

NATICK SELECT BOARD
AGENDA

Edward H. Dlott Meeting Room, Natick Town Hall,
13 East Central Street, Natick, MA 01760 and via
Zoom

Wednesday, March 6, 2024

6:00 PM

[https://zoom.us/j/91200224901?](https://zoom.us/j/91200224901?pwd=N1B1NVFjRUJxNUtuZkVyRkVJUSltZ09)

pwd=N1B1NVFjRUJxNUtuZkVyRkVJUSltZ09

Meeting ID: 912 0022 4901 Passcode: 920750

Mobile: 301-715-8592

Agenda Posted Friday, 3/1/2024 at 1:50 PM (revised)

(Times listed are approximate. Agenda items will be addressed in an order determined by the Chair.)

1. 6:00 PM OPEN SESSION, Call to Order
2. 6:25 PM RECONVENE OPEN SESSION
3. ANNOUNCEMENTS
4. SELECT BOARD UPDATES
5. 6:30 PM PUBLIC SPEAK

Any individual may raise an issue that is not included on the agenda and it will be taken under advisement by the Board. There will be no opportunity for debate during this portion of the meeting. This section of the agenda is limited to 15 minutes, and any individual addressing the Board during this section of the agenda shall be limited to five minutes.

6. 6:45 PM APPOINTMENTS
 - A. Interview and Appointment to the Council on Aging
 1. Fonda Mangino
 - B. Interview and Appointment to the Contributory Retirement Board
 1. Marco Gargurevich
 - C. Interview and Appointment to the Historic District Commission
 1. John Branagan-Dee
 - D. Interviews and Appointment to the Natick Housing Authority
 1. Deborah Doucette
 2. Sandra Green

7. 7:00 PM DISCUSSION AND DECISION

- A. Public Hearing: Hare Ram Corp d/b/a Market 10 Provisions - Application for a Section 15 Off Premise Wine and Malt Beverage License
- B. Financial Updates
 - Quarterly Update
 - DLS Report Progress
 - ARPA Spending Plan

C. Consider 2024 Spring Annual Town Meeting Warrant Articles

- Article 15 - Amend Town of Natick By-Laws: Article 42
- Article 18 - Adopt Specialized Energy Code

D. MetroWest Collaborative Development Update - 5 Auburn

E. Friends of Natick Trails (FONT) Update

F. Consider Sponsorship of Special Town Meeting Warrant Articles

G. Referral of Zoning Articles for Spring Annual Town Meeting

8. CONSENT AGENDA

A. Nordstrom, Inc. d/b/a Nordstrom Bazille: Application for a S12 all alcohol License Change of Officers

B. Approve Bagging of Meters for the 2024 Elections

March 5th, March 26th, September 3rd and November 5th, 2024

C. Support Recommendation from Audit Advisory Committee on RFP

9. TOWN ADMINISTRATOR NOTES

10. SELECT BOARD'S CONCERNS

11. CORRESPONDENCE

12. ADJOURNMENT

Agenda posted in accordance with Provisions of M.G.L. Chapter 30, Sections 18-25

Meeting recorded by Natick Pegasus

ITEM TITLE: Interview and Appointment to the Council on Aging
ITEM SUMMARY: 1. Fonda Mangino

ATTACHMENTS:

Description	Upload Date	Type
Fonda Mangino Packet	2/14/2024	Cover Memo
Fonda Mangino resume	2/14/2024	Cover Memo

Profile

Fonda

First Name

E

Middle Initial

Mangino

Last Name

femangino@gmail.com

Email Address

2 Grace Circle

Street Address

Suite or Apt

Natick

City

MA

State

01760

Postal Code

What Precinct do you live in? *☒ Precinct 10

Home: (508) 545-2114

Primary Phone

Mobile: (214) 632-9806

Alternate Phone

Self-Employed

Employer

Health, Wellness & Change
Coach

Job Title

Applicants are encouraged to attend or read the minutes of several meetings of the body to which they are applying, if possible.

Which Boards would you like to apply for?

Council on Aging: Submitted

Are you a registered voter in the Town of Natick?☒ Yes ☐ No

Have you ever attended a Natick town meeting?☒ Yes ☐ No

Have you ever served on a board, committee, or commission in the Town of Natick?☒ Yes ☐ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Apologize don't remember exact name of committee. I believe it was called Community Services Committee that supported Jemma some years ago before Covid. Also, if I remember correctly, the group was moving into sort of a "friends of Community services" type of effort when I rolled off. Don't see it listed anymore as a committee so believe it is defunct.

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

Want to learn more about the elder population in my community and see how I can help encourage and support. My passion is encouraging and improving wellbeing, health and coping skills amidst changing environments and major life transitions. Really interested in supporting people ages 50 and older navigating the two big life transition stages that occur in the second half of life: (1) actively working to fully retired (preparation/planning, go-years, slow years, no-go years) (2) fully living independently to dependent living to death (4-5 stages depending on model)

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

☐ Yes ☒ No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

Am a newly certified Health Coach and Master Life Coach focused on helping people ages 50 and over improve their knowledge, skills, abilities and environments so they can implement and sustain behaviors for improved wellness, health, and better change coping capability. Career in management consulting focused on people and technology use: Project & Program Management, Small and Large Group Facilitation; Team Development & Effectiveness; Communications (presentations, newsletters, etc.); Leadership Effectiveness Coaching; Process Analysis and Improvement Methods; Problem-Solving Techniques, Business Strategy Development, Change Implementation, Organization Design and Data Research/Analysis. Specific Community Related Skills include: approachability and rapport building, previous non-profit board leadership and volunteer management.

Please list any professional affiliations.

International Council on Active Aging; American College of Lifestyle Medicine, International Coaching Federation

Let us know what other specialized interests or hobbies you might have.

My hobbies include gardening, reading, cooking, music, cards, board games and learning. Interests include science advancements, demographic / cultural differences, philosophy and world religions/beliefs.

Applicants are encouraged to upload a resume, accepted file types are listed below.

[F_Mangino_resume_2024.pdf](#)

Upload a Resume

FONDA EMIGH MANGINO

P: (214) 632 - 9806 | E: femangino@gmail.com | LI: www.linkedin.com/in/fonda-mangino

SUMMARY

Newly double certified health and life coach with deep background in people change from career in management consulting focused on people performance, process and technology change implementation. Passionate about sustaining and improving wellbeing in changing environments and major life transitions.

SKILLS & EXPERTISE

- Facilitation • Behavior Process Analysis • Change Barriers & Support Identification • Learning
- Performance Mindset • Visioning & Planning • Goal Setting • Problem Solving • Group Performance

EXPERIENCE

CAREER BREAK – FAMILY CARE | Natick, MA

2010 – Present

Refocused people change and performance career corporations to individual, partners and family health, wellbeing and life changes for people ages 50+. Achieved Master Life Coach Certification 2022 and Certified Health Coach 2023.

Member of: [International Council on Active Aging](#), [American College of Lifestyle Medicine](#), [International Coaching Federation](#), and supporter of the [Global Wellness Institute](#). In addition, have been educating self on:

- Gen Z and Millennial demographic cohort profiles to add to existing Gen X and Boomer knowledge
- Personal knowledge management, vetting Information and disinformation processes
- Artificial intelligence change impact on people, organizations, and communities

Curriculum Specialist & Teacher

Homeschooled two elementary/middle-school aged children for 5 years. Both successfully matriculated back into public high school and are pursuing postsecondary education with high honors.

- Researched and evaluated learning approaches, settling on a mix of traditional, online, and blended learning curriculums.
- Established knowledge objectives, pacing and schedule, and evaluated progress, implementing remedial or advancing curriculum changes as needed.
- Conformed to all state and local guidelines and reporting requirements.

Community Volunteer

Volunteered in local schools, government, non-profit and religious organizations. Some examples:

- Co-chaired teacher appreciation committee for 2 years for [local charter school](#).
- Served 2 years for [local government](#) community services advisory board after completing citizens leadership academy.
- Facilitated executive leadership visioning and planning session as well as some status meetings in support of [local non-profit](#).
- Taught elementary [religious education](#) classes for 5 years and was cantor for [mass and funerals](#).

[VERTEXONE](#) | Richardson, TX

2009 – 2010

Process Architect

Led efforts to standardize processes across North America in support of global delivery model within company owned at that time by British corporation. Improved portfolio planning and program management processes.

People Change Management Consultant & Business Analyst Instructor

Analyzed, evaluated, designed, and implemented solutions to problems for:

PARIVEDA Was Thought Ensemble. 6-month business strategy project team role for U.S. utility billing and transaction services company. Included conducting cost-benefit analysis for outsourcing to India.

NORTH HIGHLAND 9-month change team consultant role for Japanese-owned corporation implementing SAP in American company locations. Focused on people impact and communications.

WTW Was Towers Perrin. Short-term contract job to redefine job descriptions and design job family skills progression for technology department of large, well-known university in California.

NETMIND Was B2T Training. Instructed training workshops once or twice a month for 2 years on how to gather, facilitate and document business, functional, data and technology requirements. IIBA consistent.

ONCOR & ATMOS ENERGY Was part of TXU Corporation. Full-time Internal Business Consultant employee for 2 years. Led or supported variety of projects: design and launch of new information management department; disaster recovery planning; ITIL rollout; technology strategy development; leadership planning; process improvements with OCM plan customers and employees.

SOUTHWEST AIRLINES Independent contractor for 2 years. Created and executed organizational change management program supporting new operational terminal information system implementation across all airports, impacting all union employees. Facilitated cross-functional leadership team to create 5-year ground operations strategy.

DELOITTE & ERNST & YOUNG (now Capgemini) | Dallas, TX

1993 – 1999

Manager - Management Consulting

Manage change teams in support of large-scale technology implementations for energy, transportation, and manufacturing. Provided troubleshooting and leadership to troubled organization change teams. Led methodology development efforts to embed people effectiveness under change into firm methodologies. Trained consultants and clients on people change and transition (comparable to current Prosci OCM).

EDUCATION

TEXAS WOMAN'S UNIVERSITY | Denton, TX

Master of Education, Guidance & Counseling - Research: Cross-Culture Mentoring

FORT HAYS STATE UNIVERSITY | Hays, KS

Bachelor of Arts, Communication**RELEVANT TRAINING & CERTIFICATIONS**

- Certified Health Coach #W57923, American Council on Exercise
- Behavior Change Specialist with Applied & Advanced Mentorship, American Council on Exercise
- Master Certified Life Coach, Certified Life Coach Institute
- Business Analyst Associate Certification, B2T Training (now Netmind)
- Certified Professional Facilitator "CPF", International Association of Facilitators
- Organizational Change Level 1 - Train the Trainer, Ernst & Young
- Senior Professional in Human Resources "SPHR", HRCI (not current)
- Conflict Resolution, Public Relations, & Meetings, Community Board Inc.
- Conflict Resolution / Problem Solving Seminar, Texas Woman's University

ITEM TITLE: Interview and Appointment to the Contributory Retirement Board

ITEM SUMMARY: 1. Marco Gargurevich

ATTACHMENTS:

Description	Upload Date	Type
Marco Application	2/27/2024	Cover Memo
Resume	3/6/2024	Cover Memo

Profile

Marco

A

Gargurevich

First Name

Middle Initial

Last Name

Email Address

Street Address

Suite or Apt

City

State

Postal Code

What Precinct do you live in? *

☒ Precinct 8

Primary Phone

Alternate Phone

Geode Capital Management

Head of Strategy

Employer

Job Title

Applicants are encouraged to attend or read the minutes of several meetings of the body to which they are applying, if possible.

Which Boards would you like to apply for?

Contributory Retirement Board: Submitted

Are you a registered voter in the Town of Natick?

☒ Yes ☐ No

Have you ever attended a Natick town meeting?

☒ Yes ☐ No

Have you ever served on a board, committee, or commission in the Town of Natick?

☐ Yes ☒ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

I am a friend of Mike Reardon where we previously served on the Natick Lacrosse Board and Elliot Lurrier who was my neighbor. Both had encouraged me to participate based on my industry and advisory board experience.

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

☐ Yes ☒ No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

I have 20 years of leadership experience in financial services in Consulting and Strategy & Planning. I am currently Head of Strategy for Geode Capital where I have run strategy and planning for two CEOs. I previously served as President of the Babson College Alumni Advisory Board and appointed to the Board of Trustees with oversight of the endowment fund. I am currently Vice Chair of the Cutler Center for Investments and Finance Advisory Board at Babson College.

Please list any professional affiliations.

I am a D&I leader at Geode Capital. I am actively involved with UNCF and the Lighted Pathways program and their network of 30 participating financial services firms in Boston. I am also a member of ALPFA and volunteer to teach financial literacy and speak at student panels.

Let us know what other specialized interests or hobbies you might have.

My wife grew up in Natick and much of her extended family still lives in Natick. I have two boys in the business school at Syracuse University. I play hockey in Natick where I have coached my kids with Natick Comets and Natick Youth Lacrosse well into HS. I play drums in a company band at Geode and a garage band in Natick.

Applicants are encouraged to upload a resume, accepted file types are listed below.

[Gargurevich_2023.docx](#)

Upload a Resume

Marco A. Gargurevich

6 Whitridge Road, Natick MA 01760

www.linkedin.com/in/marco-gargurevich-42a5112

Educational Background

Babson College

Babson Park, MA

MBA, Magna cum Laude

2001

Babson Alumni Association – Past President and Trustee

2008 to 2018

Cutler Center for Investments and Finance – Board Vice Chair

2019 to Present

NYU – Polytechnic University

Brooklyn, New York

MS Manufacturing Engineering

1995

Rensselaer Polytechnic Institute

Troy, New York

BS Mechanical Engineering

1989

Professional Experience

Geode Capital Management, LLC.

Boston, MA

Head of Strategic Initiatives

October 2021 to Present

- Responsible for multi-year plan coordination under two presidents and strategic initiatives execution
- Key initiatives: Securities Lending transition, cloud migration, enterprise risk management solution implementation, trading platform upgrade

Fidelity Investments

Fidelity Asset Management Division

Boston, MA

Vice President – Strategic Business Initiatives

August 2018 to October 2021

- Responsible for strategic initiatives execution for Asset Management
- Key initiatives: Legal entity adviser mergers, large trade workflow, FX trading platform

Vice President – Investment Operations PMO

March 2013 to August 2018

- Responsible for strategic initiatives execution for Asset Management Investment Operations
- Key initiatives: Shareholder Communications redesign, Treasury Workspace platform, Securities Lending SAILS platform, Board Reporting workflow solution, Consolidated Clearing implementation

Vice President – Strategy and Business Development

October 2010 to March 2013

- Responsible for strategic initiatives execution and business planning for Asset Management
- FIL Insourcing – Lead effort focused on the 2013 disaggregation of FMR and FIL research and trading
- Research Sharing /Combined Order Management – Ran the PMO to enable research sharing between FMR and PGA through the creation of a solution to combine trading across advisers

Fidelity Business Consulting/Operational Excellence Services

Boston, MA

Vice President - Lead Consultant

February 2004 to October 2010

- Financial Services Consulting with expertise in business transformation and Lean Six Sigma

- Lead instructor for Lean, Six-Sigma and Operations Management responsible for content development and delivery resulting in numerous consulting engagements.
- FPCMS Lean Program – Ran Lean program for several teams in Fund Accounting including Complex Securities, Pricing and Expense Processing.

General Electric Corp.

GE Information Technology Solutions

Boston, MA

Program Manager - Information Technology Solutions

August 2000 to February 2004

- Managed Services Consulting. Project Executive for GE IT Solutions' \$40M engagement with The Gillette Company. Head of Program Management Office managing over 100 field employees and subcontractors globally.
- Member of a strategic sourcing team focused on winning global IT Services and Business Process Outsourcing engagements. Six Sigma instructor for project teams at client locations.

GE Aircraft Engines

Lynn, MA

Program Manager - Development Engineering

June 1998 to August 2000

- Quality Leader/Program Manager for military and commercial engine development programs. Managed a QC and Engineering organization for certification of new engine configurations.
- Responsible for \$17M yearly development budget and project schedule.

Six Sigma Blackbelt

November 1996 to June 1998

- Certified GE Six Sigma Blackbelt 10/97 - Certification required completion of six months of project leadership training and two projects with successful execution of Six Sigma methodology.
- Certified Six Sigma Training instructor. Responsible for preparation of Six Sigma course work and delivery training.

AlliedSignal Inc.

Morristown, New Jersey

Product Engineer – New Ventures

October 1994 to November 1996

- Member of a core team set up to develop, outsource and market LCD viewing screen technology. Responsible for process development and supplier quality systems for contract manufacturing.
- Certified AlliedSignal Six Sigma Process Improvement Master Blackbelt

Photocircuits Corp.

Glen Cove, New York

Process Engineer

April 1992 to October 1994

Domino Sugar Corp.

Brooklyn, New York

Staff Engineer

April 1990 to April 1992

Other Awards and Recognition

<i>GE Crotonville Advanced Manager Course</i>	2002
<i>GE Ambassadorship Award and Best New Deal</i>	2003
<i>Fidelity Investments Cornerstone Award</i>	2007
<i>Fidelity Investments AM Excellence Award</i>	2014
<i>Babson College Distinguished Service Award</i>	2017
<i>Fidelity Global Leadership Training Program</i>	2018

ITEM TITLE: Interview and Appointment to the Historic District Commission

ITEM SUMMARY: 1. John Branagan-Dee

ATTACHMENTS:

Description	Upload Date	Type
John Branagan-Dee Resume	2/20/2024	Cover Memo
John Branagan Dee packet	2/20/2024	Cover Memo

John Branagan

781 . 974 . 8480
www.johnbranagan.com
hello@johnbranagan.com
Natick, Massachusetts

About Me

I'm a creative, and socially minded designer interested in designing high quality, locally rooted, public architecture. As a trained graphic designer, I also bring a passion for graphic and marketing challenges.

Education

Northeastern University

College of Arts, Media, & Design
Masters in Architecture (M.Arch)
2019 - 2022

Boston University

College of Fine Arts
Bachelor in Graphic Design (BFA)
Minor in Art History
2013 - 2017

Skills

Creative

Architectural Design
Print Design
Web Design
Book Design
Video Editing
Painting

Software

Revit
AutoCAD
ArchiCAD
Rhino
Creative Cloud
Microsoft Office

Volunteer & Personal Work

MetroWest Modern

Ongoing

An effort to catalogue significant Modern architecture in the Metro West Region all to be catalogued on Instagram at @MetroWestModern.

TransitMatters

September 2020 - January 2023

Design services including the creation of illustrations and icons for a Mobility Hubs Toolkit and a wayfinding map and signage as part of a wider multimodal effort for Everett's Bus Rapid Transit system

Experience

Oudens Ello Architecture

May 2022 - Present
Boston, Massachusetts

Related Beal LLC

June 2021 - March 2022
Boston, Massachusetts

designLAB architects

January 2018 - June 2019
Boston, Massachusetts

Freelance Design

Newmarket Business Association
December 2018 - May 2022

New England Society for the
Treatment of Trauma & Dissociation
January 2020 - May 2020

Reflexis Systems

April 2017 - August 2017

Designer

Manage key design aspects for the Belmont Pubic Library project including facade development

Assist production of documents for all phases of design on multiple projects spanning from private homes to museums

Create presentation-ready renderings for fundraising and public approvals

Marketing/Arch. Design Intern

Produced collateral focused on securing new projects and furthering existing projects through the public process

Worked with the Marketing Director to refresh existing condominium brands and brand new lab developments

Supported project management tasks such as fee requests, consultant selection, and building assessments

Marketing Coordinator

Coordinated and designed submission booklets for all RFPs, RFQs, Interviews, Awards, and Conferences

We obtained 21 interviews resulting in 11 new design projects including major renovations at Dartmouth College, Wellesley College, & UMass Amherst

Graphic Designer

Work with clients to create and present designs suited to their specific needs

Create work ranging from unique websites and branding systems to print booklets and clothing

Communicate with single clients and large groups to create designs to best fit their needs and budgets

Profile

John Branagan-Dee

First Name Middle Initial Last Name

jebranagan@gmail.com

Email Address

35 Florence St Apt 1

Street Address Suite or Apt

Natick MA 01760

City State Postal Code

What Precinct do you live in? *

☒ Precinct 7

Mobile: (781) 974-8480

Primary Phone Alternate Phone

Oudens Ello Architecture Designer

Employer Job Title

Applicants are encouraged to attend or read the minutes of several meetings of the body to which they are applying, if possible.

Which Boards would you like to apply for?

Historic District Commission: Submitted

Are you a registered voter in the Town of Natick?

☒ Yes ☐ No

Have you ever attended a Natick town meeting?

☐ Yes ☒ No

Have you ever served on a board, committee, or commission in the Town of Natick?

☐ Yes ☒ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

I'm interested in serving on the Historic District Commission because I think that a town's history and values is told through the buildings it chooses to preserve. I'm also interested in learning more about the process of historic preservation from the town governance side and working for my community.

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

☐ Yes ☒ No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

I have a Masters in Architecture from Northeastern University with multiple years of job experience meaning I have an understanding of the parts and processes that goes into building and renovating projects. I also have a minor in art history from Boston University specifically focusing on the history of architecture.

Please list any professional affiliations.

Let us know what other specialized interests or hobbies you might have.

I've recently undertaken a project focused on highlighting and studying the Modern architecture of the area titled Metro West Modern so I also bring a specific understanding of this community's relationship with the built environment.

Applicants are encouraged to upload a resume, accepted file types are listed below.

[John Branagan Resume.pdf](#)

Upload a Resume

ITEM TITLE: Interviews and Appointment to the Natick Housing Authority


ITEM SUMMARY: 1. Deborah Doucette
2. Sandra Green

ATTACHMENTS:

Description	Upload Date	Type
Packet from Cedar Gardens Tenant Organization with candidates information	2/15/2024	Cover Memo

We are submitting the resumes of two Natick Housing residents to be considered for the open Natick Housing Board position. Please sign below to acknowledge the receipt of these resumes.

Thank you


Signature/Town Clerk's Office

12/27/23
Date

We have two candidates for the Natick Housing Board which would like to run for the open board position.

We are submitting the enclosed resumes for consideration.

We have approved two candidates for the open position.

Sandra Green, President of CGTO

Deborah Doucette, Vice President

Donna Denault, Secretary

Lynn Sanders, Treasurer

Thank you for your consideration.

rec'd
12/27/23

Dear Select Board:

Our names are Sandra Green and Deborah Doucette, and we are the Chair and Vice Chair of the Cedar Gardens Tenant Association. We are the only officially recognized Local Tenant Organization within the Natick Housing Authority. It has come to our attention that the term of Natick Housing Authority Board Member Gregory Bazaz will expire in March of 2024, which means the seat will be open and should be filled per the process outlined in PHN 2021-01 (details below). The Natick Housing Authority sought and received a waiver from this rule last year because Mr. Bazaz lives in Public Housing. His seat therefore became the tenant member seat on the board.

In January 2021, then Governor Baker signed into law "[An Act Enabling Partnerships for Growth](#)." According to Section 71 of the act, it amends section five of Chapter 121B, creating an appointed board seat for a tenant. The appointment is to come from a list of names submitted to the select board by the recognized local tenant organization. According to section 71 of the law, "A tenants' organization may submit a list to the board of selectmen that shall contain not less than 2 and not more than 5 names and the board shall make the appointment from among the names so submitted." As the only recognized tenants' association in Natick, we would like to know by when and to whom we should submit the names of our 2-5 nominees.

We have attached the Public Housing Notice issued by the Executive Office of Housing and Livable Communities on the matter and we have cc'd Ben Echevarria from the Mass Union of Public Housing Tenants, an organization that is providing us with technical assistance on this matter. We look forward to hearing your response.

Sincerely,

Sandra and Deborah

One attachment • Scanned by Gmail

The reason why I would like to be on the Natick Housing Board is that I believe I can make a positive impact.

Listed below are some of my previous accomplishments which show that I am qualified to fulfill this position.

I have been an active member of St. Patricks Church for over 33 years. I have been instrumental in helping make policies for the future of the church community. I have participated in many community programs within the church.

For many years I was responsible for coordinating numerous functions the church sponsored in conjunction with the Archdiocese of Boston. These functions were for 300 to 500 people per event.

I was responsible for a committee of 100 volunteers.

I also volunteered with the religious education program at the church.

I was President of the Overeaters Anonymous of Massachusetts.

I worked with the Oblate Center from 1978 to 1988. My responsibilities included coordinating program topics for Overeaters Anonymous members as well as Alcohol Anonymous members:

I volunteered at the Natick Senior Center for many events. I ran the bingo program for the seniors once a week and volunteered to help with the newsletters.

I worked with the Natick Open Door program as one of the coordinators for over 5 years. This program provides meals for residents of Natick that are in need.

I worked at Framingham Union, Leonard Morse and Newton Wellesley Hospital as a CSR Technician for many years. I also worked various part time jobs as well.

I have been an active member of Eastern Star for many years.

As President of Cedar Gardens Tenant Organization for the past 6 years I have worked with the tenants to provide services and programs.

Thank you for your consideration,
Sandra Green

Deborah J. Doucette
126A Cedar Terrace
Natick, MA 01760
508-397-5239

Objective

Candidate for Natick Housing Authority Board Member

Work Experience

- Real Estate Broker* 1978 – 2008
*Sold and listed homes, developed clientele, worked closely with attorneys, negotiated, and advised clients.
- Home remodeler/General Contractor/Builder* 1977 – 2005
*Properties in Dorchester, Sherborn and Vermont from antique restoration to new construction.
- Home stager* 2005 – 2008
*Worked with Real Estate Brokers and homeowners to edit and enhance property for future sale.
- Wedding Planner* 2007 – 2008
*Launched wedding planning at Broadmoor Wildlife Sanctuary.
- Professional Writer* 1988 – present
*Freelance reporter for Local newspapers, Author of published non-fiction book, Author of published novel, and Columnist for the Huffington Post.
- Post Retirement** 2009 - present
*Personal Shopper, childcare, speaker/lecturer.

Education

*Some college: courses at Tufts University and Framingham State College

Activities

I have been a board member on various Arts organizations as well as participant in The League of Women Voters. Currently, VP of Cedar Gardens Tenant Organization.

December 18, 2023

Dear Select Board Members,

I hope you will consider my candidacy for the upcoming opening on the Housing Authority Board designated for a Tenant Representative (mandated by Governor Baker and DHCD in 2021 PHN 2021-1) to be nominated by the Cedar Gardens Tenant Organization.

In addition to the work experience listed on my resume (attached), my background encompasses many charitable and civic pursuits. Throughout the years I have worked with the Massachusetts Department of Elder Affairs on the issue of grandparents raising grandchildren. While volunteering there, I helped to develop a handbook for grandparents, ran multiple support groups and lectured both here and across the country.

For decades I organized and ran a Holiday toy and clothing drive for The Italian Home for Children in Jamaica Plain as well as for disadvantaged grandparents raising grandchildren in the New England area. I participated in The League of Women Voters and was involved in and reported on a study of Judges' rulings in child abuse cases. I have been President of an Arts Organization in Plymouth, and served on the board of several other arts groups. Currently, I am VP of the Cedar Gardens Tenant Organization. In addition, locally I actively support The Respite Center, The Peace Abbey, and the Life Experience School for disabled youth where I have often helped with their students. I take service to the disadvantaged as well as the community very seriously.

I grew up in Natick, came back to care for my aging mother and now am happy to call Natick my permanent home. I am proud of my hometown and welcome the opportunity to give back in a positive and meaningful way.

I believe my background and my work experience offer a varied and extensive set of skills that will be an asset as a Housing Authority Board member. I will work diligently to be an active advocate for tenants while working collaboratively with the Board and the Director in support of Housing and to accomplish mutual goals.

Sincerely,

Deborah J. Doucette

A handwritten signature in black ink, reading "Deborah J. Doucette". The signature is written in a cursive, flowing style with a large, stylized 'D' and 'J'.

ITEM TITLE: Public Hearing: Hare Ram Corp d/b/a Market 10 Provisions - Application for a Section 15 Off Premise Wine and Malt Beverage License

ITEM SUMMARY:

ATTACHMENTS:

Description	Upload Date	Type
Legal Notice	2/21/2024	Cover Memo
Application	2/21/2024	Cover Memo
Police Review	2/21/2024	Cover Memo
Board of Health Review	2/21/2024	Cover Memo
CED Review	2/22/2024	Cover Memo
Hare Ram Corp Floor Plan	3/4/2024	Cover Memo
Hare Ram Corp Product (1)	3/4/2024	Cover Memo
Hare Ram Corp Wine List	3/4/2024	Cover Memo

TOWN OF NATICK SELECT BOARD

Bruce T. Evans, Chair
Kathryn M. Coughlin, Vice Chair
Richard Sidney, Clerk
Paul R. Joseph
Kristen L. Pope
EMAIL: selectboard@natickma.org

TOWN OF NATICK

PUBLIC HEARING NOTICE

The Select Board will hold a public hearing on Monday, February 26, 2024 at 6:30 p.m. upon the application of a S.15 wine and malt beverage package store license. The application is for Hare Ram Corp d/b/a Market 10 Provisions (Neel Patel, Manager). The proposed location is 54B East Central Street and the area is 1600 square feet consisting of one floor with one entrance and two exits. The hearing will be held in the Edward Dlott meeting room, 13 East Central Street as well as remotely. Anyone wishing to be heard in this matter can participate in person or through Zoom. Log in instructions will be published on the 02/26/24 Select Board agenda.

All persons interested in this application may appear and be heard at the time and place mentioned above or may submit written comments to the Select Board at 13 East Central Street, Natick, MA 01760, selectboard@natickma.org by February 21, 2024.

Richard Sidney, Clerk

Neel Patel
Email: Neelp373@gmail.com
Telephone: 508-734-0084

Board of Selectmen:
Natick Town Hall, 2nd Floor
Natick MA 01760
Attn: Donna Donovan

RE: Hare Ram Corp
54B East Central Street
Natick, MA 01760

Enclosed please find the following items in connection with an application for a new application for Wine and Malt Beverage License.

1. Application For New License
2. Source Of Funds Document
3. Additional Information Page
4. ABCC Payment Receipt
5. Articles of Organization
6. Letter of Intent
7. ABCC Entity Vote
8. ABCC CORI Request Form
9. Passport And Driver's License
10. Applicant Statement
11. Qualified Vendor List
12. Floor Plan
13. Workers Compensation Affidavit

I request this matter be placed on the agenda for Feb 26, 2024. If there are any questions call 508-734-0084 or neelp373@gmail.com.

NEW LICENSE

To apply for an alcoholic beverages retail license, you will need the following:

- **\$200 Fee** paid online through our online payment link: **ABCC PAYMENT WEBSITE**
- **Monetary Transmittal Form**
- **New Retail Application**
- **Manager Application**
- **Vote of the Entity**
- **Business Structure Documents**
 - If Sole Proprietor, **Business Certificate**
 - If partnership, **Partnership Agreement**
 - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth
- **CORI Authorization Form** Complete one for each individual with financial or beneficial interest in the entity that is applying AND one for the proposed manager of record. *This form must be notarized with a stamp or raised seal.*
- **Proof of Citizenship** for the proposed Manager of Record.
- **Supporting Financial Records** for all financing and or loans, including pledge documents, if applicable.
- **Legal Right to Occupy**, a lease or deed.
- **Floor Plan**
- **Abutter's Notification**
- **Advertisement**
- **Additional information**, if necessary, utilizing the formats provided and or any affidavits.
- **Management Agreement**, if applicable, requires the following:
 - Management Agreement Application
 - Management Agreement
 - Vote of the Entity
 - CORI Forms for all listed in Section 11 and attachments

Please Note: You may be requested to submit additional supporting documentation if necessary.



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

**RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION
MONETARY TRANSMITTAL FORM**

APPLICATION FOR A NEW LICENSE

APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE LOCAL
LICENSING AUTHORITY.

ECRT CODE: RETA

Please make \$200.00 payment here: [ABCC PAYMENT WEBSITE](#)

PAYMENT MUST DENOTE THE NAME OF THE LICENSEE CORPORATION, LLC, PARTNERSHIP, OR INDIVIDUAL AND INCLUDE THE
PAYMENT RECEIPT

ABCC LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY)

ENTITY/ LICENSEE NAME Hare Ram Corp

ADDRESS 54B East Central Street

CITY/TOWN Natick

STATE MA

ZIP CODE 01760

For the following transactions (Check all that apply):

- | | | | |
|--|---|---|---|
| <input checked="" type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other | | <input type="checkbox"/> Change of DBA |

THE LOCAL LICENSING AUTHORITY MUST SUBMIT THIS
APPLICATION ONCE APPROVED VIA THE ePLACE PORTAL:

Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3
Chelsea, MA 02150-2358



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

APPLICATION FOR A NEW LICENSE

Municipality

1. LICENSE CLASSIFICATION INFORMATION

ON/OFF-PREMISES	TYPE	CATEGORY	CLASS
<input type="text" value="Off-Premises-15"/>	<input type="text" value="\$15 Package Store"/>	<input type="text" value="Wines and Malt Beverages"/>	<input type="text" value="Annual"/>

Please provide a narrative overview of the transaction(s) being applied for. On-premises applicants should also provide a description of the intended theme or concept of the business operation. Attach additional pages, if necessary.

54B East Central Street is move in ready store with coolers, shelves, counters etc. There is need for clean up and need for new computer system, there is an available wine and malt beverage license the applicant believes suits well within the premises.

Is this license application pursuant to special legislation?



Yes



No

Chapter

Acts of

2. BUSINESS ENTITY INFORMATION

The entity that will be issued the license and have operational control of the premises.

Entity Name	<input type="text" value="Hare Ram Corp"/>	FEIN	<input type="text" value="99-1167878"/>
DBA	<input type="text" value="Mile 10 Provisions"/>	Manager of Record	<input type="text" value="Neel Patel"/>
Street Address	<input type="text" value="54B East Central Street, Natick MA 01760"/>		
Phone	<input type="text" value="N/A"/>	Email	<input type="text" value="N/A"/>
Alternative Phone	<input type="text" value="N/A"/>	Website	<input type="text" value="N/A"/>

3. DESCRIPTION OF PREMISES

Please provide a complete description of the premises to be licensed, including the number of floors, number of rooms on each floor, any outdoor areas to be included in the licensed area, and total square footage. You must also submit a floor plan.

One floor, mostly sales area with a small storage area in the rear. An entrance from East Central Street and a rear exit where deliveries are accepted.

Total Square Footage:	<input type="text" value="1,600 +/-"/>	Number of Entrances:	<input type="text" value="1"/>	Seating Capacity:	<input type="text" value="N/A"/>
Number of Floors	<input type="text" value="1"/>	Number of Exits:	<input type="text" value="2"/>	Occupancy Number:	<input type="text" value="N/A"/>

4. APPLICATION CONTACT

The application contact is the person whom the licensing authorities should contact regarding this application.

Name:	<input type="text" value="Neel Patel"/>	Phone:	<input type="text" value="508-734-0084"/>
Title:	<input type="text" value="Owner"/>	Email:	<input type="text" value="neelp373@gmail.com"/>

APPLICATION FOR A NEW LICENSE

5. CORPORATE STRUCTURE

Entity Legal Structure	<input type="text" value="Corporation"/>	Date of Incorporation	<input type="text" value="02/01/2-24"/>
State of Incorporation	<input type="text" value="Massachusetts"/>	Is the Corporation publicly traded?	<input type="radio"/> Yes <input checked="" type="radio"/> No

6. PROPOSED OFFICERS, STOCK OR OWNERSHIP INTEREST

List all individuals or entities that will have a direct or indirect, beneficial or financial interest in this license (E.g. Stockholders, Officers, Directors, LLC Managers, LLP Partners, Trustees etc.). Attach additional page(s) provided, if necessary, utilizing Addendum A.

- The individuals and titles listed in this section must be identical to those filed with the Massachusetts Secretary of State.
- The individuals identified in this section, as well as the proposed Manager of Record, must complete a CORI Release Form.
- Please note the following statutory requirements for Directors and LLC Managers:
On Premises (E.g. Restaurant/ Club/Hotel) Directors or LLC Managers - At least 50% must be US citizens;
Off Premises (Liquor Store) Directors or LLC Managers - All must be US citizens and a majority must be Massachusetts residents.
- If you are a Multi-Tiered Organization, please attach a flow chart identifying each corporate interest and the individual owners of each entity as well as the Articles of Organization for each corporate entity. Every individual must be identified in Addendum A.

Name of Principal	Residential Address	SSN	DOB
<input type="text" value="Neel Patel"/>	<input type="text" value="210 Cedar St"/>	<input type="text" value="REDACTED"/>	<input type="text" value="11/23/1995"/>

Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen	MA Resident
<input type="text" value="President, Secretary, Treasurer and Director"/>	<input type="text" value="100%"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Additional pages attached? ☒ Yes ☐ No

CRIMINAL HISTORY

Has any individual listed in question 6, and applicable attachments, ever been convicted of a State, Federal or Military Crime? If yes, attach an affidavit providing the details of any and all convictions.

