

*Massachusetts
Historic Preservation
Conference 2017*



Session 1C

(9:45-11:30am)

The More the Merrier: Collaborating for Successful Preservation Projects

Teri Bernert

Executive Director, WHALE

Lisa Howe

*Director, Building Conservation
Associates, Inc., New England Branch*

Kathy Kottaridis

Executive Director, Historic Boston, Inc.

Russ Tanner

*VP of Real Estate, Madison Park
Development Corporation*

Download our conference app!

- (1) Go to the AppStore or Google Play.*
- (2) Find and install:*



**CrowdCompass
AttendeeHub**

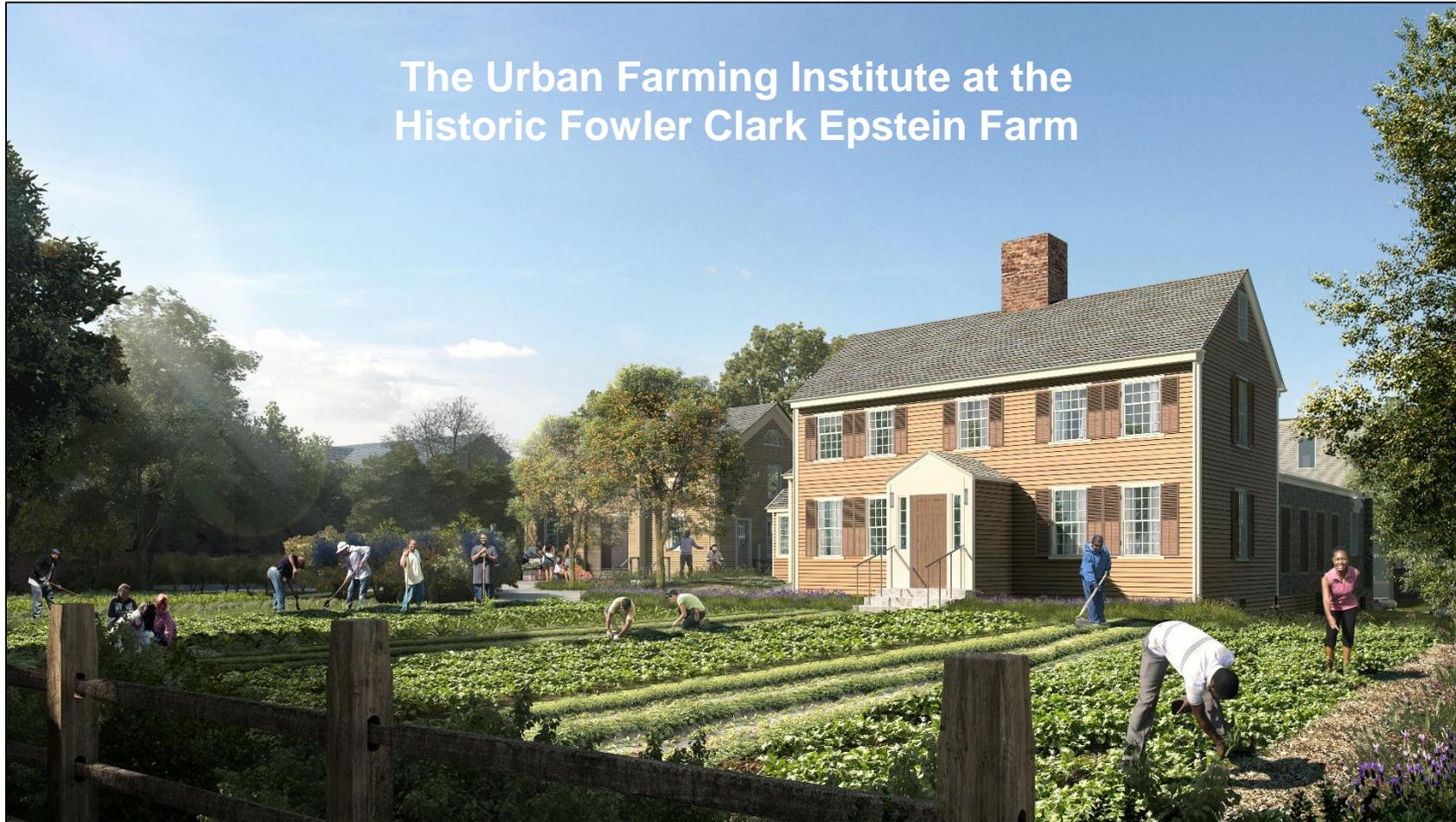
- (3) Open the app. (4) Search for our event:*

**2017 MA Historic
Preservation Conference**



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN

The Urban Farming Institute at the
Historic Fowler Clark Epstein Farm

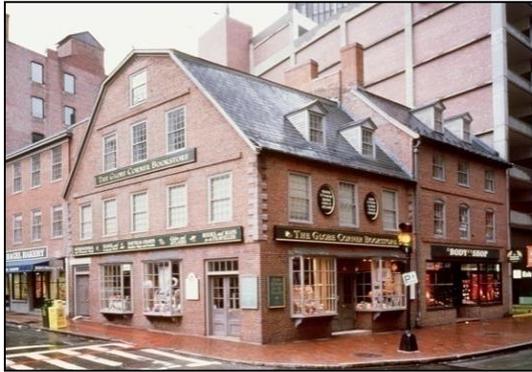


HBI HISTORIC
BOSTON
INCORPORATED

**NORTH
BENNET ST.
SCHOOL**



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



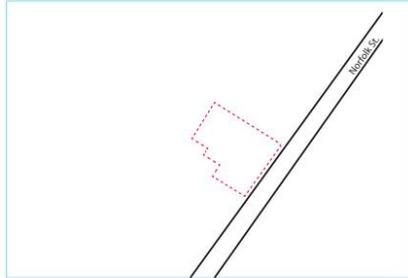
History and Significance

- A Boston Landmark
- Early intact agricultural property in Boston
- Primarily owned by three families: Fowlers (1786-1820s), Clarks (1837-1940), Epsteins (1941-2015)
- The farmhouse was built by the Fowlers between 1786 and 1806
- The barn, built by the Clarks, dates to ca. 1860 - siding and trim are thought to be original
- Landscape and additions by the Epsteins 1940s – 1960s

FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)

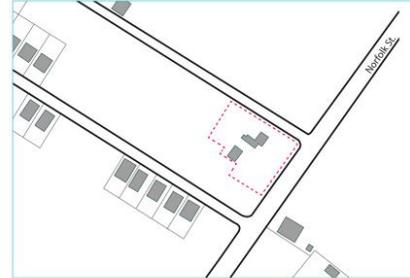
487 NORFOLK STREET, MATTAPAN

Evolution of the Neighborhood



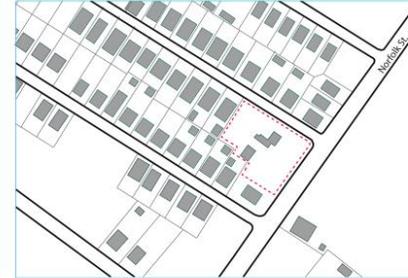
1786 - 1805

Fowler Farm



1806 - 1940

Clark Residence + Farm



1941 - 2015

Epstein Residence + Archive



2015 - Present

Urban Farm Institute

Evolution of the Built Elements



- NEW
- MODIFY
- EXISTING
- REMOVE



EXISTING



EXISTING



EXISTING

FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN

487 Norfolk Street, Mattapan
Fowler-Clark Farm



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



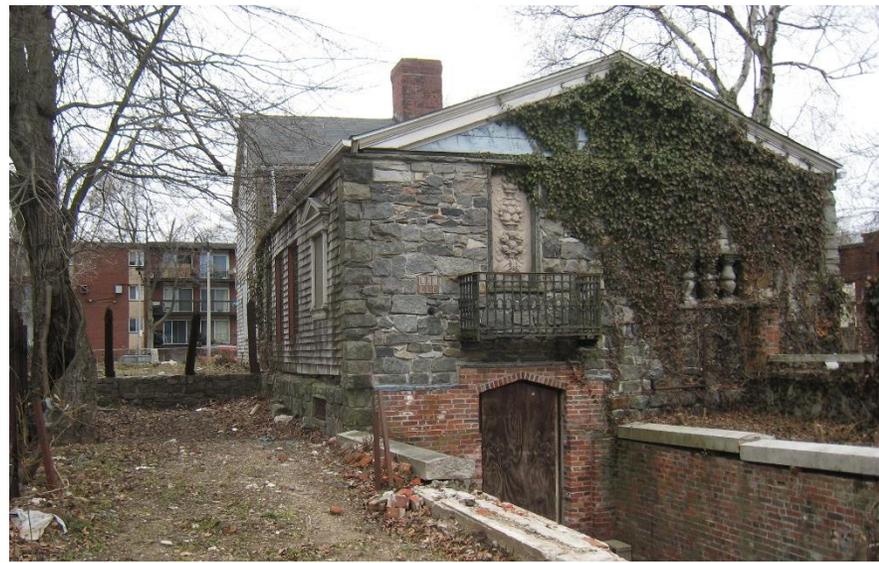
FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



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487 NORFOLK STREET, MATTAPAN



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN

Four non-profit partners leverage mission and capacity

Historic Boston Incorporated

Preservation Developer: Planning & managing entire project - predevelopment through occupancy
HBI redevelops historic buildings in order to help Boston's neighborhoods thrive.

