

ATTACHMENT 1

Oliver House Scope of Work

Prepared by:

JA Saari, Rehab Consultant

***JOHN A. SAARJ, L.L.C.***

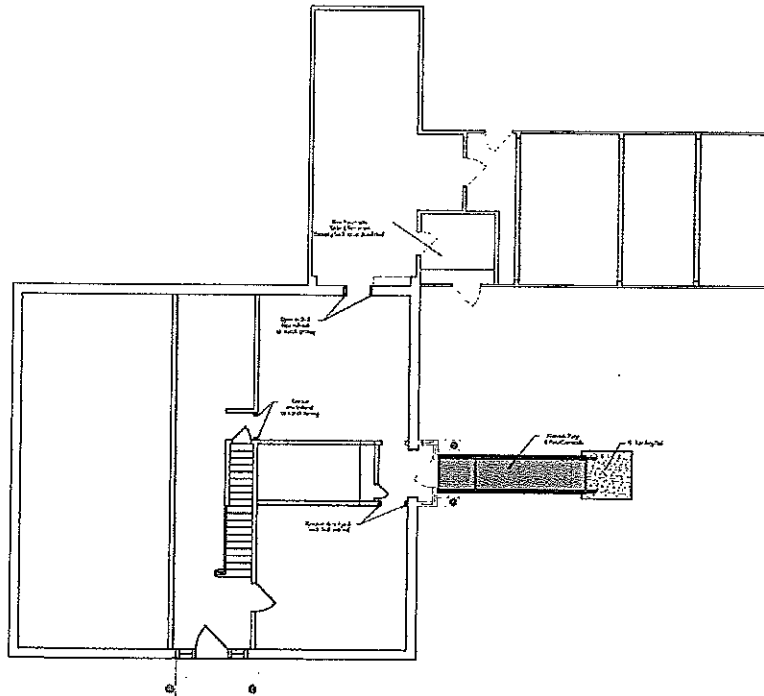
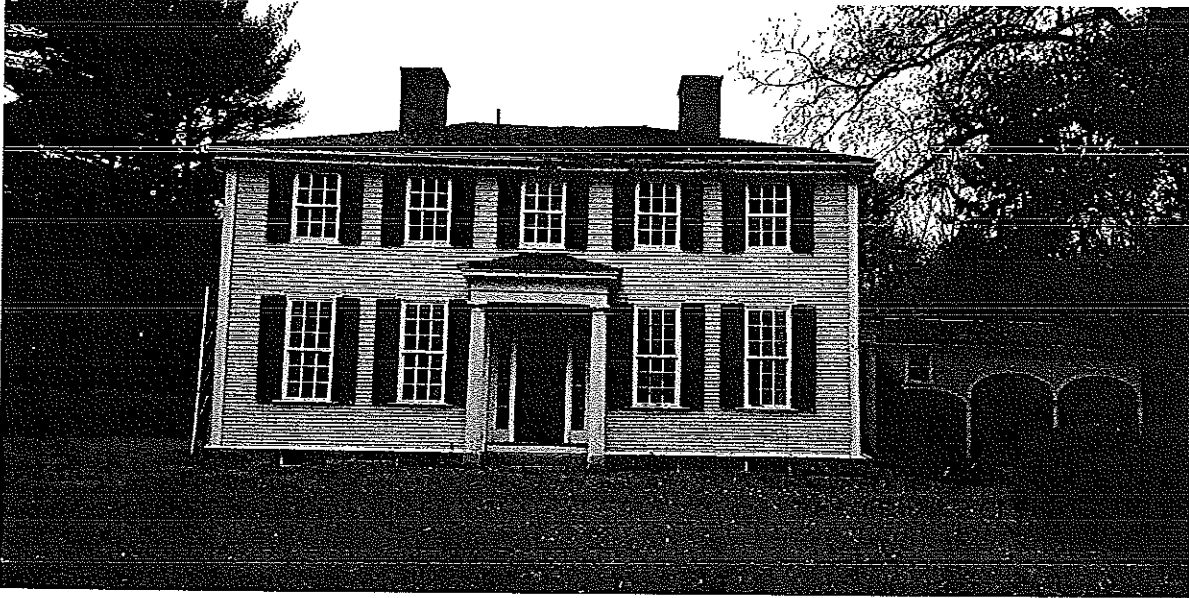
***HOUSING REHABILITATION CONSULTANT  
BUILDER/CONSTRUCTION MANAGER***

***Phone: 508-274-1813/Email: jasaari@housingrehabconsultant.com***

***Web Page: www.housingrehabconsultant.com***

***Document prepared January 16, 2016/ revised January 20, 2016***

***PROJECT WORK WRITE – UP***



***OLIVER HOUSE***  
***Middleboro, Ma.***

**General Information:**

Location of Proposed Work: *Middleboro, Ma.* Contractors are responsible for verification of field conditions, measurements and quantities. Permits and Permit Fees and Inspection fees are to be included in all bids. The costs of providing all labor and all materials shall be included in the bids. All work items in this project are subject to the requirements of **105 CMR, the State Sanitary Code; the 8<sup>th</sup> EDITION of 780 CMR 51.00, the Massachusetts Residential Building Code and the 2009 International Residential Code; the 2012 International Energy Code.** The work shall also comply with the requirements of the State and Local Historical Commissions, and the preservation restriction agreement held by Historic New England dated October 26, 2015 and recorded in the Plymouth County Registry of Deeds in Book 46422, Page 1.