☐ Yes ☒ No

ADDENDUM A

6. PROPOSED OFFICERS, STOCK OR OWNERSHIP INTEREST (Continued...)

List all individuals or entities that will have a direct or indirect, beneficial or financial interest in this license (E.g. Stockholders, Officers, Directors, LLC Managers, LLP Partners, Trustees etc.).

Entity Name

Percentage of Ownership in Entity being Licensed
(Write "NA" if this is the entity being licensed)

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

CRIMINAL HISTORY

Has any individual identified above ever been convicted of a State, Federal or Military Crime?
If yes, attach an affidavit providing the details of any and all convictions.

☐ Yes ☐ No

APPLICATION FOR A NEW LICENSE

6A. INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Does any individual or entity identified in question 6, and applicable attachments, have any direct or indirect, beneficial or financial interest in any other license to sell alcoholic beverages? Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality

6B. PREVIOUSLY HELD INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Has any individual or entity identified in question 6, and applicable attachments, ever held a direct or indirect, beneficial or financial interest in a license to sell alcoholic beverages, which is not presently held? Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality

6C. DISCLOSURE OF LICENSE DISCIPLINARY ACTION

Have any of the disclosed licenses listed in question 6A or 6B ever been suspended, revoked or cancelled? Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Date of Action	Name of License	City	Reason for suspension, revocation or cancellation

7. OCCUPANCY OF PREMISES

Please complete all fields in this section. Please provide proof of legal occupancy of the premises.

- If the applicant entity owns the premises, a deed is required.
- If leasing or renting the premises, a signed copy of the lease is required.
- If the lease is contingent on the approval of this license, and a signed lease is not available, a copy of the unsigned lease and a letter of intent to lease, signed by the applicant and the landlord, is required.
- If the real estate and business are owned by the same individuals listed in question 6, either individually or through separate business entities, a signed copy of a lease between the two entities is required.

Please indicate by what means the applicant will occupy the premises

Lease

Landlord Name Chrono Realty LLC

Landlord Phone 508-272-7621

Landlord Email dchro@comcast.net

Landlord Address 14 Hartford St, Dover MA 02030

Lease Beginning Date Upon Approval

Rent per Month \$5,000.00

Lease Ending Date 5 Year + 5 Year Option

Rent per Year \$60,000.00

Will the Landlord receive revenue based on percentage of alcohol sales?

☐ Yes ☒ No

APPLICATION FOR A NEW LICENSE

8. FINANCIAL DISCLOSURE

A. Purchase Price for Real Estate	0
B. Purchase Price for Business Assets	0
C. Other * (Please specify below)	\$50,000.00
D. Total Cost	\$50,000.00

*Other Cost(s): (i.e. Costs associated with License Transaction including but not limited to: Property price, Business Assets, Renovations costs, Construction costs, Initial Start-up costs, Inventory costs, or specify other costs):"

SOURCE OF CASH CONTRIBUTION

Please provide documentation of available funds. (E.g. Bank or other Financial institution Statements, Bank Letter, etc.)

Name of Contributor	Amount of Contribution
Neel Patel	\$50,000.00
Total	\$50,000.00

SOURCE OF FINANCING

Please provide signed financing documentation.

Name of Lender	Amount	Type of Financing	Is the lender a licensee pursuant to M.G.L. Ch. 138.
			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No

FINANCIAL INFORMATION

Provide a detailed explanation of the form(s) and source(s) of funding for the cost identified above.

The \$50,000.00 are to be used as start up costs, for computer, clean-up and minor detail work to make the store premise inviting.

9. PLEDGE INFORMATION

Please provide signed pledge documentation.

Are you seeking approval for a pledge? ☐ Yes ☒ No

Please indicate what you are seeking to pledge (check all that apply) ☐ License ☐ Stock ☐ Inventory

To whom is the pledge being made?

N/A

10. MANAGER APPLICATION

A. MANAGER INFORMATION

The individual that has been appointed to manage and control the licensed business and premises.

Proposed Manager Name	Neel Patel	Date of Birth	11/23/1995	SSN	[REDACTED]
Residential Address	210 Cedar Street, Holliston MA 01746				
Email	neelp373@gmail.com	Phone	508-734-0084		
Please indicate how many hours per week you intend to be on the licensed premises				40 +/-	

B. CITIZENSHIP/BACKGROUND INFORMATION

Are you a U.S. Citizen? ☒ Yes ☐ No *Manager must be a U.S. Citizen
If yes, attach one of the following as proof of citizenship US Passport, Voter's Certificate, Birth Certificate or Naturalization Papers.
Have you ever been convicted of a state, federal, or military crime? ☐ Yes ☒ No
If yes, fill out the table below and attach an affidavit providing the details of any and all convictions. Attach additional pages, if necessary, utilizing the format below.

Date	Municipality	Charge	Disposition

C. EMPLOYMENT INFORMATION

Please provide your employment history. Attach additional pages, if necessary, utilizing the format below.

Start Date	End Date	Position	Employer	Supervisor Name
			See Additional Information Page	

D. PRIOR DISCIPLINARY ACTION

Have you held a beneficial or financial interest in, or been the manager of, a license to sell alcoholic beverages that was subject to disciplinary action? ☐ Yes ☒ No If yes, please fill out the table. Attach additional pages, if necessary,utilizing the format below.

Date of Action	Name of License	State	City	Reason for suspension, revocation or cancellation

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate:

Manager's Signature Neel Patel Date 02/08/2024

11. MANAGEMENT AGREEMENT

Are you requesting approval to utilize a management company through a management agreement?

☐ Yes ☒ No

If yes, please fill out section 11.

Please provide a narrative overview of the Management Agreement. Attach additional pages, if necessary.

IMPORTANT NOTE: A management agreement is where a licensee authorizes a third party to control the daily operations of the license premises, while retaining ultimate control over the license, through a written contract. *This does not pertain to a liquor license manager that is employed directly by the entity.*

11A. MANAGEMENT ENTITY

List all proposed individuals or entities that will have a direct or indirect, beneficial or financial interest in the management Entity (E.g. Stockholders, Officers, Directors, LLC Managers, LLP Partners, Trustees etc.).

Entity Name	Address	Phone		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

CRIMINAL HISTORY

Has any individual identified above ever been convicted of a State, Federal or Military Crime?

☐ Yes ☐ No

If yes, attach an affidavit providing the details of any and all convictions.

11B. EXISTING MANAGEMENT AGREEMENTS AND INTEREST IN AN ALCOHOLIC BEVERAGES

LICENSE

Does any individual or entity identified in question 11A, and applicable attachments, have any direct or indirect, beneficial or financial interest in any other license to sell alcoholic beverages; and or have an active management agreement with any other licensees?

Yes ☐ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality

11C. PREVIOUSLY HELD INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Has any individual or entity identified in question 11A, and applicable attachments, ever held a direct or indirect, beneficial or financial interest in a license to sell alcoholic beverages, which is not presently held?

Yes ☐ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality

11D. PREVIOUSLY HELD MANAGEMENT AGREEMENT

Has any individual or entity identified in question 11A, and applicable attachments, ever held a management agreement with any other Massachusetts licensee?

Yes ☐ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Licensee Name	License Type	Municipality	Date(s) of Agreement

11E. DISCLOSURE OF LICENSE DISCIPLINARY ACTION

Has any of the disclosed licenses listed in questions in section 11B, 11C, 11D ever been suspended, revoked or cancelled?

Yes ☐ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Date of Action	Name of License	City	Reason for suspension, revocation or cancellation

11F. TERMS OF AGREEMENT

a. Does the agreement provide for termination by the licensee?

Yes ☐ No ☐

b. Will the licensee retain control of the business finances?

Yes ☐ No ☐

c. Does the management entity handle the payroll for the business?

Yes ☐ No ☐

d. Management Term Begin Date

e. Management Term End Date

f. How will the management company be compensated by the licensee? (check all that apply)

☐ \$ per month/year (indicate amount)

☐ % of alcohol sales (indicate percentage)

☐ % of overall sales (indicate percentage)

☐ other (please explain)

ABCC Licensee Officer/LLC Manager

Management Agreement Entity Officer/LLC Manager

Signature:

Signature:

Title:

Title:

Date:

Date:



Statement Period 12/28/23 TO 01/27/24
SANTANDER SAVINGS

If you have questions about your statement,
contact the Customer Service Center at 877-768-2265.
Hearing- and speech-impaired customers may use 7-1-1.
www.santanderbank.com

NEEL PATEL
210 CEDAR ST
HOLLISTON MA 01746

0000
1 7 27

SANTANDER SAVINGS

Statement Period 12/28/23 - 01/27/24

NEEL PATEL

Balances

Beginning Balance	\$75,019.50	Current Balance	\$70,020.91 *
Deposits/Credits	+\$1.41	Average Daily Balance	\$73,084.11
Withdrawals/Debits	-\$5,000.00		

Interest

Paid this Period *	\$1.86	Annual Percentage Yield Earned	0.03%
Earned this Period	\$1.86	Paid Last Year	\$3.40
Paid Year-To-Date	\$1.86		

* The interest earned and the interest paid may differ depending on when interest is credited to your account.

Account Activity

Date	Description	Additions	Subtractions	Balance
12-28	Beginning Balance			\$75,019.50
01-16	INTERNET TRANSFER TO ACCT *1447 - SIMPLY RIGHT CHECKING		\$5,000.00	\$70,019.50
01-26	INTEREST CREDIT LESS FED TAX WITHHELD 0.45 FROM 12/28/2023 THROUGH 01/27/2024	\$1.41		\$70,020.91
01-27	Ending Balance			\$70,020.91





Statement Period 11/28/23 TO 12/27/23
SANTANDER SAVINGS

If you have questions about your statement,
contact the Customer Service Center at 877-768-2265.
Hearing- and speech-impaired customers may use 7-1-1.
www.santanderbank.com

NEEL PATEL
210 CEDAR ST
HOLLISTON MA 01746

0000
1 7 27



Changes to transaction posting order

On November 10, 2023, we made a change in our transaction posting order. This does not impact your day-to-day banking, but you may see a difference in the order in which items are listed on your statements. All account transfers will now be placed in Posting Order Group 2 regardless of the channel they were initiated in. Please see the updated versions of the Personal Deposit Account Agreement or the Business Deposit Account Agreement available on santanderbank.com.

2311P6PO 902001 11/2023

SANTANDER SAVINGS

Statement Period 11/28/23 - 12/27/23

NEEL PATEL

Balances

Beginning Balance	\$74,018.04	Current Balance	\$75,019.50
Deposits/Credits	+\$6,001.46	Average Daily Balance	\$77,851.42
Withdrawals/Debits	-\$5,000.00		

Interest

Paid this Period *	\$1.92	Annual Percentage Yield Earned	0.03%
Earned this Period	\$1.92	Paid Last Year	\$0.00
Paid Year-To-Date	\$3.40		

* The interest earned and the interest paid may differ depending on when interest is credited to your account.

Account Activity

Date	Description	Additions	Subtractions	Balance
11-28	Beginning Balance			\$74,018.04
11-28	INTERNET TRANSFER FROM ACCT *1447 - SIMPLY RIGHT CHECKING	\$6,000.00		\$80,018.04
12-15	INTERNET TRANSFER TO ACCT *1447 - SIMPLY RIGHT CHECKING		\$5,000.00	\$75,018.04
12-27	INTEREST CREDIT LESS FED TAX WITHHELD 0.46 FROM 11/28/2023 THROUGH 12/27/2023	\$1.46		\$75,019.50
12-27	Ending Balance			\$75,019.50





Statement Period 10/28/23 TO 11/27/23
SANTANDER SAVINGS

If you have questions about your statement,
contact the Customer Service Center at 877-768-2265.
Hearing- and speech-impaired customers may use 7-1-1.
www.santanderbank.com

NEEL PATEL
210 CEDAR ST
HOLLISTON MA 01746

0000
1 7 27

SANTANDER SAVINGS

Statement Period 10/28/23 - 11/27/23

NEEL PATEL

Balances

Beginning Balance	\$0.13	Current Balance	\$74,018.04
Deposits/Credits	+\$86,017.91	Average Daily Balance	\$57,947.57
Withdrawals/Debits	-\$12,000.00		

Interest

Paid this Period *	\$1.48	Annual Percentage Yield Earned	0.03%
Earned this Period	\$1.48	Paid Last Year	\$0.00
Paid Year-To-Date	\$1.48		

* The interest earned and the interest paid may differ depending on when interest is credited to your account.

Account Activity

Date	Description	Additions	Subtractions	Balance
10-28	Beginning Balance			\$0.13
11-06	TRANSFER FROM ACCT *1890 - BUSINESS CHECKING	\$86,016.79		\$86,016.92
11-20	TRANSFER TO ACCT *1447 - SIMPLY RIGHT CHECKING		\$12,000.00	\$74,016.92
11-27	INTEREST CREDIT LESS FED TAX WITHHELD 0.36 FROM 10/28/2023 THROUGH 11/27/2023	\$1.12		\$74,018.04
11-27	Ending Balance			\$74,018.04





Statement Period 10/01/23 TO 10/31/23

Primary Account #: [REDACTED]

If you have questions about your statement,
contact the Business Customer Service Team at
1-877-768-1145. Hearing- and speech-impaired
customers may use 7-1-1. www.santanderbank.com

70 MAIN STREET REALTY TRUST
70 MAIN ST
HOPKINTON MA 01748

0000
7 5 31

BUSINESS CHECKING

Statement Period 10/01/23 - 10/31/23

70 MAIN STREET REALTY TRUST
NEEL PATEL TRUSTEE

Balances

Beginning Balance	\$51.90	Ending Balance	\$86,383.39
Deposits/Credits	+\$348,211.38	Average Daily Balance	\$59,018.72
Withdrawals/Debits	-\$261,879.89		

Checks Posted

Check #	Date Paid	Amount	Reference	Check #	Date Paid	Amount	Reference
122	10/20	\$11,242.14	09839202407	125	10/23	\$140,000.00	0984037205
124*	10/25	\$4,500.00	0991545695	127*	10/25	\$60,000.00	0991511010

4 Check(s) Posted = \$215,742.14

An asterisk (*) indicates a skip in sequential check numbers.

Account Activity

Date	Description	Credits	Debits	Balance
10-01	Beginning Balance			\$51.90
10-02	FRAMINGHAM HOUSI LL Rent 230928 *****65	\$1,047.00		\$1,098.90
10-03	MONTHLY FEE FROM 09-01-2023 TO 09-30-2023		\$15.00	\$1,083.90
10-10	SHAH DIXIT & ASS SDA MB - COct 10 12025		\$83.34	\$1,000.56
10-11	PROOF PEST CONTR PROOFPEST2 *****69		\$66.15	\$934.41
10-12	BRANCH TRANSACTION AT ASHLAND - CASH DEPOSIT.	\$2,500.00		\$3,434.41
10-12	SportsBookCasino FanDuel		\$300.00	\$3,134.41
10-12	ROCKLAND TRUST AT TRNSFER231011 AT External Transfer		\$5,620.65	-\$2,486.24
10-12	INSUFFICIENT FUNDS FEE - ITEM PAID		\$15.00	-\$2,501.24
10-13	ACH RETURNED ITEM	\$5,620.65		\$3,119.41
10-13	BRANCH MIXED DEPOSIT AT ASHLAND	\$2,600.00		\$5,719.41
	CASH DEPOSIT \$ 1,300.00			
	CHECK DEPOSIT \$ 1,300.00			
10-13	REFUND - INSUFFICIENT FUNDS FEE - ITEM PAID ON 10/12/2023	\$15.00		\$5,734.41
10-19	B P TRUCKING ASH BPTRUCKING		\$404.21	\$5,330.20
10-20	WIRE IN FRM ACCT8208 MASSACHUSETTS IO REF SELLER PROCEEDS 70 M	\$306,428.73		\$311,758.93
10-20	NORFOLK & DEDHAM INS PREM		\$443.00	\$311,315.93
10-20	CHECK 000000000122	\$11,242.14		\$300,073.79
10-23	EVERSOURCE WEB_PAY OCT 23		\$76.93	\$299,996.86
10-23	EVERSOURCE WEB_PAY OCT 23		\$92.18	\$299,904.68
10-23	EVERSOURCE WEB_PAY OCT 23		\$150.73	\$299,753.95
10-23	EVERSOURCE WEB_PAY OCT 23		\$165.32	\$299,588.63
10-23	EVERSOURCE WEB_PAY OCT 23		\$209.72	\$299,378.91
10-23	EVERSOURCE WEB_PAY OCT 23		\$230.77	\$299,148.14
10-23	EVERSOURCE WEB_PAY OCT 23		\$359.79	\$298,788.35
10-23	EVERSOURCE WEB_PAY OCT 23		\$2,904.96	\$295,883.39



**Account Activity (Cont. for Acct# 9534591890)**

Date	Description	Credits	Debits	Balance
10-23	INTERNET TRANSFER TO ACCT 231372691 2000141447 - SIMPLY RIGHT CHECKING		\$30,000.00	\$265,883.39
10-23	CHECK 000000000125		\$140,000.00	\$125,883.39
10-25	BRANCH TRANSACTION AT ASHLAND - CHECK DEPOSIT.	\$30,000.00		\$155,883.39
10-25	CHECK 000000000124		\$4,500.00	\$151,383.39
10-25	CHECK 000000000127		\$60,000.00	\$91,383.39
10-30	TRANSFER TO ACCT 231372691 2000141447 - SIMPLY RIGHT CHECKING		\$5,000.00	\$86,383.39
10-31	Ending Balance			\$86,383.39

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC TRANSFERS
CALL OUR BUSINESS CUSTOMER CONTACT CENTER AT 1-877-768-1145 OR WRITE TO THE BANK
ATTN: BUSINESS CUSTOMER CONTACT CENTER
Santander Way RI1 EPV 02 23
East Providence, RI 02915

Please contact us if you think your statement or receipt is wrong or if you need additional information about a transfer on the statement or receipt. We must hear from you no later than 30 days after we sent you the FIRST statement on which the error appeared.



Santander

75 MAIN STREET REALTY TRUST
75 MAIN STREET
HOPKINTON, MA 01748

122

DATE 10/17/23

PAY TO THE ORDER OF Tamara Hopkinton \$ 11,242.14

Eleven thousand two hundred forty two dollars and four cents

Santander
Santander Bank, N.A.

Final Water Bill Wendy Patti

12313726912

122 10/20/23 \$11,242.14

75 MAIN STREET REALTY TRUST
75 MAIN STREET
HOPKINTON, MA 01748

124

DATE 11/20/23

PAY TO THE ORDER OF Anna & Yang \$ 4,500.00

Four thousand five hundred

Santander
Santander Bank, N.A.

Post Work Wendy Patti

12313726912

124 10/25/23 \$4,500.00

75 MAIN STREET REALTY TRUST
75 MAIN STREET
HOPKINTON, MA 01748

125

DATE 10/20/23

PAY TO THE ORDER OF Mukesh Patel \$ 140,000.00

ONE hundred forty thousand

Santander
Santander Bank, N.A.

Wendy Patti

12313726912

125 10/23/23 \$140,000.00

75 MAIN STREET REALTY TRUST
75 MAIN STREET
HOPKINTON, MA 01748

127

DATE 10/24/23

PAY TO THE ORDER OF DHAYAL PATEL \$ 60,000.00

Sixty thousand dollars

Santander
Santander Bank, N.A.

Loan Return Wendy Patti

12313726912

127 10/25/23 \$60,000.00



A. SETTLEMENT STATEMENT (HUD-1)

OMB Approval No. 2502-0265

B. TYPE OF LOAN:				6. File Number		7. Loan Number		8. Mortgage Insurance Case Number	
1. <input type="checkbox"/> FHA		2. <input type="checkbox"/> RHS		3. <input type="checkbox"/> Conv. Unins.					
4. <input type="checkbox"/> VA		5. <input type="checkbox"/> Conv. Ins							
C. NOTE: This form is furnished to give you a statement of actual settlement costs. Amounts paid to and by the settlement agent are shown. Items marked "(p.o.c.)" were paid outside the closing; they are shown here for informational purposes and are not included in the totals.									
D. NAME AND ADDRESS OF BORROWER: GOKDAG LLC MA				E. NAME AND ADDRESS OF SELLER: 70 Main Street Realty Trust u/d/t May 11, 2020 MA				F. NAME AND ADDRESS OF LENDER:	
G. PROPERTY LOCATION: 70 Main St Hopkinton, MA 01748				H. SETTLEMENT AGENT: Pierce Atwood LLP 100 Summer Street, Suite 2250, Boston, MA 02110 (617) 488-8100				H. SETTLEMENT DATE October 20, 2023	
								DISBURSEMENT DATE October 20, 2023	
				PLACE OF SETTLEMENT					
J. SUMMARY OF BORROWER'S TRANSACTION					K. SUMMARY OF SELLER'S TRANSACTION				
100. GROSS AMOUNT DUE FROM BORROWER:					400. GROSS AMOUNT DUE TO SELLER:				
101. Contract sales price				1,000,000.00		401. Contract sales price		1,000,000.00	
102. Personal property						402. Personal property			
103. Settlement charges to borrower (from line 1400)				15,850.54		403.			
104.						404.			
105.						405.			
ADJUSTMENTS FOR ITEMS PAID BY SELLER IN ADVANCE:					ADJUSTMENTS FOR ITEMS PAID BY SELLER IN ADVANCE:				
106. City/town taxes		10/20/2023 to 12/31/2023		3,184.28		406. City/town taxes		10/20/2023 to 12/31/2023 3,184.28	
107. County taxes		to				407. County taxes		to	
108. Assessments		to				408. Assessments		to	
109.						409.			
110.						410.			
111.						411.			
112.						412.			
120. GROSS AMOUNT DUE FROM BORROWER:				1,019,034.82		420. GROSS AMOUNT DUE TO SELLER:		1,003,184.28	
200. AMOUNTS PAID BY OR IN BEHALF OF BORROWER:					500. REDUCTIONS IN AMOUNT DUE TO SELLER:				
201. Deposit or earnest money				30,000.00		501. Excess deposit (see instructions)			
202. Principal amounts of new loan(s)				850,000.00		502. Settlement charges to seller (line 1400)		6,749.00	
203. Existing loan(s) taken subject to						503. Existing loan(s) taken subject to			
204. Hopkinton Pie Loan less fees				496,600.00		504. Payoff of first mortgage loan Rockland Trust (10/23)		651,149.93	
205.						505. Payoff of second mortgage loan			
206.						506. Deposit or earnest money		30,000.00	
207.						507.			
208.						508. Q2 FY 2024 Tax Payment		4,068.81	
209.						509.			
ADJUSTMENTS FOR ITEMS UNPAID BY SELLER:					ADJUSTMENTS FOR ITEMS UNPAID BY SELLER:				
210. City/town taxes		to				510. City/town taxes		to	
211. County taxes		to				511. County taxes		to	
212. Assessments		to				512. Assessments		to	
213. Rent Adjustment Unit 1 (\$1,000)				387.09		513. Rent Adjustment Unit 1 (\$1,000)		387.09	
214. Rent Adjustment Unit 2 (\$1,500)				580.65		514. Rent Adjustment Unit 2 (\$1,500)		580.65	
215. Rent Adjustment Unit 3 (\$1,400)				541.94		515. Rent Adjustment Unit 3 (\$1,400)		541.94	
216. Rent Adjustment Unit 4 (\$1,356)				524.90		516. Rent Adjustment Unit 4 (\$1,356)		524.90	
217. Rent Adjustment Unit 5 (\$1,300)				503.23		517. Rent Adjustment Unit 5 (\$1,300)		503.23	
218. Security Deposits (Unit 1 and 5)				2,250.00		518. Security Deposits (Unit 1 and 5)		2,250.00	
219.						519.			
220. TOTAL PAID BY/FOR BORROWER:				1,381,387.81		520. TOTAL REDUCTION IN AMOUNT DUE SELLER:		696,755.55	
300. CASH AT SETTLEMENT FROM/TO BORROWER:					600. CASH AT SETTLEMENT FROM/TO SELLER:				
301. Gross amount due from borrower (line 120)				1,019,034.82		601. Gross amount due to seller (line 420)		1,003,184.28	
302. Less amount paid by/for borrower (line 220)				1,381,387.81		602. Less total reductions in amount due seller (line 520)		696,755.55	
303. Cash (<input type="checkbox"/> From) (<input checked="" type="checkbox"/> To) Borrower				\$362,352.99		603. Cash (<input checked="" type="checkbox"/> To) (<input type="checkbox"/> From) Seller		\$306,428.73	

L SETTLEMENT CHARGES				PAID FROM BORROWER'S FUNDS AT SETTLEMENT	PAID FROM SELLER'S FUNDS AT SETTLEMENT
700 TOTAL REAL ESTATE BROKER FEES					
Division of commission (line 700) as follows:					
701	to				
702	to				
703	Commission paid at settlement				
704					
800. ITEMS PAYABLE IN CONNECTION WITH LOAN:					
801	Our origination charge	(from GFE # 1)			
802	Your credit or charge (points) for the specific interest rate chosen	(from GFE # 2)			
803	Your adjusted origination charges	(from GFE A)			
804	Appraisal fee to	(from GFE # 3)	3,900.00		
805	Credit report to	(from GFE # 3)	48.74		
806	ERM Fee	(from GFE # 3)	750.00		
807	Flood Cert	(from GFE # 3)	14.00		
808	Appraisal Review fee		650.00		
809	Tax Service Fee		123.00		
810	Fraud Guard		20.60		
811	See HUD-1 Continuation Page		55.95		
900. ITEMS REQUIRED BY LENDER TO BE PAID IN ADVANCE:					
901	Daily interest charges from 10/20/2023 to 11/1/2023 (12 days) @ \$0.0000/day	(from GFE # 10)			
902	Mortgage Insurance premium for	(from GFE # 3)			
903	Homeowner's insurance for to	(from GFE # 11)			
904					
905					
906					
1000. RESERVES DEPOSITED WITH LENDER:					
1001	Initial deposit for your escrow account	(from GFE # 9)			
1002	Homeowner's insurance				
1003	Mortgage insurance				
1004	Property taxes				
1005					
1006					
1007					
1008	Aggregate Accounting Adjustment		\$0.00		
1009					
1100. TITLE CHARGES:					
1101	Title services and lender's title insurance	(from GFE # 4)			
1102	Settlement or closing fee to				
1103	Owner's title insurance to	(from GFE # 5)			
1104	Lender's title insurance to				
1105	Lender's title policy limit				
1106	Owner's title policy limit				
1107	Agent's portion of the total title insurance premium to				
1108	Underwriter's portion of the total title insurance premium to				
1109	Simultaneous Loan Policy with zoning to FATIC/Bigelow		4,250.00		
1200. GOVERNMENT RECORDING AND TRANSFER CHARGES:					
1201	Government recording charges	(from GFE # 7)	369.50		329.25
1202	Deed \$ 159.75 Mortgage \$ 209.75 Releases \$ 329.25				
1203	Transfer taxes	(from GFE # 8)			4,560.00
1204	City/County tax/stamps Deed \$ Mortgage \$				
1205	State tax/stamps Deed \$ 4,560.00 Mortgage \$				
1206	ALR		109.75		
1207	MLC		84.75		
1300. ADDITIONAL SETTLEMENT CHARGES:					
1301	Required services that you can shop for	(from GFE # 6)			
1302	Legal Fee to Pierce Atwood LLP		4,100.00		
1303	Legal Fee to Demakis Law Offices P.C.				1,750.00
1304	KEY/Wire/Copies/FedEx		200.00		
1305	See HUD-1 Continuation Page		1,064.50		
1400. TOTAL SETTLEMENT CHARGES (enter on Line 103, Section J and line 502, Section K)			\$15,850.54		\$6,749.00

B=borrower S=seller L=lender R=broker I=investor O=other POC=paid outside closing by

HUD-1 Continuation Page

	PAID FROM BORROWER'S FUNDS AT SETTLEMENT	PAID FROM SELLER'S FUNDS AT SETTLEMENT
800. ITEMS PAYABLE IN CONNECTION WITH LOAN:		
811. Loan Shield	44.05	
812. Lexis Nexu	10.00	
813. PACER	1.00	
1100. TITLE CHARGES:		
1200. GOVERNMENT RECORDING AND TRANSFER CHARGES:		
1208. Trustee's Cert		109.75
1209. GS	109.75	
1300. ADDITIONAL SETTLEMENT CHARGES:		
1305. Title Exam to PA	325.00	
1306. UCC to PA	23.50	
1307. Plot Plan to PA	235.00	
1308. Good Standing to PA	31.00	
1309. MLC to PA	150.00	
1310. Zoning Certificate to PA	300.00	

HUD-1 Signature Page

NAME AND ADDRESS OF LENDER: 	PROPERTY LOCATION: 70 Main St Hopkinton, MA 01748
Loan No:	
NAME AND ADDRESS OF BORROWER: GOKDAG LLC MA	NAME AND ADDRESS OF SELLER: 70 Main Street Realty Trust u/d/t May 11, 2020 MA

I have carefully reviewed the HUD-1 Settlement Statement, and, to the best of my knowledge and belief, it is a true and accurate statement of all receipts and disbursements made on my account or by me in this transaction. I further certify that I have received a copy of the HUD-1 Settlement Statement (Pages 1, 2 and 3).

Borrower: GOKDAG LLC

Seller: 70 Main Street Realty Trust u/d/t May 11, 2020

By: _____ Date: 10/20/2023 By: _____ Date: 10/20/2023
Celal Fatih Gokdag, Manager

The HUD-1 Settlement Statement which I have prepared is a true and accurate account of this transaction. I have caused or will cause the funds to be disbursed in accordance with this statement.

Settlement Agent: _____ Date: 10/20/2023

WARNING: It is a crime to knowingly make false statements to the United States on this or any other similar form. Penalties upon conviction can include a fine and imprisonment. For details see: Title 18 U.S. Code Section 1001 and Section 1010.

ADDITIONAL INFORMATION

Please utilize this space to provide any additional information that will support your application or to clarify any answers provided above.

10. MANAGER APPLICATION

C. EMPLOYMENT INFORMATION

Start-End	Position	Employer	Supervisor
2013 - 2016	Student		
2016 - 2017	Procurement Specialist	YRCI Contractor D.O.D.	Anthony Cardinale
2018 - 2019	Procurement Specialist	VMSI Contractor/Department of VA	Emily Wilson
2019 - 2022	Contract Specialist	FEMA	Ryan Colgan
2022 - 2023	Contract Specialist	Federal Aviation Agency	Kristen Moran
2023 - Present	Manager	Sital Corp.	Mukesh Patel

Massachusetts Alcoholic Beverages Control Commission - Retail

95 Fourth Street, Suite 3, Chelsea, Massachusetts 02150

Phone 617) 27-3040

Payment Confirmation

YOUR PAYMENT HAS PROCESSED AND THIS IS YOUR RECEIPT

Your account has been billed for the following transaction. You will receive a receipt via email and via text message.

**Transaction Processed Successfully.****INVOICE #: 48a37828-6e90-46b4-87f7-1661e7c76d90**

Description	Applicant, License or Registration Number	Amount
FILING FEES-RETAIL	Hare Ram Corp	\$200.00
FILING FEES-RETAIL	Hare Ram Corp	\$200.00
		\$400.00

Total Convenience Fee: \$9.40**Date Paid: 2/8/2024 2:57:44 PM EDT****Total Amount Paid: \$409.40**

Payment On Behalf Of

Multiple Items:

Please see above for all of the items in this transaction.

Billing Information

First Name:

Neel

Last Name:

Patel

Address:

210 Cedar St

City:

Holliston

State:

MA

Zip Code:

01746

Email Address:

neelp373@gmail.com

[Print Receipt](#)[Make Another Payment](#)

powered by nCourt

The Commonwealth of Massachusetts, William Francis Galvin
Corporations Division

One Ashburton Place - Floor 17, Boston MA 02108-1512 | Phone: 617-727-9640

Articles of Organization

(General Laws, Chapter 156D, Section 2.02; 950 CMR 113.16)

Minimum Filing Fee:
\$250.00

Identification Number: 001751718 (number will be assigned)																			
<div>ARTICLE I</div> <div>The exact name of the corporation is:</div> <div>HARE RAM CORP</div>																			
<div>ARTICLE II</div> <div>Unless the articles of organization otherwise provide, all corporations formed pursuant to G.L. C156D have the purpose of engaging in any lawful business. Specify if you want a more limited purpose:</div>																			
<div>ARTICLE III</div> <div>State the total number of shares and par value, if any, of each class of stock that the corporation is authorized to issue. All corporations must authorize stock. If only one class or series is authorized, it is not necessary to specify any particular designation.</div> <table><thead><tr><th>Class of Stock</th><th>Par value per share (Enter 0 if no Par)</th><th>Total authorized number of shares</th><th>Total authorized par value</th><th>Total issued and outstanding number of shares</th></tr></thead><tbody><tr><td>CNP</td><td>0</td><td>1,500</td><td>0</td><td>100</td></tr><tr><td colspan="5"></td></tr></tbody></table>					Class of Stock	Par value per share (Enter 0 if no Par)	Total authorized number of shares	Total authorized par value	Total issued and outstanding number of shares	CNP	0	1,500	0	100					
Class of Stock	Par value per share (Enter 0 if no Par)	Total authorized number of shares	Total authorized par value	Total issued and outstanding number of shares															
CNP	0	1,500	0	100															
<div>ARTICLE IV</div> <div>If more than one class of stock is authorized, state a distinguishing designation for each class. Prior to the issuance of any shares of a class, if shares of another class are outstanding, the corporation must provide a description of the preferences, voting powers, qualifications, and special or relative rights or privileges of that class and of each other class of which shares are outstanding and of each series then established within any class.</div>																			
<div>ARTICLE V</div> <div>The restrictions, if any, imposed by the articles of organization upon the transfer of shares of stock</div>																			

Other lawful provisions, and if there are no provisions, this article may be left blank.

ARTICLE VII

The effective date of organization shall be the date and time the articles were received for filing if the articles are not rejected within the time prescribed by law. If a later effective date is desired, specify such date, which may not be later than ninety (90) days from the date and time of filing

Later Effective Date (mm/dd/yyyy): 02/01/2024 Time (HH:MM) 12:00 AM

ARTICLE VIII

The information contained in Article VIII is not a permanent part of the articles of organization.

a,b. The street address of the initial registered office of the corporation in the commonwealth and the name of the initial registered agent at the registered office:

Agent name: NEEL PATEL

Number and street: 54B EAST CENTRAL ST

Address 2:

City or town: NATICK State: MA Zip code: 01760

c. The names and street addresses of the individuals who will serve as the initial directors, president, treasurer and secretary of the corporation (an address need not be specified if the business address of the officer or director is the same as the principal office location):

Title	Individual Name	Address
PRESIDENT	NEEL PATEL	210 CEDAR ST HOLLISTON, MA 01746 USA
TREASURER	NEEL PATEL	210 CEDAR ST HOLLISTON, MA 01746 USA
SECRETARY	NEEL PATEL	210 CEDAR ST HOLLISTON, MA 01746 USA
DIRECTOR	NEEL PATEL	210 CEDAR ST HOLLISTON, MA 01746 USA

d. The fiscal year end (i.e., tax year) of the corporation:

January 31

e. A brief description of the type of business in which the corporation intends to engage:

BEER AND WINE, GOURMET SNACKS

f. The street address (post office boxes are not acceptable) of the principal office of the corporation:

Number and 54B EAST CENTRAL AVE

Country: UNITED STATES

g. Street address where the records of the corporation required to be kept in the Commonwealth are located (post office boxes are not acceptable):

Number and street: 54B EAST CENTRAL ST

Address 2:

City or town: NATICK State: MA Zip code: 01760

Country: UNITED STATES

Which is:

- ☐ its principal office ☐ an office of its transfer agent
☐ an office of its secretary/assistant secretary ☒ its registered office

Signed this 29 Day of January, 2024 at 16:01 PM by the incorporator(s). (If an existing corporation is acting as incorporator, type in the exact name of the business entity, the state or other jurisdiction where it was incorporated, the name of the person signing on behalf of said business entity and the title he/she holds or other authority by which such action is taken.)

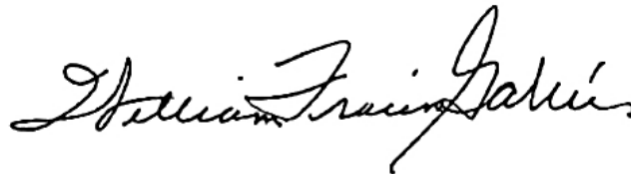
NEEL PATEL

THE COMMONWEALTH OF MASSACHUSETTS

I hereby certify that, upon examination of this document, duly submitted to me, it appears that the provisions of the General Laws relative to corporations have been complied with, and I hereby approve said articles; and the filing fee having been paid, said articles are

deemed to have been filed with me on:

January 29, 2024 03:58 PM

A handwritten signature in black ink, reading "William Francis Galvin". The signature is written in a cursive, flowing style with a large initial "W".