The Urban Farming Institute

Occupy the buildings - manage and farm the land

The Urban Farming Institute of Boston's mission is to develop and promote urban farming as a commercial sector that creates green collar jobs for residents; and to engage urban communities in building a healthier and more locally based food system.

The Trust for Public Land

Land Developer: Planning and managing the land development for urban farming
The Trust for Public Land mission is to create parks and protect land for people, ensuring healthy, livable communities for generations to come.

North Bennet Street School

Deploy preservation carpentry students for restoration of the farmhouse facade
NBSS believes that a life dedicated to perfecting one's craft nourishes the human spirit and yields deep personal satisfaction.



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



HBI's Preservation Goal & Strategy

- To repurpose the historic Fowler Clark Epstein Farm into the headquarters for the Urban Farming Institute and related subtenants utilizing the buildings for educational and administrative uses and the land for farming
- To repair and / or rehabilitate the character defining features and spatial relationships of the farmhouse, barn, and land of the historic Fowler Clark Epstein Farm by featuring the influences of its three primary family ownership periods
- To interpret the history of the farmstead and its place in the development of Mattapan
- To demonstrate the value of historic preservation in economic development and neighborhood revitalization

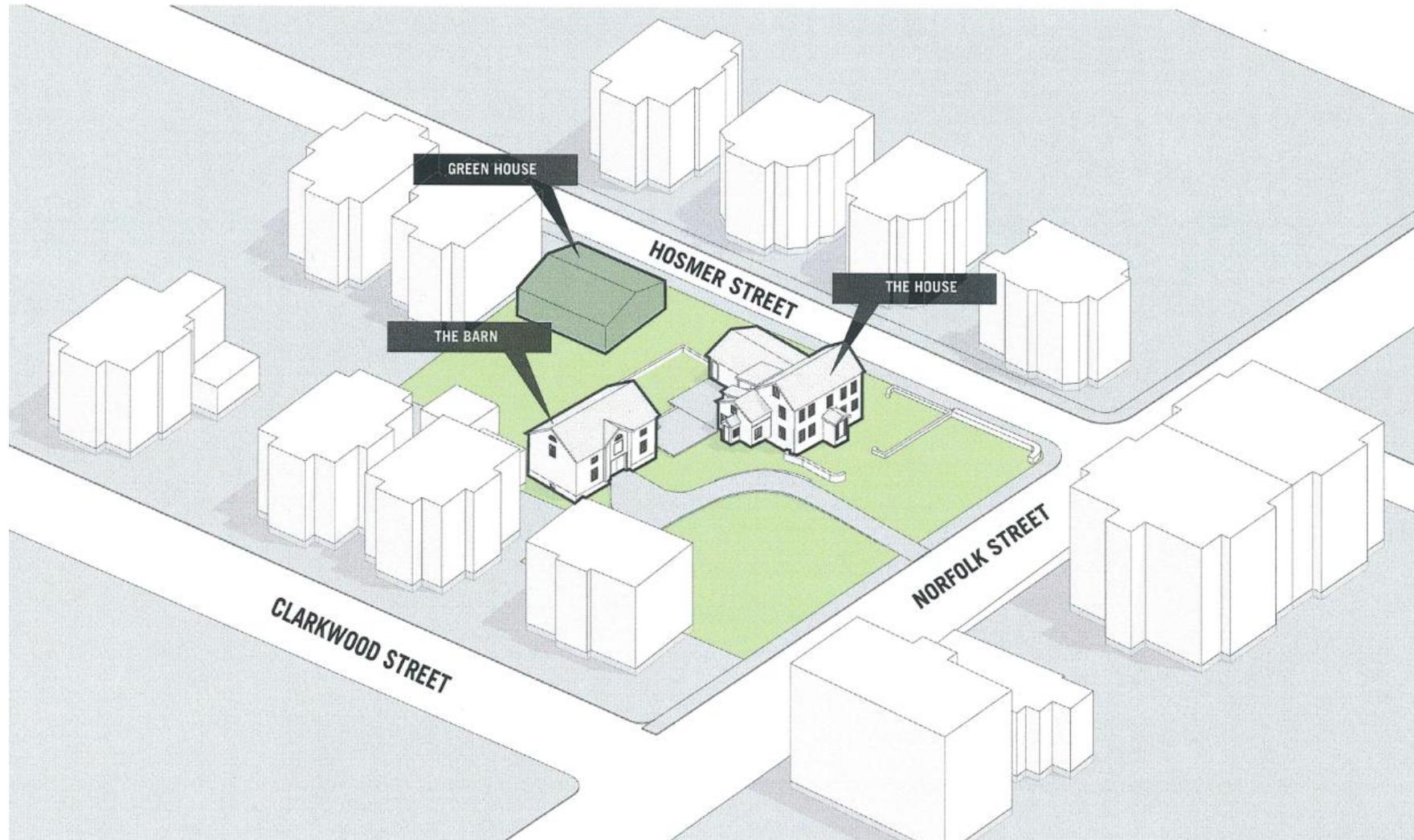
FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



Development Plans

- HBI owns the property & with partners will redevelop over a 2 year period:
 - House: On-site resident farm manager | UFI administration offices | Classrooms / conference | offices for compatible health and fitness non-profit organizations
 - Barn: UFI offices | Classrooms / conference | Demonstration kitchen
 - Land: Farmer training program | Food production for sale | community engagement
 - Greenhouse: For year-round food production
- Partners will invest \$3.8 million to rehabilitate the farmhouse, barn, and build out the farmland. Completion in fall 2017.

FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN



Development Components

FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)

487 NORFOLK STREET, MATTAPAN



Master Site Plan

FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN

FINANCE AND FUNDING:

Total Project Dev. Cost: \$ 3.68MM

Construction Costs: \$ 3.03M (with 5% Contractor and Design contingency)

HBI Project Management Fee \$ 359K (15%)

Cash Equity: \$ 200k (1772 Funds shared with NBSS used against returns)

Perm Financing: \$ 700k LTV: 71.55% (4.96% fixed - 30 YR/10 YR balloon)

Historic Tax Credits: \$ 877k \$ 437k - Federal HTC (\$0.800)
\$ 440k - MA HRTC (\$0.885)

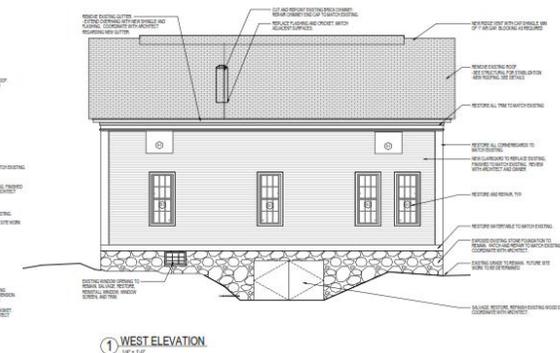
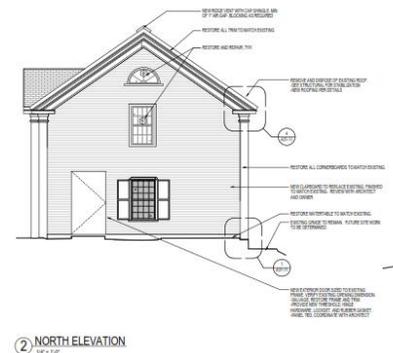
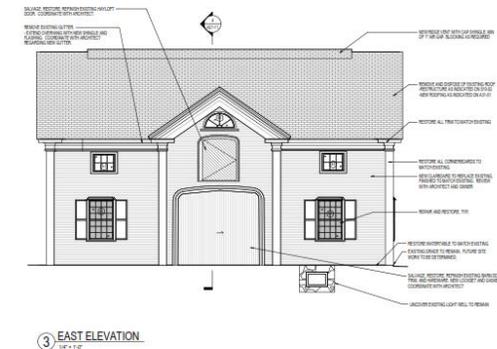
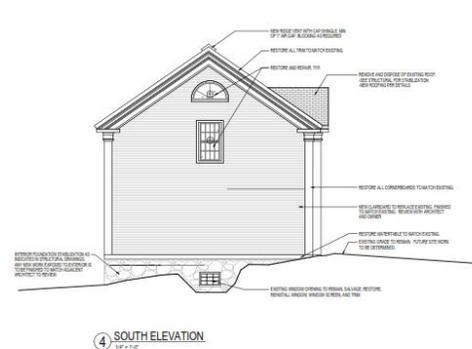
Total Funds Raised: \$ 1.75MM

FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)

487 NORFOLK STREET, MATTAPAN

Partners Add Up to More Value

- Development Capital/Shared fundraising
- Uses that can support mortgage payments
- Lease/Tenant Revenue
- Management
- Technical knowledge
- Networks & Connections



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860) 487 NORFOLK STREET, MATTAPAN

Trust with Rock Solid Agreements

- Initial MOU – Soup to Nuts
- Binding LOIs & Lease Agreements
- Revised MOUs & Operating Agreements
- 5-year plans & Open Books
- Insurances



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN

Layers of Partnership



Core Partners

HBI, UFI, TPL, NBSS
Baraka Wellness

Funders/Donors

In-kind Service
Providers/Contractors
Material donors
Grant makers
Financial Institutions

Supporters & Advocates

Municipal Government
State Government
Neighbors

Core

Historic Boston Inc.
Urban Farming Institute of Boston
Trust for Public Land
North Bennet Street School
Baraka Community Wellness

Donors

Amelia Peabody Charitable Fund
Barbara and Amos Hostetter
1772 Foundation
Perkins+Will
Tom and Jody Gill
Edward Ingersoll Browne Fund
Bromley Charitable Trust
City of Boston Department of
Neighborhood Development
George B. Henderson Foundation
Anonymous
Cabot Family Charitable Trust
Bala Consulting Engineers
Mabel Louise Riley Foundation
Regenerative Design Group
Harold Whitworth Pierce
Charitable Trust
M. J. Mawn, Inc.
Clipper Ship Foundation
Eastern Bank Charitable Foundation
Paul and Edith Babson Foundation

Supporters

City of Boston, Martin J. Walsh, Mayor
Secretary of State, Massachusetts
Historical Commission,
William F. Galvin Chairman
National Park Service
Boston Landmarks Commission
Boston Planning and
Development Agency
Klein Hornig LLP
Boston Inspectional Services
Boston Water & Sewer Commission

FOWLER CLARK EPSTEIN FARM (1786/1860)
487 NORFOLK STREET, MATTAPAN



New stairs to barn basement



Trench for new electrical service



August 9th – concrete pour

FOWLER CLARK EPSTEIN FARM (1786/1860)
487 NORFOLK STREET, MATTAPAN



FOWLER CLARK EPSTEIN FARM (1786/1860)
487 NORFOLK STREET, MATTAPAN



FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
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FOWLER-CLARK-EPSTEIN FARM (1786-1806|c. 1860)
487 NORFOLK STREET, MATTAPAN





139 & 141
Union Street
**Co-Creative
Center,
New Bedford,
MA**





CREATIVE CENTER

Grand Opening Fall 2017

Co-Creative Project Goals

- Investment in bricks and mortar to build the capacity of the arts sector of the downtown economy.
- The Reuse of vacant historic buildings downtown with a creative multi-use approach
- Activating the streetscape at the storefront level
- Building capacity for downtown's non-profit sector through co-work space
- Building the Creative Economy network to further economic development downtown



**CREATIVE
CENTER**

Project Funding

City HOME Funds	\$445,000
MassDev Fit out Grant	\$70,000
National Trust for Historic Preservation	\$5,000
NBEDC	\$2,000
Community Foundation	\$6,000
Events	\$21,655
Santander Grant	\$20,000
Kurtz Charitable Donation	\$10,000
Garfield Foundation	\$50,000
Bascom Foundation	\$50,000
Island Foundation	\$30,000
1772 Foundation/RLF	\$209,000
MassDev Patronicity Match	\$100,000
Cultural Facilities Fund	\$117,000
Non-Profit Debt MassDevelopment	\$1,000,000
BCSB Private Equity	\$250,000
State Historic Tax Credits	\$350,000
Utility Rebates	\$14,000
Private donation Atkinson	\$140,000
TOTAL PERMANENT SOURCES	\$2,889,655

CO+ ART

Co-Art Gallery: A showcase for New Bedford's community art and host spot for cultural shows; we plan to be open for monthly exhibitions.

CO+ MAKE

Co-Make Space: This is a community environment where artists and entrepreneurs can delve into the technology-driven "maker culture" as well as record music. There will be industry equipment for prototype molding such as a CNC router, 3-D printer and computer facilities people in need of a "project incubator". Members will have access to the software and supplies needed for Digital Photography, Animation (with a green wall) and Graphic Design. The recording studio is a new addition as there are many in the live music scene that wish to record their original work, but need to rent hours at a high rate or wait for a recording contract. There will be tiered memberships available for the use of the space on the ground and lower floors.

CO+ MARKET

The Co-Market: The area will be a space for stakeholders from the creative economy to work and collaborate on marketing and the business end of their art. CCC Members will be able to sell their art and products from this store while learning how to promote their work.

CO+ LEARN

Co-Learn Center: A multi-purpose room on the 1st floor, designed for the surrounding arts and culture community. Partners and public schools will be able to teach classes with the maker equipment. Class room size will be able to accommodate 25 students.

Co-Work Space for Arts & Culture: While downtown offices can be a high price, this space is dedicated to non-profits that support the arts, cultural and educational sectors in New Bedford.

Artist Housing: The four units on the upper floor will be affordable workforce housing that is perfect for artists. They are mixed sizes at 2 one-bedrooms and 2 two-bedrooms. (This portion funded through previous grants/investments)



Advisory Committee

- Ardian Tio UMASS Dartmouth CVPA
- Don Burton Videographer
- Shelley Cardoos EforAll SouthCoast/HIPPO
- Alyson Cywin UMASS Dartmouth CVPA
- Shingo Furkawa UMASS Makerspace
- Dr. Steven White UMASS Business School



Program Partners

- Our Sisters School
- Nativity Prep School
- EforAll SouthCoast
- 3rd Eye Unlimited
- New Bedford Historical Society
- GNB Writers Block
- MassMouth
- Gallery No. 9 Artist Collective
- Jodi Stevens, Artist
- David Graves, Artist
- Collin Wetzel, Artist
- Colleen MacRamos,
Photographer



Tenants

- Women's Fund of Southeastern MA
- Duende Glass
- People's Pressed
- Studio Berta
- Daniel Kornrupf, Artist
- Dyer Maker Studios



DUENDE GLASS



DANIEL KORNRUMPF
ART STUDIO

studio berta

Dyer Maker Studio



A FUND OF THE COMMUNITY FOUNDATION
OF SOUTHEASTERN MASSACHUSETTS



141 & 139 Union Street: **Co-Creative Center**

WHALE purchased the two historic commercial buildings, circa 1850, in 2015, stabilized them and is in mid-construction.