Listed below the work required for the *Oliver House project.* It is hereby understood that the Work Write-Up is to be utilized as an outline for the work and as a guide for pricing the various work items. If you have questions please call. *All costs (General Requirements, OVHD & Profit) shall be included in each work item on the bid sheet; no lines/sheets or additional cost shall be illustrated on or affixed to the Quote Sheet.*

**Lead Paint Note:** *Due to the age of the property; lead safe practices shall be adhered to during the conduct of the work herein.*

**I. Exterior Siding/Trim/Shutters & Gutters:**

**A. Siding** The Contractor shall remove and replace all existing red cedar shingles at the rear of the Main House and at the three (3) sides of the rear Addition and the rear wall of the Carriage House; approximately *1200 sq. ft.* of siding to be replaced with white cedar shingles. The Contractor is responsible for measuring the exact amount. *Once the existing siding is removed, photos of all areas of the substrate shall be taken; copies of the photos shall be immediately e-mailed to the Community Development Office; the Representative for Historic New England and the Rehab Consultant.* Next the Contractor shall check the sub-straft for rot and vermin infestation if none is found, prep the sidewalls to receive the new cedar shingles. Re-nail the substrate; next wrap areas with Tyvek Underlayment. Membrane splines will be applied at the windows, the doors, under the freeze and water table (where applicable) and the outside corners; *if rot is found the Contractor shall notify the Representative for Historic New England and the Rehab Consultant immediately and then prepare a Change Order per the Contract documents. Payment will not be made to the Contractor for changes in the work that have not been approved per the established protocol.* The Contractor shall insure that the coursing (approximately 5 inches in height) is correctly applied, maintaining correct margins and heights at all trim. Replace all head flashing at the windows and doors within the area of work. *The red cedar shingle grade is to be Extra, R & R's and have the same profile as the existing shingles Note: only stainless steel nails approved by the Shingle Manufacturer shall be utilized.*

*All Electrical Meters and related Cables, Exterior Lighting, Cable TV, Phone Wires that interfere with the trim replacement shall be removed and once the trim is completed; reinstalled. The existing Light and Outlet Blocks shall be replaced in-kind, matching the existing profile, before the Lighting and Outlets are reinstalled.*

**B. Exterior Trim:** The Contractor shall repair and/or replace all of the Fascia; the Bed Moldings; the Soffits' the Corner Boards and the Water Table on the *Main House; the Rear Addition and the Carriage House* in-kind with trim having the same profile.

*Note: The emphasis shall be on repairing the existing trim.*

Prior to the start of the trim work; the entire gutter system shall be removed from the *Main House* and the *Rear Addition.* The existing trim on the *Main House; the Rear Addition and the Carriage House* shall be cleaned and all trim that is deteriorated shall be identified by size. Once this is accomplished; the Consultants shall be notified that the structure is ready for inspection. Within five (5) business days the Rehab Consultant and the Representative for Historic New England in conjunction with the Contractor shall view and quantify all trim to be removed and replaced. There is approximately *750 lin. ft. of exterior trim* to be repaired and/or replaced. All existing trim shall be cleaned; prepped; primed with **Benjamin Moore FRESH START Premium Exterior Primer** and the painted two (2) coats with **Benjamin Moore AURA Grand Entrance Paint;** sanding and cleaning between the coat of primer and each coat of paint; the cost of prep and painting the sound materials shall be carried in the base bid. *Note: For trim replacement the Contractor shall be compensated in a change order, at the rate of \$4.50/lin. ft., which includes labor, materials and painting, for each linear foot of each size of trim replaced.*

**I. Exterior Siding/Trim/Gutters & Gutters:**

**C. Shutters:** The Contractor shall repair and/or replace all Shutters on the Main House; twenty (20) pair of Shutters shall be addressed. The treatment of each set of Shutters shall be reviewed at the Contractors walk-thru. A cost of *\$350/per set* of Shutters shall be carried in the bid; the number is subject to be revised after the walk-thru. All existing and new Shutters shall be cleaned; prepped; primed with **Benjamin Moore FRESH START Premium Exterior Primer** and the painted two (2) coats with **Benjamin Moore AURA Grand Entrance Paint**; sanding and cleaning between the coat of primer and each coat of paint; the cost of prep and painting the sound materials included in *\$350/per set*.

*Note: The emphasis shall be on repairing the existing Shutters.*

**D. Gutters/Downspouts:** The gutters are severely deteriorated; the Contractor is to replace all gutters at the property in-kind with new wood gutters that match the existing in both profile and installation configuration; the existing downspouts shall also be replaced in-kind. There are approximately *245 In. Ft.* of gutters to be replaced;

Prior to installing the new gutter system; all of the trim work as stipulated in paragraph **IA** shall be completed. The discharge of the new leaders shall be per the requirements of the Town of Middleboro. Planting and/or landscaping is not part of this Scope of Work.