WILLIAM FRANCIS GALVIN

Secretary of the Commonwealth

ENTITY VOTE

The Board of Directors or LLC Managers of

Hare Ram Corp

Entity Name

duly voted to apply to the Licensing Authority of

Natick

City/Town

and the

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on

Feb 8, 2024

Date of Meeting

For the following transactions (Check all that apply):

- | | | | |
|--|---|---|---|
| <input checked="" type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other | | <input type="checkbox"/> Change of DBA |

"VOTED: To authorize

Neel Patel

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."

"VOTED: To appoint

Neel Patel

Name of Liquor License Manager

as its manager of record, and hereby grant him or her with full authority and control of the premises described in the license and authority and control of the conduct of all business therein as the licensee itself could in any way have and exercise if it were a natural person residing in the Commonwealth of Massachusetts."

A true copy attest,



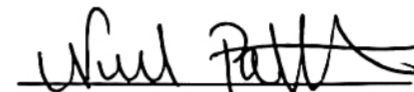
Corporate Officer /LLC Manager Signature

Neel Patel

(Print Name)

For Corporations ONLY

A true copy attest,



Corporation Clerk's Signature

Neel Patel

(Print Name)

APPLICANT'S STATEMENT

I, Neel Patel the: ☐ sole proprietor; ☐ partner; ☒ corporate principal; ☐ LLC/LLP manager
Authorized Signatory

of Hare Ram Corp
Name of the Entity/Corporation

hereby submit this application (hereinafter the "Application"), to the local licensing authority (the "LLA") and the Alcoholic Beverages Control Commission (the "ABCC" and together with the LLA collectively the "Licensing Authorities") for approval.

I do hereby declare under the pains and penalties of perjury that I have personal knowledge of the information submitted in the Application, and as such affirm that all statements and representations therein are true to the best of my knowledge and belief. I further submit the following to be true and accurate:

- (1) I understand that each representation in this Application is material to the Licensing Authorities' decision on the Application and that the Licensing Authorities will rely on each and every answer in the Application and accompanying documents in reaching its decision;
- (2) I state that the location and description of the proposed licensed premises are in compliance with state and local laws and regulations;
- (3) I understand that while the Application is pending, I must notify the Licensing Authorities of any change in the information submitted therein. I understand that failure to give such notice to the Licensing Authorities may result in disapproval of the Application;
- (4) I understand that upon approval of the Application, I must notify the Licensing Authorities of any change in the ownership as approved by the Licensing Authorities. I understand that failure to give such notice to the Licensing Authorities may result in sanctions including revocation of any license for which this Application is submitted;
- (5) I understand that the licensee will be bound by the statements and representations made in the Application, including, but not limited to the identity of persons with an ownership or financial interest in the license;
- (6) I understand that all statements and representations made become conditions of the license;
- (7) I understand that any physical alterations to or changes to the size of the area used for the sale, delivery, storage, or consumption of alcoholic beverages, must be reported to the Licensing Authorities and may require the prior approval of the Licensing Authorities;
- (8) I understand that the licensee's failure to operate the licensed premises in accordance with the statements and representations made in the Application may result in sanctions, including the revocation of any license for which the Application was submitted; and
- (9) I understand that any false statement or misrepresentation will constitute cause for disapproval of the Application or sanctions including revocation of any license for which this Application is submitted.
- (10) I confirm that the applicant corporation and each individual listed in the ownership section of the application is in good standing with the Massachusetts Department of Revenue and has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Signature:



Date: 02/08/2024

Title:

President, Treasurer, Secretary and Director



Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
239 Causeway Street, First Floor
Boston, MA 02114

DEBORAH B. GOLDBERG
TREASURER AND RECEIVER GENERAL

CORI REQUEST FORM

JEAN M. LORIZIO, ESQ.
CHAIRMAN

The Alcoholic Beverages Control Commission ("ABCC") has been certified by the Criminal History Systems Board to access conviction and pending Criminal Offender Record Information ("CORI"). For the purpose of approving each shareholder, owner, licensee or applicant for an alcoholic beverages license, I understand that a criminal record check will be conducted on me, pursuant to the above. The information below is correct to the best of my knowledge.

ABCC LICENSE INFORMATION

ABCC NUMBER: <small>(IF EXISTING LICENSED)</small>	LICENSEE NAME: Hare Ram Corp	CITY/TOWN: Natick
---	------------------------------	-------------------

APPLICANT INFORMATION

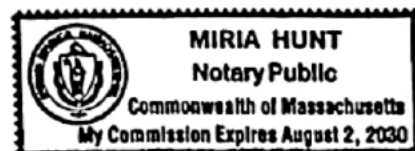
LAST NAME: Patel	FIRST NAME: Neel	MIDDLE NAME: Mukesh
MAIDEN NAME OR ALIAS (IF APPLICABLE): N/A	PLACE OF BIRTH: Queens, New York	
DATE OF BIRTH: 11/23/1995	SSN: [REDACTED]	ID THEFT INDEX PIN (IF APPLICABLE): N/A
MOTHER'S MAIDEN NAME: Hinaben Patel	DRIVER'S LICENSE #: [REDACTED]	STATE LIC. ISSUED: Massachusetts
GENDER: MALE	HEIGHT: 5 10	WEIGHT: 160 EYE COLOR: Brown
CURRENT ADDRESS: 210 Cedar St		
CITY/TOWN: Holliston	STATE: MA	ZIP: 01746
FORMER ADDRESS: 373 Union St		
CITY/TOWN: Ashland	STATE: MA	ZIP: 01721

PRINT AND SIGN

PRINTED NAME: Neel Patel	APPLICANT/EMPLOYEE SIGNATURE:
--------------------------	-------------------------------

NOTARY INFORMATION

On this 2-9-2024	before me, the undersigned notary public, personally appeared Neel M. Patel
(name of document signer), proved to me through satisfactory evidence of identification, which were MA DL	
to be the person whose name is signed on the preceding or attached document, and acknowledged to me that (he) (she) signed it voluntarily for its stated purpose.	
NOTARY	



DIVISION USE ONLY

REQUESTED BY: [REDACTED]
SIGNATURE OF CORI AUTHORIZED EMPLOYEE

The CORI Identify Theft Index PIN Number is to be completed by those applicants that have been issued an Identity Theft PIN Number by the DCI. Certified agencies are required to provide all applicants the opportunity to include this information to ensure the accuracy of the CORI request process. ALL CORI request forms that include this field are required to be submitted to the DCI via mail or by fax to (617) 640-4614.

COMMERCIAL LETTER OF INTENT TO LEASE

Hare Ram Corp (LESSEE)
Neel Patel, President
54B East Central Street
Natick, MA 01760

Chrono Realty Two, LLC (LESSOR)
Dean Chronopoulos, Manager
14 Hartford Street
Dover, MA 02030

RE: Intent to Lease Commercial Property

This Letter of Intent (the "Letter") sets forth the proposed terms and conditions of a lease agreement between the Lessor and Lessee (the "Parties") and shall govern the relationship between the Parties until replaced by a definitive, formal lease agreement addressing the same transaction and subject matter (the "Lease Agreement"). The lease agreement considered in this Letter is subject in all respects to the following:

THE LESSOR. Chrono Realty Two, LLC (the "Lessor").
14 Hartford Street
Dover, MA 02030
Phone Number: 508-272-7621
Email Address: dchro@comcast.net

THE LESSEE. Hare Ram Corp (the "Lessee").
54B East Central Street
Natick, MA 01760
Phone Number: _____
Email Address: _____

ADDRESS OF PREMISES. 54 East Central Street, Unit B, Natick, Massachusetts (the "Premises").

RENTABLE SPACE. The total rentable space of the Premises consists of approximately 1600 square feet.

LEASE TERM. The term of the lease (the "Lease Term") shall be:

Fixed-Term. The Lease shall commence beginning on the 1st month following Lessee's receipt of approval by the Town of Natick, but no later than March 1st, 2024. Payment of rent shall commence March 1st, 2024. The initial term shall be for a period of five (5) years, with an additional five (5) year option if Lessee is not in default of the lease.

USE OF PREMISES. The Lessee shall be allowed to use the Premises for the following:
A Beer and Wine Store.

RENT. The base rent shall be fixed at \$5,000.00 per month for the first two years of the lease and then 3% yearly increases for the final 3 years and the option period. Additional rent, to be defined as all operating costs of the building, as a whole, shall be due and payable quarterly based upon Lessee's percentage of total leased space available in the building.

SECURITY DEPOSIT. The Parties agree that:

The Lessee shall be required to pay the Lessor a security deposit in the amount of \$5,000.00, upon the signing of this Letter of Intent. If Lessee is not granted a liquor license this deposit shall be retained by Lessor as consideration for this Letter of Intent.

ADDITIONAL TERMS AND CONDITIONS.

- a. Access to the Premises, upon the Town of Natick's approval for the liquor license, shall be made available to Lessee prior to March 1st, 2024, solely for the purpose of cleaning and removing all perishable inventory currently in the Premises. Lessee agrees not remove any equipment or start any construction prior to March 1st, 2024.


AND OR BEFORE WRITTEN APPROVAL
BY ABCC AND EXECUTION OF SIGNED
LEASE BY BOTH PARTIES. LESSEE
SHALL RETAIN PRIVATE DUMPSTER FOR
CLEANING AND DISPOSAL OF
PERISHABLES

INTENTION OF THE PARTIES. This Letter sets forth the intentions of the Parties to use reasonable efforts to negotiate, in good faith, a Lease Agreement with respect to all matters herein.

GOVERNING LAW. This Letter shall be governed under the laws of the Commonwealth of Massachusetts.


SIGNATURES.

Lessor :
Chrono Realty Two, LLC



Dean Chronopoulos, Manager

Lessee :
Hare Ram Corp.

Neel
Patel  Digitally signed
by Neel Patel
Date: 2024.02.07
13:04:03 -05'00'

Neel Patel, President

[illegible]

MASSACHUSETTS

DRIVER'S
LICENSE

NOT FOR FEDERAL ID

Catherine Spivey



11/18/2021

11/23/2026

CLASS 12 NONE

11/23/1995

END NONE

PATEL

NEEL MUKESH

218 CEDAR ST
HOLLISTON, MA 01746-1263

18 EYES BRO

15 SEX M 16 HGT 5'-10"

8 DO 11/18/2021 Date 8/22/2016

11/23/95

Market 10 Provisions Proposed Vendors:

Mable Distribution: Chocolates, Ice Cream, Chips, Crackers, Pretzels, Jerky Snacks, Popcorn, Nova Lox, Meats include Sausage and Salami, Cheeses

Vermont Creamery: Cheese

Arena Meats: Meat

Beer Distributors: Atlas Distribution, Commercial Distributing Corp, Merrimack Valley Brewing, L Knife and Son, Startline Brewing, 7th Wave Brewing, Lookout Farm, Bolton Beerworks, Bullspit Brewery, Loyal Foe Brewing Company, Shovel Town Brewery, Crue Brewery

Wine Distributors: Mise Wines, Olmstead Wines, Martignetti, MS Walker, Horizon Bev, Taunton Wines, Ideal Wine, Circo Vino, 21st Century Wine Company, Carpe Vinum Wine Distributor, Federal Wine and Spirits, Pioneer Wine and Spirits



THE COMMONWEALTH OF MASSACHUSETTS
Department of Industrial Accidents
Office of Investigations
Lafayette City Center
2 Avenue de Lafayette, Boston, MA 02111-1750
www.mass.gov/dia

Workers' Compensation Insurance Affidavit: General Businesses

Applicant Information

Please Print Legibly

Business/Organization Name: Nare Ram Corp.

Address: 54 B East Central Street

City/State/Zip: Natick MA 01760 Phone #: none at this time

Are you an employer? Check the appropriate box:

1. ☐ I am a employer with _____ employees (full and/or part-time).*
2. ☒ I am a sole proprietor or partnership and have no employees working for me in any capacity. [No workers' comp. insurance required]
3. ☐ We are a corporation and its officers have exercised their right of exemption per c. 152, §1(4), and we have no employees. [No workers' comp. insurance required]**
4. ☐ We are a non-profit organization, staffed by volunteers, with no employees. [No workers' comp. insurance req.]

Business Type (required):

5. ☒ Retail
6. ☐ Restaurant/Bar/Eating Establishment
7. ☐ Office and/or Sales (incl. real estate, auto, etc.)
8. ☐ Non-profit
9. ☐ Entertainment
10. ☐ Manufacturing
11. ☐ Health Care
12. ☐ Other _____

*Any applicant that checks box #1 must also fill out the section below showing their workers' compensation policy information.

**If the corporate officers have exempted themselves, but the corporation has other employees, a workers' compensation policy is required and such an organization should check box #1.

I am an employer that is providing workers' compensation insurance for my employees. Below is the policy information.

Insurance Company Name: _____

Insurer's Address: _____

City/State/Zip: _____

Policy # or Self-ins. Lic. # _____ Expiration Date: _____

Attach a copy of the workers' compensation policy declaration page (showing the policy number and expiration date).

Failure to secure coverage as required under § 25A of MGL c. 152 can lead to the imposition of criminal penalties of a fine up to \$1,500.00 and/or one-year imprisonment, as well as civil penalties in the form of a STOP WORK ORDER and a fine of up to \$250.00 a day against the violator. Be advised that a copy of this statement may be forwarded to the Office of Investigations of the DIA for insurance coverage verification.

I do hereby certify, under the pains and penalties of perjury that the information provided above is true and correct.

Signature: Wend Patel Date: 02/06/2024

Phone #: 508-734-0084

Official use only. Do not write in this area, to be completed by city or town official.

City or Town: _____ Permit/License # _____

Issuing Authority (check one):

1. ☐ Board of Health 2. ☐ Building Department 3. ☐ City/Town Clerk 4. ☐ Licensing Board
5. ☐ Selectmen's Office 6. ☐ Other _____

Contact Person: _____ Phone #: _____

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Street and Apt. No., or PO Box No.
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Somerville MA 02143

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Brambleton, MA 02184

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Total Postage and Fees \$15.08

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Postage \$10.68

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Street and Apt. No., or PO Box No.
59 East Central St
Dartmouth, MA 01760

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Sent To: Roman Catholic Archdiocese of Boston
Street and Apt. No., or PO Box No.
Lake St
Brighton, MA 02135

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Postage \$10.68

Total Postage and Fees \$15.08

Sent To: Marchetti Family Trust
Street and Apt. No., or PO Box No.
60 East Central St
Hopkinton, MA 01760

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☐ Adult Signature Restricted Delivery \$0.00

Postage \$10.68

Total Postage and Fees \$15.08

Sent To: Catholic Bishop Boston
Street and Apt. No., or PO Box No.
Lake St
Brighton, MA 02135

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<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
Merla Christine M
Street and Apt. No., or PO Box No.
60 East Central St # 205
Natick MA 01760

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
Chrono Realty two LLC
Street and Apt. No., or PO Box No.
Northern management group 3 Allied dr.
Dedham MA 02026

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
cascap metstate Housing LLC
Street and Apt. No., or PO Box No.
231 Somerville Ave
Somerville MA 02143

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
Kassanos cindy A
Street and Apt. No., or PO Box No.
60 East Central St # 305
Natick MA 01760

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
Narris Mary A.
Street and Apt. No., or PO Box No.
60 East Central St 203
Natick MA 01760

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
Gaban Eric
Street and Apt. No., or PO Box No.
60 East Central St # 105
Natick MA 01760

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

Total Postage and Fees \$5.05

Sent To
Fisher Michael
Street and Apt. No., or PO Box No.
89 South Ave
Natick MA 01760

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

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Sent To
Goldstein gerald
Street and Apt. No., or PO Box No.
60 East Central St # 104
Natick MA 01760

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.65

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Sent To
Chrono Realty two LLC
Street and Apt. No., or PO Box No.
764 Great Plain Ave
Needham MA 02492

Postmark
HOPKINTON MA 01748
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<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **JWB Real Estate LLC**
Street and Apt. No., or PO Box No. **85 South Ave**
City, State, ZIP+4® **Dartmouth MA 01760**

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<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **Lev Family Irrevocable trust**
Street and Apt. No., or PO Box No. **60 East Central St #107**
City, State, ZIP+4® **Dartmouth MA 01760**

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<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **Roman Catholic Archbishop of Boston**
Street and Apt. No., or PO Box No. **1 Lake St**
City, State, ZIP+4® **Brighton MA 02135**

Postmark: **HOPKINTON MA 01748 FEB 16 2024**

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<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **Roman Catholic Archbishop of Boston**
Street and Apt. No., or PO Box No. **44 East Central Street**
City, State, ZIP+4® **Dartmouth MA 01760**

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<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **MORSE RUFUS C.**
Street and Apt. No., or PO Box No. **13 East Central St**
City, State, ZIP+4® **Dartmouth MA 01760**

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Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **McMahon Michael**
Street and Apt. No., or PO Box No. **148 Tremont St #W208**
City, State, ZIP+4® **Boston MA 02120**

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Postage \$0.68

Total Postage and Fees \$5.08

Sent To: **Lincoln Trust**
Street and Apt. No., or PO Box No. **2 Pleasant St**
City, State, ZIP+4® **Dartmouth MA 01760**

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<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.68

Total Postage and Fees \$5.08

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Street and Apt. No., or PO Box No. **1 Lake St**
City, State, ZIP+4® **Brighton MA 02135**

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Total Postage and Fees \$5.08

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- ☐ Adult Signature Restricted Delivery

Postage

\$0.68

Total Postage and Fees

\$5.08

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Street and Apt. No., or PO Box No.

City, State, ZIP+4®

New England Tel & Tel Co

PO BOX 2749

ADDISON TX 75001



4105 2284 E0000 0222 T202



ALC-75

Police Officer Review

Alcohol License Application

Status: Complete

Became Active: Feb 9, 2024

Assignee: Brian Lauzon

Completed: Feb 16, 2024

Applicant

Neel Patel
neelp373@gmail.com
210 cedar st
holliston, ma 01746
508-734-0084

Primary Location

56 EAST CENTRAL ST
Natick, MA 01760

Owner:

Dean Chronopoulos

Comments

Brian Lauzon, Feb 16, 2024

Upon review it looks as if the same applicant who we reported on previously is a suitable person for this license and I see no changes to that recommendation. Parking and access were discussed during the last proposal and should be mitigated as discussed. Public need seems to remain an issue as this proposal seems more as if its a convenience store selling beer and wine.



ALC-17

Health Dept Review

Alcohol License Application

Status: Complete

Assignee: Michael Boudreau

Became Active: Nov 1, 2023

Completed: Nov 6, 2023

Applicant

Arthur Pearlman
ampesq8@gmail.com
P.O. Box 2507
Framingham, MA 01703-2507
508-875-1500

Primary Location

56 EAST CENTRAL ST
Natick, MA 01760

Owner:

Chrono Realty Two LLC
14 Hartford Street Dover, MA 02030

Comments

Michael Boudreau, Nov 1, 2023

Contact the Board of Health to apply for any food permit



ALC-75

Site Plan Review

Alcohol License Application

Status: Complete

Became Active: Feb 21, 2024

Assignee: Amanda Loomis

Completed: Feb 21, 2024

Applicant

Neel Patel
neelp373@gmail.com
210 cedar st
holliston, ma 01746
508-734-0084

Primary Location

56 EAST CENTRAL ST
Natick, MA 01760

Owner:

Dean Chronopoulos

Comments

Amanda Loomis, Feb 21, 2024

Parcel 44-347348 is located within the Downtown Mixed (DM) Zoning District, per Section V-D.3.e) of the Zoning Bylaw off-street parking for this use is not required ("Within the DM District, 1 space for each five hundred (500) square feet of gross floor area, except that where the use is located on the first floor there is no minimum parking requirement").

Request for consideration - please requesting the owner of the property inspect the three existing light poles and fixtures on-site. Due to the condition they should be inspected for structural integrity, stability of bases/attachments/material, and are in overall good working condition. Further, if replacement is required, please add light shields to prevent light spill into abutters windows when in use.

Please consider the installation of bicycle racks on the property. Such bicycle parking spaces should not be located within off-street parking spaces, walkways, or travel lanes (this includes the rack and bicycle when attached to rack).

thank you amanda

AS-BUILT PLAN- NOT FOR CONSTRUCTION

Hare Ram Corp Product List:

The following is a proposed product list for Wine and Malt Beverage Application, including other grocery items proposed to be included in the store.

Grocery Items

- Applegate Farms Honey Maple Turkey - UNFI
- Applegate Farms Black Forest Ham - UNFI
- Applegate Farms Charcuterie Plates - UNFI
- Baba Small Batch Avocado Cilantro Hummus - UNFI
- Chino Valley Eggs - UNFI
- Core Foods Blueberry Banana Bar - UNFI
- Dalci Lemon Coconut Blondie - UNFI
- Earth Balance Buttery Sticks - UNFI
- Follow Your Heart American Slices - UNFI
- Hail Merry Dark Chocolate - UNFI
- Harmless Harvest Raw Coconut Water - UNFI
- Honey Farms Coffee Nib Crunch Bar - UNFI
- Joolies Dark Chocolate Dates - UNFI
- Kalona French Onion Dip - UNFI
- Kevita Mojito Lime Mint Coconut - UNFI
- Koia Protein Coffee - UNFI
- Melt Buttery Spread - UNFI
- Wild Tonic - UNFI
- Alvarado Bakery Sprouted Sourdough - UNFI
- Betterbrand Bagels - UNFI
- Aloha Himalayan Salt - UNFI
- Bees spices Crushed Chili - UNFI
- Black Jewell Popcorn - UNFI
- Fever Tree Tonic - UNFI
- La Croix - UNFI
- Late July Snacks Tortilla Chips - UNFI
- Lily Hazelnut Chocolate Bar - UNFI
- Maine Root Root Beer - UNFI
- Liquid Death - UNFI
- Popcorn Indiana - UNFI
- Pretzel Crisps - UNFI
- Rhythm Sea Salt Carrot Sticks - UNFI
- Rise Brewing Vanilla Oat Milk - UNFI
- Sahale Snacks Maple Pecans - UNFI
- San Pellegrino = UNFI
- Simply Gum Spearmint - UNFI

- Skinnypop - UNFI
- Spicely Organics Garlic Powder - UNFI
- Spicely Organics Ground Mustard - UNFI
- Taza Chocolate - UNFI
- Theo Chocolate Peppermint Crunch - UNFI
- Unique Pretzels - UNFI
- Pork Pepper and Fennel Salami - Mable
- Bacon Sausage Hickory and Applewood - Mable
- Chicken Meatballs - Mable
- Bluetick Bourbon Bratwurst - Mable
- Blue Bourbon Burgers - Mable
- Bluestick Bourbon Hot Dogs - Mable
- Naked Bacon - Mable
- Jowl Bacon - Mable
- Nashville Hot Chicken Sausage - Mable
- Big Bluff Organic Chicken Legs, Thighs - Mable
- Pancetta Pork Belly - Mable
- Grass Fed Sirloin 12oz - Mable
- Wild Cod River Salmon - Mable
- Grain Fed Tenderloin (Filet Mignon) - Mable
- Grass Fed Flank Steak - Mable
- Grass Fed Ribeye - Mable
- Goat Milk Grumpy Cheese - Mable
- Blue Kase Cheese (Bleu Cheese) - Mable
- Handmade Dipped Ricotta Cheese - Mable
- Jalapeno Pepper Cheese - Mable
- Smoked Farmstead Gouda - Mable
- Fresh Chevre Herbal - Mable
- Mouco Cheese - Mable
- Everything Bagel Gouda - Mable
- Gluten Free Oat Bread - Mable
- Sourdough Dam Good English Muffins - Mable
- Soft Brioche Baguette - Mable
- Gourmet Wafers Simply Natural - Mable
- Beer Breads Classic - Mable
- Plain Jane Peanut Butter - Mable
- Strawberry Rhubarb Jam - Mable
- Maine Wild Blueberry Jam - Mable
- Assorted Nuts Butter - Mable
- Vermont Maple Cream - Mable
- Water Cases, Milk - New England Farms
- Meats - Arena Butchers
- Sandwich Rolls, Sliced Bread - Boston Artisan Bread
- Winfrey Fudge, Williamson Brothers Barbeque Sauce and Spice - Boston Artisan Breads

- Biron Herbal Tea's, Hawiaan Paradise K-Cups - Boston Artisan Breads
- Karma Coffee Beans - Karma Coffee
- Coffee Blends, Flavored, Espresso's - Red Barn Coffee
- Q's Nuts Boston - Faire
- Dried Peppers, Dried Mushrooms, Nuts, De Cecco Pasta - Katsiroubas Bros
- Meats - Dom's Boston Original Steak Tips
- Sausages - DePasquale
- Fresh Herbs, and Fruits - Armata Fruit and Produce
- Honey - Boston Honey Company
- Bitter's From Boston Bittahs - Craft Beer Guild
- Cakes, Pie, Pastries - Montilio's Bakery

France

Bordeaux

- Château d'Issan Moulin d'Issan Bordeaux Supérieur - Tauton
- Château Smith Haut Lafitte - Tauton
- Chateau Grand Billard - Ideal Wine
- Château de Pez Saint-Estephe - Ruby Wine
- Château La Bernede Grand Poujeaux Moulis-en-Medoc - Wine Imports
- Château Haut-Bailly - Wine Imports
- Chateau Tire Pe Diem Bordeaux - Olmstead Wine
- Chateau Croizet-Bages La Gabare de Croizet-Bages Pauillac - Wine Imports

Burgundy

- Domaine Celine & Frederic Gueguen Chablis Cuvee 1975 - Ideal Wine
- Jean-Marc Burgaud Morgon Cote du Py James - Ideal Wine
- Jean-Marc Burgaud Morgon Les Charmes - Ideal Wine
- Louis Jadot Domaine des Heritiers Beaune Cru Clos des Couchereaux - Horizon
- Domaine Thierry Hamelin Petit Chablis - Wine Imports
- Domaine Bachelet-Monnot Bourgogne Rouge - Ruby Wines
- Joseph Drouhin Cote de Beaune - Martignetti
- Alex Gambal Bourgogne Cuvee Les Deux Papis Pinot Noir - Ruby Wines

Champagne

- Champagne Sebastien Girost Champagne Brut Reserve - Ideal Wine
- Champagne Palmer Brut Reserve - Martignetti
- Caze-Thibaut Naturellement Extra Brut - Vineyard Rose
- Moutard Pere et Fils Grande Cuvee Brut - Vineyard Rose
- Champagne Lacourte-Godbillon Champagne Terroirs D'Ecueil - Wine Imports
- Veuve Clicquot Brut Yellow Label Champagne - Martignetti

Loire Valley

- Pascal Jolivet Sancerre Blanc - MS Walker
- Sager & Verdier Sancerre - Ruby Wines
- Domaine Daniel Crochet Sancerre Blanc - Wine Imports
- Olga Raffault Chinon Les Picasses - Martignetti
- Domaine de la Perruche Saumur-Champigny - 21st Century Wine

Provence

- Chateau d'Esclans Cotes de Provence Rock Angel Rose - Martignetti
- The Pale Rose - Martignetti
- Wolffer Estate Cotes de Provence Summer in a Bottle Rose - MS Walker
- Mathilde Chapoutier Cotes De Provence Sainte Victoire Rose - Horizon

Rhone Valley

- Marc Kreydenweiss Les Grimaudes Costieres de Nimes - Wine Imports
- Jaboulet Cornas Les Grandes Terrasses - Atlantic Distributors
- M. Chapoutier Chateauneuf-du-Pape La Bernardine - Hangtime Wholesale Wine
- Caves de Gigondas Gigondas L'Hallali Grande Reserve - Tauton
- Cellier des Princes Chateauneuf-du-Pape Le Blason du Prince - Tauton

Italy

Abruzzo

- Masciarelli Marina Cvetic Montepulciano d'Abruzzo Riserva - Martignetti
- Boccantino Montepulciano d'Abruzzo - 21st Century
- Terra d'Aligi Montepulciano D'Abruzzo - Horizon
- Cantina Tollo Cagiolo Montepulciano d'Abruzzo Riserva - Grapevine
- Villa Barcaroli Montepulciano d'Abruzzo Draco Riserva - Terrior Wine

Marche

- Col Di Corte Verdicchio dei Castelli di Jesi Anno Uno Verdicchio - Mucci Imports
- Pievalta Verdicchio dei Castelli di Jesi Tre Ripe Classico Superiore - MS Walker
- La Monacesca Verdicchio di Matelica - Taunton
- Col Di Corte Marche Sant'Ansovino ROSSO - Mucci Imports
- Andrea Felici Vigna Il Cantico della Figura - Ideal Wine

Piemonte

- Piazza Barbera d'Alba DOC - Ruby
- Castello di Neive Piemonte Metodo Classico - MS Walker
- Coppo Piemonte Chardonnay Costebianche - Tauton
- Mura Mura Piemonte Bianca - Taunton
- Roberto Voerzio Barbera d'Alba Il Cereto - Italian Wine Traders
- Mauro Molino Barolo Gallinotto - Atlantic Beverage

Tuscany

- Borro Toscana Rosso IGT - Ruby Wine
- Casanova di Neri Brunello di Montalcino DOCG - MS Walker
- Castellare Il Poggiale Chianti Classico Riserva - MS Walker
- Castello Banfi Rosso di Montalcino DOC - Horizon Beverage
- Poggione Brunello di Montalcino DOCG - Martignetti
- Verbenà Brunello Di Montalcino DOCG - 21st Century Wine
- Tenuta Col d'Orcia Poggio Al Vento Brunello di Montalcino - Ruby Wines

Veneto

- Zenato Amarone della Valpolicella Classico DOCG - MS Walker
- Venica & Venica Ronco del Cero Collio Sauvignon Blanc DOC - Vineyard Road
- Senica & Venica Ronco del Cero Collio Sauvignon Blanc DOC - Ruby Wines
- Italo Cescon Madre Veneto Manzoni Bianco - Wine Imports
- Sassara Vini Delle Morene Misia Vind de Ua Veneto IGT - Olmstead

United States

California (Napa Valley)

- Bound and Determined Cabernet Sauvignon - Ruby Wines
- RouteStock Cabernet Sauvignon - Martignetti
- Charles Krug Merlot - Martignetti
- Duckhorn Vineyards - Martignetti
- Groth Napa Valley Sauvignon Blanc - Ruby Wine
- Vineyard 29 Cru Cabernet Sauvignon - MS Walker
- Long Meadow Ranch Cabernet Sauvignon Napa Valley - MS Walker
- Beringer Private Reserve Chardonnay - Ruby Wine
- AXR Chardonnay - Tauton
- Buoncristiani Chardonnay - Tauton

California (Paso Robles)

- Brady Syrah - Grapevine
- Brady Zinefinedal - Grapevine
- J Lohr Cuvee POM - Ruby Wine
- Acacia Vineyard Chopping Block Paso Robles - Taunton

California (Sonoma Valley)

- Cobb Wines Sonoma Valley Pinot Noir Rice-Spivak - MS Walker
- Hanzell Pinot Noir Sebella Sonoma Valley - Ruby Wine
- Gehricke Sonoma Valley Petite Sirah - Horizon
- Amapola Creek Estate Bottled Proprietary Red Wine Sonoma Valley - Horizon

California (Russian River)

- Siduri Russian River Valley Pinot Noir - MS Walker
- Capioux Cellars Pinot Noir Starscape Vineyard Russian River Valley - Horizon
- La Follette Black Road Vineyard Pinot Noir - Ruby Wine
- Freeman Ryo-Fu Chardonnay - MS Walker
- Davis Family Vineyards Cuvee Luke White - Ruby Wine
- Jonive Chardonnay - Martignetti
- Vaughn Duffy Wines Sauvignon Blanc Russian River Valley - Terrier Wine

Spain

Rioja

- Bodegas Muga Reserva Rioja DOC - Martignetti
- Faustino I Gran Reserva Rioja DOCa - Ruby Wines
- Milenrama Rioja Riserva - Ideal Wine
- Abel Mendoza 5V - Wine Trust

Castilla Leon

- Bodegas Emilio Moro Ribera del Duero Tempranillo Finca Resalso - Ruby Wine
- Bodegas Penafiel Ribera del Duero Mironia Black Edition - Wine Trust
- Bodegas Ismael Arroyo ValSotillo Ribera del Duero Crianza - Wine Selection

New Zealand

- Sea Pearl Sauvignon Blanc - Ruby Wine
- The Marlborist Grande Sauvignon - Tauton
- Hillersden Fume Blanc Reserve Marlborough - Wine Trust
- Mount Fishtail Sauvignon Blanc Sur Lie Marlborough - 21st Century
- Henri Bourgeois Pinot Noir Waimaunga Windblown Vineyard - Ideal Wine
- Cloudy Bay Te Koko Sauvignon Blanc - Martignetti
- O'dwyers Creek Chardonnay Marlborough - Tauton

ITEM TITLE: Financial Updates

ITEM SUMMARY:

- Quarterly Update
- DLS Report Progress
- ARPA Spending Plan

ATTACHMENTS:

Description	Upload Date	Type
FY24 Q1-2 Quarterly Report v.4	3/6/2024	Exhibit

FY 2024 Q1-Q2 Quarterly Review



Town of Natick
March 6, 2024



Agenda:

Economic Analysis

- Inflation
- Unemployment
- Interest Rates

Financial Quarterly Review

- General Fund
- Water & Sewer
- Sassamon Golf Trace

Important Updates

- DLS Action Plans Update
- ARPA Spending Plan Update



Economic Analysis: Consumer Price Index - Inflation

Boston Metro Area Inflation

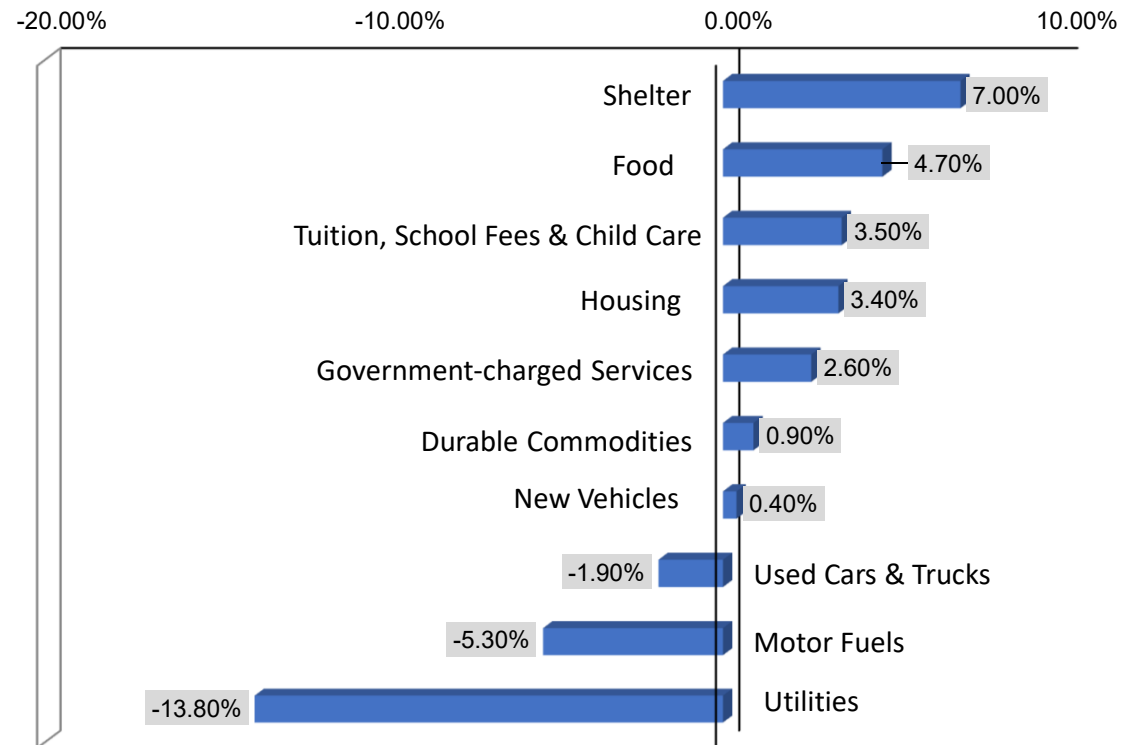
2.0%

Previous 12-month: 6.4%

Key Takeaways:

- Inflation eased again in January, with a 2.0% gain from the prior 12-month
- Food, Housing and Education costs have taken the lead in the increase
- Energy, Utilities and Used Cars & Trucks experienced drops
- Average Nationwide Inflation: 3.1%, which is close to Fed's 2% target, leading to potential rate cuts in mid of the year