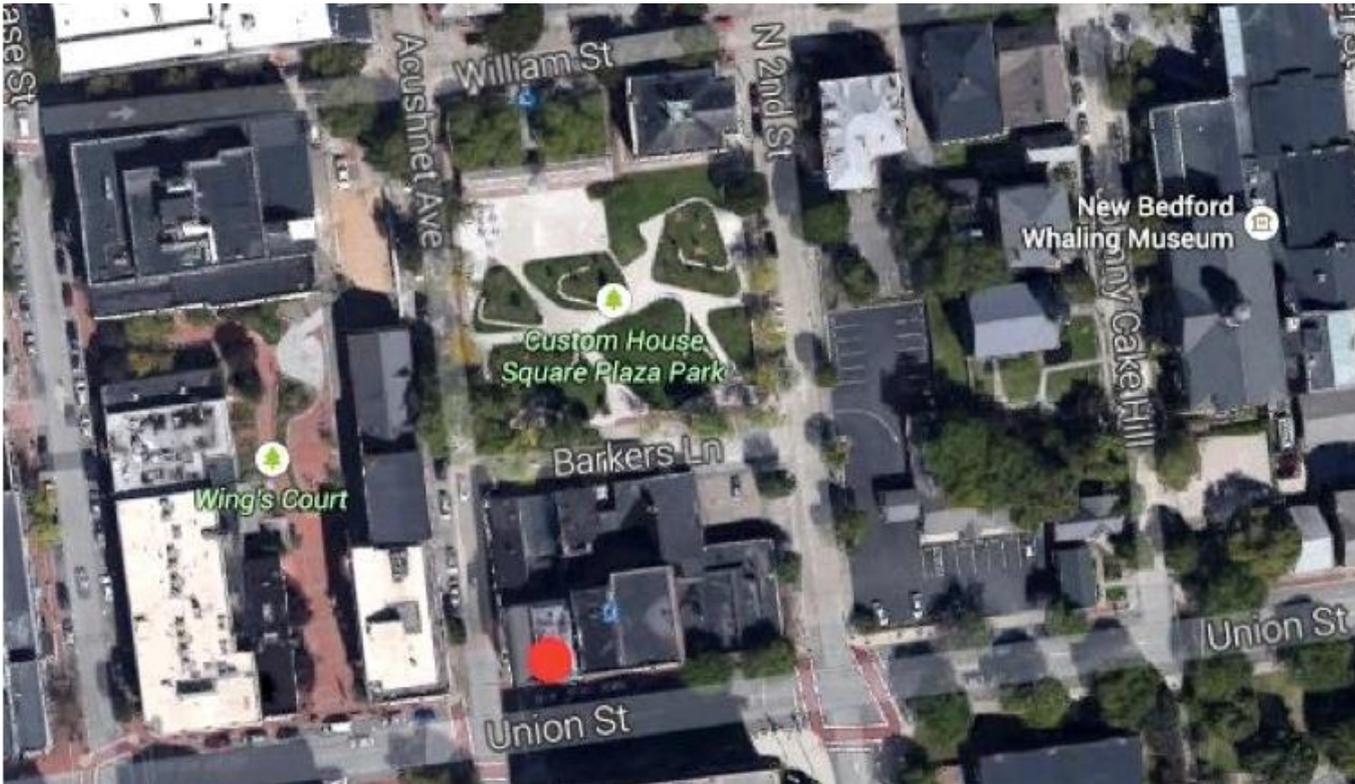
...Union Street – 19th Century...



...Union Street today...



139-141 Union: Vacant and in a blighted state in 2014



Downtown New Bedford, an urban port city: sea park & National Park...yet, many vacant historic buildings remain



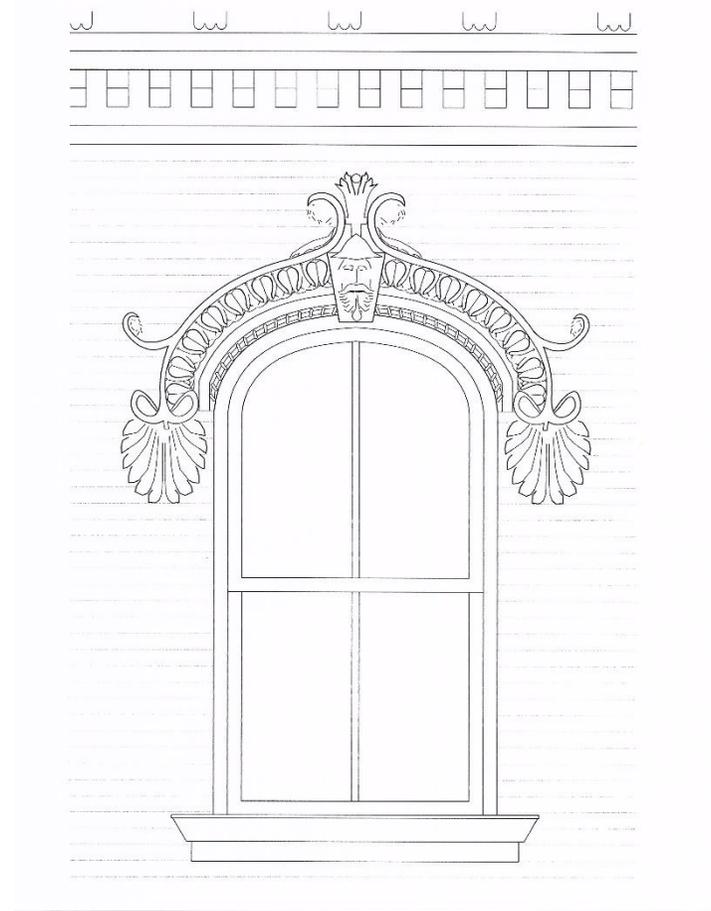
**...from Barkers Lane today...plans
to activate this streetscape**



**...across Custom House Park...and
plans to activate the park**



With a glass garage door open to the park for outdoor market



Restoring historic commercial facades, invigorating downtown's pedestrian experience.



...building a creative, cooperative community...



Vertical urban density adjacent to the Park



...makerspace, gallery, cooperative live-work space...

...vertical city: make, work, live...



DATE: 02,23,2015

WHALE & AHA
-
CO-CREATIVE CENTER
-
139 & 141 UNION ST.
FEASIBILITY STUDY

studio2sustain
architects consultants environmental evangelists

studio2sustain 440 Union St. #1000 - 11th Floor - New York, NY 10018
 phone: 212.254.1111 | fax: 212.254.1112 | email: info@studio2sustain.com
 website: www.studio2sustain.com | 200 West 11th St. - 10th Floor - New York, NY 10011
 phone: 212.254.1111 | fax: 212.254.1112 | email: info@studio2sustain.com

NOT FOR CONSTRUCTION
EXISTING PLANS
-
PROPOSED
FEASIBILITY STUDY
-
141 & 139 UNION ST.

A 1

Early project feasibility determined re-use plan and feasibility of the project

Facades under construction





Co-Creative Maker Space

Framing floor of 141 Union





...building co-work/live space...



BARKERS LANE ELEVATION



UNION STREET ELEVATION

GENERAL NOTES:

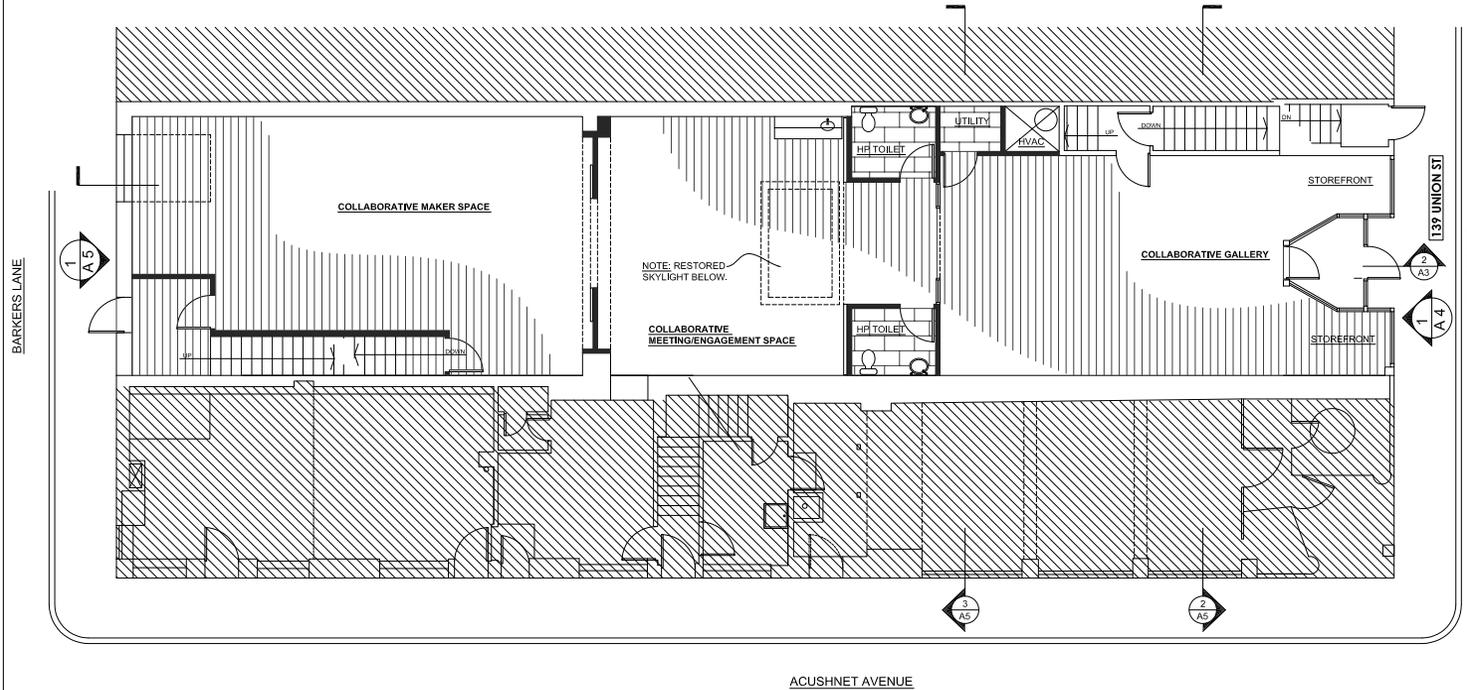
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2. ALL DIMENSIONS SHOWN REPRESENT APPROXIMATE DELINEATIONS AND ARE NOT INTENDED TO BE USED FOR CONSTRUCTION PURPOSES. ALL WIDTH DIMENSIONS ARE APPROXIMATE, AS WALLS ARE UNEVEN STONE AND/OR BRICK MASONRY.
3. THE CONTRACTOR SHALL EXAMINE THE ENTIRE SITE, AND WILL TAKE INTO ACCOUNT ALL CONDITIONS THEREON AS MAY AFFECT THE PERFORMANCE OF THE WORK UNDER THE CONTRACT. ALL DIMENSIONS MUST BE VERIFIED IN-FIELD PRIOR TO COMMENCING WORK. CONTRACTOR TO NOTIFY ARCHITECT OF ANY DISCREPANCIES AND/OR DEVIATIONS FROM WHAT IS PRESENTED AND/OR INDICATED ON THESE DRAWINGS AND SPECIFICATIONS.
4. ALL REPAIR OF EXISTING BRICK TO BE EXECUTED IN STRICT ACCORDANCE WITH THE SECRETARY OF INTERIOR STANDARDS FOR REHABILITATION AND WITH THE SPECIFICATIONS AND CONSTRUCTION DRAWINGS.
5. THESE DRAWINGS ARE INTENDED TO SHOW THE EXISTING CONDITIONS OF THE EXISTING BUILDING LOCATED AT 139 UNION STREET, INCLUDING PROPOSED REPAIRS AND RENOVATIONS. ALL DIMENSIONS AND CONDITIONS MUST BE VERIFIED IN FIELD. DO NOT SCALE DRAWINGS. CONTRACTOR TO NOTIFY THE ARCHITECT AND THE OWNER IF ANY CONDITIONS APPEAR CONTRARY TO THE DRAWINGS AND/OR SPECIFICATIONS.
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DATE: 04.27.2015
REVISION:

WHALE
-
139 UNION ST.
NEW BEDFORD,
MASSACHUSETTS
-
REHABILITATION
PRELIMINARY
NOT FOR CONSTRUCTION

CO-CREATIVE CENTER - PLAN KEY

EXISTING WALLS	
ADJACENT BUILDINGS	
PROPOSED WALLS	



PLAN - EXISTING & PROPOSED - FIRST FLOOR - 139 UNION STREET - COLLABORATIVE MAKER CENTER
SCALE: 5/32" = 1'-0"



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 architects consultants environmental evangelists
 412 county street new bedford ma 02740 508.999.5145 p 508.999.5183 f studio@sustain.com

FIRST FLOOR PLAN
-
EXISTING/PROPOSED
-
CO-WORK MAKER
SPACE & GALLERY
-
139 UNION STREET

A 1

**ground floor: gallery, education center,
maker space**

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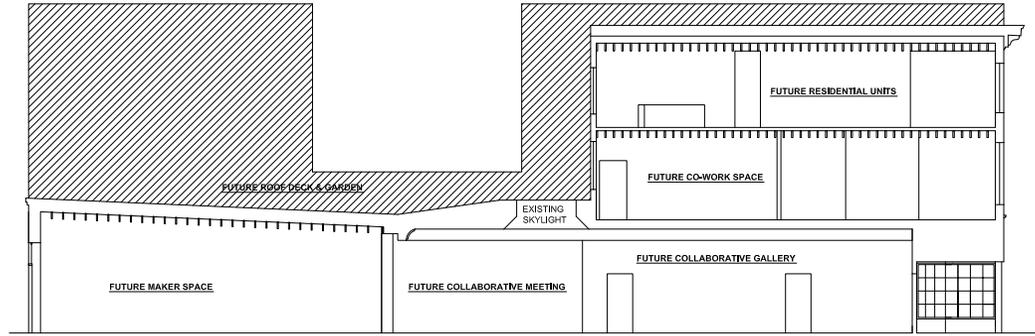
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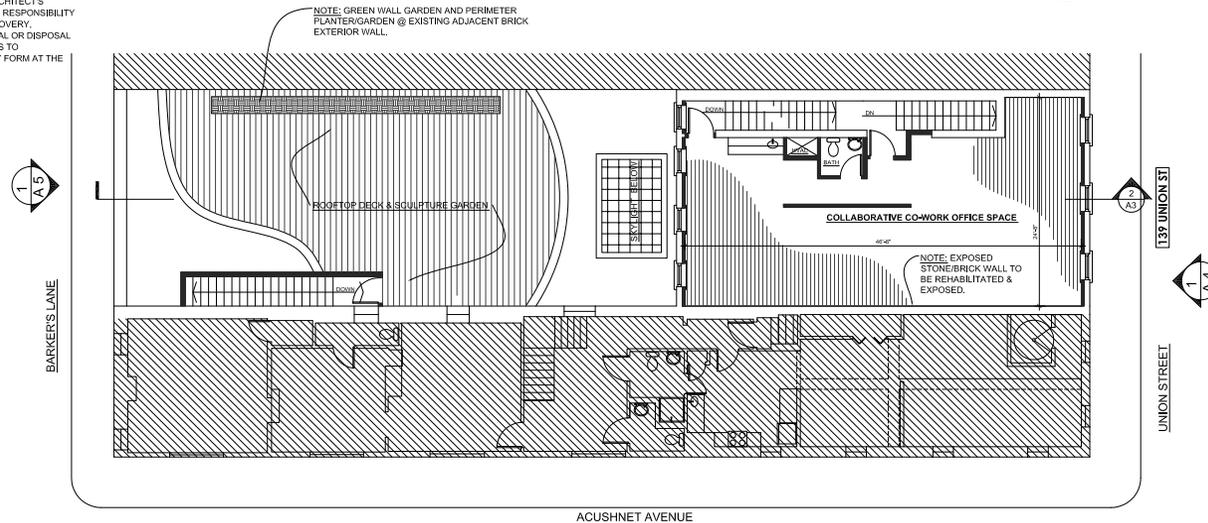
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SECTION THROUGH BUILDING - NORTH/SOUTH - 139 UNION STREET
SCALE: 1/8" = 1'-0"

2
A 2



PLAN - EXISTING & PROPOSED - SECOND FLOOR - 139 UNION STREET - COLLABORATIVE WORK SPACE
SCALE: 1/8" = 1'-0"

1
A 2

DATE: 04.27.2015

REVISION:

WHALE

139 UNION ST.
NEW BEDFORD,
MASSACHUSETTS

REHABILITATION

**PRELIMINARY
NOT FOR CONSTRUCTION**

CO-CREATIVE CENTER - PLAN KEY

EXISTING WALLS	
ADJACENT BUILDINGS	
PROPOSED WALLS	

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architects consultants environmental evangelists

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SECOND FLOOR PLAN
EXISTING/PROPOSED
CO-WORK SPACE
139 UNION STREET

A 2

2-floor: co-work, studio, residential

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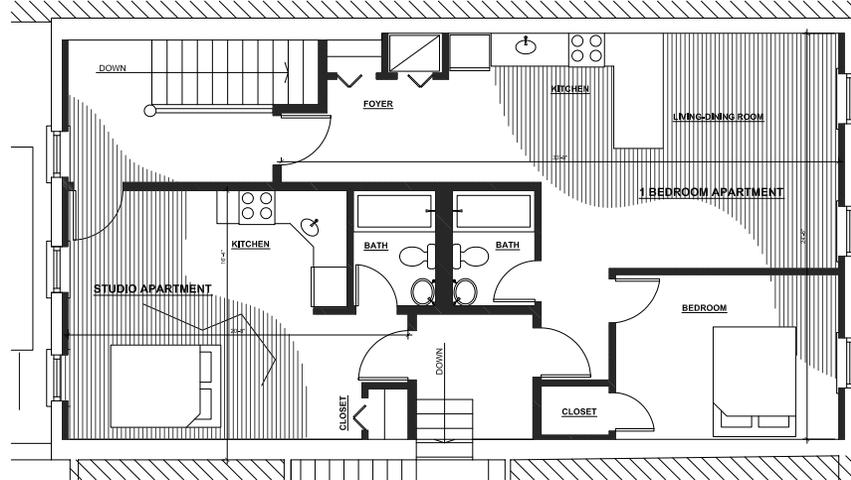
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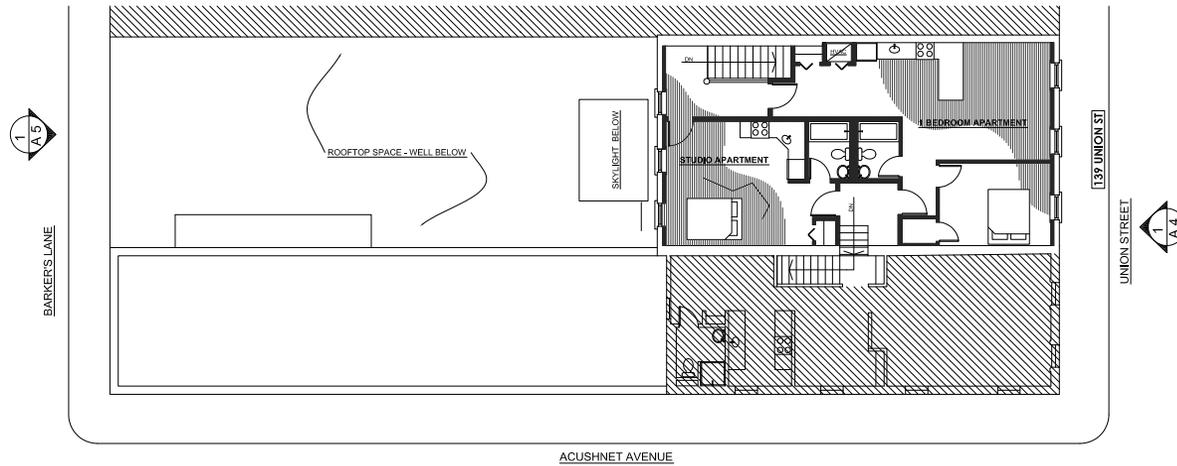
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PLAN - EXISTING & PROPOSED - THIRD FLOOR - 139 UNION STREET - RESIDENTIAL UNITS
SCALE: 1/4" = 1'-0"