**Note:** The work in this section shall meet all requirements of the *applicable sections of 105 CMR, the State Sanitary Code; Part VIII Electrical and Appendix J (Existing Buildings and Structures) of the 2009 International Residential Code, the 2012 International Energy Code (or the Massachusetts Stretch Code) and the Eighth Edition of the MA State Building Code.*

**II: Bulkhead/Basement Door/Threshold:**

**A.** Remove the existing Bulkhead; replace rotted sills and then replace the bulkhead in-kind. A new insulated steel Door shall be installed at the bottom of the bulkhead stairs. A Schlagle lockset shall be installed in the door. Prime and paint the Bulkhead and Door the with **Benjamin Moore FRESH START Premium Exterior Primer** and the painted two (2) coats with **Benjamin Moore AURA Grand Entrance Paint**; sanding and cleaning between the coat of primer and each coat of paint. *Note: the existing wood door at the bottom of the bulkhead stairs shall be preserved, labeled and stored on site.*

**B. Threshold Replacement:** At the South entrance of the east façade of the Carriage House; the existing deteriorated threshold and sill will be removed; next replace the rotted sill; install a lead pan and replace the threshold in-kind matching the existing profile.

**Note:** The work in this section shall meet the *Requirements of applicable sections of 105 CMR, the State Sanitary Code; the Requirements of Chapter 11 Energy Efficiency and Appendix J (Existing Buildings and Structures) of the 2009 International Residential Code, the 2012 International Code (or the Massachusetts Stretch Code) and the Eighth Edition of the MA State Building Code.*

**III. Chimney:**

At the rear addition (ell), the Chimney shall be taken down to the roof and rebuilt in-kind and to the existing profile and configuration. The existing brick shall be utilized the re-construction of the chimney. The new chimney flashing shall be lead. The mortar for the chimney shall be a soft, lime mortar that matches the tooling, texture and the color of the existing mortar.

**Note:** The work in this section shall meet the *Requirements of applicable sections of 105 CMR, the State Sanitary Code; the Requirements of Chapter 11 Energy Efficiency and Appendix J (Existing Buildings and Structures) of the 2009 International Residential Code, the 2012 International Code (or the Massachusetts Stretch Code) and the Eighth Edition of the MA State Building Code.*

**IV. Ceiling Painting:**

All ceilings within the Property were originally painted with Calcimine Paint. The ceilings are now badly flaking and must be properly prepped before new paint can be applied. The ready the existing ceiling for painting the Contractor must scrape all loose and flaking water based Calcimine Paint from the ceilings; next the ceilings will be sanded and washed one or more time with a mixture of 1.5 cups of TSP (tri-sodium phosphate) per I gallon of water until the ceiling are ready for the new paint.

Once the ceilings and cleaned the Contractor shall apply one coat of *OX-O-Flow* or an equally approved product to all ceilings. There are approximately 3000 square feet of ceiling to be painted. *The Contractor and Rehab Consultant and the Representative for Historic New England shall measure and agree upon the exact ceiling painting to be accomplished.*

**V. Tree & Shrub Removal:**

The Contractor shall remove in its entirety the Arborvitaes Shrubs at the right rear corner of the addition (ell). Additionally, the Contractor shall remove the Pine tree and then grind off the stump to 12 inches below grade and regrade the area. The location of the shrubs and tree will pointed-out during the Contractors walk-thru.

**General Notes:**

**A. (General Note A shall not be utilized for this project.)**

**B.** Once the Contract has been awarded; the Contractor shall prepare in typed written form, a schedule illustrating the construction services to be provided. The schedule will be designed on week by week basis (monthly calendar style), beginning at the start date (Notice to Proceed) and ending at the Contractor's projected completion date. The schedule will illustrate by trade, the tasks to be completed, including the key material delivery dates necessary to accomplish the work within the proposed time frame. Illustrated in the schedule will be the proposed dates for Inspections by the applicable Code Enforcement Departments.

**Note1:** *The schedule will be completed and presented to Program Manager and the Rehab Consultant within five (5) business days of the Notice to Proceed.*

**Note2:** *Payment will not be made to the Contractor until the requirements of General Note are met.*

**C.** The Contractor is responsible to maintain a Safe Working Environment and Safe Construction Site at all time; this includes both during the daily Construction Operations and during the time when the site is shut down, i.e. such as after work hours or when construction is halted due to un-foreseen or un-anticipated conditions. All Federal and State safety requirements and regulations pertaining to this particular type of Construction shall be adhered to.

**D.** The Workmanship/Craftsmanship shall be of the customary high standard, established in the Construction Industry for work of this nature.

**E.** The Construction Debris will be removed from the work site on a weekly basis.

**F.** The Property Owner is responsible for removing items from the Contractor's work area.

**G.** In all cases where a substitute but equal product is to be utilized, the Contractor shall present the specifications and an illustration of the product match with the bid and at that time the product will be considered. Additionally, substituting products, though equal, does not justify a delay in the start or completion of the work. Failure to make this submittal with the bid will be an indication to the Program Manager and the Rehabilitation Specialist that all products specified in the Work Write will be utilized during *the conduct of the work for this project.*

**H.** All materials shall be new, warrantable and installed per the Manufacturer's specifications.

**General Notes continued:**

I. The Contractor shall supply Portable Toilet facilities at the Job site. This will be cleaned and emptied on a weekly basis; the unit will be removed within 5 days of the completion of the work.

J. *(General Note J shall not be utilized for this project.)*

K. All applicable *International and State Building, Electrical, Energy, Plumbing & Gas and Sanitary Codes are to be* adhered to during the conduct of this work.

