonial Road Manchester, CT 06045-1270	Landry Architects 389 Main Street Salem, NH 03079	\$5,167,348.00
Stop & Shop Supermarket Monroe Township Monroe, NJ	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Venizia & Associates 104 Bayard Street New Brunswick, NJ 08901	\$12,000,000.00 (expansion w/. Retail)
Stop and Shop Supermarket Rt 140 Foxborough, MA.	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Peterson Griffin Architects 880 Main Street Waltham, MA	\$9,589,000.00
Stop and Shop Supermarket Hyannis MA.	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Peterson Griffin Architects 880 Main Street Waltham, MA	\$918,693.00
Stop and Shop Supermarket Madison, CT.	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Peterson Griffin Architects 880 Main Street Waltham, MA	\$10,708,808.00
Stop and Shop Supermarkets Rt 114 North Andover, MA.	Northpoint Development 21 Sutton Street North Andover, MA 01845	Landry Architects 389 Main Street Salem, NH 03079	\$8,668,519.00

Stop and Shop Supermarkets RT 1 Norwood, MA.	NDNE 2310 Washington Street Newton Lower Falls, MA 02162	Newbury Design Group 2310 Washington Street Newton Lower Falls, MA 02162	\$4,706,866.00
Stop and Shop Supermarkets Weymouth, MA	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Cubellis Associates Campanelli Drive Braintree, MA 02184	\$5,859,959.00
Stop and Shop Supermarkets East Meadow, NY	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Rosenbaum Design Group 2001 Mardcus Avenue Lake Success, NY 11042	\$8,215,760.00
Stop and Shop Supermarkets Levittown, NY	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Cubellis Associates Campanelli Drive Braintree, MA 02184	\$8,327,279.00
Stop and Shop Supermarkets Mount Vernon, NY	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Rosenbaum Design Group 2001 Mardcus Avenue Lake Success, NY 11042	\$7,057,635.00
Stop and Shop Supermarkets Walpole, MA	Stop & Shop Supermarket Co. 110 Fieldcrest Avenue Edison, NJ 08837	Landry Architects 389 Main Street Salem, NH 03079	\$9,362,134.00
Shaw's Supermarkets Dedham, MA.	Shaw's Supermarkets 750 West Center Street W. Bridgewater, MA. 02379	RGB 50 Holden Street Providence, RI 02908	\$3,874,393.00
Shaw's Supermarkets Waltham, MA.	Shaw's Supermarkets 750 West Center Street 02379	RGB 50 Holden Street 02908	\$3,478,560.00
The Home Depot Somerset Roadway Improvements Somerset, MA	The Home Depot 15 Dan Road Canton, MA 02021	Casco Corporation 1090 King George Post Road Edison, NJ 08837	\$1,775,000.00
The Home Depot North Kingstown 1255 Ten Rod Road North Kingstown, RI	The Home Depot 15 Dan Road Canton, MA 02021	Greenberg, Farrow Architects 265 Davidson Avenue Somerset, NJ 08873	\$6,281,360.00
The Home Depot Worcester Goldstar Blvd. Worcester, MA	The Home Depot 15 Dan Road Canton, MA 02021	Greenberg, Farrow Architects 265 Davidson Avenue Somerset, NJ 08873	\$1,109,843.00
The Home Depot Providence 387 Charles Street Providence, RI	The Home Depot 15 Dan Road Canton, MA 02021	Casco Corporation 1090 King George Post Road Edison, NJ 08837	\$9,320,000.00
The Home Depot Brockton 715 Crescent Street Brockton, MA	The Home Depot 15 Dan Road Canton, MA 02021	Greenberg, Farrow Architects 265 Davidson Avenue Somerset, NJ 08873	\$5,085,000.00
The Home Depot Mahwah, NJ	The Home Depot 15 Dan Road Canton, MA 02021	WD Partners Dublin Road Columbus, OH 42215	\$6,823,121.00
The Home Depot Middletown, CT	The Home Depot 15 Dan Road Canton, MA 02021	WD Partners Dublin Road Columbus, OH	\$5,370,898.00

		42215	
The Home Depot Rockland, ME	The Home Depot 15 Dan Road Canton, MA 02021	WD Partners Dublin Road Columbus, OH 42215	\$7,275,000.00
The Home Depot Seekonk, MA	The Home Depot 15 Dan Road Canton, MA 02021	WD Partners Dublin Road Columbus, OH 42215	\$3,085,000.00
Sleepy's Warwick, RI 02886	AC Cowesett Purchaser 1281 Main Street Stamford, CT 06902	Vision 3 Architects	\$56,225.00
Petco Warwick, RI 02886	AC Cowesett Purchaser 1281 Main Street Stamford, CT 06902	SBLM Architects 151 West 26th Street New York, NY 10001	\$1,378,528.00
Five Below Warwick, RI 02886	AC Cowesett Purchaser 1281 Main Street Stamford, CT 06902	Sargenti Architects 461 From Road Paramus, NJ 07652	\$468,000.00
Bald Hill Plaza Façade 1245 Bald Hill Road Warwick, RI 02886	North Star Centers LLC 532 Page Street Stoughton, MA 02702	John R. Scanlon, AIA 77 Aunt Lizzies Lane Marshfield, MA 02050	\$344,645.00
Cowesett Corners Space 25 & 26 300 Quaker Road Warwick, RI 02886	AC Cowesett Purchaser 1281 Main Street Stamford, CT 06902	John R. Scanlon, AIA 77 Aunt Lizzies Lane Marshfield, MA 02050	\$44,107.00
Cowesett Corners Space B1 300 Quaker Road Warwick, RI 02886	AC Cowesett Purchaser 1281 Main Street Stamford, CT 06902	John R. Scanlon, AIA 77 Aunt Lizzies Lane Marshfield, MA 02050	\$94,113.00
Quickly Restaurant 10 Dorrance Street Providence, RI 02903	Zhehui Chen 10 Dorrance Street Providence, RI 02903	Northeast Collaborative Architects 333 Westminster Street, 5 <sup>th</sup> Floor Providence, RI 02903	\$113,367.00
Bruegger's Bagels – "Timothy's" 631 VFW Parkway West Roxbury, MA 02132	Bruegger's Enterprises, Inc. 159 Bank Street Burlington, VT 05401	Ports Architects 3554 Brescksville Road, Suite 500 Richfield, OH 44286	\$127,915.00
Southgate Plaza 2454 Lafayette Road Portsmouth, NH	Waterstone Retail Development 145 Rosemary Street Needham, MA 02494	Tighe & Bond 177 Corporate Drive Portsmouth, NH 03801	\$1,560,680.00
Shell Modification Smyrna Village 551 South Lowry Street Smyrna, Tennessee	Waterstone Retail Development 145 Rosemary Street Needham, MA 02494	W. Michael Stewart Architect 1318 Tomahawk Trace Murfreesboro, TN 37129	\$903,279.00

### High Tech

EMC - Data Center 176 South Street Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$13,233,190.00
EMC Parking Garage Improvements 171 South Street Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$17,672,000.00
EMC Office Building 228 South Street Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$21,965,000.00
EMC Temporary Training Facility 31 Maple Street Milford, MA 01757	EMC 228 South Street Hopkinton, MA 01748	Add, Inc. 210 Broadway Cambridge, MA 02139	\$121,644.00

EMC Corporate Training Facility 31 Maple Street Milford, MA 01757	EMC 228 South Street Hopkinton, MA 01748	Add, Inc. 210 Broadway Cambridge, MA 02139	\$7,237,718.00
EMC Suite Fitout 35 Parkwood Drive Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$207,823.00
EMC Executive Boardroom 35 Parkwood Drive Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$16,874.00
EMC Conference Room Fitout 2nd Floor Fitout Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$29,869.00
EMC "Fishbowl" Project 171 South Street Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Gorman Richardson 77 Main Street Hopkinton, MA 01748	\$417,649.00
EMC Office Building Interior Fitout 239 South Street Hopkinton, MA 01748	EMC 228 South Street Hopkinton, MA 01748	Symmes Maini & McKee Associates 1000 Massachusetts Avenue Cambridge, MA 02138	\$977,313.00