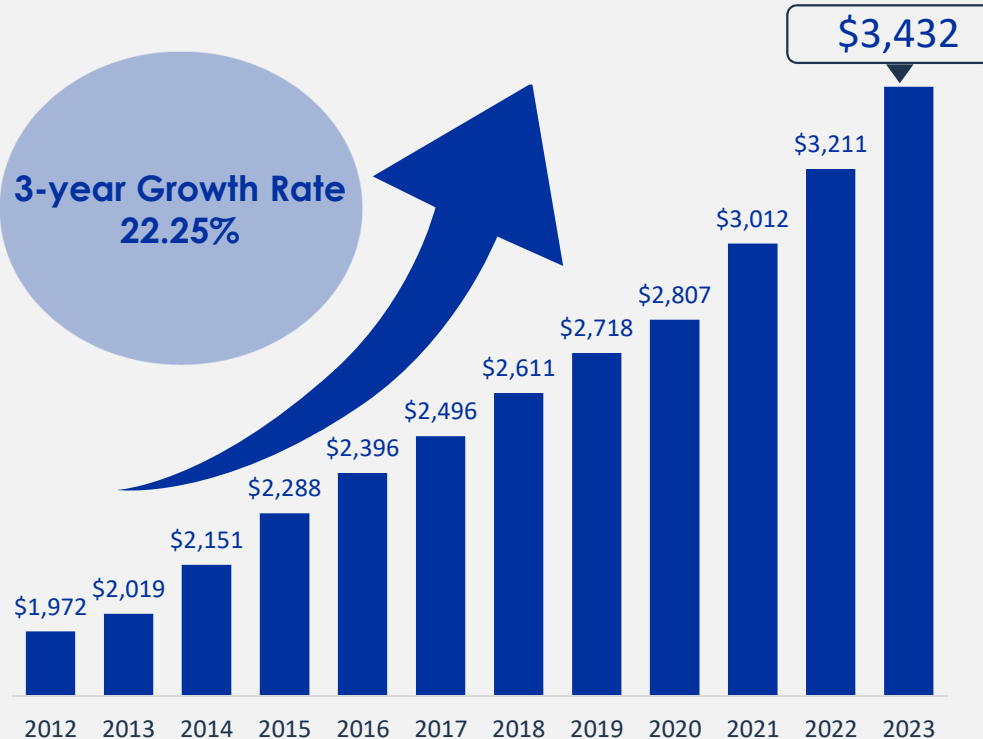
Boston Metro Area 12-month CPI (as of Jan. 2024)



Source: U.S. Bureau of Labor Statistics

HealthCare Cost: +6.87% 2023 VS. 2022

Health Insurance Expenses Per Capita



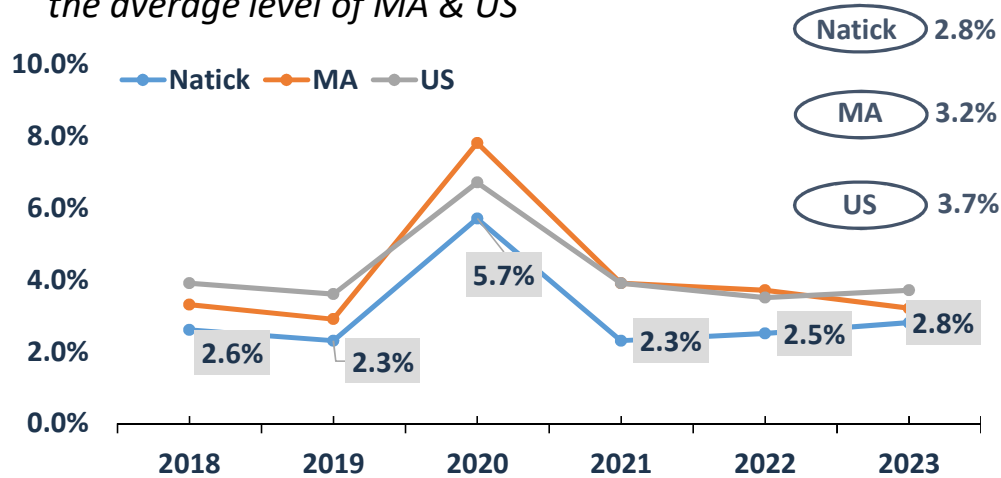
Source: "National Health Spending Explorer" – Peterson – KFF Health System Tracker

Key Takeaways:

- **HealthCare Costs have increased significantly post-COVID.**
 - Pre COVID 3-year AVG. Growth: 4.00%
 - Post COVID 3-year AVG. Growth: 6.93%
- **As HealthCare Costs have increased, consumers spending have also jumped as insurers pass costs onto employees & employers by increasing:**
 - Premiums
 - Consumer cost-sharing
- **Much of the recent rapid increase has been driven by escalating prices, instead of the use of health care services**

Unemployment Rate

Natick's Unemployment Consistently stays below the average level of MA & US



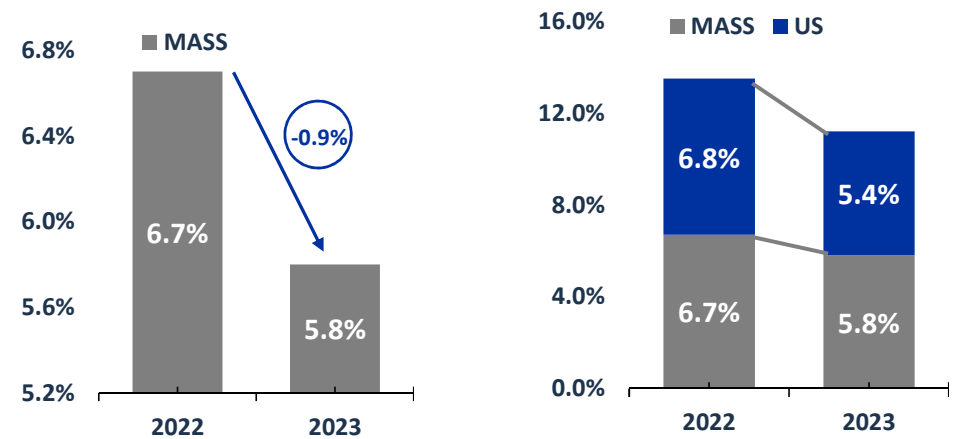
Source: Mass Executive Office of Labor and Workforce Development

Key Takeaways

- Unemployment Rate remains significant lower than the COVID year
- A mild upticking trend is seen during 2023

Job Openings & Labor Turnover

Mass. Job Openings rate exceeds Average Nation Level



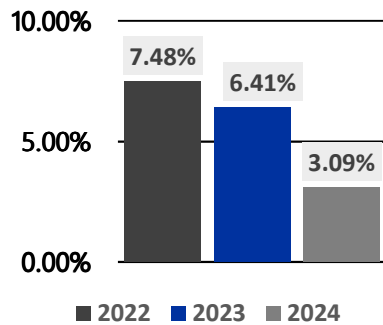
Source: U.S. Bureau of Labor Statistics

Key Takeaways

- Job Openings Rate experienced a moderate decrease from 2022-2023
- With the pressure of high interest rates, job market is expected to cool down

Economic Analysis: Interest Rates Outlook

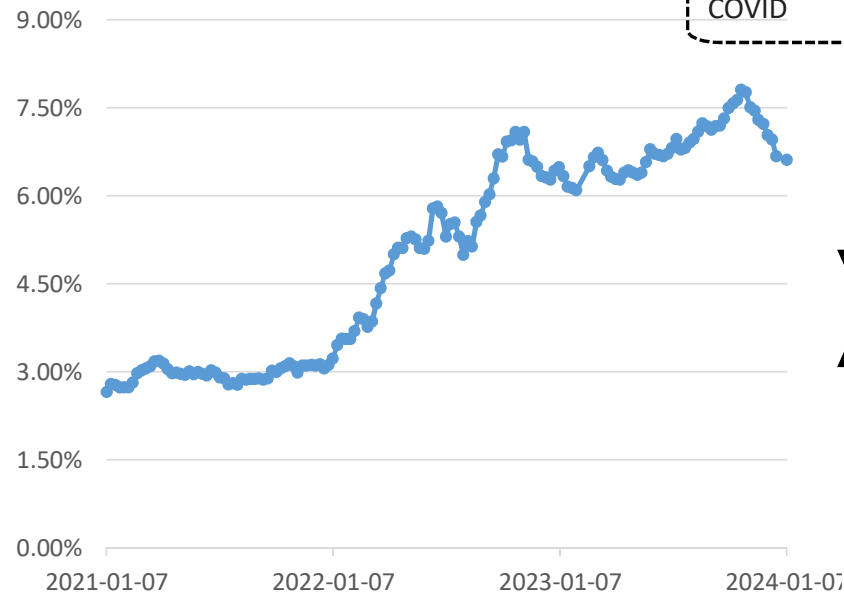
1 Disinflation during 2023



Cooling-down Inflation

- Inflation has reached 40-year peak of 9.06% in June 2022
- To tame inflation, Fed increased the rates by 11 times – totaling 5.25%
- Gradual disinflation reflected the impact of Fed's actions

2 Interest Rates Over Time



- Inflation Close to Fed's Target
- Potential Interest Rate Cuts from Mid 2024



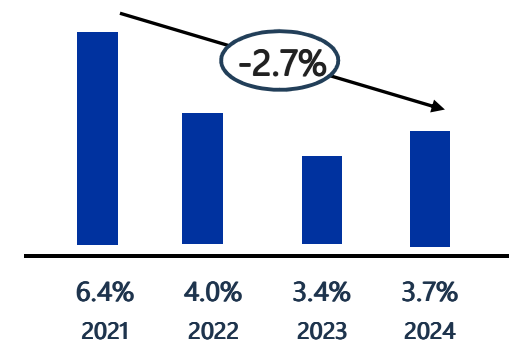
3 Economy Soft-landing

Without the widely anticipated rise in Unemployment or even recession, Fed raised the interest rates to keep inflation from raising.

Employment Measures

- Unemployment Rate: 3.2%
- Job Openings & Labor Turnover Rate: 5.8%

Unemployment Rate Over Time



Inflation

Interest Rates

Unemployment



Potential Cuts on Interest Rates

Capital Financing:

- **One-time Funding** is preferred under the rate-cut environment
- **Short-term Note** is more of a favor than long-term Bond to avoid locking in the high rates
- **Investment Income:** Trust Funds' Stock Investment anticipated to grow

Inflation - Expenses



- **Energy:** easing inflation has put great relief in budget increase of energy costs

+2% VS. +11%

Energy/Utilities Budget Increase %: FY25 VS. FY24

- **HealthCare Cost:** continues to see aggressive increases on active & senior plans

+19.5%

Two-year Growth Rate for Active Employee's Health Plans

- **Other Supplies:** Inflationary Effect on supplies budget has cooled down

Inflation - Revenues



- **Motor Vehicle Excise Tax:** Continued inflationary pressure, may lead to decreasing demand
- **Hotel/Motel Tax:** High inflation may cool down the market
- **Meals Tax:** With stable demand level, rising meals price likely results in more collection

Unemployment



- **Vacancy:** slightly trending-up unemployment marks the softened job market, which helps with filling vacancies

Quarterly Review: Introduction

General Fund Revenues

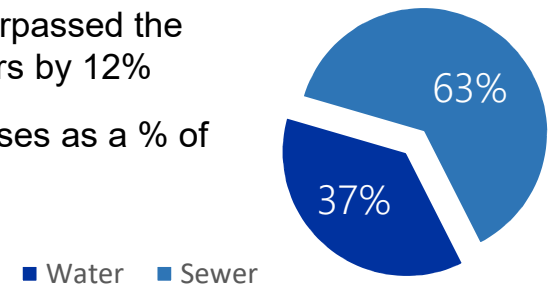
- Tax Levy & State Aid on the right track of collection
- Local Receipts % of Target exceeds historical level by 5%



Water & Sewer Fund

- Revenues surpassed the prior two years by 12%
- Actual Expenses as a % of Budget: 42%

User Charges Categories



General Fund Expenses

- Departmental Spending Pace remains at the historical level
- 2. Department Heads take conservative approach in spending

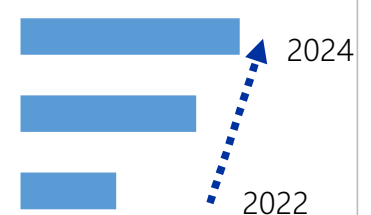
Actual VS. Budget



Sassamon Golf Trace Fund

- Revenues exceeded FY23 Revenues without Subsidies by 4%
- Spending level stays consistent as prior years

Revenues w/o Subsidies



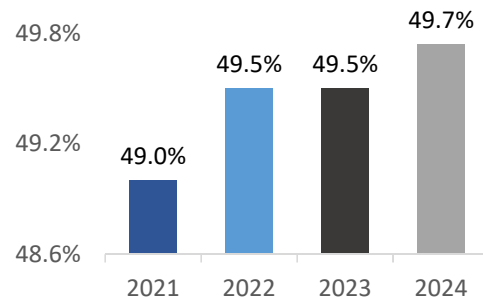


Quarterly Review: Revenues

Tax Levy
\$70.05 M

**% Change from
Prior Year**
+4.33%

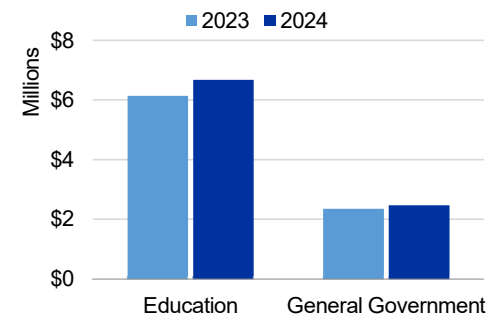
Actual as % of Projection



State Aid
\$9.13M

% of Target
49.82%

State Aid Breakdown



Major Revenue Sources



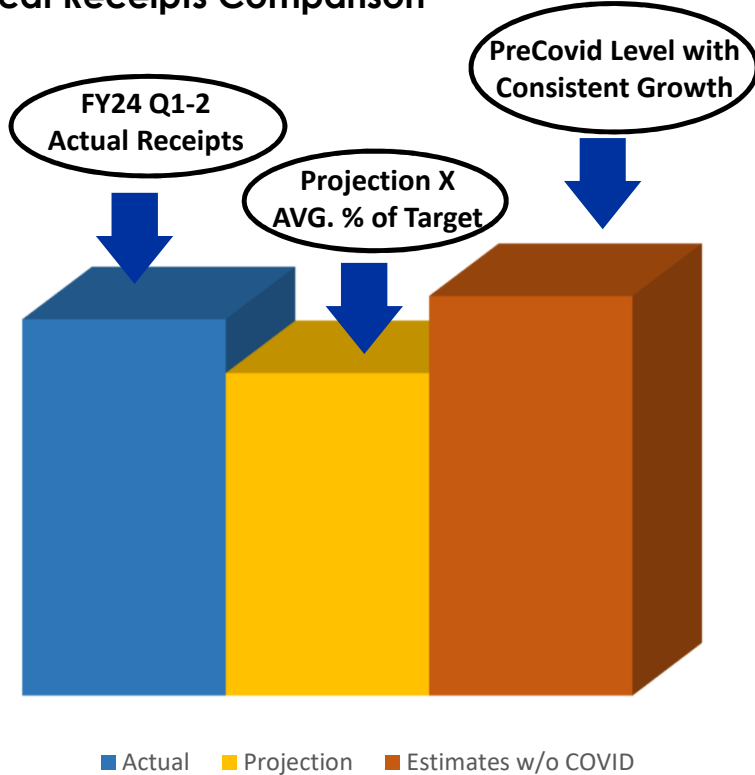
Key Takeaways:

- Major Revenues include Tax Levy, State Aid and Local Receipts
- As of FY24 Q2, Major Revenues have hit 49% of the whole-year projection – right track of collection
- Collection fluctuates each month based on billing schedules (RE Tax, PP Tax, MV Tax)

Quarterly Review: Local Receipts

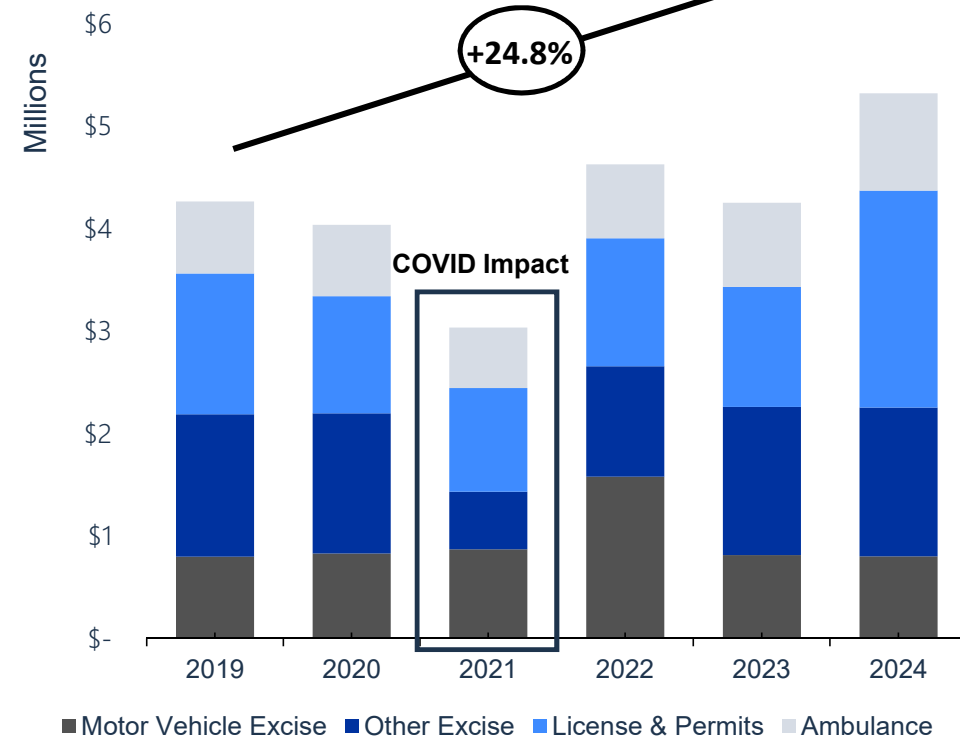
- Q2 reached 49.02% of whole-year Target, 6% higher than PreCovid % of Target
- Actual surpassed Projection by 16% but still underperformed the Estimate without COVID by 6.2%

1 Local Receipts Comparison



- ✓ Substantial increase due to fee adjustments of License & Permits
- ✓ Ambulance receipts grew by 35% due to activity level & fee adjustments
- ✓ Other Excise shrank during COVID and is now back to normal

2 Local Receipts Model – primary sources





Quarterly Review: Revenues Breakdown

AS OF 12/31/2023	FY 2024 Q1&Q2 Actual	% of whole -year Target	% CHANGE from FY2023 Q1&Q2
Tax Levy	\$ 70,054,769	49.74%	4.33%
State Aid	\$ 9,133,639	49.82%	7.77%
Local Receipts	\$ 7,968,525	49.02%	38.83%
Motor Vehicle	\$ 801,406	14.84%	-1.39%
Other Excise Taxes	\$ 1,451,192	55.69%	0.42%
Penalties & Interest Taxes/Excise	\$ 191,506	46.58%	23.71%
Payment in Lieu of Taxes	\$ -	0.00%	
Trash Disposal Charges	\$ 639,684	49.65%	-4.03%
Police Special Duty	\$ 22,774	50.61%	-12.06%
Ambulance Fees	\$ 948,928	52.72%	15.38%
Rentals	\$ -	0.00%	
Recreation	\$ 64,000	49.81%	-33.51%
Other Departmental Revenues	\$ 307,969	55.16%	-10.16%
License/Permits	\$ 2,115,668	80.78%	81.04%
Special Assessments	\$ -	0.00%	
Fines/Forfeits	\$ 40,945	53.88%	-28.44%
Investment Income	\$ 862,000	107.75%	195.56%
Miscellaneous Recurring	\$ 257,669	51.53%	204.38%
Miscellaneous Non-recurring	\$ 264,783	0.00%	503.85%
TOTAL	\$ 87,156,932	49.68%	7.11%

Motor Vehicle Tax

Q1-2 Receipts are all from the Prior Year

- Town usually expects more income during the second half of the fiscal year based on Billing Schedule

Other Excise Taxes

Including Hotel/Motel Tax, Meals Tax and Cannabis

- Meals Tax: remains the same level as FY23 Q1-2
- Hotel Excise Tax: 3.5% growth from FY23 Q1-2
- Cannabis Tax anticipated to close between \$80K-100K

License & Permits

New rates in effect from Jul. 2024

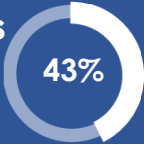
- Q2 has reached 81% of the whole-year target
- License & Permits expected to hit 140% of the projection by year-end



Quarterly Review: Expenses



Town Expenses
\$18.97M



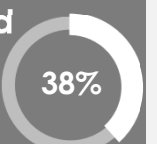
School Expenses
\$32.37M



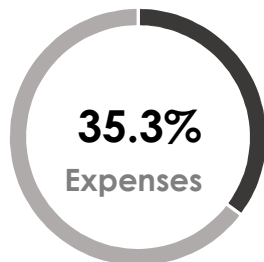
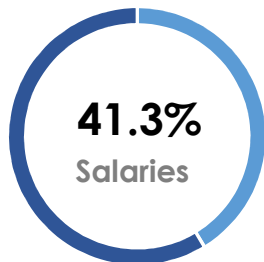
Shared Expenses
\$18.84M



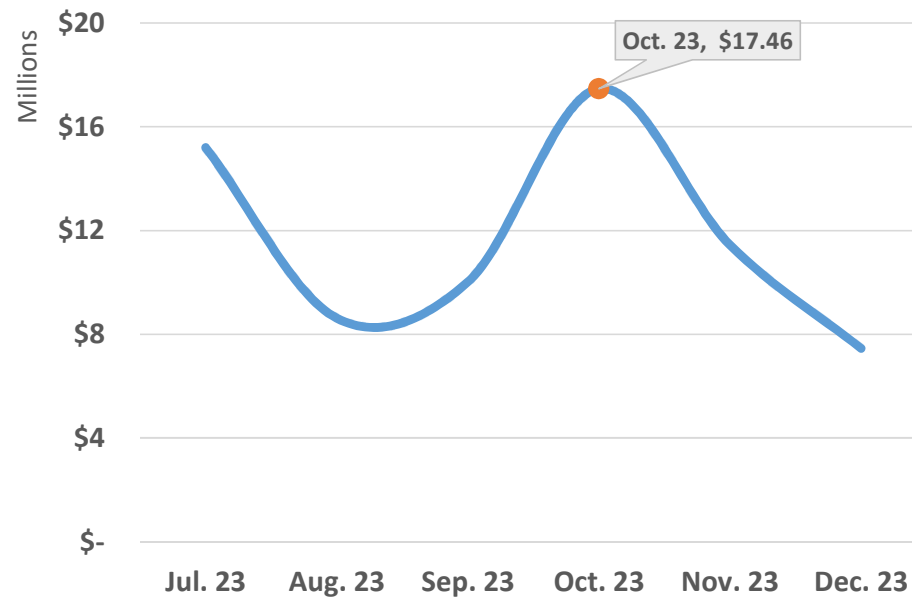
Total General Fund
\$70.18M



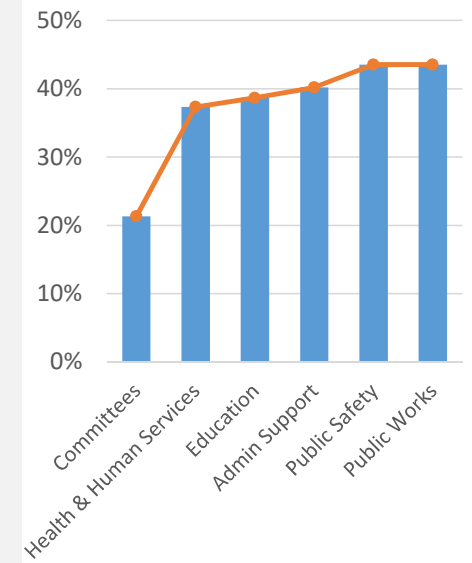
Spending Categories



General Fund Expenses



Actual % of Budget by Dept.





Quarterly Review: Expenses Breakdown

	FY 2023 Actual	FY 2023 Budget	%	FY 2024 Actual	FY 2024 Budget	%
Natick Public School	\$ 29,373,638	\$ 79,000,000	37.18%	\$ 31,842,462	\$ 83,279,134	38.24%
Keefe Tech	\$ 570,551	\$ 1,141,089	50.00%	\$ 531,747	\$ 1,063,493	50.00%
Libraries	\$ 1,204,328	\$ 2,714,666	44.36%	\$ 1,308,254	\$ 2,771,561	47.20%
Public Safety	\$ 8,445,140	\$ 19,878,282	42.48%	\$ 8,548,550	\$ 19,650,190	43.50%
Public Works	\$ 4,506,217	\$ 9,892,523	45.55%	\$ 4,721,073	\$ 10,844,515	43.53%
Health & Human Services	\$ 985,537	\$ 2,915,345	33.81%	\$ 1,091,064	\$ 2,924,672	37.31%
General Admin	\$ 3,268,898	\$ 7,647,902	42.74%	\$ 3,273,913	\$ 8,144,660	40.20%
Committees	\$ 3,236	\$ 117,550	2.75%	\$ 25,026	\$ 117,550	21.29%
Shared Expenses	\$ 17,311,867	\$ 50,620,531	34.20%	\$ 18,842,658	\$ 54,312,396	34.69%
Total General Fund Operating Expenses	\$ 65,669,412	\$ 173,927,888	37.76%	\$ 70,184,747	\$ 183,108,171	38.33%

Key Takeaways:

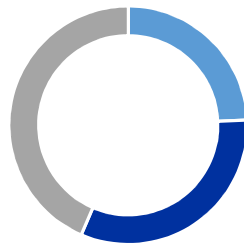
- Department Heads are taking conservative approaches in spending
- The spending pace remains the same level as the FY23 Q1-2
- Shared Expenses actual is 35% of the total budget, mainly due to the payment schedule of Debt Services

Quarterly Review: Enterprise Funds

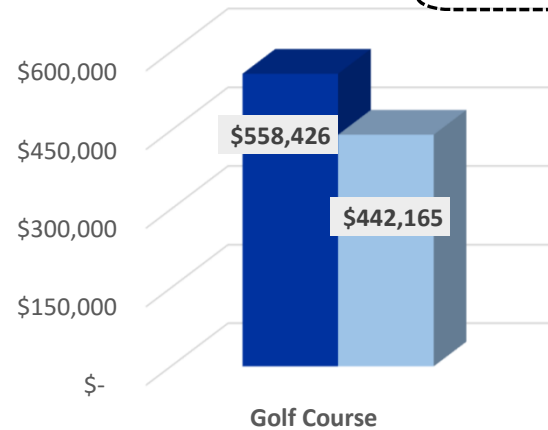
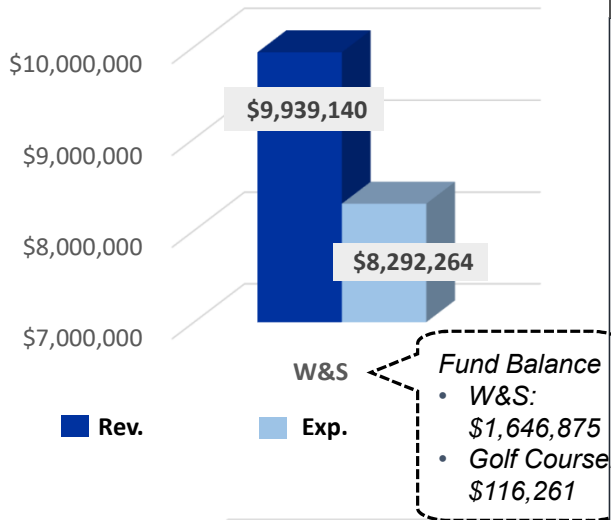
Water & Sewer Enterprise Fund

1. **Revenues** \$9,939,140 collected, the primary sources are Water User Charges and Sewer User Charges
2. **Operating Expenses** \$2,736,840 expended, reflecting a 23% of the whole-year budget
3. **Shared Expenses** Actual spending of \$2,111,653, representing 47% of the budget

Actual Spending



■ Salaries ■ Operating Expenses ■ Shared Expenses

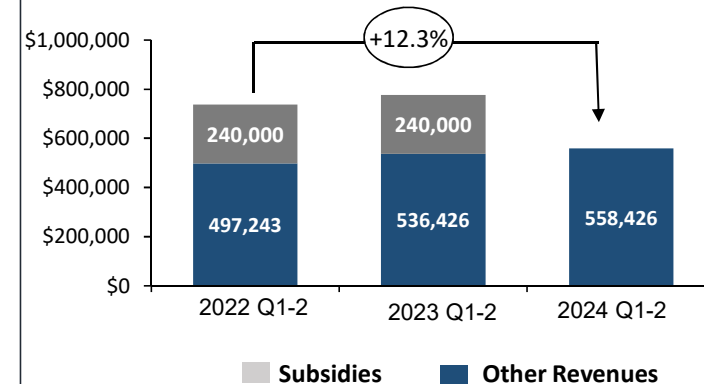


Sassamon Golf Course Enterprise Fund

FY2024 is the first year without subsidies from General Fund.

- ✓ **Revenues** increased by 4% from last year
- ✓ **Operating Expenses** reached 50% of the whole-year budget
- ✓ **Shared Expenses** hit 38.6% of the budget, due to the payment schedule of Debt Services

Revenues w/o Subsidies % Increase



Important Updates: DLS Action Plans Update

DLS Report Updates

Policies & Procedures



Revenue Receipts & Turnover

- Drafting  02-24-24
- Testing  03-04-24
- Training  03-(18-29)-24
- Implement  04-01-24






Accounts Payable

- Drafting  10-25-23
- Testing  02-20-24
- Training  04-01-24
- Implement  05-01-24







Payroll

- Drafting  12-21-23
- Testing  01-15-24
- Training  04-01-24
- Implement  06-01-24



Cash Management

- Drafting  07-05-23
- Testing  08-01-24
- Training  08-15-24
- Implement  09-01-24

Office & Staff



Finance Department:

- Close to the public third Friday of the month
- Training and work overflow



Staffing

- Existing Finance Coordinator Position to Finance Office
- Available to all Finance Offices



Space Reconfiguration



Important Updates: ARPA Spending Plan Update

Item	Estimate	July 2021 - June 2022	July 2022 - June 2023	July 2023 - June 2024	July 2024 - June 2025	July 2025 - June 2026	Allowable Use Category
Director of Inclusion, Equity and Outreach	\$ 300,000	\$ -	\$ 60,000	\$ 90,000	\$ 90,000	\$ 60,000	Address Negative Economic Impact
Facilities upgrades to HVAC Systems	\$ 325,250	\$ -	\$ 325,250	\$ -	\$ -	\$ -	Infrastructure
Public Safety - Advocate Clinician	\$ 100,000	\$ -	\$ 50,000	\$ 50,000	\$ -	\$ -	Public Health Expenditure
Town Revenue Recovery	\$ 6,625,591	\$ -	\$ 2,474,734	\$ 3,000,000	\$ 1,150,857		Address Negative Economic Impact
School Educational Response	\$ 1,624,750	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 624,750	Address Negative Economic Impact
Water/Sewer PFAS Upgrades	\$ 1,700,000	\$ 1,700,000	\$ -	\$ -	\$ -	\$ -	Invest in W/S Infrastructure
Cochichuate Rail Trail Extension	\$ 100,000						Infrastructure
ARPA TOTAL	\$ 10,775,591	\$ 1,700,000	\$ 2,909,984	\$ 3,140,000	\$ 2,240,857	\$ 684,750	

1

ARPA Summary

- Total Award Allocated: \$10,775,591.28
- Total Obligated Funds: \$10,575,591.28
- Total Cumulative YTD Expenditures: \$7,457,340.04

2

Key Updates

- Addition of the Cochituate Rail Trail Extension of \$100,000
- Addition of Revenue Replacement of \$25,591

What's Next

- Updated Forecast by Early April
- FY 2025 Amended Budget Book by April
- Expected updates for Healthcare Costs
- FY 2025 Budget Public Forum – Date TBD



ITEM TITLE: Consider 2024 Spring Annual Town Meeting Warrant Articles

ITEM SUMMARY:

- Article 15 - Amend Town of Natick By-Laws: Article 42
- Article 18 - Adopt Specialized Energy Code

ATTACHMENTS:

Description	Upload Date	Type
Article 18 - Draft Questionnaire	3/4/2024	Cover Memo
Article 18 - Presentation	3/7/2024	Cover Memo

Warrant Article Questionnaire Non-Standard Town Agency Articles

Section III – Questions with Response Boxes – To Be Completed By Petition Sponsor

Article # 18	Date Form Completed: 3/4/24
Article Title: Adopt Specialized Energy Code	
Sponsor Name: Select Board and Net Zero Committee	Email: Ann Lentell, annlentell@gmail.com , and Jillian Wilson Martin, jwmartin@natickma.org

Question	Question
1	Provide the article motion exactly as it will appear in the Finance Committee Recommendation Book and presented to Town Meeting for action.
Response	See pages 4-5
2	At a summary level and very clearly, what is the proposed purpose and objective of this Warrant Article and the accompanying Motion?
Response	<p>The sponsors seek adoption of the Specialized Code, an energy code for new construction, that is designed to ensure new buildings are consistent with Natick and the Commonwealth's net zero goals. A presentation detailing the code and its benefits is attached.</p> <p>The Motion is consistent with state-provided language to adopt the Specialized Code and has been adopted by 32 communities.</p>
3	Has this article or one of a very similar scope and substance been on a previous Warrant Article and what have been the actions taken by the Finance Committee, other Boards or Committees and Town Meeting?
Response	No. The Specialized Energy Code became available to municipalities to adopt in 2023. Since then, 32 communities have adopted the Specialized Energy Code.
4	Why is it required for the Town of Natick and for the Town Agency sponsor(s)?
Response	Per Massachusetts General Law, Towns must adopt the Specialized Code as a general bylaw through a vote of Town Meeting.
5	Does this article require funding, how much, from what source of funds and under whose authority will the appropriation be managed and spent?
Response	No, this article does not require funding, and does not have a cost impact on current homeowners or homebuyers of existing buildings. It applies to new construction homes only.

Warrant Article Questionnaire Non-Standard Town Agency Articles

6	<p>Does this article act in any way in concert with, in support of, or to extend any prior action of Natick Town Meeting, Massachusetts General Laws or CMR's or other such legislation or actions?</p> <p>Does this article seek to amend, rescind or otherwise change any prior action of Natick Town Meeting?</p>
Response	<p>It builds on Town Meeting's 2010 vote to adopt the Stretch Code and continues Town Meeting's intention to support strong energy requirements and consumer protections for new construction.</p> <p>The three available levels of MA energy codes build successively on one another, starting with the Base Code (Good), to the Stretch Code (Better) to the Specialized Code (Best). This means that the Specialized Code works in concert with the Stretch Code.</p> <p>It also advances Natick Town Meeting's 2018 Non-binding Resolution to Adopt a Greenhouse Gas Reduction Goal.</p>
7	<p>How does the proposed motion (and implementation) fit with the relevant Town Bylaws, financial and capital plan, comprehensive Master Plan, and community values as well as relevant state laws and regulations?</p>
Response	<p>At the state level, the development of the opt-in Specialized Code was mandated by state law (Climate Act of 2021), and is formulated to ensure new construction that is consistent with Massachusetts greenhouse gas limits and sub-limits set every five years from 2025 to 2050.</p> <p>At the local level, the proposed motion is directly in line with the 2018 Town Meeting Non-binding Resolution to adopt a net zero greenhouse gas emissions reduction goal and advances priorities identified in the 2021 Net Zero Action Plan, which:</p> <ol style="list-style-type: none"> 1) is the result of significant public outreach 2) was unanimously endorsed by the Select Board, School Committee and Planning Board, and 3) is regularly reported on at Town Meeting. <p>Further, Natick's greenhouse gas reduction goals mirror the Commonwealth's, meaning that new construction that is consistent with MA's greenhouse gas goals is also consistent with Natick's goals.</p>
8	<p>Who are the critical participants in executing the effort envisioned by the article motion?</p>
Response	<p>Sustainability Office and Community and Economic Development Office (Building Commissioner and Inspectors).</p>
9	<p>What steps and communication has the sponsor attempted to assure that:</p> <ul style="list-style-type: none"> • Interested parties were notified in a timely way and had a chance to participate in the process

Warrant Article Questionnaire Non-Standard Town Agency Articles

	<ul style="list-style-type: none"> • Appropriate Town Boards & Committees were consulted • Required public hearings were held
Response	<p>Ahead of Town Meeting, the Natick Net Zero Committee, in collaboration with the Wayland Energy and Climate Committee (which is also pursuing code adoption this spring), has led and is planning to lead a number of community engagement activities to educate the public and key stakeholders about the Specialized Energy Code.</p> <p>This includes: presentations to the Select Board on 8/30/23 and 3/6/24, School Committee on 2/27/24 and 3/3/24, Builders Forum on 3/12/24, and Economic Development Committee on 3/14/24. Town Meeting was also informed Natick would be exploring the new code during the Committee's annual Committee Report at the 2023 Spring Town Meeting.</p> <p>The Committee also has a series of public and community-group presentations scheduled or planned, including, but not limited to: Public Forum on 3/26/24; Coffee with a Purpose on 4/1/24; and Rotary Club on TBD.</p> <p>Should the Finance Committee have additional suggestions for community engagement, the Net Zero Committee is open to pursuing them.</p>
10	Since submitting the article have you identified issues that weren't initially considered in the development of the proposal?
Response	No.
11	If this Warrant Article is not approved by Town Meeting what are the consequences to the Town and to the sponsor(s)? Please be specific on both financial and other consequences?
Response	Natick will be unable to participate in the Climate Leaders program and will be ineligible for additional grant funding to support energy-related capital projects (opportunity cost of a minimum of \$200,00 per year). Other funding opportunities that will require Climate Leaders designation are expected, but details are not yet known.