L. The Contractor shall inform the Rehab Consultant by e-mail two (2) days prior to opening the Roof, removing the Exterior Doors or removing the Windows as the Rehab Specialist at his option will either view the work at the site during those critical openings of request that the Contractor provide photos of conditions encountered and methods and materials utilized during the installation of the new work. *Failure to provide this lead time for inspection and or photos if required will trigger a request to open and inspect the completed work as requested by the Consultant. The cost to open and close the work shall be borne by the Contractor.*

M. As applicable, the Contractor shall include with the final requisition (payment request) all documentation necessary for the Property Owner to apply for rebates, tax credits, other incentives or programs available to the Homeowner. Additionally, all product information, warranties and or guaranties applicable to the project shall accompany the last requisition. *Payment will not be made to the Contractor until these requirements are met.*

N. The Contractor is responsible for protecting all landscaping within 10 ft of the perimeter of the property requiring exterior renovations. The Contractor shall take photos of the condition of all landscaping within the indicated area prior to protecting (covering) and then take another set of photos illustrating the area once protected. A copy of these photos shall be sent to the Program Manager and the Rehab Specialist.

O. Due to Insurance Liability mandates and O.S.H.A. regulations, Property Owners are not allowed on ladders, scaffolds, roofs etc. or within the work areas deemed hazardous by the Contractor. Failure to adhere to paragraph O. *of the General Notes* by either the Contractor or the Property Owner shall be grounds to terminate the Contract.

P. There shall be no smoking on or within the property. No illegal drugs or alcoholic beverages will be consumed on or within the property.

Q. If during the final inspection, if items of work are found to be incomplete and/or areas are in need of correction, a punch list will be generated by the Rehab Specialist and emailed to the contractor within 24 hours of the inspection. The Contractor shall correct the punch list items within seven (7) days of receiving the punch list. When the work is completed, the Contractor shall notify both the Program Manager and the Rehab Specialist the work is ready for the final re-inspection.

R. The Contractor shall maintain intact all lead paint associated with the scope of work of the project.

Written by: \_\_\_\_\_ Date: \_\_\_\_\_

Accepted by: \_\_\_\_\_ Date: \_\_\_\_\_

**NOTICE TO ALL PARTIES: ALL CHANGES TO THE SCOPE OF WORK OR TIME FRAME REQUIRE A WRITTEN APPROVED CHANGE ORDER. Note:** Please feel free to call me (508- 274-1813) with bid related questions prior to submission to the Town of Middleboro. Allow a minimum of 2 business days to insure contact with me is made and questions can be answered correctly.

*Property Owner: The Town of Middleboro*

ATTACHMENT 2

Historic New England  
letter approving project and application.

John  
+ Jan, 9-1-16



**HISTORIC<sup>®</sup>  
NEW ENGLAND**

*Defining the past. Shaping the future.*

Lyman Estate  
185 Lyman Street  
Waltham, MA 02452-5645  
tel 781.891.4882  
HistoricNewEngland.org

January 22, 2016

Robert G. Nunes, Town Manager  
Town of Middleborough  
10 Nickerson Avenue  
Middleborough, Massachusetts 02346

*RE: Peter Oliver, Jr. House, 445 Plymouth Street, Middleborough, MA*

Dear Bob:

Pursuant to the Preservation Restriction Agreement between Historic New England and the Town of Middleborough dated October 26, 2015 and recorded at the Plymouth County Registry of Deeds in Book 46422, Page 1, Historic New England approves the proposed work at the Oliver House outlined in John A. Saari's proposal dated January 16, 2016/revised January 20, 2016. The proposed work will address many years of deferred maintenance at the exterior of the house and carriage house while retaining as much intact historic building fabric as possible. This work is necessary to render the building weather-tight while preventing the need for more costly future repairs. Historic New England supports the town's plans to seek funding for this work from the Massachusetts Preservation Projects Fund, and the Middleborough Community Preservation Committee.

Please feel free to contact me at (617) 994-6643 or [jcornish@historicnewengland.org](mailto:jcornish@historicnewengland.org) if you have any questions about this project or the ongoing preservation of the Peter Oliver, Jr. House.

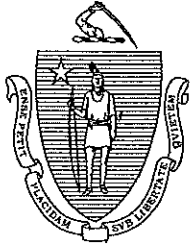
Sincerely,

Joseph Cornish  
Supervising Preservation Services Manager



ATTACHMENT 3

Support Letters



*The Commonwealth of Massachusetts*  
*House of Representatives*  
*State House, Boston 02133-1054*

**SUSAN WILLIAMS GIFFORD**  
**ASSISTANT MINORITY WHIP**

DISTRICT OFFICE  
191 MAIN ST., SUITE 213F  
WAREHAM, MA 02571  
TEL (508) 295-5999  
FAX (508) 295-5993

2ND PLYMOUTH DISTRICT  
WAREHAM • CARVER  
MIDDLEBORO

ROOM 124, STATE HOUSE  
TEL (617) 722-2100  
FAX (617) 722-2390  
Susan.Gifford@MAhouse.gov

January 26<sup>th</sup>, 2016

Jane Lopes – Chairwoman  
Community Preservation Committee  
8 Benton Street  
Middleborough, MA 02346

Re: Town of Middleborough's Massachusetts Cultural Facilities Fund Grant application – Oliver Estate

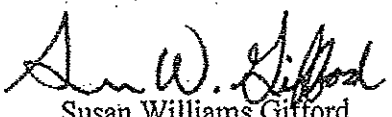
Dear Chairwoman Lopes,

We write today in support of the Town of Middleborough's application to the Massachusetts Cultural Facilities Fund Grant to perform upgrades on the Oliver Estate located on Route 44 and Plymouth Street in Middleborough, MA. These upgrades will allow the Oliver Estate to conduct tours to the public, providing both educational and recreational benefits to visitors while boosting the local economy and preserving a valuable piece of American History.