**COMMERCIAL**

Borggaard Construction Office & Garage 70 Creeper Hill Road Grafton, MA 01536	Borggaard Construction, Inc. 70 Creeper Hill Road Grafton, MA 01536	Design Build	\$325,765.00
Stephanie Ann Nason Memorial Building 246 East Main Street Norton, MA 02766	Alec Rich, III P.O. Box 528 Taunton, MA 02780	Cramer & Levine Architects 20 Hampton Dr. Suite 1 Easton, MA 02375	\$1,367,479.00
Ron Nation Office Building 239 South Street Hopkinton, MA 01748	Ron Nation Nation Children's' Trust 235 South Street Hopkinton, MA 01748	Richard H. Brousseau Architect, Inc. 2 Westcott Drive Hopkinton, MA	\$1,363,930.00
2200 West Park Drive Office Building 2200 West Park Drive Westboro, MA 01581	New England Management 259 Turnpike Road #110 Southborough, MA 01772-1706	Waterman Design Associates, Inc. 69 Milk Street, Suite 101 Westborough, MA 01581	\$5,483,289.00
Litos Strategic Communication East Providence, RI	Mark Litos East Providence, RI	Design Build	\$76,341.00
Regus 10 Dorrance Street Providence, RI 02903	Summit Real Estate 10 Dorrance Street Providence, RI 02903	WB Partners Atlanta, GA	\$561,458.00
Regus II 10 Dorrance St., 3rd & 7th Floors Providence, RI 02903	Summit Real Estate 10 Dorrance Street Providence, RI 02903	WB Partners Atlanta, GA	\$247,200.00
Timothy's 631 VFW Parkway Chestnut Hill, Mass.	Mr. Bruno Francois Bruegger's Enterprises, Inc. 159 Bank Street Burlington, VT 05401	Ports Architects 3554 Brescksville Road Suite 500 Richfield, OH 44286	\$127,915.00
Hanover Pump Room 285 Circuit Street Hanover, Mass.	The Stubblebine Company One Cranberry Hill Lexington, MA 02421	Steven E. Younis, PE 8 Haverstock Road Franklin, MA 02038	\$93,877.00
Wright Pierce Providence, RI	Summit Real Estate	Vision 3 Architects Providence, RI	\$215,000.00
Agitron, Inc. Woburn, MA	Agitron, Inc. 15 Presidential Way Woburn, MA	GSD Associates 148 Main Street North Andover, MA 01845	\$436,065.00
Tesla Motors Inc. Fremont, CA	Tesla Motors Inc. Fremont, CA	Tesla Motors Inc. Fremont, CA	\$2,219,000.00

Taylor, Duane, Barton & Gilman 10 Dorrance Street Providence, RI 02903	Summit Real Estate Strategies 100 Cummings Center Park Suite 430G Beverly, MA 01915	Vision 3 Architects 225 Chapman Street Providence, RI 02905	\$579,557.00
Mount Hope Christian Center 3 McGinnis Drive Burlington, MA 01803	Construction of Mount Hope 3 McGinnis Drive Christian Community Center Burlington, MA 01803	John Scanlon Architects 77 Aunt Lizzie's Lane Marshfield, MA	\$1,095,170.00
The Polymer Injection Molding Interior Renovation Project Third Street Bondsville, Massachusetts	Polymer Corporation 180 Pleasant Street Rockland, MA. 02370	Architectural Insights 3 Converse Street Palmer, MA 01069	\$728,574.00
Allstate Legal 10 Dorrance Street Suite 650W Providence, RI 02903	Allstate Insurance Company 3075 Sanders Road G1D Northbrook, IL 60062	Polek Schwartz Architects 1160 West Swedesford Road, Suite 330 Berwyn, PA 19312	\$124,617.00
Swipely 10 Dorrance Street Providence, RI	Summit Construction Management 60 Summer Street Manchester, MA 01944	Northeast Collaborative Architects 333 Westminster Street, 5 <sup>th</sup> Floor Providence, RI 02903	\$990,567.00
Tesla Motor Company 45500 Fremont Blvd Fremont, CA 94538	Tesla Motor Company 45500 Fremont Blvd Fremont, CA 94538	Tesla Motor Company 45500 Fremont Blvd Fremont, CA 94538	\$1,397,210.00

#### Sports Centers, Gyms & Spa's

Mayflower Garden Spa Project Washington Ct	Robert Mnuchin Washington Ct	Halper Owens Architects Washington Ct	\$23,700,057.00
David Barton Gyms 1950 Century Park East Century City, CA	Meridian Sports Clubs California LLC 1001 4th Street San Rafael, CA 94901	Wolcott Architects-Interiors 3859 Cardiff Avenue Culver City, CA 90232	\$1,800,000.00
Pyara Salon and Spa 101 Middlesex Turnpike Burlington, MA 01803	Christin Perkins 104 Mt Auburn Street Cambridge, MA 02138	LDL Studio 103 Putnam Street Providence, RI 02909	\$1,690,000.00
Essex Sports Center 15 Manning Avenue Middleton, MA 01949	Essex Sports Center LLC 15 Manning Road Middleton, MA 01949	LLB Architects Exchange Street Pawtucket, RI	\$16,749,000.00
Worcester Sports Center 12 Harding Street Worcester, MA	Worcester Sports Center LLC 12 Harding Street Worcester, MA	LLB Architects Exchange Street Pawtucket, RI	\$15,789,000.00
Guiffrida Sports Center 720 Broadway Saugus, MA	Guiffrida Sports Center LLC 720 Broadway Saugus, MA	LLB Architects Exchange Street Pawtucket, RI	\$15,232,555.00

#### CITY STATE FEDERAL PROJECTS

Dorrance Street Renovations 10 Dorrance Street Providence, RI 02903	CB Richard Ellis NE Partners 380 Westminster Street Providence, RI 02903	Vision 3 Architects 225 Chapman Street Providence, RI 02905	\$277,342.00
Veterans Administration 380 Westminster Street Providence, RI 02903	CB Richard Ellis NE Partners 380 Westminster Street Providence, RI 02903	Design Build	\$235,000.00
US Trustees 10 Dorrance Street Providence, RI 02903	Summit Real Estate Strategies 100 Cummings Center Park Suite 430G Beverly, MA 01915	Vision 3 Architects 225 Chapman Street Providence, RI 02905	\$122,300.00
Small Business Administration 380 Westminster Street Providence, RI 02903	Small Business Administration 380 Westminster Street Providence, RI 02903	Avantgarde Design Group 1117 Douglas Avenue North Providence, RI 02904	\$146,933.15

FBI 10 Dorrance Street, 11th Floor Providence, RI 02903	10 Dorrance Street Providence, RI 02903	Vision 3 Architects 225 Chapman Street Providence, RI 02905	\$116,500.00
Secret Service 380 Westminster Street Providence, RI 02903	CB Richard Ellis NE Partners 380 Westminster Street Providence, RI 02903	Vision 3 Architects 225 Chapman Street Providence, RI 02905	\$319,700.00

**Residential / Historical Rehab**

Mason Residence Basement Renovation North Attleboro, MA	Jim and Rebecca Mason Charles Barth Road North Attleboro, MA	Design Build	\$78,300.00
Sepe Residence Interior Finishes Coventry, RI	Michael Sepe Coventry, RI	Design Build	\$78,737.00
Olney Street 263 Olney Street Providence, RI	Olney Street 263 Olney Street Providence, RI	Design Build	\$433,000.00
Constitution Hill #7 Constitution Hill Providence, RI	Constitution Hill #7 Constitution Hill Providence, RI	Design Build	\$289,777.00
The Arcade 65 Weybosset Street. Providence, RI 02903	130 Westminster Street Associates LLC 170 Westminster Street Suite 700 Providence, RI 02903	Northeast Collaborative Architects 333 Westminster Street, Moulton Hall Providence, RI 02903	\$6,773,000.00
Cable Mills- Rehab 160 Water Street Williamstown, MA 01267	Northeast Interiors 27 Pacella Park Drive Randolph, Ma 02368	Finegold, Alexander Architects 77 N Washington Street Boston, MA 02114	\$2,753,900.00

# DRAFT AIA® Document A305™ – 2020

## Contractor's Qualification Statement

THE PARTIES SHOULD EXECUTE A SEPARATE CONFIDENTIALITY AGREEMENT IF THEY INTEND FOR ANY OF THE INFORMATION IN THIS A305-2020 TO BE HELD CONFIDENTIAL.