Warrant Article Questionnaire Non-Standard Town Agency Articles

Article Motion

Article __

Amend By-Laws: Adopt Specialized Energy Code

Move that the Town replace Article 72B of the Town of Natick General By-Laws entitled “Stretch Energy Code” with the “Specialized Energy Code” pursuant to the entirety of 225 CMR 22 and 23, including Appendices RC 9 and CC, and future editions, amendments or modifications in substantially the form below:

Article 72B: Specialized Energy Code

Section 1: Definitions

Effective Date – July 1, 2025.

International Energy Conservation Code (IECC) – The International Energy Conservation Code (IECC), a building energy code created by the International Code Council. The baseline energy conservation requirements of the MA State Building Code are the IECC with Massachusetts amendments, as approved by the Board of Building Regulations and Standards and published in state regulations as part of 780 CMR.

Specialized Energy Code – Codified by the entirety of 225 CMR 22 and 23 including Appendices RC and CC, the Specialized Energy Code adds residential and commercial appendices to the Massachusetts Stretch Energy Code, based on amendments to the respective net-zero appendices of the International Energy Conservation Code (IECC) to incorporate the energy efficiency of the Stretch energy code and further reduce the climate impacts of buildings built to this code, with the goal of achieving net-zero greenhouse gas emissions from the buildings sector no later than 2050.

Stretch Energy Code – Codified by the combination of 225 CMR 22 and 231, not including Appendices RC and CC, the Stretch Energy Code is a comprehensive set of amendments to the International Energy Conservation Code (IECC) seeking to achieve all lifecycle cost-effective energy efficiency in accordance with the Green Communities Act of 2008, as well as to reduce the climate impacts of buildings built to this code.

Section 2: Purpose

The purpose of 225 CMR 22.00 and 23.00 including Appendices RC and CC, also referred to as the Specialized Energy Code is to provide a more energy efficient and low greenhouse gas emissions alternative to the Stretch Energy Code or the baseline Massachusetts Energy Code,

Warrant Article Questionnaire Non-Standard Town Agency Articles

applicable to the relevant sections of the building code for both new construction and existing buildings.

Section 3: Applicability

This energy code applies to residential and commercial buildings.

Section 4: Specialized Code

The Specialized Code, as codified by the entirety of 225 CMR 22 and 23 including Appendices RC and CC, including any future editions, amendments, or modifications, is herein incorporated by reference into the Town of Natick General Bylaws, Article 72B. The Specialized Code is enforceable by the inspector of buildings or building commissioner.



Article 18: Adopt Specialized Energy Code

Natick Net Zero Committee

March 6, 2024

Three Levels of MA Energy Codes Build Successively

Town Meeting Vote

*32 communities have already opted in
10 additional expected in 2024*

Specialized

IECC 2021
+ MA amendments
+ Stretch Code amendments
+ Specialized Code appendices
for new construction only

*300 communities
(including Specialized communities)*

Stretch

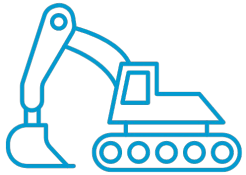
IECC 2021
+ MA amendments
+ Stretch Code amendments

50 communities

Base

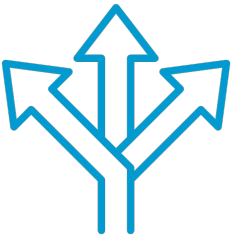
Int'l Energy
Conservation
Code (IECC) 2021
+ MA amendments

Specialized Code: The Basics



The Specialized Code applies to new construction only.

Renovations and alterations are not impacted



The Specialized Code facilitates, but does not require, the electrification of new buildings.

Multiple pathways to compliance are available (incl. fossil fuels-based homes)



We are proposing an effective date of July 1, 2025 in Natick.

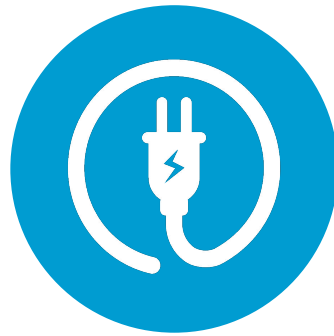
Provides builders more than one year notice before going into effect

Specialized Code: Key Features for New Construction



Exemplary performance for large homes

Homes greater > 4,000 conditioned square feet using mixed fuels must be all-electric or net zero energy



Pre-wiring for future electrification

Mixed fuel buildings (except multifamily and Passive House projects) must prewire



Solar arrays for buildings using mixed fuels

Mixed fuel buildings must install rooftop solar (with exemptions for shaded sites and Passive House)



Exemplary performance for large multifamily

Multifamily buildings >12,000 CSF must use Passive House pathway

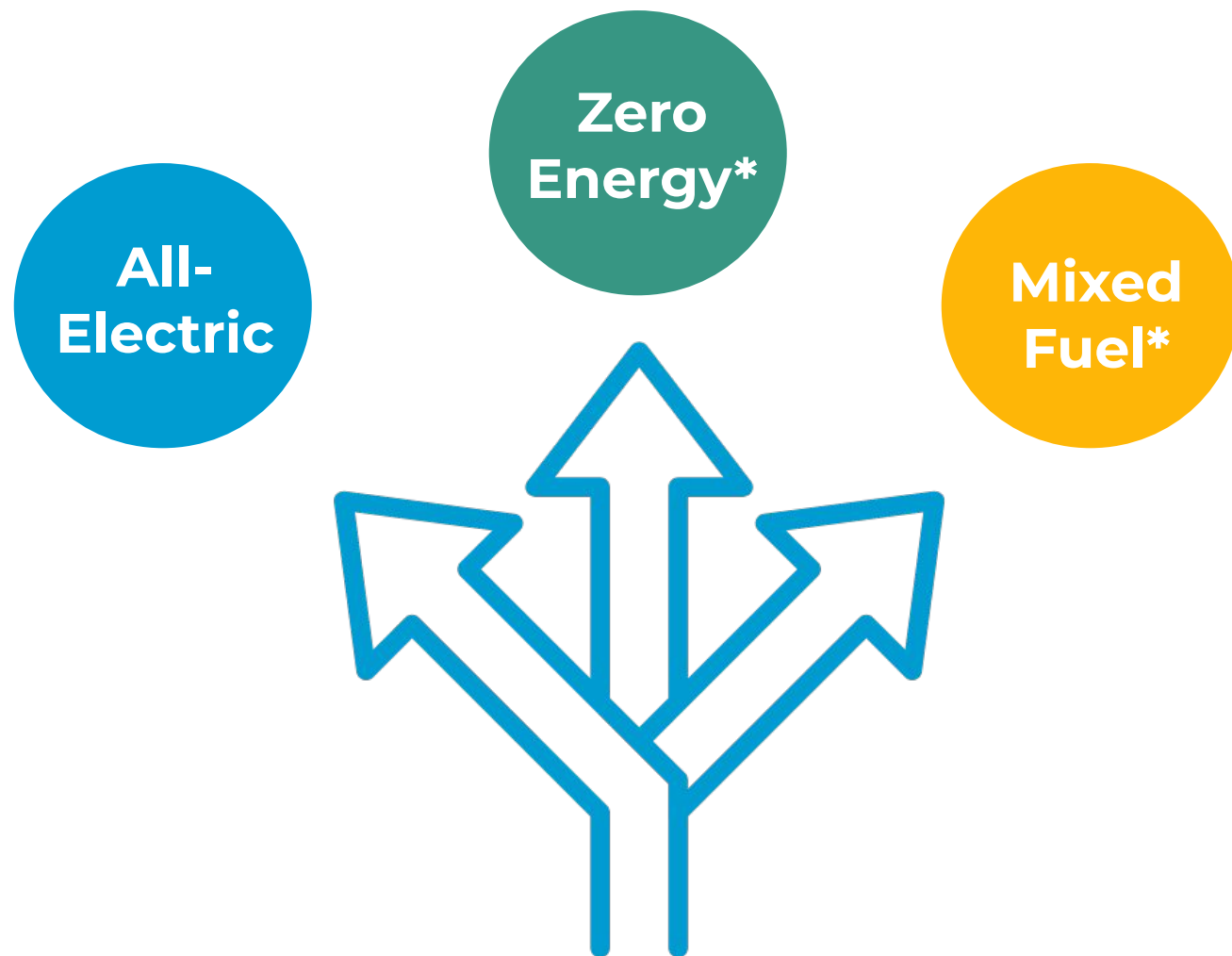
Example:

New Construction Single-Family Home in Natick



Median Size: 4,035 sf
Median Price: \$1.6M

Source: 2021-present MLS data



*Both Zero Energy and Mixed Fuel Homes can use fossil fuels

Benefits of Code Adoption

Adopting the Specialized Code in Natick will...

- ✓ Reduce our community's #1 source of emissions and follow through on Natick's Net Zero Action Plan
- ✓ Result in better homes and buildings — quality, health and cost
- ✓ Preserve choice while protecting consumers from expensive retrofits
- ✓ Increase Natick's grant eligibility
- ✓ Support consistency in building standards with surrounding towns

Essential to Natick's Net Zero Goals

2018: Town Meeting adopts net zero goal via non-binding resolution

2019 -2020: Inventory of greenhouse gas emissions and development of Net Zero Action Plan

2021: Net Zero Action Plan unanimously endorsed by all major elected boards - electrification of buildings is key strategy

2023: Adoption of "Net Zero Ready New Construction" building code identified as upcoming action at Spring 2023 ATM

**65% of Natick's emissions
come from
buildings**

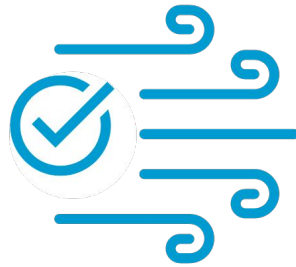


Results in Better Homes & Buildings



Same as Best Custom Homes

Electrification is increasingly part of custom-built projects



Cleaner Indoor Air

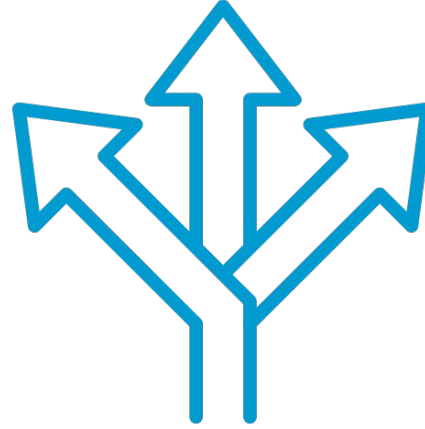
Reduces harmful indoor air pollution, specifically nitrogen dioxide, carbon monoxide



Lower Total Cost

Similar upfront cost after incentives, plus cheaper energy bills and less maintenance

Preserves Choice & Protects Consumer



Builder Decides

Specialized Code
encourages
All-electric, but
allows Fossil Fuels.



Eases Future Retrofits

Pre-wiring makes it
cheaper and easier
to switch fuels in the
future

Support for Builders

New Incentives,
Technical
Assistance &
Trainings

Upcoming Local Incentive

Natick intends to pay for
50% of Passive House
Builder Certification for
10 builders

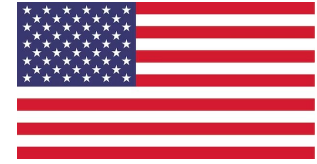


All Electric Home
\$15,000 - \$25,000

**Multi-family
Passive House**
\$3,000 per unit plus
design study funding

**Free Trainings
& Tech Support**

***No incentives for
fossil fuels after 2024***



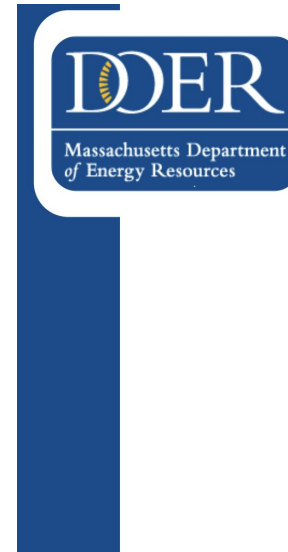
45L Tax Credit
\$5,000 per home

179D Tax Credit
\$6 per sq ft for
commercial &
multifamily

25D Tax Credit
30% of installation and
equipment costs of
rooftop solar, battery,
geothermal

Increases Natick's Grant Eligibility

*Department of
Energy Resources,
Green Communities
Program
and more*



COMMONWEALTH OF MASSACHUSETTS
DEPARTMENT OF ENERGY RESOURCES
Elizabeth Mahony, Commissioner

**Green Communities 2.0
(Climate Leader
Communities)**

Fall 2023

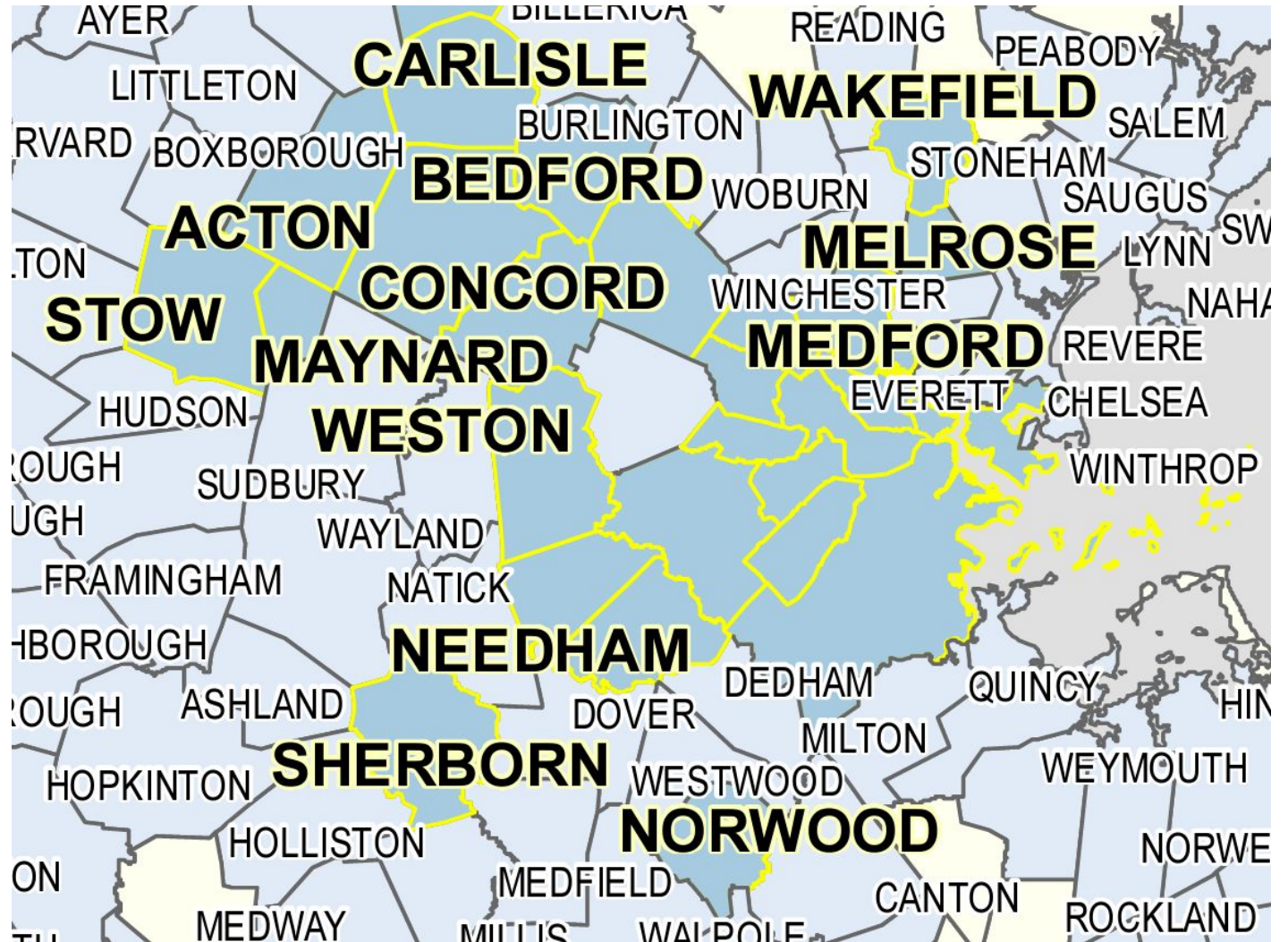
Prerequisite to new
Climate Leaders Program,
**DOER IS Natick's
main source of grants.**

Consistency with Neighboring Towns

Standard Bylaw.

100% templated
language.

Consistent for builders.



Upcoming Community Engagement

3/12
Builders
Forum



3/14
Econ Dev.
Comm



3/17
School
Comm



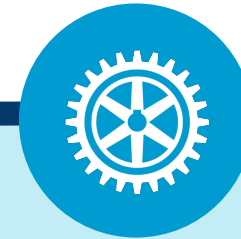
3/26
Public
Forum



4/1
Coffee w/
Purpose



TBD
Rotary



TBD
Other
Comms



And more!

Thank you & Questions

Appendix

FAQs

Question	Answer
What about backup power?	You can install a fossil fuel backup generator on an “All-Electric” home.
Will I have to cut down trees to install rooftop solar?	No. Homes are exempt where solar access is less than 70% or the roof is too steep.
Will the grid be ready?	Yes. Eversource has filed plans to increase grid capacity by 180% to support “full electrification.”
Is the code too new?	No. It’s live in nearby communities, and the code additions (pre-wiring, solar) are well-practiced.

Natick's Net Zero Action Plan

21 PRIORITY
ACTIONS

WHERE OUR ENERGY COMES FROM



Green the grid with renewable energy sources



Produce more renewable energy locally



Make our homes and buildings super-efficient



Electrify heating and cooking equipment



Electrify cars, trucks, buses, trains, and other ways we get around



Make walking, biking, and public transit the best way to get around

OUR HOMES & BUSINESSES

HOW WE GET AROUND

Priority Actions for Our Homes & Businesses

NATICK'S 2021-2025 NET ZERO ACTION PLAN

(Numbering does not denote
prioritization)

8

Create an ongoing program to help home and small business owners reduce emissions.

9

Require large, new commercial buildings to gradually achieve net zero by 2040.

10

Require large commercial building owners to report on and reduce energy use.

11

Adopt net zero standards for new public buildings and major renovations.

12

Support state legislation to establish a net zero stretch code.

13

Require at least one climate-ready feature on all new or replaced roofs.

14

Opt into the state's commercial Property Assessed Clean Energy law

Natick was an active participant in the Specialized Code's development

May 2020 BBRS, EZ-Code NSC Comments

May 26, 2020

Robert Anderson Chief of Inspections MA
Office of Public Safety and Inspections
1000 Washington St., Suite 710
Boston, MA 02118

Re: Comments from Municipality in support of the Massachusetts E-Z Code as an update to the Massachusetts Stretch Energy Code, pursuant to 780 CMR Chapter 115 AA

Dear Chief Anderson,
We would like to thank the Board of Building Regulations and Standards for the opportunity to provide testimony at the virtual public comment hearing on May 12, 2020, and for the opportunity to continue this commentary in written testimony.
We appreciate the Board's efforts to continue to engage the public and municipalities through virtual meetings at this time.

We recognize the importance of a common stretch energy code that preserves the safety of our residents and enables the health and resiliency of their future.
We look forward to working with the BBRS on developing updates to the Stretch Energy Code, and to discussions with a broad range of municipalities across the commonwealth.

I live in Natick and serve as the volunteer chair of the Natick's Sustainability Committee.

In the Fall of 2018 Natick's Town Meeting approved a non-binding resolution (88-12) to eliminate or offset all greenhouse gas emissions that originate in Natick by 2050. Natick is a designated Green Community and part of the MVP community.

As part of Natick's drive to become a Net Zero community we are striving to "Use less and Green the Rest". To that end we have:

- Funded a Sustainability Coordinator position (since 2014), Jillian Wilson Martin, MA
- Wilson-Martin was recognized in 2019 with the Leading by Example Award by the Commonwealth of MA
- Realized a 37% decrease in GHG from a 2004 baseline
- Targeted LEED Silver for our soon to be completed Kennedy Middle School

I support the AIA Zero Code and the Massachusetts Energy-Zero (MA E-Z) Code. These code modifications seek to add efficiency and electrification to the Zero Code and strengthen the Zero Code's renewables provisions for Massachusetts.

Natick is a community in growth mode. We are currently constructing a new, larger middle school and annually adding new housing units. With the existing and planned construction in

Environmental Health & Engineering, Inc. | YYYYYY | www.eheinc.com 1

November 2020 BBRS, EZ-Code SB Letter



Town of Natick Massachusetts

November 18, 2020

TO: Richard Crowley, Chair
Lisa Davey, Vice-Chair
Massachusetts Board of Building Regulations and Standards (BBRS)

Re: Comments from the Town of Natick in support of the principles of the Massachusetts EZ Code 2.0 (Proposal 11-03-2020) as an update to the Massachusetts Stretch Energy Code, pursuant to 780 CMR Chapter 115 Appendix AA

Dear Chair Crowley and Board Members,

Thank you for soliciting feedback from municipal stakeholders regarding the Massachusetts Energy Zero Code 2.0 (Proposal 11-03-2020). We are writing today on behalf of the Town of Natick to express our support for the net zero principles embodied in the proposed EZ Code 2.0.

As one of the first communities to adopt the Stretch Energy Code, Natick looks forward to working with the BBRS on developing updates that enable the Commonwealth to make progress on our shared climate goals. At present, the Stretch Energy Code is no longer a "stretch" and it does not meet our community or the Commonwealth's needs. As you consider proposals to improve it, we are eager to ensure updates are both feasible and ambitious in minimizing energy consumption and reducing carbon pollution.

In Natick, we believe the development of efficient buildings will also improve public health, resilience, and comfort, and we have sought to deploy such strategies in the construction of public buildings locally. As the Massachusetts Board of Building Regulations and Standards (BBRS) reviews proposals, we ask you to consider including robust thermal envelopes and enclosures, reductions in energy use, an emphasis on the electrification of space and water heating, an emphasis on renewables, and measures to accelerate the deployment of electric vehicles, solar, and battery storage as new requirements to the Stretch Energy Code. We support the intent of these components in the EZ Code 2.0 proposal as it relates to commercial construction, and likewise support the development of a companion residential net zero pathway.

The Town of Natick's support for these net zero principles are guided by our community's history of leadership on climate issues. In 2010, Natick was designated as a founding member of the Green Communities program. In 2012, we became the first MetroWest community to install solar on school and municipal buildings. In 2014, the Town achieved its Green Communities 20% energy use reduction goal. In 2016, Natick implemented the most successful SolarizeMass campaign in the state's history, as measured in terms of contracted capacity. In 2017, Natick was recognized as a SolSmart Gold Community for its leadership on solar, and, in 2018, Natick Town Meeting overwhelmingly voted to support a non-binding resolution to adopt a 2050 net zero greenhouse gas emissions goal – the same goal Governor Baker recently announced he would seek for the Commonwealth as a whole.

As our community joins the Governor and a growing number of communities – both large and small – in the pursuit of this goal, we appreciate the importance of the changes your Board is considering related to the Stretch Energy Code. Natick has sought to become a more active participant in these discussions, and, as a

13 East Central Street • Natick, Massachusetts 01760 • (508) 647-6410

March 2021 CECP Joint Letter Signed by SB



March 22, 2021

Kathleen Theodorides
Secretary of Energy and Environmental Affairs
Executive Office of Energy and Environmental Affairs
100 Cambridge Street, Suite 900
Boston, MA 02114

RE: Joint Comments from Municipalities regarding the Interim Clean Energy and Climate Plan for 2030

Dear Secretary Theodorides,

The Cities of Framingham, Melrose and Newton and the Towns of Arlington, Ashland, Chelmsford, Concord, Holliston, Lexington, Medford, Needham Heights, Norwell, Sharon, Sudbury, Swampscott, Weyland, Weymouth, Weston and Weymouth ("Communities") are pleased to respond to the Interim Clean Energy and Climate Plan for 2030 ("2030 CECP").

Our Communities have grave concerns regarding the impact climate change will have on the Commonwealth, the United States, and the world, and we have each made strong commitments to reducing greenhouse gas emissions. We appreciate the thoughtful analysis the Executive Office of Energy and Environmental Affairs (EOEA) has conducted to understand the complex scientific, technological and economic impact for various readings.

March 2022 Straw Proposal for Code SB Letter

Natick Select Board
Karen Adelson-Torres, Chair
Richard P. Jannett, Jr., Vice-Chair
Michael J. Hickey, Jr., Clerk
Susan G. Schaeffer
Paul R. Joseph
PHONE: 508-647-6410
EMAIL: selectmen@natickma.org



LOCATED AT
Town Hall
13 East Central Street
Natick, Massachusetts
01760

Town of Natick • Select Board Office

March 2, 2022

Department of Energy Resources (DOER)
100 Cambridge Street, Suite 1020
Boston, MA 02114

Re: Stretch Code Straw Proposal Comments

Dear Commissioner Woodcock, Director McCarey, Msrs. Finlayson and Ormond, et al:

Thank you for soliciting feedback regarding the Department of Energy Resources (DOER) straw proposal to update the Massachusetts Stretch Code and establish a new Specialized Opt-in Stretch Code.

The Town of Natick was one of the first communities to adopt the Stretch Energy Code, and we are eager to ensure changes are both feasible and ambitious in achieving net zero greenhouse gas emissions.

The Town of Natick's feedback is guided by our community's history of leadership on climate issues. In 2010, Natick was designated as a founding member of the Green Communities program. In 2012, we became the first MetroWest community to install solar on school and municipal buildings. In 2014, the Town achieved its Green Communities 20% energy use reduction goal. In 2016, Natick implemented the most successful SolarizeMass campaign in the state's history, as measured in terms of contracted capacity. In 2017, Natick was recognized as a SolSmart Gold Community for its leadership on solar. In 2018, Natick Town Meeting overwhelmingly voted to support a non-binding resolution to adopt a 2050 net zero greenhouse gas emissions goal. In 2020, Natick completed its first communitywide greenhouse gas inventory, and in 2021, Natick published its first Net Zero Action Plan, which calls for advocacy for a net zero stretch code.

With these net zero principles in mind, the Town of Natick's feedback on the straw proposal is summarized below.

Support for Updating the Stretch Code

We are encouraged by DOER's first straw proposal and applaud the agency for proposing updates to the existing Stretch Code, which regulates the design and construction of buildings in 299 Massachusetts cities and towns. In its current form, the Stretch Code is comparable with the Base Code and does not result in meaningful reductions to building energy or fossil fuel usage. We believe that the proposed updates to the Stretch Code will restore its original purpose of ensuring buildings constructed to the Stretch Code use significantly less energy than buildings built to current building codes. Including these changes in the Stretch Energy Code will deliver the greatest impact to the Commonwealth in the shortest

Natick Town Offices • 13 East Central Street • Natick, Massachusetts 01760 • 508-647-6400 • www.natickma.gov

Residential: Specialized Code (in Red) vs. Stretch Code

Summary of updated Stretch and Municipal Opt-in Specialized Codes for New Low-rise Residential Buildings

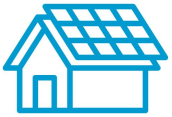
Building Size	Fuel Type	Minimum Efficiency Pathway		Heat/Energy Recovery Ventilation	Electrification	Renewable Energy Generation
		<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>	<i>Stretch Code</i>	<i>Specialized Opt-in Code addition</i>	<i>Specialized Opt-in Code addition</i>
Dwelling units up to 4,000 sf	All-electric	HERS 45 or Passive House pathways	same	required for HERS		
Dwelling units up to 4,000 sf	Mixed-fuels	HERS 42 or Passive House pathways	same	required for HERS	Pre-wiring required	Solar PV: ≥ 4 kW for single family and ≥ 0.75 W/sf for multi-family (except shaded sites and Passive House buildings)
Dwelling units >4,000 sf	All-electric	HERS 45 or Passive House pathways	same	required for HERS		
Dwelling units >4,000 sf	Mixed-fuels	HERS 42 or Passive House pathways	HERS 0	required for HERS	Pre-wiring required	No additional requirement: Solar PV or other renewables are required to meet HERS 0
Multi-family >12,000 sf AND ≤ 3 stories	All Electric	HERS 45 or Passive House pathways	Passive House pathways	required for HERS		
Multi-family >12,000 sf AND ≤ 3 stories	Mixed-fuels	HERS 42 or Passive House pathways	Passive House pathways	required for HERS	Pre-wiring required	

Commercial: Specialized Code (in Red) vs. Stretch Code

Summary of updated Stretch and Municipal Opt-in Specialized Codes for New Commercial Buildings

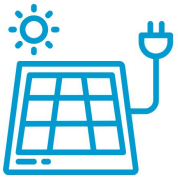
Building Type	Fuel Type	Minimum Efficiency Pathway		Electrification		Minimum EV Wiring (% of parking spaces)	Renewable Energy Generation
		Stretch Code	Specialized Opt-in Code	Stretch Code	Specialized Opt-in Code addition	Stretch Code	Specialized Opt-in Code addition
Offices and Schools >20,000 sf	All Electric	Thermal Energy Demand Intensity (TEDI) or Passive House pathways	same			20% for offices	
Offices and Schools >20,000 sf	Mixed-fuels	TEDI or Passive House pathways	same	Full heating with curtainwall env	Pre-wiring required	20% for offices	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area and all AC must be minimum efficiency heat pump (except Passive House buildings).
High Ventilation (Hospitals, Labs, etc.)	All Electric	TEDI, 10% better than 2019 ASHRAE Appendix G, or Passive House pathways	same			20% for labs	
High Ventilation (Hospitals, Labs, etc.)	Mixed-fuels	TEDI, 10% better than 2019 ASHRAE Appendix G, or Passive House pathways	same	Partial heating, full with curtainwall env	Pre-wiring required	20% for labs	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area and all AC must be minimum efficiency heat pump (except Passive House buildings).
Multi-family >12,000 sf AND > 3 stories	All Electric	TEDI, HERS 45, Passive House pathways, or (until July 1, 2024) 10% better than ASHRAE Appendix G	Passive House pathways			20%	
Multi-family >12,000 sf AND > 3 stories	Mixed-fuels	TEDI, HERS 42, Passive House pathways, or (until July 1, 2024) 10% better than ASHRAE Appendix G	Passive House pathways	Full heating with curtainwall env	Pre-wiring required	20%	
Small Commercial (<20,000 sf, except multi-family)	All Electric	Prescriptive pathway plus Stretch Code amendments	same			20%	
Small Commercial (<20,000 sf, except multi-family)	Mixed-fuels	Prescriptive pathway plus Stretch Code amendments	same	Full heating with curtainwall env	Pre-wiring required	20%	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area and all AC must be minimum efficiency heat pump.

Solar in Natick



1,000+ Natick buildings have solar

Including every new public building since 2012 - and every viable existing public building



9.5 kW DC is the average size of a single-family solar project in Natick

This is more than twice the amount required for mixed fuel new construction



The average total cost per watt of solar in Natick is down 25% since 2012

In 2023, the average total cost per watt was \$3.70



In 2023, 23% of Natick solar projects were third-party owned

Specialized code does not mandate direct ownership

Extra Support for Natick Builders

**Mass Save pays for 50% of Passive House
Certification for Builders**

*Using grant funds, Natick intends to
pay the balance for 10 local builders if the
Specialized Code is adopted.*

Changes to Mass Save in 2025

No Fossil Fuel Incentives

“Any new buildings, homes or building additions enrolling in our residential or commercial new construction programs must be fully electrified (for space heating, ventilation air heating, domestic hot water heating and kitchen equipment) to participate.”

Sponsors of Mass Save, 2/9/24

New 3 Year Plan with New Incentives

RESIDENTIAL SECTOR RECOMMENDATIONS

- I. Accelerate GHG Reductions and Transition Away from Fossil Fuel Incentives
 - A. Launch with the start of the 2025 plan year revised New Homes and Renovations and Additions offerings that promote and incentivize electrification and above code performance.
 - 1. Implement recommendations and address considerations in the RNC Electrification Barriers EM&V study and the forthcoming Renovations and Additions Process Evaluation
 - 2. Develop and implement outreach strategies to transition builders of propane and gas heated homes to electric homes.
 - 3. Ensure multifamily offers, including for Passive House, continue to advance electrification and other greenhouse gas reduction measures.
 - 4. Promote and support Specialized Code adoption for new construction.
 - 5. For renovations and additions, provide a decarbonization audit as appropriate to identify and promote electrification opportunities. Develop a participation path and incentive structure that explicitly promotes electrification.
 - 6. Promote demand enabled equipment where cost effective and support the installation of battery storage and PVs in both new homes and in renovations and additions.

ITEM TITLE: MetroWest Collaborative Development Update - 5 Auburn
ITEM SUMMARY:

ITEM TITLE: Friends of Natick Trails (FONT) Update
ITEM SUMMARY:

ATTACHMENTS:

Description	Upload Date	Type
FoNT_2023_Annual_Report_To_Town_030624	3/4/2024	Exhibit
2023 FONT Report to Select Board 030624	3/4/2024	Exhibit



Friends of Natick Trails, Inc.
c/o 12 Clifton Road
Natick, MA 01760
friendsofnaticktrails.org

March 6, 2024

Bruce Evans, Chair
Natick Select Board
13 East Central Street
Natick MA 01760

Dear Chair Evans,

Pursuant to the Fundraising Agreement between the Town of Natick and Friends of Natick Trails, Inc. (FoNT) dated September 17, 2019, FoNT presents to the Select Board this annual report for calendar year 2023. This is provided as a narrative to provide context, and as a financial summary.

We are pleased to note that since 2021, we have provided \$173,422.22 to the Town of Natick.

1. Narrative

A. Major sponsorships

FoNT did not receive major sponsorship revenue in 2023. An installment was received in Calendar 2024 that will be reflected in the next annual report.

B. Bench Sponsorships

We sold two bench sponsorships for \$12,500. These funds were provided directly to Natick.

C. Bricks

38 commemorative bricks were sold in 2023 with gross revenue of \$8,833,21. The brick program is now concluded. 183 bricks have now been sold and installed (4 replacement bricks are pending installation). Over \$41,000 was received by FoNT, and most of that revenue has been provided to Natick whether directly or indirectly. There is room on the CRT for more bricks, and we may consider reopening this program in the future.

D. Other gifts

FoNT received eight gifts not associated with sponsorships totaling \$2,047.48. These donations are not subject to the Town's agreement with FoNT, although the intent as always will be to use these funds for the benefit of, and in coordination with, the Town.

E. Expenses

Expenses incurred during the year include:

- Fabrication of commemorative bricks (\$2,544)
- Fabrication of bronze bench plaques (\$801)
- Installation of bricks and plaques (\$1,621.87)
- Procurement of a shed that was delivered to Natick as an in-kind donation (\$4,230)
- Plants and supplies both for a donation received and general purposes (\$303.04)
- Management fees from FoNT's fiscal sponsor, Mission:Earth (\$656.79)

As in previous years, these expenses have been paid using revenue received by FoNT from the sale of commemorative bricks; funds paid by sponsors for most benches and major sponsorships are in most cases made directly payable to the Town.

We incurred additional expenses related to the Studios Without Walls art exhibit (\$6600), and for the New Year's Eve event (\$600.40). These expenses were paid for using unrestricted gifts to FoNT not subject to the terms of our agreement with Natick.

See the financial summary section for more details.

F. Programs and Events

In addition to fundraising efforts for the Town, FoNT planned and helped execute the *Studios Without Walls* public art exhibit in September/October, in partnership with the Natick Center Cultural District, the third "NYE on the CRT" on December 31 in partnership with Town staff, and the *All Aboard* accessible cycling event in September, in partnership with the Community Services Department.

FoNT participated in other events, such as Trails Days, Natick Days, etc. FoNT also participates in regional convenings about rail trails, including the Golden Spike statewide trails conference held in Natick in October.

G. Looking ahead

In 2024, we will offer sponsorships for six benches, two bike repair stations, and sun shelters through a new business sponsorship program. These amenities were procured using the CRT revolving fund, and revenue from these sponsorships will continue to be returned to the fund. In addition, we may secure a sponsor for the historical panels.

For programming, we will also participate with the Community Services Department *All Aboard* program, which will provide accessible cycling opportunities for people with disabilities, and to collaborate with public art programs, potentially including *Studios Without Walls*, and to present another New Year's Eve event.

Members of the Friends of Natick Trails also partner with Public Works to help maintain and enhance the CRT through plantings of native species and other efforts, and we expect to build on these volunteer initiatives.