2
A 3



PLAN - EXISTING & PROPOSED - THIRD FLOOR - 139 UNION STREET - RESIDENTIAL UNITS
SCALE: 1/8" = 1'-0"

1
A 3

DATE: 04,27,2015
REVISION:

WHALE

139 UNION ST.
NEW BEDFORD,
MASSACHUSETTS

REHABILITATION

PRELIMINARY
NOT FOR CONSTRUCTION

CO-CREATIVE CENTER - PLAN KEY

EXISTING WALLS	
ADJACENT BUILDINGS	
PROPOSED WALLS	

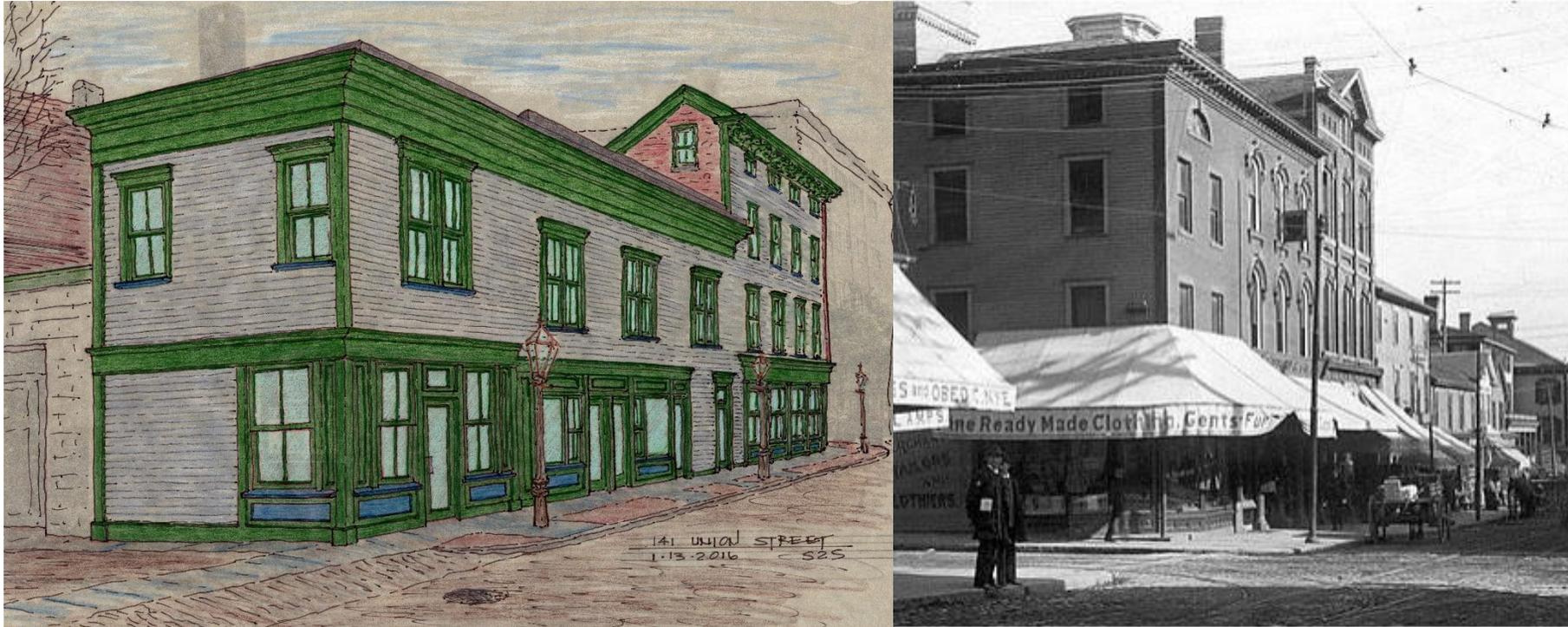
studio2sustain
architects consultants environmental evangelists

412 county street new Bedford ma 02740 508.998.5145 p 508.998.5183 f studio2sustain.com

THIRD FLOOR PLANS
EXISTING/PROPOSED
RESIDENTIAL UNITS
139 UNION STREET

A 3

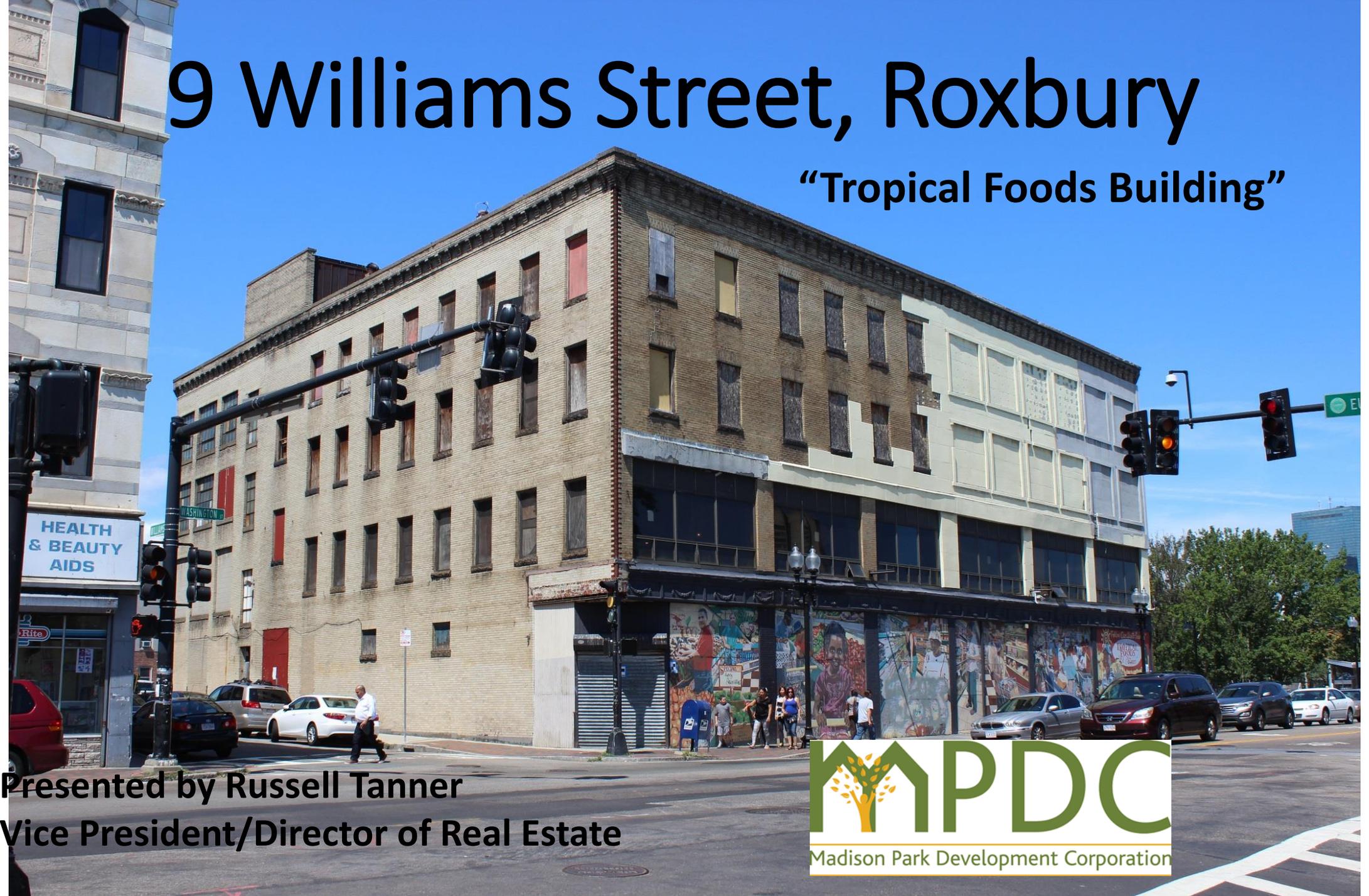
3-floor: residential



“You teach me, I forget. You show me, I remember. You involve me, I understand.” – Edward O. Wilson.