SUBMITTED BY: (Organization name and address.)  
« Marathon Construction Inc »

SUBMITTED TO: (Organization name and address.)  
« Rhode Island Housing »

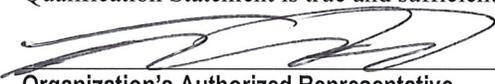
**TYPE OF WORK TYPICALLY PERFORMED**  
(Indicate the type of work your organization typically performs, such as general contracting, construction manager as constructor services, HVAC contracting, electrical contracting, plumbing contracting, or other.)  
« General contracting, and construction management »

**THIS CONTRACTOR'S QUALIFICATION STATEMENT INCLUDES THE FOLLOWING:**  
(Check all that apply.)

- Exhibit A – General Information
- Exhibit B – Financial and Performance Information
- Exhibit C – Project-Specific Information
- Exhibit D – Past Project Experience
- Exhibit E – Past Project Experience (Continued)

### CONTRACTOR CERTIFICATION

The undersigned certifies under oath that the information provided in this Contractor's Qualification Statement is true and sufficiently complete so as not to be misleading.

  
Organization's Authorized Representative  
Signature

«09/01/2021 »  
Date

«Franklin Angevine CFO »  
Printed Name and Title

### NOTARY

State of: « Massachusetts »

**ADDITIONS AND DELETIONS:** The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An Additions and Deletions Report that notes added information as well as revisions to the standard form text is available from the author and should be reviewed.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

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§ A.1 ORGANIZATION

§ A.1.1 Name and Location

§ A.1.1.1 Identify the full legal name of your organization.

« Marathon Construction Inc »

§ A.1.1.2 List all other names under which your organization currently does business and, for each name, identify jurisdictions in which it is registered to do business under that trade name.

« Marathon Construction Inc »

§ A.1.1.3 List all prior names under which your organization has operated and, for each name, indicate the date range and jurisdiction in which it was used.

« Marathon Construction Inc »

§ A.1.1.4 Identify the address of your organization's principal place of business and list all office locations out of which your organization conducts business. If your organization has multiple offices, you may attach an exhibit or refer to a website.

« 580 Harrison Ave Boston MA 02118 »

§ A.1.2 Legal Status

§ A.1.2.1 Identify the legal status under which your organization does business, such as sole proprietorship, partnership, corporation, limited liability corporation, joint venture, or other.

« Corporation »

.1 If your organization is a corporation, identify the state in which it is incorporated, the date of incorporation, and its four highest-ranking corporate officers and their titles, as applicable.

« Massachusetts, 2014, Harry Angevine CEO, and Franklin Angevine CFO »

.2 If your organization is a partnership, identify its partners and its date of organization.

« N/A »

.3 If your organization is individually owned, identify its owner and date of organization.

«N/A »

.4 If the form of your organization is other than those listed above, describe it and identify its individual leaders:

«N/.A »

§ A.1.2.2 Does your organization own, in whole or in part, any other construction-related businesses? If so, identify and describe those businesses and specify percentage of ownership.

« No »

§ A.1.3 Other Information

§ A.1.3.1 How many years has your organization been in business?

« 7 years »

§ A.1.3.2 How many full-time employees work for your organization?

« 5 employees »

§ A.1.3.3 List your North American Industry Classification System (NAICS) codes and titles. Specify which is your primary NAICS code.

« 236115 »

§ A.1.3.4 Indicate whether your organization is certified as a governmentally recognized special business class, such as a minority business enterprise, woman business enterprise, service disabled veteran owned small business, woman owned small business, small business in a HUBZone, or a small disadvantaged business in the 8(a) Business Development Program. For each, identify the certifying authority and indicate jurisdictions to which such certification applies.

« N/A »

§ A.2 EXPERIENCE

§ A.2.1 Complete Exhibit D to describe up to four projects, either completed or in progress, that are representative of your organization's experience and capabilities.

§ A.2.2 State your organization's total dollar value of work currently under contract.

« \$5,229,486.38 »

§ A.2.3 Of the amount stated in Section A.2.2, state the dollar value of work that remains to be completed:

« \$1,145,597.50 »

§ A.2.4 State your organization's average annual dollar value of construction work performed during the last five years.

« \$6,000,000.00 »

§ A.3 CAPABILITIES

§ A.3.1 List the categories of work that your organization typically self-performs.

« None »

§ A.3.2 Identify qualities, accreditations, services, skills, or personnel that you believe differentiate your organization from others.

« »

§ A.3.3 Does your organization provide design collaboration or pre-construction services? If so, describe those services.

« Yes. We help with permitting, design, and value engineering »

§ A.3.4 Does your organization use building information modeling (BIM)? If so, describe how your organization uses BIM and identify BIM software that your organization regularly uses.

« »

§ A.3.5 Does your organization use a project management information system? If so, identify that system.

« Yes. ProCore »

§ A.4 REFERENCES

§ A.4.1 Identify three client references:

(Insert name, organization, and contact information)

«  
Carpionato Group  
Redstone Investments  
St. Marks School  
»

§ A.4.2 Identify three architect references:

(Insert name, organization, and contact information)

«  
Northeast Collaborative Architects  
Ci Design, Inc.  
Scott Griffin Architects  
»

§ A.4.3 Identify one bank reference:

(Insert name, organization, and contact information)

« Simo Larguet First Republic Bank »

§ A.4.4 Identify three subcontractor or other trade references:

(Insert name, organization, and contact information)

« Northern Electric  
Energy One  
Danielson Glass »

»  
County of Suffolk  
Signed and sworn to before me this « 1st » day of « September » « 2021 »

Notary Signature \_\_\_\_\_  
My commission expires « 01-01-27 »

§ B.1 FINANCIAL

§ B.1.1 Federal tax identification number:

« 61-1748438 »

§ B.1.2 Attach financial statements for the last three years prepared in accordance with Generally Accepted Accounting Principles, including your organization's latest balance sheet and income statement. Also, indicate the name and contact information of the firm that prepared each financial statement.

« »

§ B.1.3 Has your organization, its parent, or a subsidiary, affiliate, or other entity having common ownership or management, been the subject of any bankruptcy proceeding within the last ten years?

« No »

§ B.1.4 Identify your organization's preferred credit rating agency and identification information. (Identify rating agency, such as Dun and Bradstreet or Equifax, and insert your organization's identification number or other method of searching your organization's credit rating with such agency.)

« Dun and Bradstreet »

## § B.2 DISPUTES AND DISCIPLINARY ACTIONS

§ B.2.1 Are there any pending or outstanding judgments, arbitration proceedings, bond claims, or lawsuits against your organization, its parent, or a subsidiary, affiliate, or other entity having common ownership or management, or any of the individuals listed in Exhibit A, Section 1.2, in which the amount in dispute is more than \$75,000? (If the answer is yes, provide an explanation.)

« No »

§ B.2.2 In the last five years has your organization, its parent, or a subsidiary, affiliate, or other entity having common ownership or management: (If the answer to any of the questions below is yes, provide an explanation.)

- .1 failed to complete work awarded to it?

« No »

- .2 been terminated for any reason except for an owners' convenience?

« No »

- .3 had any judgments, settlements, or awards pertaining to a construction project in which your organization was responsible for more than \$75,000?

« No »

- .4 filed any lawsuits or requested arbitration regarding a construction project?

« Yes »

§ B.2.3 In the last five years, has your organization, its parent, or a subsidiary, affiliate, or other entity having common ownership or management; or any of the individuals listed in Exhibit A Section 1.2: (If the answer to any of the questions below is yes, provide an explanation.)

- .1 been convicted of, or indicted for, a business-related crime?