The Friends of Natick Trails has received several unrestricted donations in recent years, and we will use these funds for costs associated with our mission. These donations represent the majority of our current balance of \$38,617.03. We also have a practice of retaining a portion of funds received for some sponsorships in order to pay sponsorship-related expenses, as described below.

2. FoNT 2023 Financial Summary

Revenues	
\$ 8,833.21	Brick sales/related donations through fiscal sponsor Mission:Earth
\$ 2,047.48	Miscellaneous unrestricted individual gifts and donations
\$ 0.12	Interest income
\$10,880.81	Total Funds Collected (Revenues)
Expenses	
\$ 2,544.00	Brick engraving and delivery (Stiles & Hart)
\$ 801.00	Plaque fabrication for two bench sponsorships (Colonial Brass)
\$ 1,621.87	Installation of bricks and plaques (Superior Construction)
\$ 600.40	NYE expenses including toilet rental and misc. supplies
\$ 6,600.00	Studios Without Walls fee
\$ 4,230.00	Maintenance shed (Decks Plus)
\$ 656.79	Mission:Earth fiscal sponsor fees for funds collected in 2022
\$ 303.04	Plants and trail supplies
\$ 17,357.10	Total Expenses
Balances	
\$45,067.19	Total cash on hand 12/31/22 reported to Select Board
+ \$26.13	Adjustment to 2022 balance
\$38,617.03	Total cash on hand 12/31/23
	<i>Note: Funds retained by FoNT include a) continuing cash flow against anticipated and unforeseen sponsorship-related expenses, and b) unrestricted gifts and donations to FoNT.</i>
Direct disbursements	
\$12,500	Distributed directly to Town of Natick CRT Revolving Fund from sponsors

We are happy to provide answers to any questions you might have, whether at a Board meeting or by email to FriendsOfNatickTrails@gmail.com. FoNT thanks the Town and the Select Board for the support they have shown to our efforts these past few years.

Respectfully submitted,

Chris Temper, President
Friends of Natick Trails, Inc.
friendsofnaticktrails@gmail.com



2023 Report to Natick Select Board

March 6, 2024

2023 Report

- Mission
- Fundraising
- Events
- Volunteer activities
- Looking ahead

Friends of Natick Trails Mission

To promote outdoor recreation and alternative transportation within our community and to encourage and support collaboration within and between communities to ensure the safe enjoyment of the trail network for all users and neighbors.



Fundraising

- *A 2019 agreement authorizes the Friends to offer sponsorships on the CRT*
- *\$173,422 has been provided to Natick since 2021*
- *This includes direct, indirect and in-kind donations*



2023 Fundraising

- *Two bench sponsorships*
- *38 commemorative bricks (program is now concluded)*
- *Town installed new amenities with past sponsorship revenue*
 - *Four steel benches with accessible pads*
 - *Two bike repair stations, partially funded with a DEP grant*
 - *Two kiosks*
- *Most sponsorship revenue is provided directly to the Town*
- *The Friends retain some funds to pay for sponsorship-related expenses, such as plaque fabrication and installation*

Events: CRT on NYE

- *3rd New Year's Eve celebration in partnership with Town departments*
- *~2000 people participated*



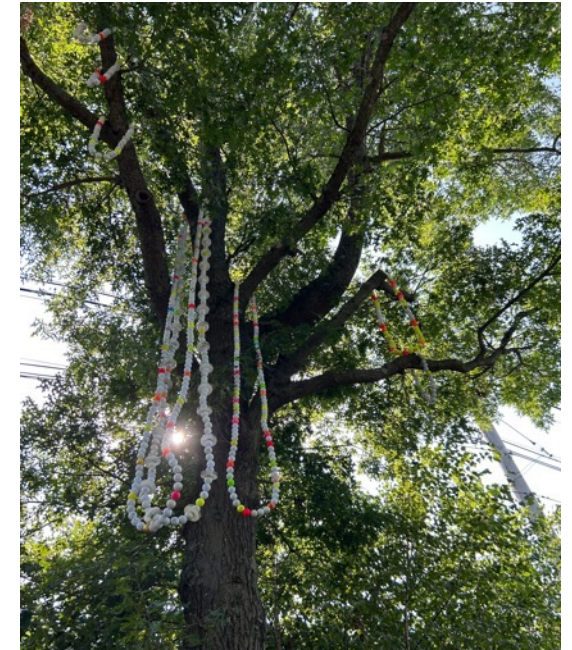
Events: All Aboard

- *All Aboard (1st adaptive/accessible cycling event) in partnership with Community Services*
- *~30 people participated*



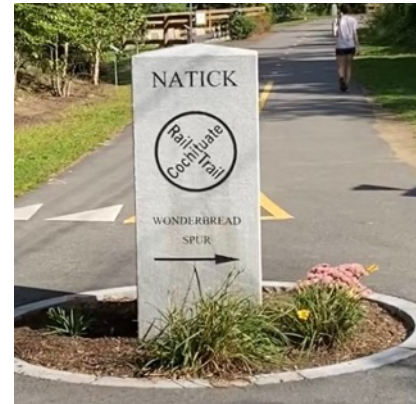
Events: Public art

- *Studios Without Walls exhibit in partnership with the Natick Center Cultural District*
- *Over 20,000 people used the trail during this exhibit*



Volunteering

- *Friends of Natick Trails volunteers help maintain and beautify the CRT in partnership with DPW*
- *Native plantings including trees, shrubs and wildflowers*
- *Donated maintenance shed and water source*



Looking ahead in 2024

- *Sponsorships of trail amenities*
- *Business Friends program*
- *Volunteer activities to maintain the trail*
- *All Aboard, public art, New Year's Eve events*
- *We welcome volunteer energy!*

Thank you!

Christopher Temper, President

Janie Kass, Treasurer

John Gregory

Gary Pease

Sofia Romero

Barb Coco

Laura Niedermeyer

David Camacho

Michelle Langedoc

Dennis Ravenelle

Josh Ostroff

Sophanny McArdle

Michael Walz

Will Schoenig

FriendsOfNatickTrails.org

ITEM TITLE: Consider Sponsorship of Special Town Meeting Warrant Articles
ITEM SUMMARY:

ITEM TITLE: Referral of Zoning Articles for Spring Annual Town Meeting
ITEM SUMMARY:

ATTACHMENTS:

Description	Upload Date	Type
CED Letter	2/28/2024	Cover Memo



Natick Community & Economic Development

BUILDING • PLANNING • ZONING • CONSERVATION
Town of Natick, 13 E. Central Street Natick, MA 01760
www.NatickMA.gov • (508) 647 – 6450

To: The Natick Select Board
cc: The Natick Planning Board
From: Amanda Loomis, Director of Community & Economic Development
RE: 2024 Spring Annual Town Meeting Zoning Articles,
Special Permit, Site Plan Review, and 5 Commonwealth Road
Date: February 28, 2024

Dear Members of the Natick Select Board,

Pursuant to MGL c. 40A, Section 5, the Planning Board requests that the Select Board refer the following Zoning Articles for the 2024 Spring Town Meeting back to the Planning Board to commence the public hearing process.

1. Amend Zoning Bylaw: Special Permit and Site Plan Review and Approval

To see if the Town will vote to amend the Zoning Bylaw by amending Section 200 – Definitions; amending § III-A.1 Permitted Uses in Districts (Zones as set out in Section II-A & B); deleting § III-A.7 Regulations of Land or Structure for Purposes Otherwise Exempted from Permitting; amending § VI-DD Special Permit Procedures and Site Plan Review; adding a new § VI-DDD Site Plan Review and Approval; amending references to Special Permit and Site Plan Review in § III, § IV, § V, § VI, and Sections 323-329 and any other associated sections; or act in any other manner in relation thereto.

2. Amend Zoning Map: 5 Commonwealth Road

To see if the Town will vote to amend the Zoning Map by rezoning 5 Commonwealth Road (Map 10, Lot 23) from Residential Single– A (RSA) Zoning District to Industrial – II (In-II) Zoning District to the centerlines of the fronting streets or ways; and further expand the Regional Center (RC) Overlay District to include 5 Commonwealth Road (10-23) to the centerlines of the fronting streets or ways; or act in any other manner in relation thereto.

Please let me know if you have any questions.

Thank you,

Amanda Loomis, AICP

Part 1: Section 200 – Definitions

Addition of five (5) new definitions to support the new provisions of Site Plan Review. The New definitions shall read:

- **As of Right:** A development that may proceed under a zoning bylaw without the need for a special permit, variance, zoning amendment, waiver, or other discretionary zoning approval.
- **By-right:** See “As of Right”
- **MGL:** Massachusetts General Law
- **Site Plan Review:** Review and approval of a proposed use of land or structure(s) to determine whether a proposed use of land or structure(s) is in compliance with sound site utilization principles relative to traffic circulation and safety, pedestrian safety and access, off-street parking and loading, emergency vehicle access, storm water drainage, screening, signage and exterior lighting, visual impact of parking, storage or other outdoor service area, and consistency with the bulk character and scale of the surrounding buildings.
- **Site Plan Review, Limited:** No zoning ordinance or bylaw in any city or town shall prohibit, or require a special permit for, the use of land or structures, or the expansion of existing structures, for the primary, accessory or incidental purpose of operating a child care facility; provided, however, that such land or structures may be subject to reasonable regulations concerning the bulk and height of structures and determining yard sizes, lot area, setbacks, open space, parking and building coverage requirements. — MGL Chapter 40A, Section 3, third para.

Part 2: Section III-A – Use Regulations

Adding “, may be subject to §VI-DDD Site Plan Review” to provide clarification when Site Plan Review is needed for As of Right uses

III-A.1 PERMITTED USES IN DISTRICTS (ZONES AS SET OUT IN SECTION II-A & B)

- a. In such Districts no building or structure shall be erected or used and no premises shall be used except as set forth in the "Use Regulations Schedule" herein and in accordance with the following notations:

Y	-	A <u>As of Right</u> permitted use, <u>may be subject to §VI-DDD Site Plan Review</u>
N	-	An excluded or prohibited use
SP	-	Use allowed under a Special Permit as granted by a Special Permit Granting Authority and as designated elsewhere in this By-Law (RS includes all Single Residence Districts unless otherwise specified)

Part 3: Delete Section III-A.7 Regulation of Land or Structure for Purposes Otherwise Exempted from Permitting

Delete Section III-A.7 in its entirety, such review shall be incorporated into the provisions of the new Site Plan Review

III — A.7 Regulation of Land or Structures for Purposes Otherwise Exempted from Permitting

- ~~1. Purpose: To provide for the reasonable regulation of land and structures exempted from permitting by Massachusetts General Laws chapter 40A, §3, or other State or Federal statute.~~
- ~~2. Subject to the limitations of G.L. c. 40A, §3 or other State or Federal statute, and notwithstanding anything to the contrary, the development, redevelopment, alteration, or conversion of land or structures for such an exempted purpose shall be subject to Site Plan Review by the Planning Board per Section VI DD 2B and the following:~~
 - ~~a. In reviewing the site plan submittal made under this section, the following criteria shall be considered:~~
 - ~~i. relationship of the bulk, height of structures, and adequacy of open spaces to the natural landscape, existing buildings and other community assets in the area, and compliance with other requirements of this Bylaw, which includes but is not limited to lot coverage, yard sizes, lot areas and setbacks;~~
 - ~~ii. physical layout of the structures, driveways, utilities and other infrastructure as it relates to the convenience and safety of vehicular and pedestrian movement on the site and in relation to streets and properties in the surrounding area, and for the location of driveway openings in relation to street traffic and to adjacent streets, so as to prevent traffic congestion and dangerous access within the site and onto existing ways, and when necessary, compliance with other requirements for the disabled, minors or the elderly;~~
 - ~~iii. adequacy of the arrangement of parking and loading areas in relation to the proposed use of the site;~~
 - ~~iv. physical lighting of the site, including the methods of exterior lighting for convenience, safety and security within the site, and in consideration of impacts on neighboring properties and excessive light pollution to the standards of Section V-I; and~~
 - ~~3. Intensity Regulations:~~
 - ~~a. In all non-residential districts the intensity regulations shown on, or referenced in, Table IV — B shall apply.~~
 - ~~b. In all residential districts:~~
 - ~~i. The intensity regulations shown on, or referenced in, Table IV — B shall apply.~~
 - ~~ii. All parking, areas of active use, play areas, communal gathering areas, and storage; whether in buildings, accessory structures, or outdoor; shall be subject to the district's setbacks as shown in Table IV — B~~
 - ~~iii. Except as otherwise stated in subsection 3b)(iv), the Floor Area Ratio (FAR) shall not exceed 0.17~~
 - ~~iv. For a Child Care Facility: The ground area covered by the Building in which such business is located, up to 2,500 square feet, shall not exceed the Maximum % Building Coverage for the zoning district in which it is located. For a Building with a ground area coverage in excess of 2,500 square feet the Floor Area Ratio (FAR) shall not exceed 0.17~~

~~(iv.a) — For a School Campus: For contiguous parcels of less than 5 acres, intensity regulations of part (iv) apply. For contiguous parcels of 5 acres and greater: Buildings and structures not exceeding the height for the zoning district in which they are located may not project beyond sky exposure planes determined from the lot lines in a rise:run ratio of 1:1. For contiguous parcels of 5 acres and greater the height of individual buildings and structures may be 60 feet subject to 60 foot setbacks and sky exposure planes determined from the lot lines in a rise:run ratio of 1:2 (Art. 18 Fall A.T.M 10/24/17)~~

~~v. — Sky Exposure Plane: The roof of the building may not project beyond sky exposure planes determined from the lot lines in a rise:run ratio of 1:1.~~

~~vi. — Towers, steeples, cupolas, and other similar elevated structural building elements may exceed the Maximum Height of Building for the district in which it is located provided that such structural element does not project beyond the applicable Sky Exposure Plane, and provided that such elements do not have a combined cross-section area exceeding the lesser of 500 square feet or 15 percent of the building's footprint.~~

~~(Art. 18 Fall A.T.M 10/24/17)~~

~~4. — Savings Clause: If any provision, clause, subsection, or other part of Section III A.7 shall be held to be invalid or unconstitutional by any court of competent jurisdiction, the remainder of this Section shall not be affected thereby, but shall remain in full force and effect, to the extent permitted by law"~~

~~(Art. 3, STM #1, 5/9/17)~~

Part 4: Add a new § VI-DDD Site Plan Review and Approval

Add a new §VI-DDD Site Plan Review and Approval

Section VI-DDD Site Plan Review and Approval

1. Purpose and Intent

Site Plan Review serves as a tool to evaluate and provide a clear, consistent, comprehensive review of construction projects. Site Plan Review sets the following expectations to mitigate impacts of the project on and off-site.

2. Authority

The Planning Board or its designee, as prescribed herein, shall follow the procedures set forth herein. Where an activity or use requires both Site Plan Review and one or more Special Permits the Planning Board shall conduct such reviews concurrently.

3. Applicability

Site Plan Review shall apply to all proposed construction projects or modifications of previously reviewed outlined herein.

a. Exempt from Site Plan Review

Site Plan Review shall not apply to:

- i. Any construction or modification to a Single and Two-Household Dwellings on an individual lot;
- ii. Any construction of a new building or facility of 2,500 or less gross square feet or expansion of an existing building or facility that results in a net increase of 2,500 or less gross square feet;

- iii. Any construction of a new off-street parking area of five (5) or fewer spaces or modification to an existing off-street parking areas that results in five (5) or fewer net spaces; or
- iv. Any façade modification to a building or facility that does not modify structural features, impede emergency access, or significantly and materially expand the building or facility dimensions.

b. Minor Site Plan Review

Minor Site Plan Review and approval may be conducted by the Development Review Team (DRT) or Planning Board, as outlined in the Planning Board Rules and Regulations, as amended, for projects that propose:

- i. A change in use of a property that requires Special Permit review and does not trigger Major or Limited Site Plan Review;
- ii. Construction of a new non-residential building or facility between 2,500 – 3,000 gross square feet or expansion of an existing building or facility that results in a net increase between 2,500-5,000 gross square feet; or
- iii. Construction of a new off-street parking area of six (6) or more spaces or modification to an existing off-street parking area that results in six (6) or more net spaces.

c. Major Site Plan Review

Major Site Plan Review shall be conducted by the Planning Board for projects that that propose:

- i. Construction of a nonresidential building or facility of 5,000 or more gross square feet or expansion of such a building or facility by 5,000 or more net gross square feet;
- ii. Construction of a Multi-household Dwelling, Mixed-use Residential Development, or Mixed-use Development of 3,000 or more gross square feet or expansion of such building or facilities that results in a net increase of 3,000 or more gross square feet;
- iii. Any project subject to the provisions of Inclusionary Housing Bylaw, Historic Preservation Bylaw, and Open Space Cluster Development (OSRD) Bylaw, herein.
- iv. Any project with a new or existing drive-thru facility; or
- v. All Marijuana Establishments (Marijuana Retailers, Marijuana Cultivators, and Marijuana Product Manufacturers).

d. Limited Site Plan Review

Limited Site Plan Review shall apply to any new structure or alteration of an existing structure or change of use in any structure for an entity claiming exception under MGL c. 40A, § 3 as determined by the Building Commissioner.

e. Site Plan Approval Modification

For any construction project that has undergone Minor, Major, or Limited Site Plan Review, any proposed changes that are determined by the Building Inspector to be material and significant to such project shall be reviewed by the Planning Board.

4. Application Materials

Submittal requirements for Site Plan Review shall be outlined in the Planning Board Rules and Regulations, which shall prescribe the form and content of all applications, plans, documents, reports, and other relevant materials to be reviewed and considered by the Planning Board.

5. Review Criteria

Each project that requires Site Plan Review shall be evaluated based on the following Findings, unless modified herein. Projects shall be designed to protect the safety, public health, and

common good of the Natick and its environment. The considerations enumerated herein shall be the criteria by which the Planning Board renders a decision for Site Plan Review.

a. Site Plan Review

All projects that require Site Plan Review shall be evaluated on the following:

- i. the layout and arrangement of one or more buildings
- ii. the arrangement and quality of landscaping and open areas
- iii. the design of the streetscape and transitioning between abutting properties
- iv. The protection and mitigation of adjoining premises against detrimental impacts (surface water drainage, light, sound and sight buffers and preservation of views, light, and air)
- v. the provision of vehicular access, parking, and circulation
- vi. the accommodation of non-vehicular/multi-modal access and circulation
 - i. the management of emergency service and loading/delivery operations, access, and circulation
- vii. the location, and arrangement of municipal, public, and private infrastructure and utilities
- viii. the provision of stormwater management features and measures
- ix. the protection and management of surface and ground water
- x. the management of solid waste and snow removal
- xi. the development of a sustainable, climate sensitive, and environmentally conscious site
- xii. site and building security and fencing
- xiii. site lighting
- xiv. site and building signage
- xv. other aspects of site design that may be reasonably within the spirit and intent of this section and the purview of the Planning Board.

b. Limited Site Plan Review

Projects deemed to meet the provisions of MGL c. 40A, § 3 as determined by the Building Commissioner, shall be evaluated on the following

- ii. Bulk and height of structures
- iii. Yard sizes and setbacks
- iv. Lot area and building coverage
- v. Off-street parking (parking, circulation, lighting, landscaping, and stormwater)

c. Modification of Site Plan Approval

Projects subject to a modification to a previously approved decision shall be reviewed based on type of site plan review outlined in § VI-DDD.3, and associated Findings outlined in § VI-DDD.5.

6. Review Procedures

All construction projects requiring site plan review shall be subject to the following procedures outlined herein.

a. Public Hearing

A public hearing shall be required conducted by the Planning Board. The hearing shall be advertised in a local newspaper no less than one (1) week and no more than two (2) weeks prior to the public hearing. Notice shall be sent to all landowners within three-hundred (300) feet of any lot upon which the project is proposed and said notice shall be filed and posted in accordance with MGL c. 30A, §20(c).

- b. Pre-Application Review
Applicants are strongly encouraged to meet with the Development Review Team (DRT) prior to an application submittal.
- c. Decision
The Planning Board shall render its decision generally within sixty (60) days for minor and limited site plan review; one-hundred and twenty (120) days for major site plan review; and Site Plan Approval Modifications shall be rendered by the Planning Board within a reasonable time dependent on the scope of modifications.
- d. Special Permit Coordination
Notwithstanding the general decision periods outlined above, where a construction project requires Site Plan Review and one or more Special Permits, the Planning Board shall conduct a coordinated, comprehensive review of the project and shall render its Site Plan Review decision concurrently with the Special Permit decision(s), unless otherwise agreed upon with Applicant.

7. Administration

- a. The Planning Board shall establish and periodically amend rules and regulations related to administration of this Section, submittal requirements, and design standards.
- b. The Planning Board shall establish and periodically amend a schedule of fees for all applications under this Section. No application shall be deemed complete unless all associated fees are paid.
- c. No building permit shall be issued for any construction project subject to Site Plan Review unless the Planning Board has rendered a decision on said project in accordance with this Section of the Zoning Bylaw.
- d. A decision for site plan approval shall three (3) years, not including such time required to pursue or await the determination of an appeal as referred to in MGL c. 40A, §17, if construction was not begun by such date except for good cause.

8. Waiver

The Planning Board, at its discretion, may waive technical or submittal requirements of site plan review where such technical or submittal requirements are not appropriate or relevant for the evaluation of the project. All Applicants seeking waiver requests shall provide a detailed description of the need for relief from the technical or submittal requirement.

Part 5: Delete Site Plan Review from § VI-DD

Amend Section VI-DD as presented below

VI-DD SPECIAL PERMIT PROCEDURES ~~AND SITE PLAN REVIEW~~

1. Purpose and Intent Administration

- a) The purpose of the following Special Permit section of this zoning bylaw is to authorize the hearing of and decisions on Special Permit applications, authorize the issuance of Special Permits, establish criteria and procedures for the issuance of Special Permits and set forth matters which can be addressed and regulated in a Special Permit decision. ~~Unless specifically exempted in Section VI-DD2.B., a~~ All uses requiring Special Permits under this Zoning By-Law shall require Site Plan Review in accordance with VI-DDD, ~~unless specifically exempt. 2.B. The purpose of the Site Plan Review Procedure hereby established is to protect the safety, public health, convenience and general welfare of the inhabitants of the Town by~~

~~providing a comprehensive review of plans for those uses and structures which have a significant impact upon the character of the Town and upon traffic, utilities and property values therein. Factors to be considered are the placement of buildings and utilities, surface and groundwater drainage, wetlands, water supply, parking, loading, landscaping, lighting, dust and noise control, access to the development, acceptable sanitary conditions and the proper provision for open areas. It is intended to insure that the design and layout of those developments so subject to this procedure in this bylaw will constitute suitable development and will not result in a detriment to the neighborhood or to the environment. It is also intended hereby to assist those wishing to build projects within the Town by providing them with the necessary information about all of the Town's requirements affecting their project prior to the start of any construction or the issuance of the permits. (Art. 38, Spring ATM, 4/11/17)~~

- b) The Special Permit Procedure ~~is and the Site Plan Review Procedure are to be~~ administered by a Special Permit Granting Authority ("SPGA") in those uses and/or districts, and in the manner as indicated in this Section VI-DD. Those Town Agencies who may function as the SPGA hereunder are: The Zoning Board of Appeals (ZBA) and the Planning Board. The specific assignments given to each SPGA are set forth in Section 2.A ~~and Section 2.B~~ hereafter. (Art. 38, Spring ATM, 4/11/17)

- ~~c) It is the further intent of the Site Plan Review Procedure that any Final Site Plan filed with the SPGA shall receive the approval of such SPGA if said plan conforms to the standards established herein and to the reasonable rules and regulations of the SPGA made in conformity with these bylaws. It is to be noted, however, that where maximums are stated in this bylaw the SPGA acting hereunder can deny granting the maximum (e.g. height, building coverage, etc.) if in its opinion the proposed plan does not merit granting the maximum, in view of the criteria and standards set hereby. Similarly, where minimums are stated in this bylaw, the SPGA acting hereunder can make increased requirements. (e.g. parking, screening, landscaping, etc.) if in its opinion in applying the criteria and standards set hereby, the proposed plan warrants exceeding such minimums.~~

2.A. Special Permits

- a. Special Permit Granting Authority. As designated in this By-Law, the Zoning Board of Appeals or the Planning Board shall act as the Special Permit Granting Authority (SPGA) for hearing and deciding all matters pertaining to Special Permits and for issuance of such Special Permits. The specific assignments are listed below.
1. The Planning Board shall act as the SPGA in the following Districts:
 - Highway Mixed Use - I
 - Highway Mixed Use II
 - Highway Mixed Use III
 - Highway Planned Use
 - Open Space Residential Development (OSRD)
 - Hospital (H)
 - Inclusionary Housing Option Program (IHOP)
 - Regional Center Overlay District
 - Highway Corridor Overlay District
 - Planned Cluster Development - PCD
 - Mall Center (MC) Overlay District
 - Housing Overlay Option Plan - I (HOOP I)

Housing Overlay Option Plan - II (HOOP II)
 Regional Center Mixed-Use Overlay District
 Historic Preservation
 Administrative and Professional (AP)
 Commercial II (C-II)
 Industrial I (In-I)
 Industrial II (In-II)
 Downtown Mixed Use (DMU)
 Center Gateway (CG)
 Independent Senior Living Overlay Option Plan (ISLOOP)
 Assisted Living Overlay Option Plan ALOOP
 Indoor Recreational Overlay District (IROD)
 Inclusionary Housing Special Permit (IHSP)

2. Zoning Board of Appeals shall act as the SPGA in the following Districts:

Limited Commercial (LC)
 Subsidized Housing (SHA)
 Non Conforming Uses in accordance with Section V-A

3. In the event of a failure of this zoning by law to designate an SPGA, the Planning Board shall be authorized to act and serve as SPGA.

- b. Decision Criteria. The following criteria shall be the minimum basis for all decisions on special permits, in addition to criteria as may be more specifically provided elsewhere in this By-Law. Special permits shall be granted by the Special Permit Granting Authority as specified herein only upon its written determinations for each of the following factors that the proposed use will not have adverse effects which outweigh its beneficial effects for both the neighborhood and the Town, in view of the particular characteristics of the site and of the proposal in relation to that site. The determinations shall be made separately for and indicate consideration of each of the following criteria:

1. Social, economic, or community needs which are served by the proposal;
2. Adequacy of traffic flow and safety, including parking and loading;
3. Adequacy of utilities and other public services;
4. Neighborhood character and social structures;
5. Impacts on the natural environment;
6. Potential fiscal impact, including impact on town services, tax base, and employment; and
7. Conformity with the purposes and objectives of both this zoning by law and the district which the property is situated.

The applicant shall show to the satisfaction of the Special Permit Granting Authority that the use, building, or structure for which application is made shall not be against the public interest, shall not derogate from the character of the neighborhood in which such use, building, or structure is to occur and shall not be detrimental or offensive because of noise, vibration, smoke, gas, fumes, odor, dust or other objectionable features and that such use, building, or structure shall not otherwise be injurious to the inhabitants of the Town or their property or dangerous to the public health or safety.

Consideration of traffic flow and safety and parking and loading shall consider affects on nearby and collector streets at both peak and off peak hours. Consideration of the natural environment shall include not creating additional shadow or causing additional blockage of sunlight and/or view on or from existing buildings, constituting the primary use, on adjacent properties to a greater extent than could result from the construction of a permitted use (i.e. a use not requiring special permit) in full compliance with all applicable dimensional and intensity regulations on the parcel for which the special permit is sought. When the foregoing criteria are not so satisfied, the special permit granting authority shall deny the application.

In addition to these criteria, the ~~S~~special ~~P~~permit ~~G~~granting ~~A~~authority may impose conditions, safeguards and limitations on time and use.

- c. Procedures. Applicants shall file a complete special permit application electronically for review through the Town's online permitting portal. (Art 23, FTM 10/18/2022)
- d. Referral to Other Officials and Agencies. The Special Permit Granting Authority shall refer notice of all applications immediately upon receipt to the Town Administrator, Building Commissioner, Planning Board (when it is not the SPGA), Town Engineer, DPW, Board of Health, Conservation Commission, Police Department, Fire Department, and to any other involved Town official or agency.

The Special Permit Granting Authority shall also transmit copies of the submitted plans and support documentation to all agencies having requested such documentation for either that specific project or for such projects generally, and to any other authorities whose review is judged appropriate by the Building Commissioner, for technical review and comment. Failure of any official or agency to make recommendation within thirty-five days of receipt of the application and support documentation shall be deemed lack of opposition thereto.

- e. Decision. A special permit, if granted, shall be subject to any general or specific rules prescribed herein, and it may be made subject to appropriate conditions, safeguards, and limitations on time or use. When the Special Permit Granting Authority determines that a special permit may be granted if accompanied by conditions specially designated to safeguard the neighborhood and the Town, it shall impose such conditions and make them a part of the decision, and they shall be made a part of the building permit issued by the Building Commissioner.
- f. Lapse. A special permit granted under this Section shall lapse within three (3) years, which shall not include such time required to pursue or await the determination of an appeal referred to in ~~M~~G-L c. 40A, ~~§~~5-17, from the grant thereof, if a substantial use thereof has not sooner commenced except for good cause or, in the case of permit for construction, if construction has not begun by such date except for good cause (Art. 38, Spring ATM, 4/11/17)

(Art. 30, Fall ATM, 10/19/21)

~~2.B Site Plan Review Applicability and SPGA Designation~~

- a) ~~All uses, other than Uses Nos. 1, 3, 5, 8, 9, 17, 18, 46, 47 and 48, permitted or allowed in the following Zoning districts, shall be subject to the Site~~

~~Plan Review Procedure described herein, to be administered by the Planning Board, acting as the SPGA: _____~~

~~Highway Mixed Use – I _____~~
~~Highway Mixed Use – II~~
~~Highway Mixed Use – III~~
~~Highway Planned Use~~
~~Open Space Residential Development (OSRD)~~
~~Hospital (H)~~
~~Inclusionary Housing Option Program (IHOP)~~
~~Regional Center Overlay District (Art. 7, S.T.M. #1, 2/3/93)~~
~~Highway Corridor Overlay District (Art. 7, S.T.M. #1, 2/3/93)~~
~~Planned Cluster Development – PCD (Art. 2, S.T.M. #2, 10/10/00)~~
~~Mall Center (MC) Overlay District – (Art. 1, S.T.M. #2, 12/03/02)~~
~~Housing Overlay Option Plan – I (HOOP – I) (Art. 27, Spring A.T.M., 4/15/04)~~
~~Housing Overlay Option Plan – II (HOOP – II) (Art. 27, 2004 Spring A.T.M., 4/15/04)}~~
~~Regional Center Mixed Use Overlay District (Art. 1, Fall STM #1, 10/18/05)~~
~~Historic Preservation (Art. 37, Fall ATM, 10/21/14)~~
~~Industrial I (In-I) (Art. 7, S.T.M.#2, 11/1/16)~~
~~Industrial II (In-II) (Art. 7, S.T.M.#2, 11/1/16)~~
~~Downtown Mixed Use (DMU) (Art. 38, Spring ATM, 4/11/17)~~
~~Center Gateway (CG) (Art. 24, Spring ATM, 05/02/2023)~~
~~Independent Senior Living Overlay Option Plan (ISLOOP)~~
~~Assisted Living Overlay Option Plan ALOOP~~
~~Indoor Recreational Overlay District (IROD)~~

~~The following zoning districts shall be subject to the Site Plan Review Procedures described herein, to be administered the Zoning Board of Appeals acting as the SPGA~~

~~Limited Commercial (LC)~~
~~Subsidized Housing (SHA)~~
~~(Art. 38, Spring ATM, 4/11/17)~~

- b) ~~All uses, other than Uses No. 46, 47, 48 and 54 which are permitted or allowed under the Use Regulation Schedule in the Commercial II (C-II), zoning districts, shall be subject to the Site Plan Review procedure described herein with the Planning Board acting as SPGA (Art. 7, S.T.M.#2, 11/1/16) (Art. 38, Spring ATM, 4/11/17)~~
- c) ~~Notwithstanding the foregoing, in the Commercial II, Industrial I, and Industrial II districts, the Site Plan Review procedures described herein shall not be required with respect to alteration or rehab construction unless:~~
- 1.) ~~There is a change from one use designation to another use designation as described in the Use Regulation Schedule, or when an additional use designation, as described in the Use Regulation Schedule, is sought, or~~
~~(Art. 28, Spring Town Meeting, 4/14/15)~~

~~2.) The proposed alteration of a structure in existence prior to August 10, 1960 will increase the floor area of a building on the premises by more than five (5%) percent. (Art. 28, Spring Town Meeting, 4/14/15)~~

~~d) All uses, other than Use No. 1, which are permitted or allowed under the Use Regulation Schedule in the AP (Administrative & Professional) District and Center Gateway District (CG), shall be subject to the Site Plan Review procedure described herein, with the Planning Board acting as the SPGA for all such review procedures.~~

~~(Art. 39 Spring T.M. 4/12/2011)~~

~~e) Where Site Plan Review is not otherwise required by the provisions of Section VI DD, in all zoning districts the construction of parks, trails, roads, driveways and parking areas shall be subject to the Site Plan Review procedure described herein to be administered by the Planning Board as the SPGA. This section VI DD 2.B (c) shall not remove the exclusions created by Section VI DD 2.B (c). (Art. 29, Spring Town Meeting, 4/14/15) (Art. 33, Spring ATM, 4/10/18)~~

3. General Requirements

~~a) Final Site Plan: No person shall undertake a use, construction or alteration of any structure which is subject to the provisions of the Site Plan Review Procedure in those districts and/or uses to which this Section VI DD applies, unless he has first submitted to the SPGA for its approval, a Final Site Plan of such proposed use or alteration. Once approved by the SPGA, the SPGA shall issue a Special Permit therefor and such Plan shall not be changed in any material respect without being amended or modified in the same manner as provided for obtaining initial approval. No building or use permit shall be issued by the Building Inspector for any use subject to the Site Plan Review Procedure, and no construction or site preparation shall be started, until a decision of the SPGA approving the final Site Plan has been filed with the Town Clerk. An applicant for site plan review may not attach conditions to its submittal of plans for review, and any site plan so submitted may be rejected as not being in conformance with these bylaws. There shall only be one (1) Final Site Plan in effect for a tract at any point in time. The SPGA shall not approve multiple Final Site Plans for all or any portion of a tract subject to the Site Plan Review Procedure. Although final Site Plans may be approved for all or part of a project on a tract to accommodate the phasing thereof, any subsequent changes in such previously approved Final Site Plan may be accomplished by amending or modifying the prior approval, including by substituting or replacing previously approved plans or portions thereof. Notwithstanding any other provision in these By-laws, once a building permit is issued for development under plans approved by the SPGA under the Site Plan Review Procedure for all or any part of a tract, all further development of the remainder of such tract shall be subject to this Site Plan Review Procedure, regardless of the zoning classification applicable to such tract at the time of site plan approval, prior thereto, or effective thereafter.~~

~~b) Content of Final Site Plan and Other Submittals: In addition to any other requirements which the SPGA may reasonably make, a Final Site Plan shall show all existing and proposed buildings, existing and proposed contour elevations, structures, parking spaces, driveway openings, driveways, service areas, facilities for sewage, refuse and other waste disposal and for surface water drainage, wetlands, surface water, areas subject to the 100 year flood, maximum groundwater elevation, location of aquifers, private or public wells and drinking water supplies in relation to the site, and landscape features such as fences, walls, planting~~

~~areas, walks, and lighting both existing and proposed. The Site Plan shall also show the relation of the above features to adjacent ways and properties. The site plan shall also show all contiguous land owned by the applicant or by the Owner(s) of the property which is the subject of the application. In addition to the foregoing, the applicant shall submit material dealing with pollution of surface or groundwater, soil erosion, increased runoff, changes in groundwater level, and flooding as it affects the site and the project; and the plans and such other submittal shall indicate the measures proposed to deal with and mitigate such environmental impacts. Similar submittals and materials regarding design features intended to integrate the proposed new development into the existing landscape, to enhance aesthetic assets, and to screen objectionable features from neighbors shall also be presented. The applicant shall further submit a traffic study which shall project traffic flow patterns into and upon the site for both vehicles and pedestrians, and an estimate of the projected number of motor vehicle trips to and from the site for an average day and for peak hours, as well as the existing patterns and existing ways for passage of traffic and pedestrians. Except for building permits, any other permits or approvals required from Town Agencies are to be included as part of this submittal or an explanation for their absence satisfactory to the SPGA shall be submitted. Failure to provide such permits or approvals shall not be due to failure by the applicant to apply to the appropriate Agency for their grant.~~

34. Procedures:

The SPGA shall adopt such rules and regulations for carrying out its duties under this Section as a SPGA in accordance with ~~MGL c. 40A, §Section 9, of the General Laws, Chapter 40A,~~ these bylaws, and the Constitution of the Commonwealth of Massachusetts. The SPGA may in any particular case, where such action is allowed by law, in the public interest and not inconsistent with the purpose and intent of ~~this Site Plan Review Procedure~~the Special Permit, waive strict compliance with its rules and regulations. ~~The SPGA shall not require a Site Plan Review where the nature of the proposed construction, alteration or use is such as to have a minimal effect on any of the standards or criteria provided for hereafter in this Section, when measured against existing conditions of the site.~~ The SPGA may provide for a schedule of examination fees in connection with the ~~Site Plan Review~~Special Permit Procedure herein provided.

aa) Submission of Plans

~~Although preliminary plans may be discussed informally with the SPGA only one plan submission is required. An application for Final Site Plan approval shall be made by filing an application with the SPGA. The applicant shall file a copy of such application with the Town Clerk and with the Planning Director for their information and records.~~

b) Approval and Disapproval: Notice and Hearing:

Before approval, approval subject to conditions, or disapproval, of a ~~Final Site Plan~~Special Permit is given, a public hearing shall be held by the SPGA in the manner set forth in ~~General Laws MGL, c. Chapter 40A, §Section 11.~~ The SPGA shall file its decision with the Town Clerk, and shall send notice of such action by registered or certified mail, postage prepaid to the applicant. In the event of disapproval, the SPGA shall state in detail wherein the plan does not conform with legal requirements, or the requirements of this Site Plan Review Procedure. Reconsideration of applications and withdrawal of application shall be in accordance with ~~General Laws MGL, Chapter c. 40A, §Section 16.~~

be) Failure to Act:

Failure of the SPGA to take final action upon an application for ~~site plan review~~Special Permit, within ninety (90) days following the close of a public hearing shall be deemed to be approval of such application, however, the public hearing procedure need not be concluded in one sitting, and it may be continued or extended as the SPGA determines to be necessary for it to receive further information to enable it to render its decision in the matter.

cd) Right of Appeal:

Any person aggrieved by a decision of the SPGA may appeal to the Superior Court or to the Land Court in accordance with ~~General Laws~~MGL, Chapter c. 40A, §Section 17.