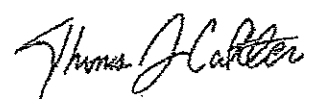
The Oliver Estate was built in 1769 by loyalist Judge Peter Oliver for his son and his wife, the daughter of then Governor of Massachusetts, Thomas Hutchinson. Early Middleboro Revolutionaries seized the property while the loyalist Oliver family fled at the onset of the Revolution. The property is a true time capsule of our Revolutionary History that should be shared with the public. Before tours can begin, there are upgrades that need to be done. The Oliver Estate is applying to upgrade the septic, install accessible bathrooms, and an accessible ramp. The Tourism Committee has teamed up with several Revolutionary re-enactment organizations and local citizens to create and implement a plan to conduct these tours. With the MA Cultural Facilities help in conducting these upgrades, the Oliver Estate will be ready to open its doors to the public and start sharing this unique view into such an integral part of our history as a nation.

It is for these reasons that we respectfully request your assistance in awarding the Massachusetts Cultural Facilities Fund Grant to the town of Middleboro to conduct upgrades on the Oliver Estate and thank you for your time and consideration.

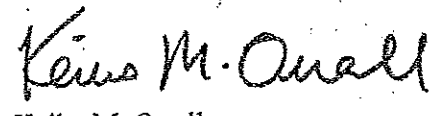
Sincerely,



Susan Williams Gifford  
State Representative  
2<sup>nd</sup> Plymouth District



Thomas J. Calter  
State Representative  
12<sup>th</sup> Plymouth District



Keiko M. Orrall  
State Representative  
12<sup>th</sup> Bristol District



# Plymouth County

MASSACHUSETTS, USA

CONVENTION & VISITORS BUREAU

December 2, 2015

Jane Lopes, Chairman  
Community Preservation Committee  
Town of Middleborough, MA

Dear Chairperson Lopes,

I have been asked by the Middleborough Tourism organization, working vigilantly to put their Town on the map as a viable tourism destination, to write to you in regard to the restoration of the Peter Oliver Estate in Middleborough.

Peter Oliver graduated from Harvard and purchased an iron works in Middleborough in 1744. The company made cast iron household items and cannonballs. With profits he had built Oliver Hall, described as one of the most elegant residences in all colonial New England. In 1767, he built the equally elegant Oliver Estate for his son and daughter-in-law, who was the daughter of then Colonial Governor Thomas Hutchinson.

He held numerous official positions in the Commonwealth including justice of the Court of Common Pleas and justice of the Massachusetts Superior Court of Judicature to name a few. Oliver supported the idea that colonists should be taxed and was a staunch Tory. He was also one of the three judges during the trials held after the Boston Massacre. Friends with both John Adams and Benjamin Franklin, he was a key figure in our young Country's birth. His estate was destroyed during the Revolution by angry townspeople. Fortunately, his son's estate remained intact. Restoration of this important residence so as to offer tours, lectures and events would not only increase visitors to Middleborough but add a significant stop for those history buffs making their way through Massachusetts and its part in the American Revolution.

Besieged with worthy requests from all over Massachusetts as you are, I hope you will find a way to support projects such as this important historic property.

Feel free to contact me if it is felt that I can be of any assistance in helping to secure adequate funding in order to continue to support the great work of MCC.

Sincerely,

Paul Cripps

Executive Director

Plymouth County Development Council & CVB

CRANBERRY CAPITAL  
OF THE WORLD



Phone: 508-946-2405

Fax: 508-946-0058

# Town of Middleborough

Massachusetts

Board of Selectmen

January 26, 2016

Jane Lopes, Chairman  
Community Preservation Committee  
20 Centre Street  
Middleborough, MA 02346

Dear Chairman Lopes & Committee Members:

At its meeting held on January 25, 2016, the Board of Selectmen voted unanimously to authorize the OECD to apply for CPC funds for the renovation of the Oliver Estate. These funds will be used as a match to the Mass Historical grant due in March 2016.

Sincerely,

A handwritten signature in black ink, appearing to read 'Allin Frawley'.

Allin Frawley, Chairman  
BOARD OF SELECTMEN

*Incorporated 1669*  
*346 Years of Progress*



CRANBERRY CAPITAL  
OF THE WORLD



**Town of Middleborough**  
*Massachusetts*

January 27, 2016

Ms. Jane Lopes Chair,  
Community Preservation Committee  
20 Centre Street  
Middleborough, MA 02346

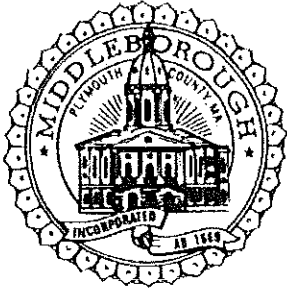
Dear Chairman Lopes & Committee Members:

I am writing in support of the Office of Economic and Community Development's application for funding to renovate the Oliver Estate.

These funds are required as matching funds in order to apply to the Mass Historic Commission in March, 2016 for total project costs. By committing the matching funds, the Town will be able to apply for the Mass Historic grant and also show that the community supports this project. With renovations completed through the Mass Historic Grant and the CPC, the historic Oliver Estate will be made available for the Town to promote and enjoy.