« No »

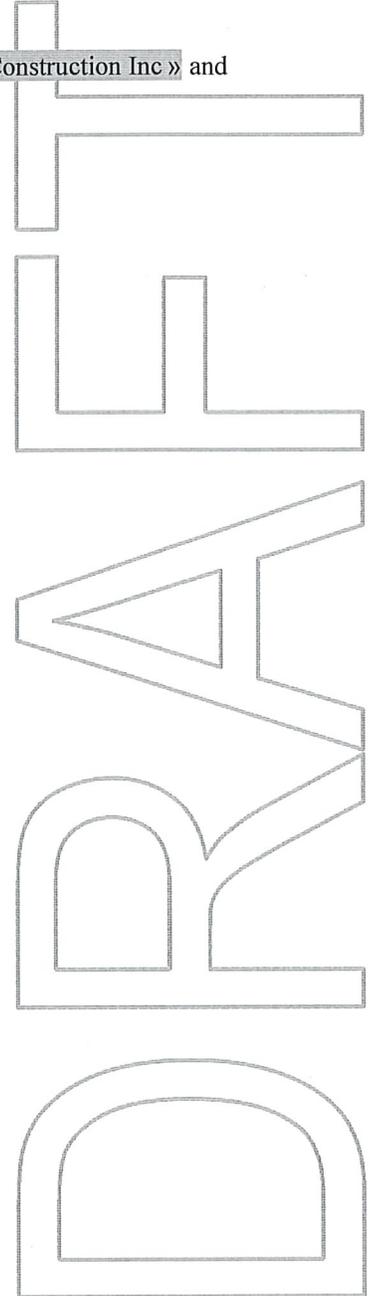
.2 had any business or professional license subjected to disciplinary action?

« No »

.3 been penalized or fined by a state or federal environmental agency?

« No »

This Exhibit is part of the Contractor's Qualification Statement, submitted by « Marathon Construction Inc » and dated the « 1st » day of « September » in the year « 2021 »  
(In words, indicate day, month and year.)



**PROJECT:**

*(Name and location or address.)*

« Copley Chambers »  
« 206 Broad Street Providence RI »

**CONTRACTOR'S PROJECT OFFICE:**

*(Identify the office out of which the contractor proposes to perform the work for the Project.)*

« 580 Harrison Ave Boston MA 02118 »

**TYPE OF WORK SOUGHT**

*(Indicate the type of work you are seeking for this Project, such as general contracting, construction manager as constructor, design-build, HVAC subcontracting, electrical subcontracting, plumbing subcontracting, etc.)*

« General Contracting »

**CONFLICT OF INTEREST**

Describe any conflict of interest your organization, its parent, or a subsidiary, affiliate, or other entity having common ownership or management, or any of the individuals listed in Exhibit A Section 1.2, may have regarding this Project.

« Common ownership with 206 Broad Street LLC, and Marathon Development LLC »

**§ C.1 PERFORMANCE OF THE WORK**

**§ C.1.1** When was the Contractor's Project Office established?

« N/A »

**§ C.1.2** How many full-time field and office staff are respectively employed at the Contractor's Project Office?

« N/A »

**§ C.1.3** List the business license and contractor license or registration numbers for the Contractor's Project Office that pertain to the Project.

« »

**§ C.1.4** Identify key personnel from your organization who will be meaningfully involved with work on this Project and indicate (1) their position on the Project team, (2) their office location, (3) their expertise and experience, and (4) projects similar to the Project on which they have worked.

« Harry Angevine CEO, and David Langlois Project Superintendent »

**§ C.1.5** Identify portions of work that you intend to self-perform on this Project.

« None »

**§ C.1.6** To the extent known, list the subcontractors you intend to use for major portions of work on the Project.

« Undetermined »

**§ C.2 EXPERIENCE RELATED TO THE PROJECT**

**§ C.2.1** Complete Exhibit D to describe up to four projects performed by the Contractor's Project Office, either completed or in progress, that are relevant to this Project, such as projects in a similar geographic area or of similar project type. If you have already completed Exhibit D, but want to provide further examples of projects that are relevant to this Project, you may complete Exhibit E.

§ C.2.2 State the total dollar value of work currently under contract at the Contractor's Project Office:

« \$5,229,486.38 »

§ C.2.3 Of the amount stated in Section C.2.2, state the dollar value of work that remains to be completed:

« \$1,145,597.50 »

§ C.2.4 State the average annual dollar value of construction work performed by the Contractor's Project Office during the last five years.

« \$6,000,000.00 »

§ C.2.5 List the total number of projects the Contractor's Project Office has completed in the last five years and state the dollar value of the largest contract the Contractor's Project Office has completed during that time.

« 16 projects completed, and the largest was 16.7 million »

**§ C.3 SAFETY PROGRAM AND RECORD**

§ C.3.1 Does the Contractor's Project Office have a written safety program?

« Yes »

§ C.3.2 List all safety-related citations and penalties the Contractor's Project Office has received in the last three years.

« None »

§ C.3.3 Attach the Contractor's Project Office's OSHA 300a Summary of Work-Related Injuries and Illnesses form for the last three years.

§ C.3.4 Attach a copy of your insurance agent's verification letter for your organization's current workers' compensation experience modification rate and rates for the last three years.

**§ C.4 INSURANCE**

§ C.4.1 Attach current certificates of insurance for your commercial general liability policy, umbrella insurance policy, and professional liability insurance policy, if any. Identify deductibles or self-insured retentions for your commercial general liability policy.

§ C.4.2 If requested, will your organization be able to provide property insurance for the Project written on a builder's risk "all-risks" completed value or equivalent policy form and sufficient to cover the total value of the entire Project on a replacement cost basis?

« Yes »

§ C.4.3 Does your commercial general liability policy contain any exclusions or restrictions of coverage that are prohibited in AIA Document A101-2017, Exhibit A, Insurance A.3.2.2.2? If so, identify.

« No »

**§ C.5 SURETY**

§ C.5.1 If requested, will your organization be able to provide a performance and payment bond for this Project?

« Yes »

§ C.5.2 Surety company name:

« N/A »

§ C.5.3 Surety agent name and contact information:

« N/A »

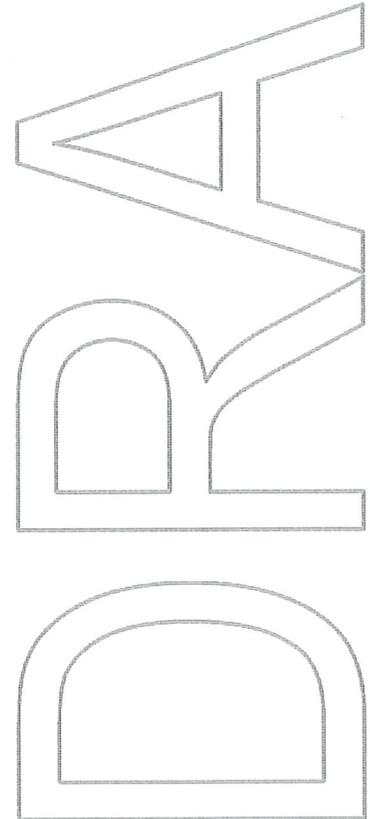
§ C.5.4 Total bonding capacity:

« N/A »

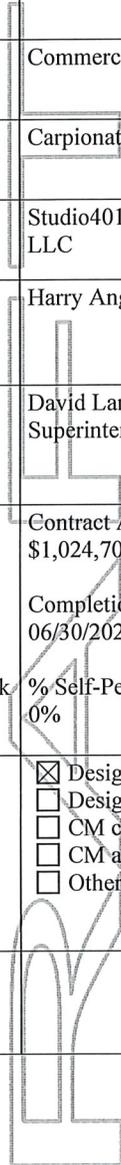
§ C.5.5 Available bonding capacity as of the date of this qualification statement:

« N/A »

This Exhibit is part of the Contractor's Qualification Statement, submitted by «Marathon Construction Inc » and dated the « 1st » day of « September » in the year « 2021 »  
(In words, indicate day, month and year.)