5. Criteria for Approval

~~In considering a Final Site Plan for approval, the SPGA shall assure that the following criteria are met:—~~

- ~~a) Compliance with all provisions of the Zoning Bylaws.~~
- ~~b) Protection of adjoining premises against seriously detrimental or offensive uses on the site (e.g. by integrating development design onto existing landscape to enhance aesthetic assets, screening of objectionable features from neighbors, providing adequate surface water drainage, buffers against light, sound, dust, noise and vibration).~~
- ~~c) Convenience and safety of vehicular and pedestrian movement on the site and in relation to streets and properties in the surrounding area, and for the location of driveway openings in relation to street traffic, so as to prevent traffic congestion and dangerous access within the site and onto existing ways.~~
- ~~d) Adequacy of the methods of disposal of wastes.~~
- ~~e) Adequacy of measures for the prevention of pollution of surface and groundwater, soil erosion, increased runoff, changes in groundwater level and runoff, and conservation and recycling of water.~~
- ~~f) Protection of significant features on the site and in adjacent areas insofar as consistent with the purposes of these bylaws.~~

6. Standards for Site Plan Review

~~The following performance standards shall be utilized by the SPGA in addition to any specific standards prescribed elsewhere in these bylaws, or in the Rules and Regulations of the SPGA, in reviewing all site plans. These standards are intended to provide guidance to the applicant in the preparation of his plans as well as guidelines for review. These are not intended to be exhaustive, and specific additional standards may be applied for a project if in the opinion of the SPGA such are reasonably necessary. The standards are not intended to discourage creativity, invention and innovation; but are intended to encourage good design and exemplary projects offering solutions to all problems of a site, where possible. The issues and concerns represented by the standards enumerated below must be addressed to the satisfaction of the SPGA in the Final Site Plan:~~

a) Preservation of Landscape:

- ~~—The landscape shall be preserved in its natural state, insofar as practicable by minimizing tree and soil removal and any grade changes shall be in keeping with the general appearance of the neighboring developed areas. Where tree coverage does not exist, or has~~

been removed, new planting may be required. Finish site contours shall depart only minimally from the character of the natural site and the surrounding properties.

b) Relation of Buildings to Environment:

— Proposed development shall be related harmoniously to the terrain and to the use, scale and siting of existing buildings in the vicinity that have functional or visual relationship to the proposed buildings. All buildings and other structures shall be sited to minimize disruption of the topography. Strict attention shall be given to proper functional, visual, and spatial relationship of all structures, landscape elements and paved areas.

c) Open Space:

— All open space (landscaped and useable) shall be so designed as to add to the visual amenities of the vicinity by maximizing its visibility to persons passing the site or overlooking it from nearby properties.

d) Circulation:

— With respect to vehicular and pedestrian circulation, including entrances, ramps, walkways, drives and parking, special attention shall be given to location and number of access points to the public streets (especially in relation to existing traffic controls), width of interior drives and access points, general interior circulation, separation of pedestrian and vehicular traffic, access to community facilities, and arrangement of parking areas that are safe and convenient and, insofar as practicable do not detract from the use and enjoyment of proposed buildings and structures and the neighboring properties.

e) Surface Water Drainage:

— Special attention shall be given to proper site surface drainage so that removal of surface waters will not adversely affect neighboring properties or the public storm drainage system, nor obstruct the flow of vehicular or pedestrian traffic, and will not create puddles in the paved areas. All surface water drained from roofs, streets, parking lots and other site features shall be disposed of in a safe and efficient manner which shall not create problems of water runoff or erosion on the site in question or on other sites. Insofar as possible, natural drainage courses, swales properly stabilized with plant materials, or paving when necessary, and drainage impounding areas, shall be utilized to dispose of water on the site through natural percolation to a degree equivalent to that prior to development. Also, appropriate control measures shall be employed which include: maximum slope requirements, slope stabilization measures including seeding of exposed areas to replace vegetative cover.

f) Groundwater Recharge and Quality Preservation:

— Groundwater recharge shall be maximized and groundwater quality shall be protected. Various techniques may be required to maximize recharge, such as perforated drain pipes, pervious pavement, reduction of paved areas, reduction of building coverage, etc; or to improve quality, such as installing grease traps or gas/oil separators. Where the groundwater elevation is close to the surface, extra site grading precautions may be required to maintain the protective function of the overburden.

g) Utilities:

~~—The placement of electric, telephone and other utility lines and equipment, such as water, sewer or gas, shall be underground; and so located as to provide no adverse impact on the groundwater levels, and to be coordinated with other utilities. The proposed method of sanitary sewage disposal and solid waste disposal from all buildings shall be indicated precisely on the plans.~~

~~h) Advertising~~

~~—All signs and outdoor advertising features shall be reviewed as an integral element in the design and planning of all development on the site. As a minimum all signs and advertising devices shall be in conformance with Section V-H of these bylaws, and the provisions thereof shall be administered by the SPGA having responsibility for the Site Plan Review Procedure.~~

~~i) Other Site Features:~~

~~—Exposed storage areas, exposed machinery installation, service areas, truck loading areas, utility buildings and structures, and similar accessory areas and structures shall be subject to such setbacks, screen plantings, or other screening methods as shall be reasonably required to prevent their being a hazard or being visually incongruous with the existing or contemplated environment and the surrounding properties.~~

~~j) Safety:~~

~~—With respect to personal safety, all open and enclosed spaces shall be designed to facilitate building evacuation and to maximize accessibility by fire, police, and other emergency personnel and equipment.~~

47. Start of Construction

Construction on a site must be started or substantial activity commenced on the site within one (1) year from the date of Final Site Plan Special Permit approval. Site preparation alone shall not be deemed to constitute start of construction. Approval of a Final Site Plan Special Permit may be extended for one additional year at the discretion of the SPGA after a receipt of a written request from the owner or his designated agent, and for good cause shown. If one (1) year has elapsed from the date of approval and no extension has been granted, or if so granted then at the end of such one year extension, no construction has been started or substantial activity commenced, the Final Site Plan Special Permit approval shall be come null and void without requiring any further action by the SPGA.

8. ~~Certificate of Occupancy: Designer's Certification:~~

~~No certificate of occupancy shall be issued for any structure or parcel subject to a Site Plan Review Procedure unless it, and all of its related facilities, substantially conform to the approved Final Site Plan. The applicant shall conform to the approved Final Site Plan. The applicant shall submit to the Building Inspector with a copy to the SPGA, a written certification from a professional engineer, architect, or landscape architect, preferably the one who prepared the Final Site Plan, that the work has been completed substantially in accord with the approved Final Site Plan. The Building Inspector shall deny the issuance of a certificate of occupancy if a professional engineer's, architect's or landscape architect's certification is not so provided. A Certificate of Occupancy, issued by the Building Inspector for any activity requiring Site Plan approval shall constitute a certificate that such construction was performed and completed in compliance with an approved Final Site~~

~~Plan, and such certification shall be conclusive for all purposes, unless it was issued in disregard of the requirement for certification by a professional engineer, architect or landscape architect as provided for herein. Prior to the issuance of a Certificate Of Occupancy, documents for all easements to be granted to the Town shall be recorded.~~

Part 5: Use Regulation Schedule

Amend Section III.A.2 Footnote associated with Licensed Nursery Schools and/or Daycares as presented below

- * ~~"Licensed Nursery Schools and/or Daycare Centers, if located in an existing building, in a (CII), INI, or (H) district, shall not be subject to section VI-DD, "Site Plan Review"; and "L~~icensed Nursery Schools and Daycare Centers, shall not be subject to the requirements of section III-A.5, Aquifer Protection District, provided they shall be located in an existing building and further provided no impervious materials shall be added to the site."
(Art. 14, 1987 Fall A.T.M.)

Part 6: Section III-A.6.B – Housing Overlay Option Plan – (HOOP)

Amended references to Site Plan Review as presented below

4. BONUSES, USES

- a) Where the SPGA, in its discretion, finds that, in addition to the project's meeting the requirements under ~~site plan review under~~ § VI-DDD Site Plan Review of this ~~B~~ylaw, the following criteria are met for parcels in the HOOP – I District, then the maximum number of dwelling units allowed shall equal the gross area of the parcel divided by 1,500 square feet, rounded to the nearest whole number, and where the SPGA, in its discretion, finds that, in addition to the project's meeting the requirements under ~~site plan review under~~ § VI-DDD Site Plan Review of this ~~b~~ylaw, the following criteria are met for parcels in the HOOP – II District, then the maximum number of dwelling units allowed shall equal the gross area of the parcel divided by 3,000 square feet, rounded to the nearest whole number.

Part 7: Section III-C Highway Mixed Use – (HM-II) District Use Regulations

Amended references to Site Plan Review as presented below

2. OVERALL SITE PLAN

In the event the owner or owners of a lot, or several adjacent lots in an HM-II district, elect to develop their land under an Over-all Site Plan, then the uses set forth hereafter under Section III-C.3 may be permitted upon Site Plan Review and the grant of a Special Permit by the Planning Board in accordance with Sections VI-DD, VI-DDD, and V-EE of these By-Laws. Where owners of adjacent lots wish to combine them for the purpose of seeking a Special Permit and approval of a Final Site Plan under this Section, they must submit a recordable agreement to the Planning Board with their petition for a Site Plan Review and Special Permit. Such agreement must be in a form that is satisfactory to the Planning Board and shall authorize the joint proposed development, and be binding upon their successors in interest. Such agreement shall be recorded upon approval of a Final Site Plan prior to the issuance of any building permit. (Art. 9, S.T.M. #1 January 21, 1992)

Part 8: Section III-EE Center Gateway (CG)

Amended references to Site Plan Review as presented below

2. Use Regulations for CG Districts

- a. Projects within the CG district may include two or more uses as identified in the CG District in § III-A.2. Use Regulation Schedule.
- b. Residential Mixed-use Development and mixed-use developments shall require a special permit.
- c. All projects within the CG district shall be subject to Site Plan Review under § VI-DDD of this Bylaw.
- d. Projects with four or more new residential units shall comply with §V-J.
- e. Projects within the CG district may have more than one building per lot.
- f. Projects with frontage on East Central Street and/or Union Street shall provide a minimum of 50 percent of the first floor for non-residential uses.

Part 9: Section III-F.5.b Open Space Residential Development

Amended references to Site Plan Review as presented below

- b. Planning Board
The Planning Board shall review an OSRD project in accordance with the provisions of § VI-DD and § VI-DDD of this By-Law (Special Permit Procedures and Site Plan Review). The Planning Board shall adopt additional application requirements, review and approval procedures, and design guidelines to effectuate the implementation of this section of the ByLaw.

Part 10: Section III-G.1 Highway Mixed Use – III (HM-III) District Use Regulations

Amended references to Site Plan Review as presented below

1. PERMITTED USES; SITE PLAN REVIEW:

Use Nos. 1, 3, 5, 9 and 46C as set forth in Section III-A.2 (USE REGULATIONS SCHEDULE) shall be permitted as a matter of right in the HM-III District. The following additional uses may be allowed upon the issuance of a Special Permit by the Planning Board, subject to Site Plan Review and the procedure as described in Section VI-DDD of this Bylaw: (Art. 10, S.T.M. #1 January 21, 1992) (Use 46C – Art. 30, Fall ATM, 10/8/98)

Part 11: Section III-G.2 Highway Planned Use (HPU) Districts, Section III-G.2.2.B. Allowed Uses-Overall Site Plan

Amended references to Site Plan Review as presented below

- B. ALLOWED USES-OVERALL SITE PLAN In the event the owner or owners of a lot, or several adjacent lots in an HPU district, having in total a minimum area of 25 acres elect to develop their land under an Overall Site Plan then the uses permitted under Section 2.A above shall no longer be allowed and the following uses may be permitted upon Site Plan ~~R~~review and the grant of a Special Permit by the Planning Board in accordance with sections VI-DD, VI-DDD, and ~~&~~ VI-EE of these By-laws. Where owners of adjacent lots wish to combine them for the purpose of seeking a Special Permit and approval of a final Site Plan under this Section, they must submit a

recordable agreement to the Planning Board with their petition for a Site ~~P~~lan Review and Special Permit. Such agreement must be in a form that is satisfactory to the Planning Board and shall authorize the joint proposed development, and be binding upon their successors in interest. Such agreement shall be recorded upon approval of a Final Site Plan prior to the issuance of any building permit. The following are the only uses which may be allowed in such a development in an HPU District:

Part 12: Section III-H – Wireless Communications Facilities, Section III-H.2

Amended references to Site Plan Review as presented below

2 - GENERAL REQUIREMENTS

Special Permit Required. No Free-Standing WCF or Building-Mounted WCF may be erected or installed except upon the issuance of a Special Permit by the Planning Board acting as the Special Permit Granting Authority (SPGA) in accordance with Section VI-EE, and subject to the Site Plan Review procedure as set forth in Section VI-DD~~D~~. The Planning Board shall adopt Rules and Regulations regarding the construction, installation, maintenance and removal of WCFs. Such Rules and Regulations shall include a requirement that the Planning Board employ the services of technical consultants who are expert in the Site Selection and coverage for WCFs, who are expert in the field of RF radiation, who are structural experts having experience in WCF tower design, and who otherwise are sufficiently conversant with wireless industry technology to be able to evaluate any proposal for a WCF. The cost of the services of such consultants shall be borne by the Applicant.

Part 13: Section III-I.1: Assisted Living Residence

Amended references to Site Plan Review as presented below

2. **Applicability:** The Planning Board, acting as Special Permit Granting Authority (SPGA), may grant a Special Permit/Site Plan Approval in accordance with Sections ~~VI-DD~~, ~~VI-DDD~~, and VI-EE of these ~~Bylaws~~~~by-laws~~, for the construction of an Assisted Living Residence (ALR).

4. Procedures

- d. Further procedures: Once a Special Permit/Site Plan Approval is issued, no changes to the final site plan, exclusive of minor modifications as determined by the SPGA, shall be made without applying for a modification of such Special Permit ~~and~~ Site Plan ~~Approval~~~~Review~~ in the manner set forth in Sections ~~VI-DD~~ ~~and~~ ~~VI-DDD~~.

Part 14: Section III-I.2.: Independent Senior Living Overlay Option Plan

Amended references to Site Plan Review as presented below

- 2.2. Applicability and Eligibility. The Special Permit Granting Authority (SPGA), may grant a ~~S~~pecial ~~P~~ermit ~~and Site Plan Review~~ in accordance with Sections VI-DD, ~~VI-DDD~~, ~~and~~ VI-EE, and this ISLOOP section for the construction of an Independent Senior Living Facility in an ISLOOP eligible zone. To be eligible to be placed in an ISLOOP, a parcel must satisfy the following criteria:

Part 15: Section III-I.3: Assisted Living Overlay Option Plan

Amended references to Site Plan Review as presented below

2.6 Standards

The SPGA may grant a Special Permit and approval under Site Plan Review under the procedures and criteria established in MGL 40A, Section VI- DD ~~2-A~~ Special Permits and Section VI-DD ~~D-2B~~ Site Plan Review sections of this Bylaw, and the following standards and requirements.

2.8 Procedures.

In addition to the process set forth in Sections VI-DD [Special Permit2A](#) and VI-DD [Site Plan Review-2B](#), the following procedures are to be followed in obtaining approval for an ALR:

Part 16: Section III-K: Marijuana Establishments, 8. Criteria for Issuance of Special Permit.

Amended references to Site Plan Review as presented below

- 8.10 Hemp: For the purposes of this Bylaw, the cultivation of hemp shall require a Site Plan ~~Review~~[Approval](#) from the Planning Board in accordance with [§VI-DDD Section III-A.7 “Regulation of Land or Structures for Purposes Otherwise Exempted from Permitting”](#) and comply with all applicable sections herein.

Part 17: Section 323.1.9

Amended references to Site Plan Review as presented below

323.1.9 All uses permitted or allowed in the underlying zoning districts (including the RC Overlay District and the MC Overlay District) shall be permitted or allowed respectively on land in the RCP Overlay District. The portion of a Regional Center Mixed-Use Development devoted to multi-family residential use shall be permitted only by ~~Sspecial Ppermit~~ and ~~Ssite Pplan Reviewapproval~~ of the Planning Board granted under Section 320 and Sections ~~VI-DD and VI-DDD~~. Such special permit may authorize the use of parking spaces located on other parcels in the Regional Center Mixed-Use Development to satisfy the parking requirements for buildings located on other parcels in the Regional Center Mixed-Use Development. The Planning Board shall have the authority to include in any such special permit conditions obligating the applicant to fund the reasonable cost of any special equipment or training that may be required for personnel of town departments to mitigate public-safety impacts of such multifamily residential use. The Planning Board shall also have the authority, by issuance of a special permit therefor, to allow the Affordable Housing Standard to be met through the use of offsite affordable units. The portion of a Regional Center Mixed-Use Development devoted to shopping mall use shall be permitted by ~~Sspecial Ppermit~~ and ~~Ssite Pplan approval-Review~~ of the Planning Board granted under Section 320 and Sections ~~VI-DD and VI-DDD~~.

Part 18: Section 324.9.4

Amended references to Site Plan Review as presented below

- 324.9.4 The proposed consolidation of lots for development purposes, or minor alteration of a structure, satisfies all of the criteria and standards of Section VI-DD ~~D~~ Site Plan Review.

Part 19: Section 324.10.2.4

Amended references to Site Plan Review as presented below

324.10.2 In granting a special permit for an increase in FAR under Section 324.10.1, the Planning Board shall make, in lieu of the finding required in Section 324.9, a specific finding, in writing, that the following conditions are met:

- .1 the parcel (or if parcels, the parcels in the aggregate) included in such application have an existing FAR in excess of .32;
- .2 that the increase in FAR shall not result in a development which is substantially more detrimental to the neighborhood than the use of the lots as then improved;
- .3 the increase will achieve the goals, objectives and interests of the MC Overlay District regulations; and
- .4 the project, with such increased FAR, shall satisfy all of the criteria and standards of Section VI-DD Site Plan Review.

Part 20: Section 329.12

Amended references to Site Plan Review as presented below

329.12 For all bonus projects, and projects requiring a special permit under the underlying zoning, the Planning Board shall be the Special Permit Granting Authority. The procedures for site plan submission, review and approval shall be as set forth under Section s VI-DD and VI-DDD of these Bylaws, as specifically modified by other provisions of these Highway Overlay District Regulations.

Part 21: Section IVA. General Requirements, 6. Shared Driveways

Amended references to Site Plan Review as presented below

6. Shared Driveways. Two or more residential structures hereafter erected in any district, whether under an Approval Not Required plan or a Special Permit, shall not be served by a common or shared driveway unless approved under Section VI-DDD Site Plan Review by the Planning Board, acting as a Special Permit Granting Authority (SPGA). Specifications for a shared driveway shall be required which are adequate to serve the number of vehicles that will use it, and where more than two residential structures are to be served such driveway shall meet minimum town Standards as found in the Subdivision Rules and Regulations. Notwithstanding the foregoing, the Permit Granting Authority (PGA) or an SPGA, whenever they have a plan properly before them that shows a shared driveway, shall require such specifications, and may make any other requirement that it considers appropriate. It is the intention of this provision that shared driveways shall only be permitted where in the judgment of the PGA or the SPGA the shared driveway is the most appropriate to serve such residences. (Art. 39, Spring Session, A.T.M. 1983) (Amended- Art. 20 Fall Session A.T.M. 10/10/95)

Part 22: Footnote d. (Section IV-B)

Amended references to Site Plan Review as presented below

- d. 20,000 square feet for first four families, 4,300 square feet for each family thereafter, and in addition to the minimum frontage required per lot for four families; each family thereafter an additional 10 feet of street frontage. (Art. 45 A.T.M. 1965) For large parcel development HM-II Districts (see Section III-C-2), the Planning Board, in accordance with Site Plan Review (Section VI-DDD) procedures provided for hereinafter, shall allow densities of up to a maximum of twenty (20) units per acre. (Art. 3 S.T.M. 3/20/79)

Part 23: Section V-B.2 Accessory Uses

Amended references to Site Plan Review as presented below

- b. Review. This accessory use requires a special permit from the Planning Board. In its discretion to approve or deny a special permit authorizing an Agri-tourism accessory use, the SPGA shall consider the following:

- i. The review conditions for all Special Permits, as specified in ~~s~~Section VI-DD.2.A.b.

Part 24: Section V-B.3. 11) and a) and b)

Amended references to Site Plan Review as presented below

- 11) Site Plan Review: Medium-scale Ground-mounted Solar Energy Systems in all districts and Solar Parking Canopies in non-residential districts are subject to site plan review by the Special Permit Granting Authority prior to construction, installation or modification as provided in this section and in accordance with Section VI-DD - Special Permit Procedures and [Section VI-DDD](#) Site Plan Review. The Planning Board will serve as the Special Permit Granting Authority for these systems.

- a) Site Plan Document Requirements: The project proponent shall provide a Final Site Plan to the [Special Permit Granting Authority Planning Board](#) in compliance with Section VI-DDD ~~3b—Content of Final Site Plan and Other Submittals~~. In addition, applicants should submit the following:
 - b) Site Plan Review Design Standards: The [Special Permit Granting Authority Planning Board](#) shall consider the following criteria and standards, in addition to those listed in Section VI-DDD ~~5 and 6—Criteria for Approval and Standards for Site Plan Review~~ when reviewing site plan submittals made under this section:

Part 1: Add a new § VI-DD Special Permit Procedures

Add a new §VI-DD Special Permit Procedures to read as follows:

Section VI-DD Special Permit Procedures

1. Purpose and Intent

Special Permit, a discretionary permit that may be granted based on the evaluation of a complete application that meets the requirements of this Section and advances the goals and policies of Natick's long-range planning documents and the Town's Comprehensive Plan.

2. Authority

The Special Permit Granting Authority ("SPGA") shall be the Planning Board or the Zoning Board of Appeals ("ZBA") as prescribed herein.

- a. The Planning Board shall serve as the SPGA, except for uses identified in § III-A.2.
- b. Where an activity or use requires both Site Plan Review and one (1) or more Special Permits the Planning Board shall serve as the SPGA, and conduct such reviews concurrently.

3. Application Materials

A Special Permit application shall be filed in accordance with the rules and regulations of the SPGA.

4. Review Criteria

The SPGA shall evaluate a Special Permit application based the following criteria.

- a. The site and immediate area is appropriate for such a use, structure, or condition.
- b. The use, structure or condition will not adversely affect the neighborhood.
- c. The use, structure or condition will not be a nuisance or cause hazard to vehicles or pedestrians.
- d. The site has access to adequate and appropriate facilities to ensure proper operation of the proposed use, structure or condition.
- e. The adverse impacts are adequately mitigated, which may require improvements to public infrastructure, roadways, and environmental impacts.
- f. The use, structure, or condition exceeds the minimum design standards outlined in the SPGA's rules and regulations.

5. Waiver

The Planning Board, at its discretion, may waive technical or submittal requirements of a Special Permit where such technical or submittal requirements are not appropriate or relevant for the evaluation of the project. All Applicants seeking waiver requests shall provide a detailed description of the need for relief from the technical or submittal requirement.

6. Review Procedures

All uses that require a Special Permit shall be subject to the following procedures outlined herein.

- a. Public Hearing
A public hearing shall be required conducted by the SPGA within sixty-five (65) days after the submittal of a complete Special Permit application. The SPGA shall give notice and hold a public hearing in accordance with MGL c. 40A, §9 and 11.
- b. Pre-Application Review
Applicants are strongly encouraged to meet with the Development Review Team (DRT) prior to an application submittal.
- c. Peer Review Consultant
The SPGA may require the Applicant to fund a Peer Review Consultant to assist in the technical review of the proposal in accordance with the Planning Board Rules and Regulations and MGL c. 44, § 53G.
- d. Decision
The SPGA shall render a decision in accordance with MGL c. 40A, §9.

7. Administration

- a. The SPGA shall establish and periodically amend rules and regulations related to the administration of this Section, submittal requirements, and design standards.
- b. The SPGA shall establish and periodically amend a schedule of fees for all applications under this Section. Applications shall only be deemed complete if all associated fees are paid.
- c. No building permit shall be issued for any application that requires a Special Permit unless the SPGA has rendered a decision for the project in accordance with this Section.

8. Modification

Any modification to an approved Special Permit requires prior approval from the SPGA, Building Commissioner, Town Engineer, or Chief of Fire, as outlined herein.

- a. Technical Modification: The Building Commissioner, Town Engineer, Fire Chief, or their authorized designee may approve modifications that have been identified to protect or improve public safety. A letter from the respective Town Official shall be provided to the SPGA and incorporated into the project file.
- b. Minor Modification: The SPGA during an open public meeting, may grant approval for a minor modification. Minor Modifications are modifications to a previously approved Special Permit that do not trigger Site Plan Review; does not change a use, structure or condition in a way that is not consistent with the previous approval; or would not result in a different decision being made by the SPGA.
- c. Major Modification: If the SPGA, in its review, determines that a requested modification constitutes a major modification, it shall require the submission of an application for an amendment requiring a new public hearing pursuant to MGL c. 40A, §9 and §11.

9. Extension of Time

Prior to the expiration of a Special Permit, a Petitioner may request an Extension of Time. The Petitioner must show good cause for such request and, in the case of a permit for construction, if construction was not begun by such date, expect for good cause. A request for an Extension of Time shall follow the procedures in accordance with MGL c. 40A, §9 and §11.

10. Expiration

Pursuant to MGL c. 40A, §9, a Special Permit granted under this Section shall lapse within three (3) years, not including such time required to pursue or await the determination of an appeal as referred to in MGL c. 40A, §17.

11. Repetitive Application

No application for a Special Permit that has been unfavorably and finally acted upon by the Planning Board shall be acted favorably upon within two (2) years after the date of final unfavorable action unless the Planning Board by a three-fourths (3/4th) vote finds specific and material changes in the conditions upon which the previous unfavorable action was based.

Part 2: Delete Section VI-DD Special Permit Procedures

Delete provisions relative to Special Permit from Section VI-DD as presented below

VI-DD ~~SPECIAL PERMIT PROCEDURES AND SITE PLAN REVIEW~~

~~1. Purpose and Intent Administration~~

- ~~a) The purpose of the following Special Permit section of this zoning bylaw is to authorize the hearing of and decisions on Special Permit applications, authorize the issuance of Special Permits, establish criteria and procedures for the issuance of Special Permits and set forth matters which can be addressed and regulated in a Special Permit decision. Unless specifically exempted in Section VI-DD2.B., all uses requiring Special Permits under this Zoning By-Law shall require Site Plan Review in accordance with VI-DD 2.B. The purpose of the Site Plan Review Procedure hereby established is to protect the safety, public health, convenience and general welfare of the inhabitants of the Town by providing a comprehensive review of plans for those uses and structures which have a significant impact upon the character of the Town and upon traffic, utilities and property values therein. Factors to be considered are the placement of buildings and utilities, surface and groundwater drainage, wetlands, water supply, parking, loading, landscaping, lighting, dust and noise control, access to the development, acceptable sanitary conditions and the proper provision for open areas. It is intended to insure that the design and layout of those developments so subject to this procedure in this bylaw will constitute suitable development and will not result in a detriment to the neighborhood or to the environment. It is also intended hereby to assist those wishing to build projects within the Town by providing them with the necessary information about all of the Town's requirements affecting their project prior to the start of any construction or the issuance of the permits. (Art. 38, Spring ATM, 4/11/17)~~
- ~~b) The Special Permit Procedure and the Site Plan Review Procedure are to be administered by a Special Permit Granting Authority ("SPGA") in those uses and/or districts, and in the manner as indicated in this Section VI-DD. Those Town Agencies who may function as the SPGA hereunder are: The Board of Appeals and the Planning Board. The specific assignments given to each SPGA are set forth in Section 2.A and Section 2.B hereafter. (Art. 38, Spring ATM, 4/11/17)~~
- ~~c) It is the further intent of the Site Plan Review Procedure that any Final Site Plan filed with the SPGA shall receive the approval of such SPGA if said plan conforms to the standards established herein and to the reasonable rules and regulations of the SPGA made in conformity with these bylaws. It is to be noted, however, that where maximums are stated in this bylaw the SPGA acting hereunder can deny granting the maximum (e.g. height,~~

building coverage, etc.) if in its opinion the proposed plan does not merit granting the maximum, in view of the criteria and standards set hereby. Similarly, where minimums are stated in this bylaw, the SPGA acting hereunder can make increased requirements. (e.g. parking, screening, landscaping, etc.) if in its opinion in applying the criteria and standards set hereby, the proposed plan warrants exceeding such minimums.

2. A. Special Permits

a. ~~Special Permit Granting Authority. As designated in this By Law, the Board of Appeals or the Planning Board shall act as the Special Permit Granting Authority (SPGA) for hearing and deciding all matters pertaining to Special Permits and for issuance of such Special Permits. The specific assignments are listed below.~~

1. ~~The Planning Board shall act as the SPGA in the following Districts:~~

- ~~— Highway Mixed Use I~~
- ~~— Highway Mixed Use II~~
- ~~— Highway Mixed Use III~~
- ~~— Highway Planned Use~~
- ~~— Open Space Residential Development (OSRD)~~
- ~~— Hospital (H)~~
- ~~— Inclusionary Housing Option Program (IHOP)~~
- ~~— Regional Center Overlay District~~
- ~~— Highway Corridor Overlay District~~
- ~~— Planned Cluster Development – PCD~~
- ~~— Mall Center (MC) Overlay District~~
- ~~— Housing Overlay Option Plan I (HOOP I)~~
- ~~— Housing Overlay Option Plan II (HOOP II)~~
- ~~— Regional Center Mixed-Use Overlay District~~
- ~~— Historic Preservation~~
- ~~— Administrative and Professional (AP)~~
- ~~— Commercial II (C II)~~
- ~~— Industrial I (In I)~~
- ~~— Industrial II (In II)~~
- ~~— Downtown Mixed Use (DMU)~~
- ~~— Center Gateway (CG)~~
- ~~— Independent Senior Living Overlay Option Plan (ISLOOP)~~
- ~~— Assisted Living Overlay Option Plan ALOOP~~
- ~~— Indoor Recreational Overlay District (IROD)~~
- ~~— Inclusionary Housing Special Permit (IHSP)~~

2. ~~Zoning Board of Appeals shall act as the SPGA in the following Districts:~~

- ~~Limited Commercial (LC)~~
- ~~Subsidized Housing (SHA)~~
- ~~Non-Conforming Uses in accordance with Section V-A~~

3. ~~In the event of a failure of this zoning by law to designate an SPGA, the Planning Board shall be authorized to act and serve as SPGA.~~

b. ~~Decision Criteria. The following criteria shall be the minimum basis for all decisions on special permits, in addition to criteria as may be more specifically provided elsewhere in this~~

~~By Law. Special permits shall be granted by the Special Permit Granting Authority as specified herein only upon its written determinations for each of the following factors that the proposed use will not have adverse effects which outweigh its beneficial effects for both the neighborhood and the Town, in view of the particular characteristics of the site and of the proposal in relation to that site. The determinations shall be made separately for and indicate consideration of each of the following criteria:~~

- ~~1. Social, economic, or community needs which are served by the proposal;~~
- ~~2. Adequacy of traffic flow and safety, including parking and loading;~~
- ~~3. Adequacy of utilities and other public services;~~
- ~~4. Neighborhood character and social structures;~~
- ~~5. Impacts on the natural environment;~~
- ~~6. Potential fiscal impact, including impact on town services, tax base, and employment;~~
~~and~~
- ~~7. Conformity with the purposes and objectives of both this zoning by law and the district which the property is situated.~~

~~The applicant shall show to the satisfaction of the special permit granting authority that the use, building, or structure for which application is made shall not be against the public interest, shall not derogate from the character of the neighborhood in which such use, building, or structure is to occur and shall not be detrimental or offensive because of noise, vibration, smoke, gas, fumes, odor, dust or other objectionable features and that such use, building, or structure shall not otherwise be injurious to the inhabitants of the Town or their property or dangerous to the public health or safety.~~

~~Consideration of traffic flow and safety and parking and loading shall consider affects on nearby and collector streets at both peak and off peak hours. Consideration of the natural environment shall include not creating additional shadow or causing additional blockage of sunlight and/or view on or from existing buildings, constituting the primary use, on adjacent properties to a greater extent than could result from the construction of a permitted use (i.e. a use not requiring special permit) in full compliance with all applicable dimensional and intensity regulations on the parcel for which the special permit is sought. When the foregoing criteria are not so satisfied, the special permit granting authority shall deny the application.~~

~~In addition to these criteria, the special permit granting authority may impose conditions, safeguards and limitations on time and use.~~

~~c. Procedures. Applicants shall file a complete special permit application electronically for review through the Town's online permitting portal. (Art 23, FTM 10/18/2022)~~

~~d. Referral to Other Officials and Agencies. The Special Permit Granting Authority shall refer notice of all applications immediately upon receipt to the Town Administrator, Building Commissioner, Planning Board (when it is not the SPGA), Town Engineer, DPW, Board of Health, Conservation Commission, Police Department, Fire Department, and to any other involved Town official or agency.~~

~~The Special Permit Granting Authority shall also transmit copies of the submitted plans and support documentation to all agencies having requested such~~

~~documentation for either that specific project or for such projects generally, and to any other authorities whose review is judged appropriate by the Building Commissioner, for technical review and comment. Failure of any official or agency to make recommendation within thirty five days of receipt of the application and support documentation shall be deemed lack of opposition thereto.~~

~~e. Decision. A special permit, if granted, shall be subject to any general or specific rules prescribed herein, and it may be made subject to appropriate conditions, safeguards, and limitations on time or use. When the Special Permit Granting Authority determines that a special permit may be granted if accompanied by conditions specially designated to safeguard the neighborhood and the Town, it shall impose such conditions and make them a part of the decision, and they shall be made a part of the building permit issued by the Building Commissioner.~~

~~f. Lapse. A special permit granted under this Section shall lapse within three years, which shall not include such time required to pursue or await the determination of an appeal referred to in G.L. c. 40A, s. 17, from the grant thereof, if a substantial use thereof has not sooner commenced except for good cause or, in the case of permit for construction, if construction has not begun by such date except for good cause (Art. 38, Spring ATM, 4/11/17)~~

~~(Art. 30, Fall ATM, 10/19/21)~~

Part 3: Section 200 – Definitions

Add a new definition to support the new provisions relative to special permit procedures. The New definition shall read:

SPGA: Special Permit Granting Authority

Part 4: Section III-A – Use Regulations

Deleting “as granted by a Special Permit Granting Authority and as designated elsewhere in this By-Law (RS includes all Single Residence Districts unless otherwise specified)”

Adding “, subject to §VI-DDD Special Permit”

III-A.1 PERMITTED USES IN DISTRICTS (ZONES AS SET OUT IN SECTION II-A & B)

- a. In such Districts no building or structure shall be erected or used and no premises shall be used except as set forth in the "Use Regulations Schedule" herein and in accordance with the following notations:

Y - A permitted use

N - An excluded or prohibited use

SP- Use allowed under a Special Permit, subject to §VI-DD Special Permit ~~as granted by a Special Permit Granting Authority and as designated elsewhere in this By-Law (RS includes all Single Residence Districts unless otherwise specified)~~

Part 5: Section III-F.5.b Open Space Residential Development

Amended references to Site Plan Review as presented below

b. Planning Board

The Planning Board shall review an OSRD project in accordance with the provisions of § VI-DD of this By-Law ~~(Special Permit Procedures and Site Plan Review)~~. The Planning Board shall adopt additional application requirements, review and approval procedures, and design guidelines to effectuate the implementation of this section of the ~~Bylaw~~By-Law.