Sincerely,

Robert G. Nunes  
Town Manager



TOWN OF MIDDLEBOROUGH  
*Oliver Estate Advisory Committee*  
20 CENTER STREET  
MIDDLEBOROUGH, MA 02346

P (508) 946-2405

[ldalpe@middleborough.com](mailto:ldalpe@middleborough.com)

Leilani Dalpe  
Chairman

Jane Lopes, chairman  
Community Preservation Committee  
Town of Middleborough, MA

Dear Committee:

I am writing on behalf of the Oliver Estate Advisory Committee in the Town of Middleborough in support of funding for the purpose restoration at the Oliver Estate located at 445 Plymouth Street in Middleborough.

The Oliver Estate represents one of the few existing original and structurally intact buildings from this country's Revolutionary period and is a pristine example of Colonial architecture. It also is historically significant in that the early revolutionaries seized the property from the Loyalist Oliver family spurring events leading directly to the American Revolution.

The Town has already taken steps through zoning, general repairs, upkeep and a Historic Preservation Restriction with Historic New England to prepare the property to be open to the public for tours. The very successful Tourism Committee in town has collaborated with local artisans and professional re-enactment groups to present various tours throughout the year to coincide with festivals adjacent to the property which yield thousands of visitors and revenue to further support the Estate. These festivals include The Herring Festival, Oktoberfest and Festival of Lights.

In conclusion, the Town and Tourism Committee are ready to open the doors to the public and begin sharing the extensive historical and architectural assets the Oliver Estate has to offer once the accessibility requirements have been met. The Oliver Estate Advisory Committee fully supports this endeavor and recommends the project for any funding for which it qualifies.

Sincerely,  
Leilani Dalpe  
Oliver Estate Advisory Committee, Chairman



# Town of Middleborough

Massachusetts

MIDDLEBOROUGH HISTORICAL COMMISSION

Jane Kudcey  
Office of Economic and Community Development  
20 Center Street  
Middleboro, MA 02346

Déar Ms. Kudcey:

The Middleboro Historical Commission reviewed the proposed grant application for Community Preservation Act funding for work on the Oliver House at its Jan. 19 meeting.

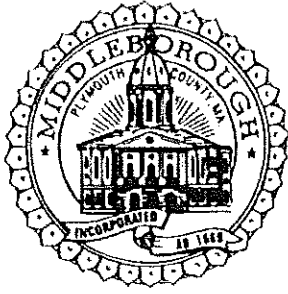
While the commission will take an official vote following a formal presentation at its February meeting, members were generally favorably inclined toward using CPA money for a match to obtain Massachusetts Historical Commission grant funding for needed work at the Oliver estate.

The commission looks forward to reviewing the application on Feb. 16.

Sincerely,

  
Jane Lopes  
Chairman





TOWN OF MIDDLEBOROUGH  
*TOURISM COMMITTEE*  
20 CENTER STREET  
MIDDLEBOROUGH, MA 02346

(774) 766-6335  
[discovermiddleborough@gmail.com](mailto:discovermiddleborough@gmail.com)

Leilani Dalpe  
Chairman

The Oliver Estate Advisory Committee  
Town of Middleborough  
10 Nickerson Avenue  
Middleborough, MA 02346

Dear Committee,

Please be advised that the Middleborough Tourism Committee voted at their January 20, 2016 meeting to pledge up to \$10,000 from the proceeds of the tours that they conduct at the Oliver Estate in 2016.

The Committee feels that the Estate is a rare glimpse into our Revolutionary history and we are committed to supporting the Estate and highlighting it as a regional attraction.

*Leilani Dalpe*

Tourism Committee, Chairman  
Town Of Middleborough, MA  
[Selectmandalpe@middleborough.com](mailto:Selectmandalpe@middleborough.com)  
774-766-6335

*The Middleborough Tourism Committee is a group of individuals dedicated to encouraging economic prosperity through sponsorship, marketing and support of local events and attractions.*

ATTACHMENT 4

JA Saari Resume

Jane Kudcey Resume

**John A. Saari L.L.C.**  
**P.O. Box 454**  
**Falmouth, MA 02540**  
**(508) 274-1813**

I am a people centered builder, businessman and manager with notable achievements in the housing development and housing rehabilitation industry. Some of my achievements follow: a Housing Rehabilitation Consultant for two Non Profit Community Development Corporations on Cape Cod and a Township in South Eastern Massachusetts; a Builder with a wide range of experience in accomplishing substantial renovations on all types of housing; the Assistant Director and then Director, for a Design/Construction department and a Modernization/New Development department of two large Public Housing Authorities, playing the lead role in managing all aspects of the comprehensive grant program, the State funded housing programs and the other departmental responsibilities; the Managing Partner for a single family housing real-estate development firm, the Vice President of Operations for a substantial custom builder; the Project Director for a 10,000 unit multi-family, Federal housing Developer; a Construction Management Consultant with a client base of major real-estate players in the Boston area; and as a Business Development professional with broad-based experience in the presentation of complex multimillion dollar projects to investors, community groups and governmental agencies.