	1	2	3	4
PROJECT NAME	Citizen's Bank	StarChip	Windham Façade	Dollar Tree/Family Dollar
PROJECT LOCATION	Warwick RI	Windham ME	Windham ME	Pawtucket RI
PROJECT TYPE	Commercial Retail	Commercial Retail	Commercial Retail	Commercial Retail
OWNER	Carpionato Group	Redstone Investments	Redstone Investments	Carpionato Group
ARCHITECT	Ci Design, Inc.	ALPHAarchitects	ALPHAarchitects	Studio401 Architecture, LLC
CONTRACTOR'S PROJECT EXECUTIVE	Harry Angevine	Harry Angevine	Harry Angevine	Harry Angevine
KEY PERSONNEL (include titles)	David Langlois, Superintendent	Mike Raitto, Superintendent	Mike Raitto, Superintendent	David Langlois, Superintendent
PROJECT DETAILS	Contract Amount \$1,373,895.00  Completion Date  % Self-Performed Work 0%	Contract Amount \$1,699,625  Completion Date  % Self-Performed Work 0%	Contract Amount \$262,768.38  Completion Date  % Self-Performed Work 0%	Contract Amount \$1,024,700.00  Completion Date 06/30/2021  % Self-Performed Work 0%
PROJECT DELIVERY METHOD	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:
SUSTAINABILITY CERTIFICATIONS				



	1	2	3	4
PROJECT NAME	St. Mark's Rink	Benny's	Starbucks	Benny's
PROJECT LOCATION	Sudbury MA	Providence RI	Warwick RI	Smithfield RI
PROJECT TYPE	Education/Sports	Commercial Retail	Commercial Retail	Commercial Retail
OWNER	St. Mark's	Carpionato Group	Carpionato Group	Carpionato Group
ARCHITECT	Design Build	Scott Griffin Architects	RGB Architects	Scott Griffin Architects
CONTRACTOR'S PROJECT EXECUTIVE	Harry Angevine	Harry Angevine	Harry Angevine	Harry Angevine
KEY PERSONNEL (include titles)	Jim Harrison, Superintendent	David Langlois, Superintendent	David Langlois, Superintendent	David Langlois, Superintendent
PROJECT DETAILS	Contract Amount \$868,498.00  Completion Date  % Self-Performed Work 0%	Contract Amount \$3,414,768.05  Completion Date 12/31/2021  % Self-Performed Work 0%	Contract Amount \$1,030,000.00  Completion Date 06/30/2020  % Self-Performed Work 0%	Contract Amount \$3,406,413.57  Completion Date 04/01/2020  % Self-Performed Work 0%
PROJECT DELIVERY METHOD	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Design-bid-build <input type="checkbox"/> Design-build <input type="checkbox"/> CM constructor <input type="checkbox"/> CM advisor <input type="checkbox"/> Other:
SUSTAINABILITY CERTIFICATIONS				

This Exhibit is part of the Contractor's Qualification Statement, submitted by « Marathon Construction Inc » and dated the « 1st » day of « September » in the year « 2021 »  
(In words, indicate day, month and year.)

# Michael Liberatore

[mikeliberatore@icloud.com](mailto:mikeliberatore@icloud.com) | (401) 626-0698 | 23 Franklin Street #6, Westerly, RI 02891

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## PROFESSIONAL EXPERIENCE

### **Director of Real Estate Development with Marathon Development: July 2021 to Present**

*Boston, MA* - Led the development of real estate into multifamily housing utilizing public and private finance.

Responsibilities included: property acquisition, due diligence, pro forma financial analysis, financial applications for loans, grants and subsidies, low-income and historic tax credit investor management and development management.

### **Senior Real Estate Development Officer with Rhode Island Housing: December 2019 to July 2021**

*Providence, RI* - Origination and underwriting of mixed-income, Section 8 and LIHTC multifamily loans in Rhode Island utilizing: Taxable and Tax-Exempt Debt, Low-Income Housing and Historic Tax Credits, Rebuild Rhode Island Tax Credits, Housing Trust Fund, HOME, CDBG and various municipal sources.

### **Real Estate Development Consultant: August 2018 to December 2019**

*Providence, RI* - Development consulting and pro forma analysis for affordable and market rate developments in Rhode Island and Massachusetts. Clients included: Bayview Financial, FJS Associates, and One Fifty-One Broadway Associates.

### **Real Estate Development Officer with Rhode Island Housing: January 2016 to August 2018**

*Providence, RI* - Underwrote \$500,000 to \$27MM commercial loans for the development of multifamily and mixed-income properties in Rhode Island, utilizing federal and state sources including Low-Income Housing and Historic Tax Credits. Served on the corporation's Strategic Planning Committee and worked in partnership with various lenders and tax-credit syndicators.

### **Real Estate Sales Agent and Consultant with Olympus Group Real Estate: June 2007 to January 2016**

*Providence, RI* - Marketed, negotiated and sold/leased commercial and residential property in Rhode Island and Massachusetts. Assisted local banks with distressed asset analysis and disposition.

### **Real Estate Development Manager with the Procaccianti Group: March 2005 to June 2007**

*Cranston, RI* - Managed mixed-use real estate developments including hotel and multi-family properties from conception through construction in MA, CA and RI. Duties included property acquisition & due diligence, financial modeling and analysis with Microsoft Excel, investment committee presentations, project management, bank requisitions, marketing, leasing and sales.

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## EDUCATION

- Master of Business Administration from Providence College (2006)
  - Bachelor of Science - Finance, Cum Laude, from Providence College (2001)
  - Semester Abroad in Florence, Italy - (2000)
- 

## LICENSES, SKILLS & EXPERIENCE

- Advanced Spanish and conversational Italian
- Licensed real estate sales agent in Rhode Island and Massachusetts
- Highly proficient with Smartsheet & Microsoft Excel for financial modeling
- International experience in Europe, Asia, South and Central America

## VIRGINIA BRANCH, PRINCIPAL

## BRANCH ARCHITECTS

Branch Architects works to maximize our clients' capital investments with functional and beautiful design solutions. Leading with honesty, focus, and humor, our intention is to make the process as comfortable as the result.

Focused in Rhode Island and throughout the New England area, Virginia brings over 25-years' experience helping numerous community-minded, for-profit and non-profit developers achieve their goals to plan and construct housing, community health centers, commercial, industrial, retail, and mixed-uses varying from child care to farmers markets.

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**SKILLS** Client focused assistance with feasibility planning, test-fits, regulatory outreach and approval processes, code review, design, construction documentation, bidding assistance, and construction administration.

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**SELECTED PROJECTS** **KING STREET COMMONS, PROVIDENCE, RI \***

Working with One Neighborhood Builders to plan, obtain approvals, and develop two sites accommodating 30 residential units for lower income tenants, led the team working with Children's Friend to custom design an 8,600 sq. ft. child care facility located on the first floor of a new residential building.

**THE ERNESTINA - PARCEL 9, PROVIDENCE, RI \***

Working again with One Neighborhood Builders to plan and compete for selection to develop a large parcel of the former I-195 highway, Virginia led the team to propose a new building housing 58 residential units for workforce and market rate housing that would include a custom designed, 10,000 sq. ft. child care facility at the ground floor for Children's Friend.

**ELMOOD NEIGHBORHOOD REVITALIZATION and OLNEYVILLE REDUX, PROVIDENCE, RI \***

These two affordable housing developments had reached their 20-year mark and needed interior and exterior renovations for a financial recapitalization process. Virginia worked closely with the developer, One Neighborhood Builders and their construction management / general contractor and management team to assess conditions, rank priorities, create basic drawings and outline specification for pricing in a design-build process.

**AS220 AT THE MERCANTILE BLOCK, THE DREYFUS, and EMPIRE STREET, PROVIDENCE, RI \***

Over a period of fifteen years, AS220 purchased and renovated 3 historic, multi-story buildings creating a vibrant mix of live/workspaces, arts related youth programs and offices, galleries, and unique local retail and commercial spaces. Virginia led the A&E teams working on each of these buildings and worked directly with each tenant to custom design their spaces.

**OUTER CAPE HEALTH SERVICES (OCHS), HARWICHPORT and WELLFLEET, MA \***

OCHS planned to develop 2 new community health centers on the Cape by rehabilitating two existing buildings with strict adherence to a phased construction schedule meeting their busy summer season demands. Both projects required special attention to HUD and/or HRSA regulations for funding, MA Department of Health certification, required complex town and regional approvals while maintaining close attention to a fixed budget. Virginia led the A&E and Civil team to create two transformative, team-based care centers equipped with pharmacy, laboratory and other community-based services such as a food bank, WIC and healthy eating clinics.