9 Williams Street, Roxbury

“Tropical Foods Building”

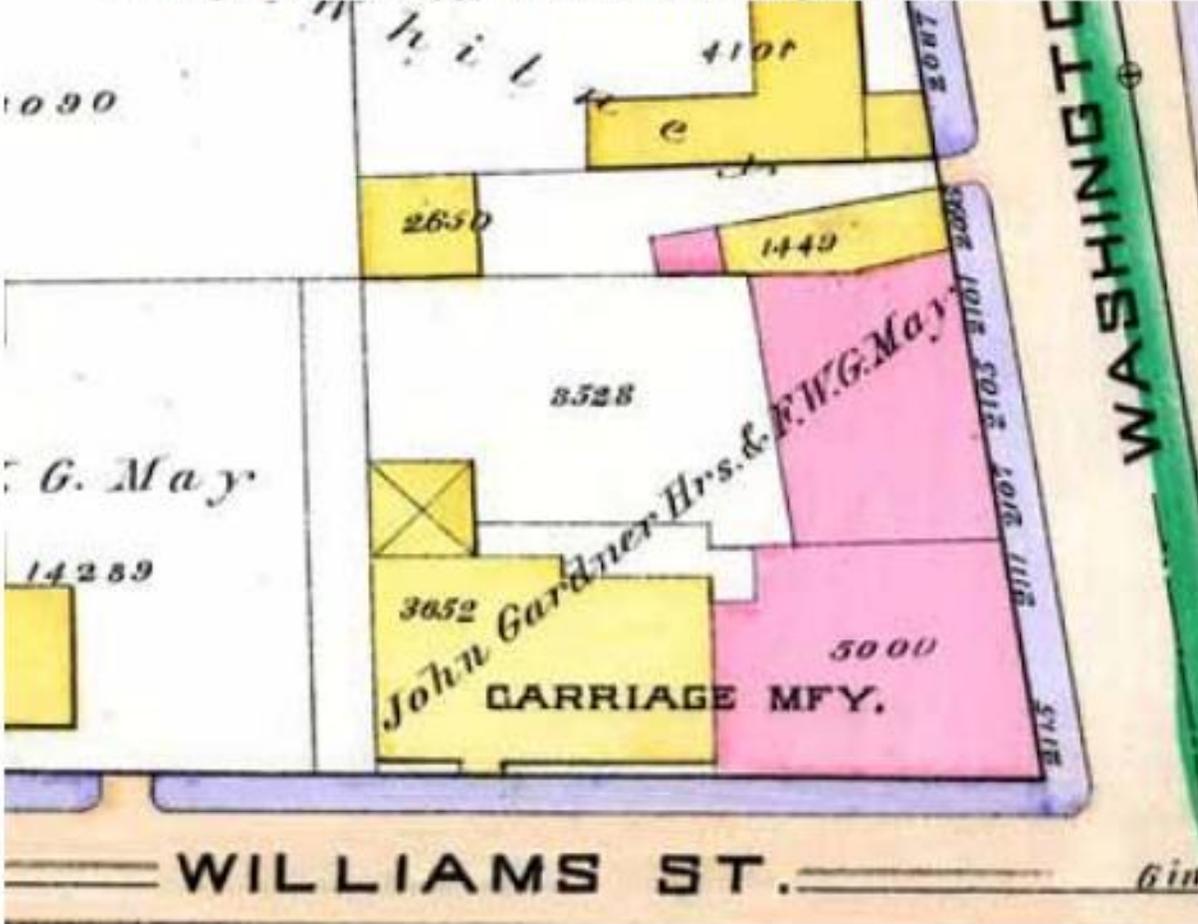


Presented by Russell Tanner
Vice President/Director of Real Estate



1899 Buggy Factory

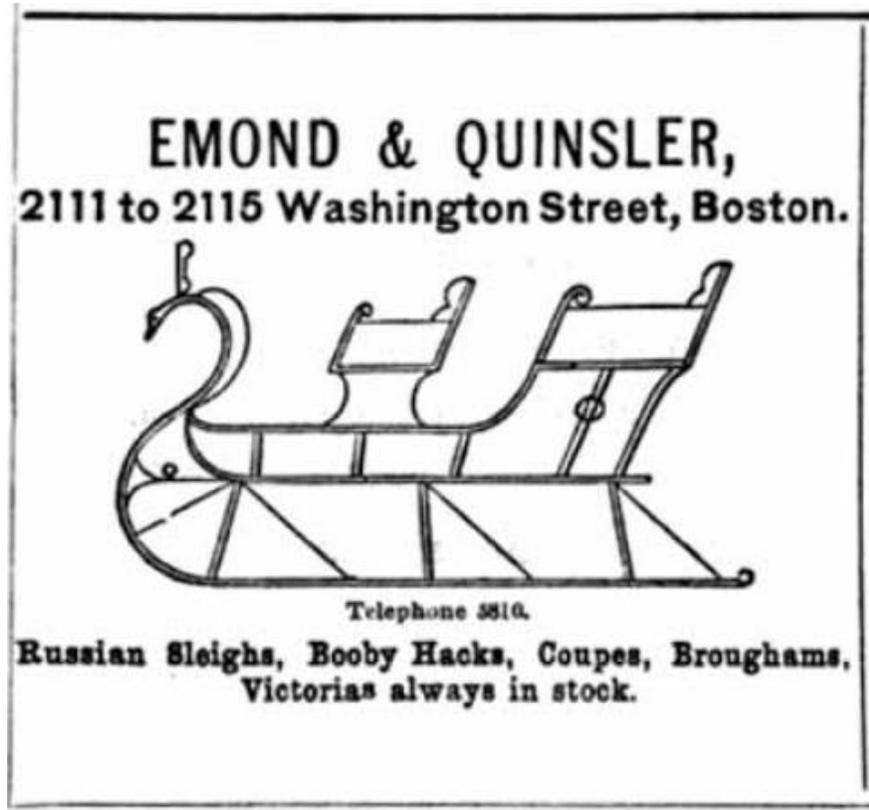
The Age of the Buggy @ 2101 Washington Street



The Age of the Buggy @ 2101 Washington Street



9 Williams Street, Roxbury



- Historic Renovation and Adaptive Reuse
- “Survivor” of Urban Renewal
- Long-time Home of Tropical Foods
- Part of Mixed-Use Development Plan
- City of Boston for Adjacent Land & Entitlements