**SELECTED MAJOR ACCOMPLISHMENTS**

**HOUSING REHAB CONSULTANT/DEVELOPER/CONSTRUCTION MANAGER:**

Housing Rehab Consultant: From January 2008 to the present I have provided Housing Rehabilitation services to The Resources, Inc. (TRI); the Lower Cape Cod Community Development Partnership (CDP); the Town of Middleboro; the Town of Bourne and the Brockton Redevelopment Authority. The services provided are broad and include the initial home inspections with the Program Managers and the Homeowners to identify the scope of work, prioritizing the life safety and building code corrections required, energy conservation is also considered; the completion of the HUD inspection reports further documenting the condition of the property; the development of individual Work Write-ups and related Cost Estimates; the Construction Monitoring of the General Contractors to insure adherence to the work contracted. When the work is completed a final walk-thru inspection and project completion sign-off is conducted. These tasks were performed for approximately 569 qualified Home Owners and Public Housing Authorities in several towns on Cape Cod, on Martha's Vineyard and in South Eastern MA. Additionally, since 2009 I have provided a full complement of Housing Rehabilitation and design services to TRI for several multifamily projects in the City of New Bedford and the City of Brockton; during the past three years I have performed the same scope of services for the Brockton Redevelopment Authority; in some cases these units were rehabilitated thru the Attorney General's Receivership program. Lastly, in concert with a TRI Program Manager, I valued engineered the Noyes Building, a mixed use project in Oak Bluffs, MA that appeared to be infeasible because bids exceeded the budget. When this V.E. process was completed, the original plans and specifications were modified and then the project put out to bid for a second time; the 2<sup>nd</sup> round winning bidder was 27% lower than the original low bid. This substantial cost reduction made the mixed use project feasible. Construction is now completed and the building is occupied. The community now has three (3) new affordable housing units and mercantile space for a much needed pharmacy. This fiscal year I am providing Housing & Commercial Rehabilitation services to the City of Attleboro, Massachusetts these services include providing the plans and specifications for a Historic Property to be rehabbed and the accessibility survey for a sixty (60) unit Public Housing Property.

Developer/Builder: A self employed, builder in the Falmouth area, concentrating on purchasing older homes dating from 1805 to the early 1900s, then substantially rehabilitating the properties with new mechanical and electrical systems while maintaining the integrity of the historic properties. Responsible for the property investigation and purchase, work write-ups, design changes and configurations, legal and permitting requirements, cost estimating, sub-contracting and the overall management of the construction and property marketing.

**GENERAL AND OPERATIONAL MANAGEMENT:**

Acting Director of Design and Development for the New Orleans Housing Authority: During the period from April 1998 to September 2000, I was directly involved in managing an annual Comprehensive Grant budget of \$30M and part of the team that was directly responsible for bringing the department off the Modernization Troubled list (PHMAP score of 26) to a Standard Performer with a score of 85. This was accomplished while developing and putting into play department Policies and Procedures, and obligating nearly \$200M of old Comprehensive Grant monies from years 1992 through 1997. Successfully administrating tens of millions of dollars worth of construction; a task considered impossible 24 months prior. Directly responsible for all contract compliance reporting and all program management for the Housing Authority of New Orleans.

Construction Manager and Assistant Director: During the period of 1992 till April 1998 I provided the level of expertise required to successfully participate in the overall management of the Modernization/New Development Department which had an annual budget of \$6M + and is responsible for the capital planning and improvements for all State and Federal Public Housing for the Worcester Housing Authority. Responsibilities ranged from needs assessments through estimating and the grant application process to developing RFP's to selecting project architects, then supervising the design from schematics through contract documents, to negotiations with trade unions, to overall project management of the Modernization projects.

Vice President of Operations: From 1988 to 1989 while employed by a \$6M residential and light commercial business, was influential in turning an annual loss of 10% into a 3.5% profit margin by changing the structure of the Company from an internal labor based company to a sub-contractor based company thus allowing for better controls on all aspect of cost.

### **PROJECT MANAGEMENT:**

During the period from 1977 to 1982, I expanded and grew with a \$55M Real Estate Development firm which operated in the subsidized housing market. Became a central player in the areas of project planning, design development, project costing, contractor identification, and agency review, then completed to the occupancy, 10 to 15 projects worth in \$150M.

Contracted to complete 70% of a 304 unit apartment complex and build another 96 units when a South Florida developer fired the general contractor. Completed both of these projects on time and within budget.

### **CONSULTING:**

During the period from 1982 to 1988, I contracted to negotiate with Federal housing agencies, the project architect, the contractor and the developers to complete construction of three subsidized housing projects valued at \$17M which were in jeopardy because the prime contractor had filed for bankruptcy protection. Organized the separate interest groups into a working unit and successfully guided the team. All three projects were completed to agency standards and approximately 300 units were occupied.

### **PROFESSIONAL EXPERIENCE**

Housing/Commercial Rehabilitation Consultant		2008 to present
John A Saari	Builder	2000 to 2008
Housing Authority of New Orleans New Orleans, LA	Director Design & Construction	1998 to 2000
Worcester Housing Authority Worcester, MA	Assistant Director Modernization Dept	1992 to 1998
Limestone Realty Trust Worcester, MA	General Partner	1989 to 1992
G. M. Bergeron, Inc. Worcester, MA	Vice President for Operations	1988 to 1989
J. A. Saari Associates Worcester, MA	Real-Estate/Construction Consultant	1982 to 1988
Winn Development Company	Project Development Director	1974 to 1979

### **EDUCATION**

Worcester Polytechnic Institute	MS, Project Management Program	1989 to 1991
Worcester State College	BS, Urban Studies/Business Management	1974 to 1978

JANE M. KUDCEY  
93 KEVIN'S WAY  
S. EASTON, MA 02375  
(508) 238-4741  
[jmk79@verizon.net](mailto:jmk79@verizon.net)

**EXPERIENCE:**

**MIDDLEBOROUGH OFFICE OF ECONOMIC AND COMMUNITY DEVELOPMENT, Middleborough, MA:**

**DIRECTOR, November 2012 – Present,**

Responsible for the promotion of economic development for the Town of Middleborough. Duties include:

- Application to Grant Funding sources such as the Dept. of Housing and Community Development for Housing Rehab programs, infrastructure repairs, handicapped accessibility for housing project and Town Office entrance, emergency repair of the Town Hall cupola, creation of affordable housing advisory group and other activities
- Working with private developers on affordable housing projects, such as Star Mill, Mayflower Manor and Shoe Shop Place
- Management of a Housing Rehab Program that has renovated over 70 housing units
- Downtown Development and beautification
- Collaborating with several Town organizations such as Middleborough on the Move, the Chamber of Commerce, Tourism Committee, Oliver Estate Committee, Middleborough Area Assistance Coalition

**ACCOUNTING/PROGRAM MANGER, November 2006 – November 2012,**

Responsible for overseeing the Town of Middleborough's Housing Rehabilitation Program as well as fiscal management of grants and office expenditure. Duties include:

- Analysis and approval of home owner applications for the Housing Rehabilitation Grant/Loan Program
- Reviewing housing rehabilitation needs with rehabilitation specialist,
- Working with General Contractors in addressing home repair needs
- Preparing grant/loan documents
- Reporting to the Mass. Department of Housing and Community Development
- Writing Grant Application to the DHCD and other funding agencies
- Office financial and general management
- Oversight of several grant/gift accounts

**DANA-FARBER CANCER INSTITUTE, Boston, MA:**

**SENIOR FINANCIAL ANALYST, May 2005– May, 2006**

Maintained the decision support, cost accounting and financial analysis database system. Responsibilities included:

- Participating in the annual budget process by providing wage and job code detail on the TSI system
- Performing special analyses required for the Hospital budget
- Creating the annual budget monthly distribution download file and loading into TSI
- Communicating with Departmental Managers and creating specialized reports to improve the financial analysis of their departments
- Analyzing and correcting the allocation of indirect costs to direct departments to improve cost analysis

**CARITAS GOOD SAMARITAN MEDICAL CENTER, Brockton, MA:**

**BUDGET AND DECISION SUPPORT ANALYST, January 2004 – May 2005**

Reported monthly statistical and cost accounting analyses of the Caritas Good Samaritan Medical Center. Responsibilities included:

- Creating the budget for the Medical Practice Corporation
- Working closely with the Budget Manager in the creation of the Medical Center's budget
- Reporting of Weekly and Monthly Key performance Statistics for the Good Samaritan and Caritas Senior Management
- Updating and Maintaining of the Decision Support Cost Accounting System
- Ad-hoc reporting and analyses as requested.

**LUTHERAN COMMUNITY SERVICES, Natick, MA:**

**MANAGER OF BUDGETS AND CONTRACTS, December 2001 – January 2004**

Responsible for the financial management of fifteen community service programs in Southern New England, such as refugee relocation programs, teen living facilities, adoption agencies and foster care services. Responsibilities included:

- Overseeing the annual corporate budget preparation process and presentation to Board of Directors
- Preparing and submitting budgets and proposals for more than 50 grants and contracts totaling over eight million dollars funded by several state and Federal agencies
- Advising program managers on the financial management of each program
- Preparing and analyzing monthly financial reports
- Researching issues and making adjustments to the accounting system
- Preparing documents and reconciliations to ensure compliance with Federal and state agency audits.

**HARVARD MEDICAL SCHOOL, Boston, MA:**

**SENIOR COST ACCOUNTANT, Financial Operations and Analysis, September 1991 - July 1997**

Responsible for accounting for the Medical School's facilities, maintenance and administrative costs that pertained to more than 100 million federal dollars. Responsibilities included:

- Preparing the presentation to the Federal General Accounting Office of Facility and Administration costs used to negotiate an overhead rate for federally funded research performed at the Medical School
- Calculating annual depreciation of the Medical School buildings and renovations
- Providing financial analysis and cost overview of new building construction renovations.
- Overseeing the database of the more than one million square feet of office and lab space usage
- Training and supervision of personnel hired to assist in the indirect cost analyses
- Surveying 1,000 employees to analyze the proportion of salary expenses used for Federal Research
- Organizing and leading meetings of a policy review board to ensure compliance with Cost Accounting Standards Board and to create a disclosure statement of direct accounting policies and procedures

**HARVARD MEDICAL SCHOOL, Boston, MA:**

**FINANCIAL ANALYST, Financial Analysis Department, June 1989 - September 1991**

Acted as a financial consultant for several stand-alone operations in the Medical School. Responsible for the budgeting, financial analysis, fiscal control and long term financial planning for the Campus parking facility, Health Publications Group, Animal Resource Center and outside private research institutes.

**WANG LABORATORIES, Lowell, MA:**

**FINANCIAL ANALYST, U.S. Finance Department, May 1987 - June 1989**

Managed the monthly accounting closing process for the U. S. headquarters. Prepared a monthly revenue and expense performance reporting package distributed to all regional sales offices, reconciled internal revenue reports for the Controller, and analyzed home office and field reporting issues.

**EDUCATION:**

**M.B.A., Northeastern University, 1987.**

Concentration in Finance. Cooperative employment at Wang Labs, Lowell MA, January 1986 – June 1986

**B.A., Providence College, 1984.**

Political Science/French double major. Studied junior year abroad at the University of Fribourg, Switzerland.

**REFERENCES:**

References are available upon request.