**BARBARA JORDAN II APARTMENTS, PROVIDENCE, RI \***

Virginia led the A & E & Civil team for co-developers, Omni Development Corporation and Wingate Properties, in their successful bid for development rights to re-invent an abandoned housing development in South Providence. The team boldly proposed complete demolition of 74 derelict dwelling units to be replaced with 83 new, energy efficient apartments with a mix of design styles from townhouses to a 4-story elevator building.

**PARAGON MILLS, PROVIDENCE, RI \***

Over the span of 12 years, Virginia worked with numerous developers attempting to restore this 116,000sf historic mill complex located on the Woonasquatucket River in the Olneyville neighborhood. Assisting the City of Providence to select The Alexander Company (TAC) from Madison, WI as developer, Virginia led the A & E team in TAC's successful first round bid for Low Income Housing Tax Credits and State and Federal Historic Tax Credits. When complete the development will provide 101 mixed-income, residential units.

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**WORK HISTORY** **ASSOCIATE PRINCIPAL, DBVW ARCHITECTS, PROVIDENCE, RI**

June 2001 – March 2021

**\*INDICATES WORK COMPLETED AT DBVW**

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**EDUCATION** **UNIVERSITY OF ARIZONA, BACHELOR OF ARCHITECTURE, 1995**

**CLEMSON UNIVERSITY, BACHELOR OF DESIGN, 1989**

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**REFERENCES** **JENNIFER HAWKINS, EXECUTIVE DIRECTOR One Neighborhood Builders (401) 351-8719**

**RALPH COLE, DEVELOPMENT PROJECT MANAGER, Wingate Companies (508) 905-2800**

**LUCIE SEARLE, REAL ESTATE AND COMMUNITY DEVELOPER, for AS220 (401) 351-9686**

**SHARON MORRIS, EXECUTIVE DIRECTOR, Omni Development Corp. (401) 461-4442**

**PATRICIA NADLE, CHIEF EXECUTIVE DIRECTOR, Outer Cape Health Services (508) 905-2800**

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**VOLUNTEER** **CROSSROADS RI, BOARD MEMBER AND SECRETARY**

**AFFILIATIONS** **FARM FRESH RI, BOARD MEMBER**

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**REGISTRATIONS** **RHODE ISLAND #3007**

**MASSACHUSETTS #31152**

**CONNECTICUT #12567**

# Phoenix

PROPERTY MANAGEMENT INC.

**931 Jefferson Blvd. Suite 3001  
Warwick, RI 02886  
P: (401) 739-0100**

A Midland Capital Partners Company

## **Our Philosophy**

Providing owners with exemplary service and returns on investment encompasses more than just strong fiscal management and oversight. Understanding the mission and goals of the property owner and fostering an environment of resident engagement and satisfaction is key to preserving and enhancing the value of their property.

Owners, residents, investors, lenders, regulatory agencies, and employees are all critical components to a successful operation. Phoenix strives to be the best business partner, manager, and employer. This ethos is put into practice everyday through the actions of our management and maintenance team.

Phoenix Property Management, Inc. understands that they do not just manage real estate, but rather they manage people's homes and communities and ultimately an investment for the owner/investor.

## **About Us**

Phoenix Property Management, Inc. was formed in 1993 by executives of a large, well respected regional multifamily management company specializing in affordable housing.

Phoenix is a full service, professional property management firm. On-site managerial and maintenance personnel are supported by corporate staff in functional areas that include compliance, accounting and asset management, risk management, human resources, resident services, and facilities management. Today, Phoenix manages a diverse portfolio of properties with an emphasis on affordable and subsidized housing.

Phoenix's broad range of experience has allowed successful management of a wide variety of property types. The collective industry experience among the management team fosters recommendations that are technically and fiscally sound.

The management team and staff have extensive and superior track records in all phases of management operations, development, and construction processes and how all interrelate.

## **Management Services**

### **Management**

- Qualified on-site management and maintenance staff
- Regular staff training in compliance, fair housing and safety and continuing education
- Strong focus on resident retention and relationships
- Resident service coordinators and service programs are available
- Maximize occupancy through optimizing waiting list and maintaining ties to community leaders and social programs
- Utilize RealPage®'s Onsite Leasing and Rents platform to optimize occupancy and rental revenue collections
- In-place risk management measures to ensure the safety of the staff members and residents and to preserve and to enhance the value of the properties

### **Compliance**

- Senior management holds the following certifications: Certified Property Manager (IREM), Certified Occupancy Specialist, Tax Credit Specialist (NCHM), Asset Management Specialist (CHAM), Certified Credit Compliance Professional (Spectrum), Certified Professional Occupancy (NEAHMA) and Professional in Human Resources (HR Certification Institute)
- Utilization of AJ Johnson Consulting Services for pre-move-in file reviews, audit testing and compliance training
- Utilization of CohnReznick for LIHTC regulations and policy and procedures guidance
- Conduct pre-inspections for REAC, LIHTC review, Lender Review, and State Housing Authority inspections

### **Financial Management and Reporting**

- Utilization of RealPage® Accounting platform for record keeping, AP module, AR module, creation of financial statements, cash management and spend management
- Monthly financial reporting packages for owners, investors contain balance sheet, income statement, cash flow, rent roll, aged AP and AR reports and variance reports.
- Tailored reporting prepared for agencies and lenders to comply with regulations and loan agreements
- Annual financial budgeting and multiyear forecasting is prepared and discussed with ownership
- Asset Management reviews financial and operating reports for property benchmarking, to identify best practices and cost saving measures within the managed portfolio
- Established internal controls for purchasing and payments

## **Maintenance**

- Regular inspections of property interiors (common areas and units), building systems and building exteriors and grounds
- Preventative maintenance plans are developed, executed and monitored by on-site and corporate staff
- Comprehensive property records are maintained in resident files, vendor files and maintenance logs
- RealPage® electronic work orders and inventory control management allows cost effective, accurate and timely repairs to be completed, which increases resident satisfaction and protects the building and grounds
- Review the capital needs of the property in conjunction with replacement reserve analysis
- Collaboration with ownership on multi-year capital planning

## **Principals**

**Michael J. Packard** is responsible for the overall strategic direction of the company. With over 25 years of experience in the business, Michael has built a distinguished career earning respect among his peers. Michael is regarded as a creative problem solver who has shown a knack for unlocking value in the most complex assets. Michael has delivered returns unparalleled to his peers. Prior to leading Phoenix Property Management, he served as Principal and VP of Operations of a national affordable housing development and management firm. In this capacity, Michael stewarded the firm through tremendous growth, acquiring over 35 apartment complexes, redeveloped 15 properties across the country, increasing the value of portfolio from \$150 million to \$500 million dollars. Michael implemented key policies and procedures at the company structuring the firm for growth. Additionally, he has worked in several housing authorities, including RIHousing, where he was the Multifamily Compliance Specialist and Contract Administrator overseeing a portfolio of state RAP properties, Project Based Section 8 properties and contract administration properties. Michael is a graduate of the University of Rhode Island with a Bachelor of Science in Human Science and Services with a focus on Housing.

**Jennifer Y. Huynh** is responsible for the fiscal health of the company and its portfolio properties. Jennifer has been in the affordable housing business for over 16 years, and is well versed in the myriad of financial, regulatory, and management challenges that face the subsidized housing industry. Prior to Phoenix Property Management, Jennifer served as the VP of Finance for a large national affordable housing development firm. In that role, she oversaw the financial performance of 60+ properties valued over \$500 million dollars, coordinated with 3rd party accounting/auditing firms, oversaw investors relations, supervised the underwriting of acquisitions, and assisted with the redevelopment 13 properties. Jennifer worked as a liaison with outside vendors/partners and built many of the company's key policies and procedures. Jennifer holds a C3P Certification from Spectrum Companies and a CPO from New England Affordable Housing Management Association. Jennifer is a graduate of Suffolk University with Bachelor of Science in Business Administration with a focus on Global Business and Finance and an accounting and international economics minor.