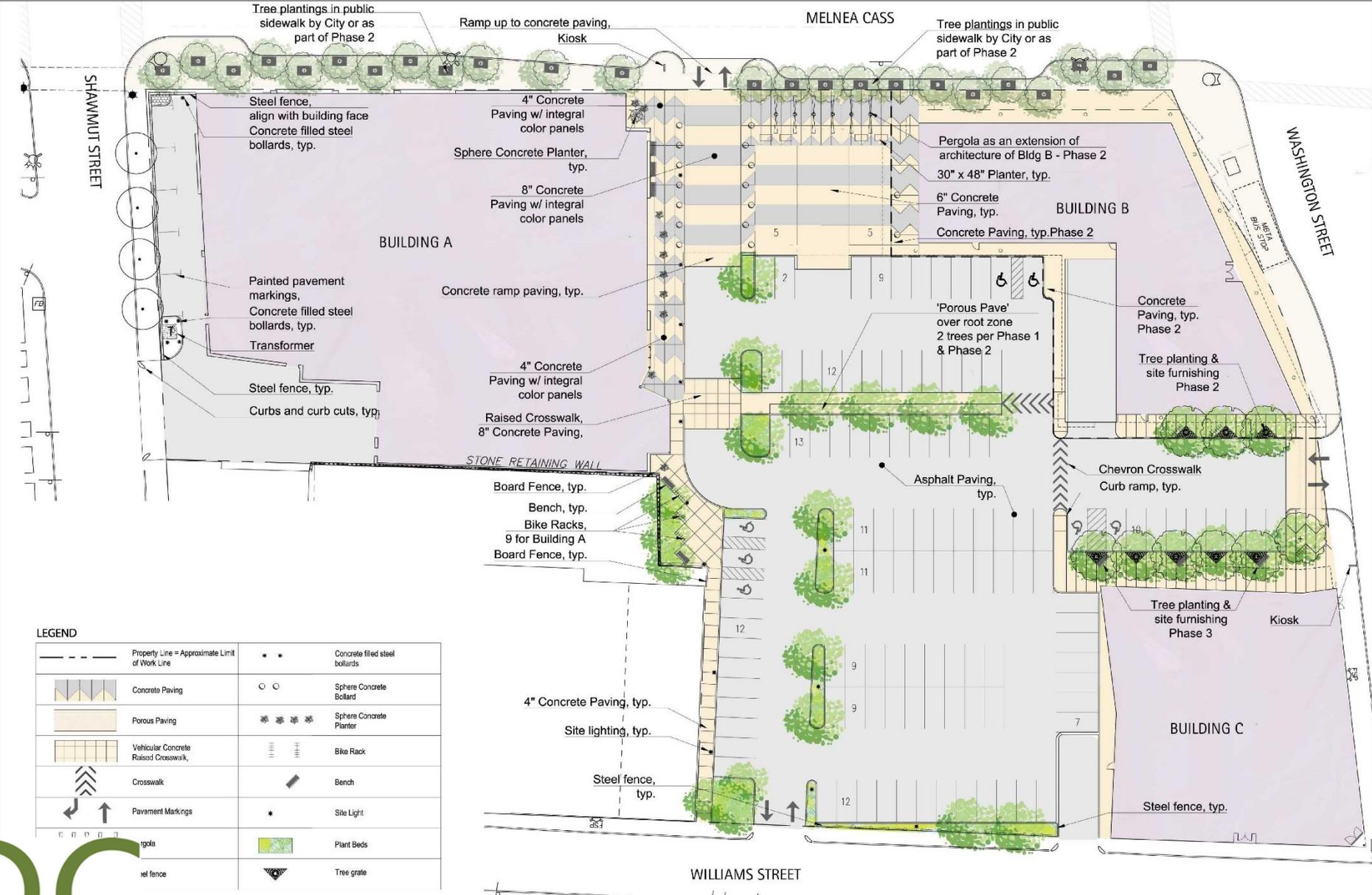
Existing Conditions



Existing Conditions

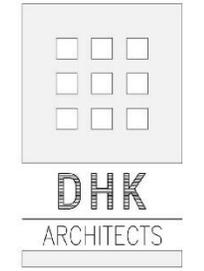


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LEGEND

	Property Line = Approximate Limit of Work Line		Concrete filled steel bollards
	Concrete Paving		Sphere Concrete Bollard
	Porous Paving		Sphere Concrete Planter
	Vehicular Concrete Raised Crosswalk		Bike Rack
	Crosswalk		Bench
	Pavement Markings		Site Light
	Pergola		Plant Beds
	Steel fence		Tree grate



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Prepared for:
MADISON TROPICAL
Project:
PARCEL 10 REDEVELOPMENT

SITE PLAN

Scale: 1"=20'	
File Name: L-series	
Drawn By: N/A	
Checked By:	Drawing No.:
Job Name:	
Date: 8.23.13	L-series

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Mixed Use Development Plan

Phase 1, Tropical Foods Supermarket



Construction



Construction



Construction



Construction



...with our great neighbors



Three-Way Public Private Partnership

- MPDC as “Master Developer” for Parcel 10 and 9 Williams
- Tropical Foods, local business and “Anchor Tenant”
- B.P.D.A., provides Site Control and Entitlements



Benefits of Collaboration:

Achieve Mutual Development Goals

- Tropical gets modern supermarket.
- Madison gets housing and economic development
- BPDA gets productive development of vacant land.

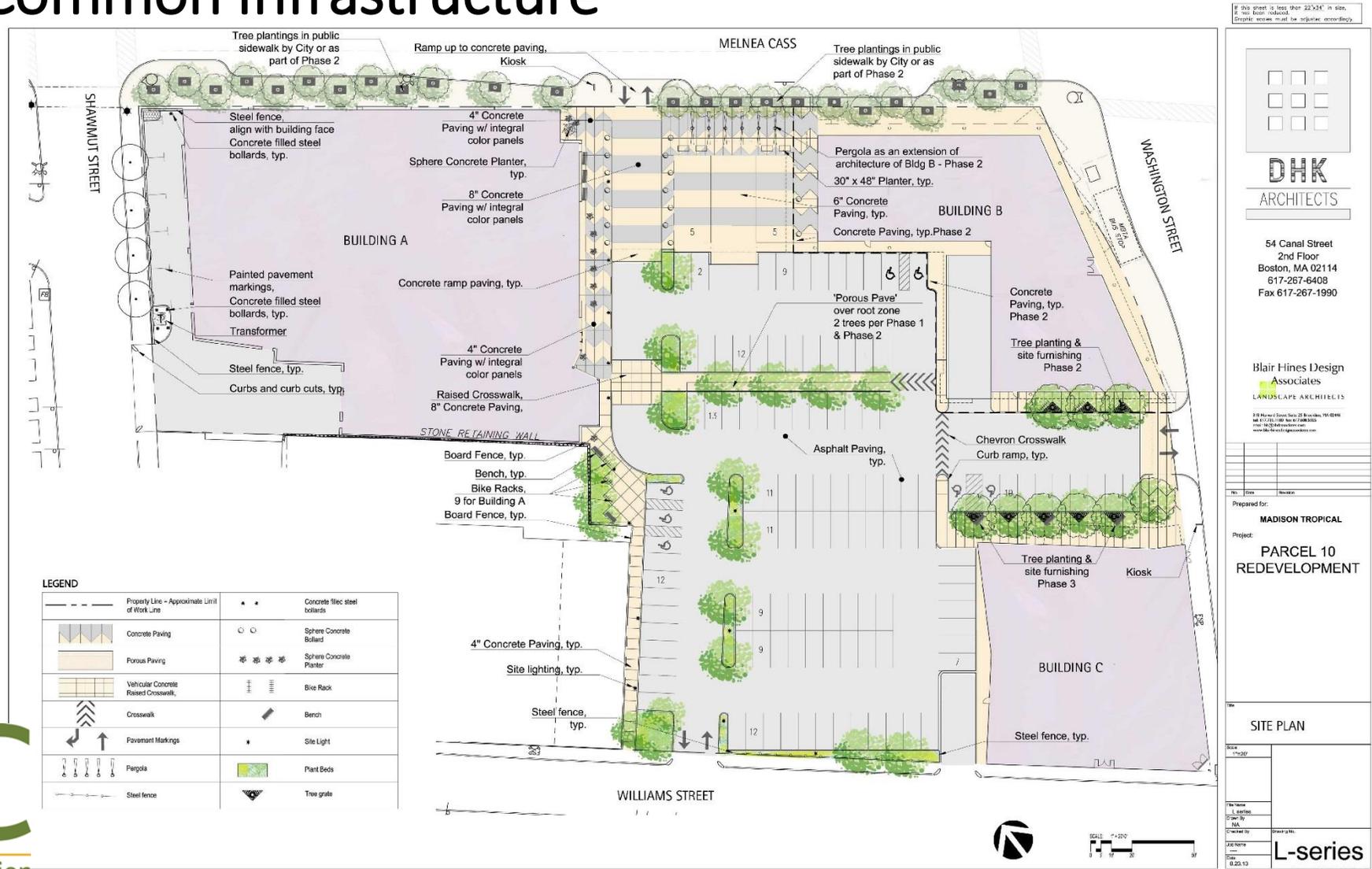
Financial benefits

- MPDC conduit to Tropical Foods financing
 - City and State support of Parcel 10 Plan
- Madison purchase of Old Tropical Foods Building

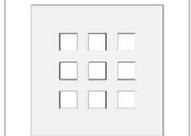


Benefits of Collaboration:

Value of Common Infrastructure



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Prepared for: **MADISON TROPICAL**

Project: **PARCEL 10 REDEVELOPMENT**

SITE PLAN

Scale: 1"=20'

DATE: 8.20.13

L-series

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Key “Collaboration” Documents:

- Madison Tropical, LLC
- Access and Utility Agreements
- Article 80 and ZBA approvals
- Land Lease and Financing Agreements
- Purchase Agreement between Madison and Tropical.

Completed Project...coming soon.