## **Property Management**

**Kathleen Manzi** has over 30 years of property management experience. Kathy provides oversight to over a dozen properties located throughout Rhode Island. This portfolio includes a range of property types with affordable funding programs including LIHTC, Project Based Section 8, Housing Choice Vouchers, RAD, Mod-Rehab, HOME, NOP, PRAC 811 and PRAC 202.

Within Phoenix, Kathy plays a crucial role in the on-boarding of new properties and project development including new construction, substantial and moderate rehabs. Kathy is responsible for Section 8 contract renewals, affordable housing compliance, project income stabilization, and budgeting. She is also the liaison with several housing authorities, state agencies, and HUD. Additionally, she is intensely involved in personnel

development, compliance training, and support staff supervision. In her role she propagates the company's core values for a culture of growth and intuitiveness.

Prior to joining Phoenix Property Management, Kathy worked at Eastland Property Management, a regional property management. She is a graduate of the University of Rhode Island and is a Certified Property Manager® and Accredited Residential Manager® (IREM). She was the past Treasurer of the Greater Rhode Island Chapter of the Institute of Real Estate Management, and a past mentor for the chapter's candidates seeking the prestigious designation of Certified Property Manager®.

**James O'Brien** has over 20 years of affordable housing experience. He provides oversight to a portfolio of 18 properties throughout Rhode Island. Prior to joining Phoenix in 2006, James worked at RIHousing as a Multifamily Compliance Specialist and Contract Administrator, where he became a Certified Credit Compliance Professional for the Low Income Housing Tax Credit Program and a Certified Occupancy Specialist (NCHM).

Being well versed in the compliance field, James' responsibilities for PPMI include planning and conducting on-site reviews of projects for Tax Credit, HUD project-based section 8, 202, 911 PRAC, and HOME programs. He ensures compliance with regulations of housing programs, and safeguards against issues of noncompliance, developing policies and procedures for training companywide.

James has been an active member of IREM since 2004 and is a Certified Property Manager® and Accredited Residential Manager®. He maintains his affordable housing education by taking courses and attending seminars offered by IREM, HUD, and RIHousing. James obtained his real estate license in 1999 and is a graduate of Johnson and Wales University.

### **Corporate Staff**

**Tom Beattie** has over 30 years of experience in real estate and affordable housing. He is responsible for human resources management, staff training and development, salary and benefits administration, insurance and risk management servicing contracting and administration, and fair housing and community outreach. Tom was previously employed as Director of Administration at Eastland Property Management and as Public Relations and Program Coordinator for the Rhode Island Association of Realtors®. Tom is a graduate of Providence College and has an MBA from the University of Rhode Island, where he taught for 20 years in the College of Business and Cooperative Extension School. He is an accredited Professional in Human Resources® (HR Certification Institute).

**Christine Mattio** has over 20 years progressive accounting experience. She currently oversees the financial responsibilities for over 40 properties managed by Phoenix Property Management. Prior to joining Phoenix, Christine worked at RIHousing as Multifamily Financial Officer, responsible for collection, tracking, review and analysis of quarterly financial reports, annual budgets, and audited financial statements for the 200-unit multifamily loan portfolio. She also worked as Financial Controller at a Government

Subcontractor for over 11 years where she was responsible for accounting, financial statement preparation and budgeting for the organization and managing financial information for contracts. Christine is a graduate of the University of Rhode Island with a Bachelor of Science Degree in Accounting.

**Kate Mashburn** has over 30 years of experience in the real estate industry, focusing on hotel and multifamily housing properties. She spearheads asset management for Phoenix, ensuring industry best practices for the portfolio. Additionally, Kate reviews financial and operational reporting and confirms compliance with loan documents and regulatory agreements. She was previously employed as Senior Financial Officer, Multifamily Asset Management & Compliance at RIHousing, responsible for review of audited financial statements and approval of distributions, benchmarking metrics, escrow analysis, maintenance of the risk rating database and administration of a state subsidy program. Kate has a BS in Hotel Administration from Cornell University and an MBA from the University of Texas. Kate is a member of CHAM (Consortium of Housing and Asset Management) and is a Certified Asset Management Specialist (CHAM) and Tax Credit Specialist (NCHM).

<b>Properties Managed</b>	<b>Location</b>	<b>State</b>	<b>Programs</b>	<b>Demographics</b>
Access Housing	Cumberland / Pawtucket	RI	PRAC 811	Special Needs
Anthony House	Portsmouth	RI	LIHTC / S8	Elderly
Applecreek Apartments / Windwood Apartments	Tiverton	RI	Market	Family
Belleville House I & II	North Kingstown	RI	PRAC 202	Elderly
Belmont Commons	Pawtucket	RI	PRAC 811	Special Needs
BVARC Housing	Pawtucket	RI	PRAC 811	Special Needs
Cara Estates	Johnston	RI	PRAC 811	Special Needs
Carleton Westside Apartments	Providence	RI	PBV	Family
Cranston Apartments	Newport	RI	PBV	Special Needs
Cranston Commons East	Cranston	RI	PBV	Family
Cross Street Apartments	Central Falls	RI		Family
Eagle III Apartments	Manville	RI	LIHTC / S8	Family
Edward Cooney House	Providence	RI	S8 / 202 / PBV	Elderly
Elmhurst House	North Providence	RI	PRAC 811	Special Needs
Fifty Washington Square	Newport	RI	LIHTC / PBV	Homeless
Forest Farm Assisted Living	Middletown	RI	LIHTC / HOME	Elderly
Freedom Apartments	Middletown	RI	PRAC 811	Special Needs
Harbor House	Newport	RI	LIHTC	Elderly
Independence House	Providence	RI	PRAC 811	Special Needs
Keats Gardens	Pawtucket	RI	PRAC 202	Elderly
Kenyon Terrace	Pawtucket	RI	PRAC 811	Special Needs
Matthew XXV Apartments	Warwick	RI	S8	Elderly
Mumford Manor	Newport	RI	LIHTC / S8 / 202	Elderly
New Life Estates	Cranston	RI	PRAC 811	Special Needs
Pidge Manor	Pawtucket	RI		Family
Quaker Estates I-IV	Portsmouth	RI	PRAC 202 / HOME	Elderly
Quaker Manor	Portsmouth	RI	S8 / RAD	Family
Sandywoods Farm	Tiverton	RI	LIHTC / S8 / 202	Family
St Ann's Apartments	Woonsocket	RI	LIHTC / PBV	Family
Valerie Case	Providence	RI	PRAC 811	Special Needs
Veterans for Tomorrow	Providence	RI	LIHTC / VASH	Homeless
Villa Nia	Middletown		PRAC 811	Special Needs
West House	Middletown	RI	PRAC 202	Elderly
Westminster Street Supported Living	Providence	RI	PRAC 811	Special Needs
Willow Street Supportive Housing	Providence	RI	PRAC 811	Special Needs



## MacRostie Historic Advisors LLC

Bringing strategy, equity, and experience  
to historic building development

Since 2004, MacRostie Historic Advisors LLC has been a national leader in historic tax credit consulting, assisting real estate developers nationwide obtain project equity through federal and state historic tax credit programs. Our partners have more than 60 years of combined experience in the field of historic preservation and have managed more than 1,000 federal historic rehabilitation tax credit certification applications for developments in 39 states across the country, including Alaska and Hawaii. Additionally, MHA performs a variety of services related to National Register nominations, historic structures reports, local landmark review and compliance, Section 106, and state environmental review as well as other historic preservation related undertakings. MHA has advised its clients, including municipalities and institutions, on numerous complicated real estate transactions under regulatory review. All of our associates meet the Secretary of the Interior's Professional Qualification Standards for Architectural History and maintain strong professional relationships with review staffs at the National Park Service and State Historic Preservation Offices.

In our practice, we place particular emphasis on providing clients with a strategic approach to the historic tax credit certification process, ensuring timely and successful project certification with a minimum of design changes. We work collaboratively with clients and project teams to identify creative solutions that balance client and project objectives, regulatory requirements, and historic preservation principles. With extensive contacts in the equity syndication and corporate investor communities, we also are able to facilitate connections between our developer and corporate investor clients. With an active market providing institutional equity investment, state and federal historic credits are used as sources of capital to reduce a project's debt load and increase overall project viability. MacRostie Historic Advisors' success rate for Part 3 approvals is approximately 99 percent.

Our diverse portfolio of work includes consulting for affordable housing, market-rate housing, student housing, military housing, hotels, commercial office and retail space, arts and entertainment venues, civic and educational facilities, and research and technology campuses.

We currently have seven offices in key locations around the country: Washington, DC; Boston, MA; Chicago, IL; Charleston, SC; Houston, TX; New Orleans, LA; and San Jose, CA. Our locations provide for efficient and customized client service wherever our projects are located while taking advantage of a greater network of resources and support.

Our headquarters location in Washington, DC, and the involvement of our Senior Partner Bill MacRostie in industry advocacy on Capitol Hill, reinforces our position as leaders in the historic tax credit field. The proximity to the DC-based National Park Service (NPS) headquarters strengthens our relationship with decision makers for federal rehabilitation tax credit certification applications and gives us a competitive advantage by allowing us to work directly with reviewers to swiftly resolve issues that may arise in any given application.

[macrostiehistoric.com](http://macrostiehistoric.com)



## Boston Team

All MHA associates meet the Secretary of the Interior's Historic Preservation Professional Qualification Standards.

### | Albert Rex

Partner, CEO | MHA Boston

Albert Rex is a Massachusetts-based historic real estate consultant and strategist with more than 20 years of experience in the Northeast. Albert has worked with clients that include developers and organizations, municipalities, and institutions that have complex preservation, permitting, and zoning issues.

Albert is a former executive director of the Boston Preservation Alliance, Boston's citywide non-profit preservation advocacy organization. While at the Alliance, he was involved in numerous projects and planning processes that focusing on historic preservation's role as an economic development tool. He was one of four authors of the original legislation that created the Massachusetts Historic Rehabilitation Tax Credit (MAHRTC) and has consulted on that matter as a technical advisor to Preservation Massachusetts, Inc., the statewide non-profit advocacy organization.

Albert has a Bachelor of Arts from the University of Rhode Island, a master's degree in Historic Preservation from Boston University, and has completed courses in business administration at Babson College.

### | Scott Hanson

Senior Associate | MHA Boston

Scott's work includes preparing state and federal historic rehabilitation tax credit applications, National Register nominations, and preservation consulting services for museums and institutions. Scott previously worked for Sutherland Conservation & Consulting as an architectural historian and director of historic preservation consulting services in Maine from 2010 to 2020. From 2005-2010, he was a preservation planner for the City of Portland, Maine.

Scott's best-selling book, "Restoring Your Historic House, The Comprehensive Guide for Homeowners," won the 2020 Maine Writers and Publishers Alliance "Excellence in Publishing" award. Previously, he co-authored two books on northeastern architecture with Maine State Historian Earle G. Shettleworth, Jr.

Scott studied at Pratt Institute's School of Art and Design. He received a statewide historic preservation honor award from Maine Preservation and a Greater Portland Landmarks Preservation Award for his work with the City of Portland's preservation program.

### | Kim Smith Barnett

Partner | MHA Boston

Previously the director of our Boston office, Kim has more than 20 years of experience as a historic preservation professional. Her experience includes developing blighted historic properties, acting as historic tax credit consultant for non- and for-profit developers, and also acting as lender and equity partner in historic property developments. Her projects have won awards from Providence Preservation Society, Rhode Island Historical Preservation & Heritage Commission and Preserve Rhode Island.

Kim uses her skills in real estate finance and non-profit finance in several volunteer roles. She is serving as treasurer for Pawtucket Central Falls Development Co. (formerly Realty Endeavors for Central Falls) since 2009. Her past involvement has included the Housing Network of Rhode Island, the Providence Preservation Society and on the West Broadway Neighborhood Association Community Development Committee.

Kim holds a Bachelor of Science in Historic Preservation and Conservation from Roger Williams University in Bristol, Rhode Island and a Bachelor of Arts in Psychology and Philosophy from Rhode Island College, in Providence, Rhode Island.

### | Mary Nastasi

Senior Associate | MHA Boston

Mary's work includes preparing state and federal historic rehabilitation tax credit applications and National Register nominations for projects throughout the country. She has been involved with the successful rehabilitation of a wide variety of projects, including market-rate and affordable housing, hotels, and other commercial and mixed-use properties. In 2018, she received a Paul & Niki Tsongas Award from Preservation Massachusetts as a member of the Next Generation in preservation.

Mary earned her Master of Science in Historic Preservation from Columbia University, where she undertook a thorough study, narrative, and analysis of mid-twentieth-century concrete architecture in Boston and New England as her thesis. She has applied her knowledge of mid-century architecture and construction to such projects as the 2017 rehabilitation of Eero Saarinen's 1962 TWA Flight Center. She is a member of Docomomo US. In addition to her master's degree, Mary holds a Bachelor of Arts in Architecture and Urbanism from Smith College.



### | **Emily Dominijanni**

Associate | MHA Boston

Emily's work includes preparing state and federal historic rehabilitation tax credit applications and National Register nominations for projects throughout the country.

Prior to joining MHA, Emily restored historic wooden windows in the Boston area and held internships with the National Park Service and a local preservation consulting firm.

Emily received her Master of Science in Historic Preservation degree from Columbia University, where she completed a thesis on Polychlorinated Biphenyls, their impact on historic buildings and remediation approaches. In addition to her master's degree, Emily holds Bachelor of Arts in Cultural and Historic Preservation and International Studies from Salve Regina University in Newport, Rhode Island where she developed her love for historic buildings.

### | **Ryan Cameron**

Associate | MHA Boston

Ryan's work includes preparing state and federal historic rehabilitation tax credit applications and National Register nominations for projects throughout the country.

Prior to joining MHA, Ryan held an internship with a local preservation architect in Los Angeles where he did historic research and writing for local landmark designations.

Ryan received his Master of Arts in Historical and Sustainable Architecture from New York University in London, England where he completed a thesis on low-impact performance venue adaptations using redundant heritage buildings.

In addition to his master's degree, Ryan holds a Bachelor of Arts in Architectural Studies and Theatre from Connecticut College in New London, Connecticut.

### | **Roysin Younkin**

Associate | MHA Boston

Roysin prepares state and federal historic rehabilitation tax credit applications and National Register nominations. Roysin is an architectural historian with extensive experience in the preparation of National Register nominations and landmark designation reports.

Prior to joining MHA, Roysin served for five years as the architectural historian at the Boston Landmarks Commission (BLC), the City of Boston's historic preservation agency. While at the BLC, Roysin prepared reports for designation of a wide variety of buildings as Boston Landmarks and administered the National Register program in Boston.

Roysin holds a Bachelor of Arts in American Studies from Carleton College and a Masters of Architectural History and a Certificate in Historic Preservation from the University of Virginia.

### | **Kendal Anderson**

Junior Associate | MHA Boston

Kendal's work includes preparing state and federal historic tax credit applications and National Register nominations.

While in graduate school, Kendal worked as an associate consultant at Sutherland Conservation & Consulting. Kendal was accepted into the Maine Preservation Fellowship, which included an internship at Maine Preservation and working on the restoration of the 1908 Wood Island Life Saving Station in Kittery, Maine with Preservation Timber Framing. In addition to the Fellowship, Kendal was an intern at the Maine Project for Fine Art Conservation, where she now serves on the Board of Directors. Kendal also worked as an architectural historian for Gray & Pape Heritage Management.

Kendal received her Bachelor of Arts in Painting from Maine College of Art and a Masters of Arts in Historic Preservation from Savannah College of Art & Design.



## | **Mark McDonnell**

Junior Associate | MHA Boston

Mark graduated cum laude from Boston University with a Bachelor of Arts in History and a minor in Religion in 2019. In 2021, he received his Master of Arts in Preservation Studies with a minor in Urban Planning, also from Boston University. Mark completed National Register of Historic Places eligibility assessments for historic piers in the Central Waterfront of Portland, Maine for his capstone project.

Mark was an advocacy intern with Greater Portland Landmarks (Maine) during the summer of 2020. In this role, he helped create a historic homeowners' guide for climate change damage mitigation and walking tours of Portland's historic neighborhoods.