Part 6: Section III-H Wireless Communications Facilities

2 - GENERAL REQUIREMENTS

Special Permit Required. No Free-Standing WCF or Building-Mounted WCF may be erected or installed except upon the issuance of a Special Permit ~~by the Planning Board acting as the Special Permit Granting Authority (SPGA) in accordance with Section VI-EE~~, and subject to the Site Plan Review procedure as set forth in Section VI-DD. The Planning Board shall adopt Rules and Regulations regarding the construction, installation, maintenance and removal of WCFs. Such Rules and Regulations shall include a requirement that the Planning Board employ the services of technical consultants who are expert in the Site Selection and coverage for WCFs, who are expert in the field of RF radiation, who are structural experts having experience in WCF tower design, and who otherwise are sufficiently conversant with wireless industry technology to be able to evaluate any proposal for a WCF. The cost of the services of such consultants shall be borne by the Applicant.

Part 7: Section III-I.1: Assisted Living Residences

2. Applicability: The Planning Board, acting as Special Permit Granting Authority (SPGA), may grant a Special Permit ~~and~~/ Site Plan Approval in accordance with Section VI-DD ~~and VI-EE~~ of these ~~Bylaws~~By-Laws, for the construction of an Assisted Living Residence (ALR).
3. Allowed Uses: The SPGA, as hereinafter provided, may grant a Special Permit ~~and~~/ Site Plan Approval pursuant to the provisions of this ~~Bylaw~~By-Law, under the following standards and requirements:
 - a. An Assisted Living Residence (ALR) shall provide residences of no more than two bedrooms each exclusively to meet the needs of seniors and the elderly together with their spouses, surviving spouses, and resident staff.
 - b. Such facility may include common areas and community dining facilities, and may provide personal care services, activities of assistance with daily living, and other related programs and services. This may include, but is not strictly limited to, meal care services, beauty salon, sundry shop, and banking and recreational facilities. Space designated for accessory uses may not exceed ten (10) percent of total floor area.

- c. At the time of application, the Applicant must demonstrate to the satisfaction of the SPGA the feasibility of future conversion of the facility to a use permitted for the zoning district.
 - d. The SPGA, in order to approve the Special Permit and /Site Plan Approval for an ALR, must find that the overall impact of the facility will not substantially derogate from the cumulative impact associated with other uses allowed as a matter of right or by special permit within the zoning district.
4. Procedures: The procedures to be followed in obtaining approval for an Assisted Living Residence (ALR) are:
 - a. ~~RESERVED Special Permit Granting Authority: The Planning Board shall act as the Special Permit Granting Authority (SPGA) for uses administered under Section III-I of the Zoning By-Laws.~~
 - b. Pre-application: The Applicant is encouraged to meet with the Director of Community and Economic Development ~~Director~~ and the SPGA prior to the preparation of a formal application, for general discussion of the project to be proposed.
 - c. Formal application: The Applicant shall submit a plan for the overall development, including a final site plan showing the final completed development in all phases as contemplated on the site at the time of application, regardless of the number of phases in which it may be constructed. Said application shall include at a minimum a completely designed first phase of development. The application shall be filed in the name of the Applicant. The Applicant must either own or submit authorization in writing to act for all of the owners of the ALR parcel prior to submitting a formal application. The application for a Special Permit and /Site Plan Approval shall be filed by the applicant with the Town Clerk and a copy of said application, including the date and time of filing certified by the Town Clerk, shall be filed by the applicant with the SPGA.
 - d. Further procedures: Once a Special Permit and /Site Plan Approval is issued, no changes to the final site plan, exclusive of minor modifications as determined by the SPGA, shall be made without applying for a modification of such Special Permit and /Site Plan Approval in the manner set forth in Section VI-DD.
5. Number of Living Units: The number of living units allowed in an ALR shall not exceed 30 living units per acre (43,560 s.f.), subject to the requirements of Section 6 and the grant of a Special Permit and /Site Plan Approval ~~by the SPGA.~~
8. Affordability Requirements: Unless a determination has been made satisfactory to the SPGA that the living units of the ALR do not affect the Town's Statutory Minima or the Town's Computation of Statutory Minima as defined and/or set forth in 760 CMR 56 and as maintained by the Commonwealth of Massachusetts Executive Office of Housing and Livable Communities (EOHLC) Department of Housing and Community Development (DHCD), the Applicant shall be subject to and comply with all provisions of Section V-J of this Bylaw ~~by-law~~. (Art. 52, F.T.M. 10/17/17) (Art. 32, Fall TM 10/16/18)

Part 8: Section III-I.2.: Independent Senior Living Overlay Option Plan

2.2. Applicability and Eligibility. The Special Permit Granting Authority (SPGA), may grant a special permit in accordance with Sections VI-DD, ~~VI-EE~~, and this ISLOOP section for the construction of an Independent Senior Living Facility in an ISLOOP eligible zone. To be eligible to be placed in an ISLOOP, a parcel must satisfy the following criteria:

2.4 Standards. The SPGA may grant a Special Permit and approval under Site Plan Review under the procedures and criteria established in MGL 40 A, the Special Permit and Site Plan Review sections of this ~~Bylaw~~^{by-law} and the following standards and requirements:

Part 9: Section III-I.3: Assisted Living Overlay Option Plan

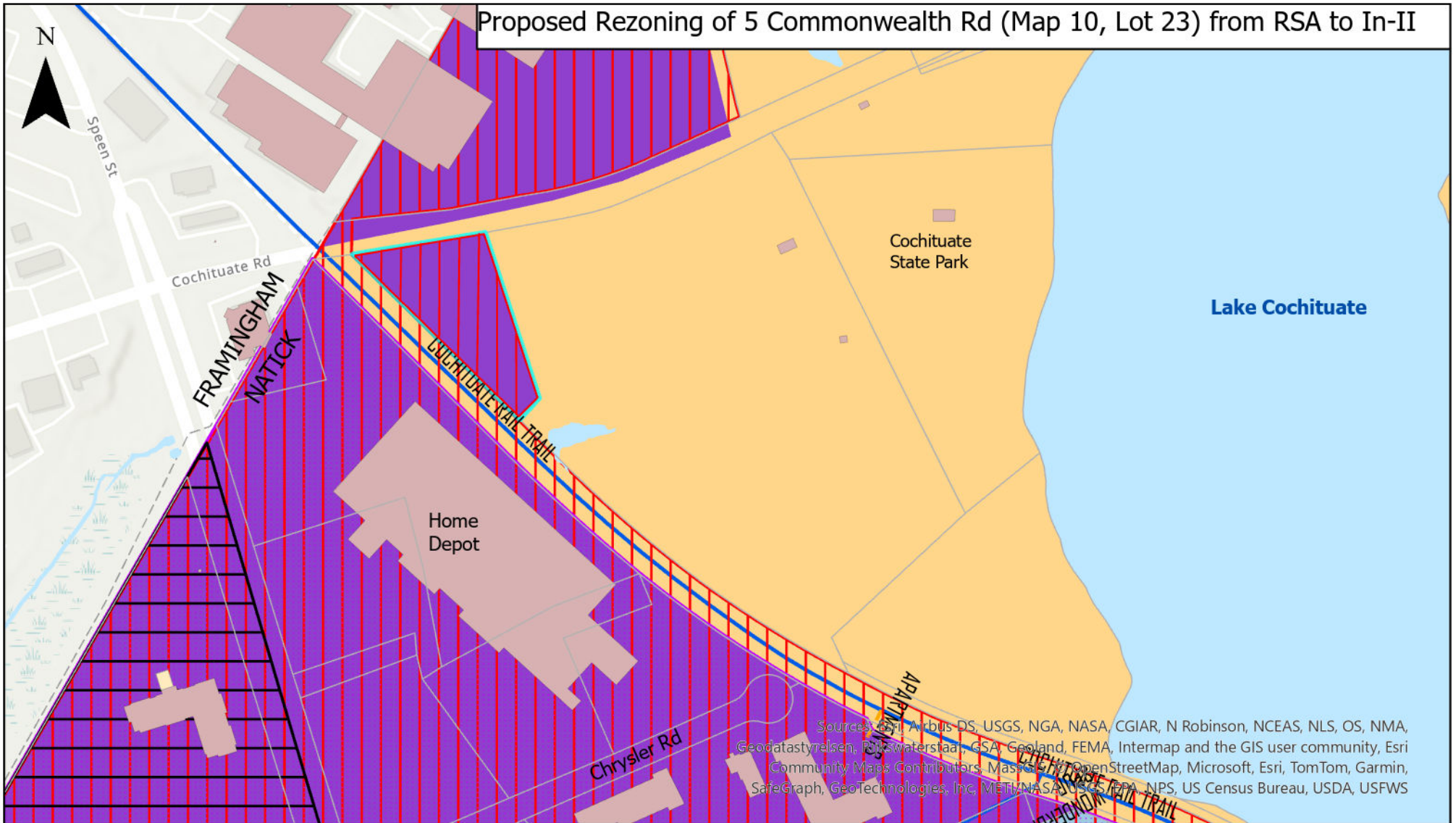
2.6 Standards The SPGA may grant a Special Permit and approval under Site Plan Review under the procedures and criteria established in MGL 40A, Section VI- DD ~~2-A~~ Special Permits and Section VI-DD-~~2B~~ Site Plan Review sections of this Bylaw, and the following standards and requirements.

Part 10: Section V-B.2 Accessory Uses

b. Review. This accessory use requires a special permit from the Planning Board. In its discretion to approve or deny a special permit authorizing an Agri-tourism accessory use, the SPGA shall consider the following:

i. The review conditions for all Special Permits, as specified in section VI-DD.~~2-A.b.~~

Proposed Rezoning of 5 Commonwealth Rd (Map 10, Lot 23) from RSA to In-II



Legend

- | | |
|--|------------------------------|
| Mall Center Overlay District (MC) | Industrial II |
| Regional Center Overlay District (RC) | Highway Mixed I |
| Marijuana Retail Overlay District (MR) | Residential-Single A |
| | Parcel for Proposed Rezoning |

ITEM TITLE: Nordstrom, Inc. d/b/a Nordstrom Bazille: Application for a S12 all alcohol License Change of Officers

ITEM SUMMARY:

ATTACHMENTS:

Description	Upload Date	Type
Application	2/26/2024	Cover Memo
Police review	2/26/2024	Cover Memo



Commonwealth of Massachusetts
Department of Revenue
Geoffrey E. Snyder, Commissioner

mass.gov/dor

Letter ID: L1980291872
Notice Date: October 19, 2023
Case ID: 0-002-197-819



CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE



NORDSTROM INC
PO BOX 2229
SEATTLE WA 98111-2229

Why did I receive this notice?

The Commissioner of Revenue certifies that, as of the date of this certificate, NORDSTROM INC is in compliance with its tax obligations under Chapter 62C of the Massachusetts General Laws.

This certificate doesn't certify that the taxpayer is compliant in taxes such as unemployment insurance administered by agencies other than the Department of Revenue, or taxes under any other provisions of law.

This is not a waiver of lien issued under Chapter 62C, section 52 of the Massachusetts General Laws.

What if I have questions?

If you have questions, call us at (617) 887-6400 or toll-free in Massachusetts at (800) 392-6089, Monday through Friday, 9:00 a.m. to 4:00 p.m..

Visit us online!

Visit mass.gov/dor to learn more about Massachusetts tax laws and DOR policies and procedures, including your Taxpayer Bill of Rights, and MassTaxConnect for easy access to your account:

- Review or update your account
- Contact us using e-message
- Sign up for e-billing to save paper
- Make payments or set up autopay

Edward W. Coyle, Jr., Chief
Collections Bureau



Certificate of Compliance

NORDSTROM INC
1700 7TH AVENUE
SEATTLE WA 98101

Date: November 3, 2023
Letter ID: L0000243124
Employer ID (FEIN): XX-XXX5058

Certificate ID: L0000243124

The Department of Unemployment Assistance certifies that as of 02-Nov-2023, NORDSTROM INC is current in all its obligations relating to contributions, payments in lieu of contributions, and the employer medical assistance contribution established in G.L.c.149,§189.

This certificate expires in 30 days from the date of issuance.

Sincerely,

Katie Dishnica, Director
Department of Unemployment Assistance

Questions?

Revenue Enforcement Unit
Department of Unemployment Assistance
Email us: Revenue.Enforcement@detma.org
Call us: (617) 626-5750



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION
MONETARY TRANSMITTAL FORM

APPLICATION FOR AMENDMENT-Change of Officers, Stock or Ownership Interest

APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE LOCAL LICENSING AUTHORITY.

ECRT CODE: RETA

Please make \$200.00 payment here: [ABCC PAYMENT WEBSITE](#)

PAYMENT MUST DENOTE THE NAME OF THE LICENSEE CORPORATION, LLC, PARTNERSHIP, OR INDIVIDUAL AND INCLUDE THE PAYMENT RECEIPT

ABCC LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY)

076800042-RS-0768

ENTITY/ LICENSEE NAME Nordstrom, Inc. DBA Nordstrom Bazille

ADDRESS 290 Speen Street

CITY/TOWN Natick

STATE MA

ZIP CODE 01760

For the following transactions (Check all that apply):

- | | | | |
|---|---|---|---|
| <input type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input checked="" type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other | | <input type="checkbox"/> Change of DBA |

THE LOCAL LICENSING AUTHORITY MUST SUBMIT THIS APPLICATION ONCE APPROVED VIA THE ePLACE PORTAL

Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3
Chelsea, MA 02150-2358



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

APPLICATION FOR AMENDMENT

-Change of Officers, Stock or Ownership Interest

☒ **Change of Officers/ Directors/LLC Managers** ☐ **Change of Stock Interest**

- DOR Certificate of Good Standing
- DUA Certificate of Compliance
- Change of Officer/Directors Application
- CORI Authorization
- Vote of the Entity
- Payment Receipt
- Business Structure Documents
 - If Sole Proprietor, **Business Certificate**
 - If partnership, **Partnership Agreement**
 - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

(e.g. New Stockholders or Transfer or Issuance of Stock)

- DOR Certificate of Good Standing
- DUA Certificate of Compliance
- Change of Stock Application
- CORI Authorization
- Financial Statement
- Vote of the Entity
- Purchase & Sale Agreement
- Supporting Financial Records
- Advertisement
- Payment Receipt
- Business Structure Documents
 - If Sole Proprietor, **Business Certificate**
 - If partnership, **Partnership Agreement**
 - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

☐ **Change of Ownership Interest**

(e.g. LLC Members, LLP Partners, Trustees etc.)

- DOR Certificate of Good Standing
- DUA Certificate of Compliance
- Change of Stock Application
- CORI Authorization
- Financial Statement
- Vote of the Entity
- Purchase & Sale Agreement
- Supporting Financial Records
- Advertisement
- Payment Receipt
- Business Structure Documents
 - If Sole Proprietor, **Business Certificate**
 - If partnership, **Partnership Agreement**
 - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

Non-Profit Club Change of Officers/ Directors

- ☐
 - DOR Certificate of Good Standing
 - DUA Certificate of Compliance
 - Change of Officer/Directors Application
 - Vote of the club signed by an approved officer
 - Payment Receipt
 - Business Structure Documents -**Articles of Organization** from the Secretary of the Commonwealth

Management Agreement

- ☐
 - DOR Certificate of Good Standing
 - DUA Certificate of Compliance
 - Management Agreement
 - Vote of Entity
 - Payment Receipt

**If abutter notification and advertisement are required for transaction, please see the local licensing authority.*

1. BUSINESS ENTITY INFORMATION

Entity Name	Municipality	ABCC License Number
Nordstrom, Inc.	Natick	00042-RS-0768

Please provide a narrative overview of the transaction(s) being applied for. Attach additional pages, if necessary.

Change of officers: Catherine Rae Smith replaces Anne Bramman. Erik Nordstrom, Ann Munson Steines and Vincent Rossetti are still current officers.

APPLICATION CONTACT

The application contact is the person who should be contacted with any questions regarding this application.

Name	Title	Email	Phone
Trish Farnsworth	attorney	tfarnsworth@lawson-weitzen.com	617.439.4990

APPLICATION FOR AMENDMENT-Change of Officers, Stock or Ownership Interest

2. PROPOSED OFFICERS, STOCK OR OWNERSHIP INTEREST

List all individuals or entities that will have a direct or indirect, beneficial or financial interest in this license (E.g. Stockholders, Officers, Directors, LLC Managers, LLP Partners, Trustees etc.). Attach additional page(s) provided, if necessary, utilizing Addendum A.

- The individuals and titles listed in this section must be identical to those filed with the Massachusetts Secretary of State.
- The individuals identified in this section, as well as the proposed Manager of Record, must complete a CORI Release Form.
- Please note the following statutory requirements for Directors and LLC Managers:
On Premises (E.g. Restaurant/ Club/Hotel) Directors or LLC Managers - At least 50% must be US citizens;
Off Premises (Liquor Store) Directors or LLC Managers - All must be US citizens and a majority must be Massachusetts residents.
- If you are a Multi-Tiered Organization, please attach a flow chart identifying each corporate interest and the individual owners of each entity as well as the Articles of Organization for each corporate entity. Every individual must be identified in Addendum A.

Name of Principal	Residential Address	SSN	DOB	Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen	MA Resident
Erik Nordstrom	8751 Overlake Drive West, Medina, WA 98039	[REDACTED]	10/24/1963	CEO	2.18	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Catherine Smith	121 Stewart Street #2401, Seattle, WA 98101	[REDACTED]	08/22/1963	CFO & Treasurer	less than 1%	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Ann Munson Steines	4543 Forest Avenue SE, Mercer Island, WA 98040	[REDACTED]	04/28/1965	Corporate Secretary	less than 1%	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Vincent Rossetti	6507 240th Way NE, Redmond, WA 98053	[REDACTED]	06/02/1971	VP Restaurant Operations	less than 1%	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
						<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
						<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Additional pages attached? ☐ Yes ☒ No

CRIMINAL HISTORY

Has any individual listed in question 2, and applicable attachments, ever been convicted of a State, Federal or Military Crime? If yes, attach an affidavit providing the details of any and all convictions.

☐ Yes ☒ No

MANAGEMENT AGREEMENT

Are you requesting approval to utilize a management company through a management agreement?
Please provide a copy of the management agreement.

☐ Yes ☒ No

APPLICATION FOR AMENDMENT-Change of Officers, Stock or Ownership Interest

3. CURRENT OFFICERS, STOCK OR OWNERSHIP INTEREST

List the individuals and entities of the current ownership. Attach additional pages if necessary utilizing the format below.

Name of Principal	Title/Position	Percentage of Ownership
Erik Nordstrom	CEO	2.18%
Name of Principal	Title/Position	Percentage of Ownership
Anne Bramman	CFO	less than 1%
Name of Principal	Title/Position	Percentage of Ownership
Vincent Rossetti	VP Restaurant Operations	less than 1%
Name of Principal	Title/Position	Percentage of Ownership
Anne Munson Steines	Corporate Secretary	less than 1%
Name of Principal	Title/Position	Percentage of Ownership
Name of Principal	Title/Position	Percentage of Ownership

4. INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Does any individual or entity identified in question 2, and applicable attachments, have any direct or indirect, beneficial or financial interest in any other license to sell alcoholic beverages? Yes ☒ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality
Please see attachment			

5. PREVIOUSLY HELD INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Has any individual or entity identified in question 2, and applicable attachments, ever held a direct or indirect, beneficial or financial interest in a license to sell alcoholic beverages, which is not presently held? Yes ☒ No ☐

If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality
Catherine Smith was an officer of Target			
corporation that holds liquor licenses			
across USA			

6. DISCLOSURE OF LICENSE DISCIPLINARY ACTION

Have any of the disclosed licenses listed in question 4 or 5 ever been suspended, revoked or cancelled?

Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Date of Action	Name of License	City	Reason for suspension, revocation or cancellation

7. FINANCIAL DISCLOSURE

Associated Cost(s): (E.g. Costs associated with License Transaction including but not limited to: Property price, Business Assets, Renovations costs, Construction costs, Initial Start-up costs, Inventory costs, or specify other costs):"

Associated Cost(s):

\$0.00

Nordstrom, Inc. is already open and operating. Corporate Bank is Bank of America, however, Nordstrom, Inc. borrows funds from itself.

SOURCE OF CASH CONTRIBUTION

Please provide documentation of available funds. (E.g. Bank or other Financial institution Statements, Bank Letter, etc.)

Name of Contributor	Amount of Contribution
N/A	
Total:	

SOURCE OF FINANCING

Please provide signed financing documentation.

Name of Lender	Amount	Type of Financing	Is the lender a licensee pursuant to M.G.L. Ch. 138.
N/A			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No

FINANCIAL INFORMATION

Provide a detailed explanation of the form(s) and source(s) of funding for the cost identified above.

N/A



JEAN M. LORIZIO, ESQ.
CHAIRMAN

Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3
Chelsea, MA 02150

CORI REQUEST FORM

The Alcoholic Beverages Control Commission ("ABCC") has been certified by the Criminal History Systems Board to access conviction and pending Criminal Offender Record Information ("CORI"). For the purpose of approving each shareholder, owner, licensee or applicant for an alcoholic beverages license, I understand that a criminal record check will be conducted on me, pursuant to the above. The information below is correct to the best of my knowledge.

ABCC LICENSE INFORMATION

ABCC NUMBER: (IF EXISTING LICENSEE)	076800042	LICENSEE NAME:	Nordstrom Bazille	CITY/TOWN:	Natick
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APPLICANT INFORMATION

LAST NAME:	Nordstrom	FIRST NAME:	Erik	MIDDLE NAME:	Bruce
MAIDEN NAME OR ALIAS (IF APPLICABLE):		PLACE OF BIRTH:	Portland, OR		
DATE OF BIRTH:	10/24/1963	SSN:	[REDACTED]	ID THEFT INDEX PIN (IF APPLICABLE):	
MOTHER'S MAIDEN NAME:	Wakeman	DRIVER'S LICENSE #:	[REDACTED]	STATE LIC. ISSUED:	Washington
GENDER:	MALE	HEIGHT:	6 5	WEIGHT:	175
				EYE COLOR:	Blue
CURRENT ADDRESS:	8751 Overlake Drive West				
CITY/TOWN:	Medina	STATE:	WA	ZIP:	98039
FORMER ADDRESS:	442 Upland Road				
CITY/TOWN:	Medina	STATE:	WA	ZIP:	98039

PRINT AND SIGN

PRINTED NAME:	Erik B. Nordstrom	APPLICANT/EMPLOYEE SIGNATURE:	<i>Erik B. Nordstrom</i>
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NOTARY INFORMATION

On this	11/07/2023	before me, the undersigned notary public, personally appeared	Erik B. Nordstrom
(name of document signer), proved to me through satisfactory evidence of identification, which were		Driver's License	
to be the person whose name is signed on the preceding or attached document, and acknowledged to me that (he) (she) signed it voluntarily for its stated purpose.			
		<i>Mila Darling</i>	
		NOTARY	

DIVISION USE ONLY

REQUESTED BY:	
SIGNATURE OF CORI AUTHORIZED EMPLOYEE	

The DCII Identify Theft Index PIN Number is to be completed by those applicants that have been issued an Identify Theft PIN Number by the DCII. Certified agencies are required to provide all applicants the opportunity to include this information to ensure the accuracy of the CORI request process. ALL CORI request forms that include this field are required to be submitted to the DCII via mail or by fax to (617) 660-4614.





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ABCC LICENSE INFORMATION

ABCC NUMBER: <small>(IF EXISTING LICENSEE)</small>	076800042	LICENSEE NAME:	Nordstrom Bazille	CITY/TOWN:	Natick
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APPLICANT INFORMATION

LAST NAME:	Smith	FIRST NAME:	Catherine	MIDDLE NAME:	Rae			
MAIDEN NAME OR ALIAS (IF APPLICABLE):	Conklin	PLACE OF BIRTH:	Bakersfield, CA					
DATE OF BIRTH:	08/22/1963	SSN:	[REDACTED]	ID THEFT INDEX PIN (IF APPLICABLE):				
MOTHER'S MAIDEN NAME:	Winckel	DRIVER'S LICENSE #:	[REDACTED]	STATE LIC. ISSUED:	Texas			
GENDER:	FEMALE	HEIGHT:	5	6	WEIGHT:	135	EYE COLOR:	brown
CURRENT ADDRESS:	121 Stewart St. #2401							
CITY/TOWN:	Seattle	STATE:	WA	ZIP:	98101			
FORMER ADDRESS:	2552 W. Lake of the Isles Pkwy							
CITY/TOWN:	Minneapolis	STATE:	MN	ZIP:	55405			

PRINT AND SIGN

PRINTED NAME:	Catherine Smith	APPLICANT/EMPLOYEE SIGNATURE:	
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NOTARY INFORMATION

On this	11/07/2023	before me, the undersigned notary public, personally appeared	Catherine Smith
(name of document signer), proved to me through satisfactory evidence of identification, which were		Driver's License	
to be the person whose name is signed on the preceding or attached document, and acknowledged to me that (he) (she) signed it voluntarily for its stated purpose.			
		NOTARY	

DIVISION USE ONLY

REQUESTED BY:	
SIGNATURE OF CORI AUTHORIZED EMPLOYEE	

The DCJ Identify Theft Index PIN Number is to be completed by those applicants that have been issued an Identity Theft PIN Number by the DCJ. Certified agencies are required to provide all applicants the opportunity to include this information to ensure the accuracy of the CORI request process. ALL CORI request forms that include this field are required to be submitted to the DCJ via mail or by fax to (617) 660-4614.





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ABCC LICENSE INFORMATION

ABCC NUMBER: (IF EXISTING LICENSEE)	076800042	LICENSEE NAME:	Nordstrom Bazille	CITY/TOWN:	Natick
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APPLICANT INFORMATION

LAST NAME:	Steines	FIRST NAME:	Ann	MIDDLE NAME:	Munson
MAIDEN NAME OR ALIAS (IF APPLICABLE):	Ann Lynn Munson	PLACE OF BIRTH:	Cincinnati, OH		
DATE OF BIRTH:	04/28/1965	SSN:	[REDACTED]	ID THEFT INDEX PIN (IF APPLICABLE):	
MOTHER'S MAIDEN NAME:	Chung	DRIVER'S LICENSE #:	[REDACTED]	STATE LIC. ISSUED:	Washington
GENDER:	FEMALE	HEIGHT:	5 3	WEIGHT:	125
		EYE COLOR:	Brown		
CURRENT ADDRESS:	4543 Forest Avenue SE				
CITY/TOWN:	Mercer Island	STATE:	WA	ZIP:	98040
FORMER ADDRESS:	602 Terry Avenue North #1370				
CITY/TOWN:	Seattle	STATE:	WA	ZIP:	98109

PRINT AND SIGN

PRINTED NAME:	Ann Munson Steines	APPLICANT/EMPLOYEE SIGNATURE:	
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NOTARY INFORMATION

On this	11/07/2023	before me, the undersigned notary public, personally appeared	Ann Munson Steines
(name of document signer), proved to me through satisfactory evidence of identification, which were		Driver's License	
to be the person whose name is signed on the preceding or attached document, and acknowledged to me that (he) (she) signed it voluntarily for its stated purpose.			
		 NOTARY	

DIVISION USE ONLY

REQUESTED BY:	
SIGNATURE OF CORI-AUTHORIZED EMPLOYEE	

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ABCC LICENSE INFORMATION

ABCC NUMBER: (IF EXISTING LICENSEE)	076800042	LICENSEE NAME:	Nordstrom Bazille	CITY/TOWN:	Natick
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APPLICANT INFORMATION

LAST NAME:	Rossetti	FIRST NAME:	Vincent	MIDDLE NAME:	Pat
MAIDEN NAME OR ALIAS (IF APPLICABLE):		PLACE OF BIRTH:	Berwyn, IL		
DATE OF BIRTH:	06/02/1971	SSN:	[REDACTED]	ID THEFT INDEX PIN (IF APPLICABLE):	
MOTHER'S MAIDEN NAME:	Santucci	DRIVER'S LICENSE #:	[REDACTED]	STATE LIC. ISSUED:	Washington
GENDER:	MALE	HEIGHT:	5 5	WEIGHT:	200
				EYE COLOR:	Brown
CURRENT ADDRESS:	6507 240th Way NE				
CITY/TOWN:	Redmond	STATE:	WA	ZIP:	98053
FORMER ADDRESS:	8602 236th Way NE				
CITY/TOWN:	Redmond	STATE:	WA	ZIP:	98053

PRINT AND SIGN

PRINTED NAME:	Vincent P. Rossetti	APPLICANT/EMPLOYEE SIGNATURE:	
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NOTARY INFORMATION

On this	11/07/2023	before me, the undersigned notary public, personally appeared	Vincent P. Rossetti	
(name of document signer),		proved to me through satisfactory evidence of identification, which were		Driver's License
to be the person whose name is signed on the preceding or attached document, and acknowledged to me that (he) (she) signed it voluntarily for its stated purpose.				
				NOTARY

DIVISION USE ONLY

REQUESTED BY:	
SIGNATURE OF CORI AUTHORIZED EMPLOYEE	

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NORDSTROM, INC. LIQUOR LICENSES

Since 1979, Nordstrom, Inc. has held FEIN number 91-0515058, tax return serial number 1987-177-015-023. To date, Nordstrom, Inc. has alcoholic beverage licenses at the following Nordstrom Stores:

Store/Address	DBA/Restaurant Name	License Number/Type	Since	Expires
ARIZONA				
#380 Fashion Square 7055 E. Camelback Rd. Scottsdale, AZ 85215	Nordstrom Marketplace Café	#12073971 - State #0850195 - City Beer & Wine	1998	Mar. 31st Dec. 31st
CALIFORNIA				
#320 South Coast Plaza 3333 Bristol Avenue Costa Mesa, CA 92626-1888	Nordstrom Ruscello	#47-225258 Liquor/Beer/Wine 68-225258 (1-3) Portable Bars	1989	Nov. 30th Nov. 30th
#321 Brea 500 Brea Mall Way Brea, CA 92821	Nordstrom Marketplace Café	#41-233067 Beer & Wine	1989	Dec. 31st
#322 Cerritos 300 Los Cerritos Mall Cerritos, CA 90703	Nordstrom Cafe Bistro	#41-482382 Beer & Wine	2010	Dec. 31st
#326 Mission Viejo Mall 27000 Crown Valley Pkwy Ste100 Mission Viejo, CA 92691	Nordstrom Marketplace Café	#41-354802 Beer & Wine	1999	Dec. 31st
#330 Irvine 100 Fortune Drive Irvine, CA 92618	Nordstrom Cafe Bistro	#41-426077 Beer & Wine	2005	Dec. 31st
#333 Fashion Island 901 Newport Center Dr Newport Beach, CA 92660	Nordstrom Bazille	#41-482241 Beer & Wine	2010	Dec. 31st
#340 Glendale 102 Caruso Ave. Glendale, CA 91210	Nordstrom Bar Verde	#47-531875 Liquor/Beer/Wine	1998	Dec. 31st
#341 Topanga Plaza 21725 Victory Blvd. Canoga Park, CA 91303	Nordstrom Bazille	#47-439156 Liquor/Beer/Wine	1988	Dec. 31st
#342 South Bay 21500 Hawthorne Blvd Torrance, CA 90503	Nordstrom Bazille	#47-555302 Liquor/Beer/Wine	2015	Dec. 31st
#345 Santa Anita 400 S. Baldwin Ave. Suite 200 Arcadia, CA 91007	Nordstrom Marketplace Café	#41-337508 Beer & Wine	1998	Dec. 31st
#348 The Oaks 350 W Hillcrest Dr Thousand Oaks, CA 91360	Nordstrom Bazille	#47-580108 Liquor/Beer/Wine	2008	June 30th
#349 The Grove 189 The Grove Drive Los Angeles, CA 90036	Nordstrom Bar Verde	#47-535762 Liquor/Beer/Wine #58-535762 Caterer	2013	Dec. 31st Dec. 31st
#353 Santa Monica 220 Broadway Santa Monica, CA 90401	Nordstrom Bazille	#47-581025 Liquor/Beer/Wine #58-581025 Caterer	2010	Dec. 31st Dec. 31st
#360 Fashion Valley 6997 Friars Road San Diego, CA 92108	Nordstrom Marketplace Café	#41-342600 Beer & Wine	1998	Dec. 31st
#361 La Jolla UTC 4401 La Jolla Village Drive Suite 1175 San Diego, CA 92122	Nordstrom Bazille	#47-581399 Liquor/Beer/Wine	2017	Aug. 31st
#384 Century City 10250 Santa Monica Boulevard Department 3 Los Angeles, CA 90067	Nordstrom Bar Verde	#47-580220 Liquor/Beer/Wine	2017	July 31st

attachment
for
question
#4

NORDSTROM, INC. LIQUOR LICENSES

Since 1979, Nordstrom, Inc. has held FEIN number 91-0515058, tax return serial number 1987-177-015-023. To date, Nordstrom, Inc. has alcoholic beverage licenses at the following Nordstrom Stores:

Store/Address	DBA/Restaurant Name	License Number/Type	Since	Expires
#420 Hillsdale Shopping Center 130 Hillsdale Mall San Mateo, CA 94403-3456	Nordstrom Marketplace Café	#41-205587 Beer & Wine	1987	Dec. 31st
#421 Walnut Creek 1200 Broadway Plaza Walnut Creek, CA 94596-5129	Nordstrom Marketplace Café	#41-195845 Beer & Wine	1987	Dec. 31st
#422 Palo Alto 550 Stanford Shopping Center Palo Alto, CA 94304-1476	Nordstrom Bazille	#47-525409 Liquor/Beer/Wine	1987	Dec. 31st
#423 Corte Madera 1870 Redwood Hwy Corte Madera, CA 94925	Nordstrom Bazille	#47-535008 Liquor/Beer/Wine	2014	June 30th
#425 Valley Fair 2400 Forest Avenue San Jose, CA 95128-1521	Nordstrom Bazille	#47-531871 Liquor/Beer/Wine CA BASE FILE	1987	Dec. 31st
#425 Valley Fair 2400 Forest Avenue San Jose, CA 95128-1521	Nordstrom Habitant	#47-531871 Liquor/Beer/Wine CA BASE FILE	1987	Dec. 31st
#427 San Francisco Centre 865 Market Street San Francisco, CA 94103	Nordstrom Bazille	#47-214131 Liquor/Beer/Wine #58-214131 Caterer Permit	1988	Dec. 31st Dec. 31st
COLORADO				
#34 Park Meadows Mall 8465 Park Meadows Center Drive Lone Tree, CO 80124	Nordstrom Grill	#03497580001 Liquor/Beer/Wine	1996	Aug. 8th
#37 Cherry Creek 2810 East First Avenue Denver, CO 80206	Nordstrom Bazille	#03497580009 Beer & Wine Business No. 1025226	2007	Apr. 30th
CONNECTICUT				
#526 Westfarms Mall 600 Westfarms Mall Farmington, CT 06032	Nordstrom Marketplace Café	#LRW.0003057 Beer & Wine	1998	May 4th
#538 The Sono Collection 100 N Water St., Ste A Norwalk, CT 06854	Nordstrom Bazille	#LIR.0020149 Liquor/Beer/Wine	2019	Feb. 6th
DELAWARE				
#639 Christiana Mall 100 Christiana Mall Newark, DE 19702	Nordstrom Grill	#14235 Liquor/Beer/Wine Sunday Sales	2011	June 30th
FLORIDA				
#762 Boca Raton 5820 Glades Rd Boca Raton, FL 33431	Nordstrom Bazille	BEV-6015731 / 4COP Liquor/Beer/Wine	2011	Mar. 31st
#763 The Village at Merrick Park 4310 Ponce de Leon Blvd. Coral Gables, FL 33146	Nordstrom Bazille	BEV-2329106 / 4COP Liquor/Beer/Wine	2002	Mar. 31st
#765 International Plaza 2223 North West Shore Blvd, Ste 300 Tampa, FL 33607	Nordstrom Bazille	BEV-3911250 / 4COP-SRX Liquor/Beer/Wine	2001	Sept. 30th
#773 The Gardens Mall 3111 PGA Boulevard Palm Beach Gardens, FL 33410	Nordstrom Café Bistro	BEV-6013984 / 2COP Beer & Wine	2006	Mar. 31st
#774 Aventura 19507 Biscayne Boulevard Aventura, FL 33180	Nordstrom Café Bistro	BEV-2328581 / 2COP Beer & Wine	2008	Mar. 31st
#789 St. John 4835 Town Crossing Dr Jacksonville, FL 32246	Nordstrom Bazille	BEV-2610747 / 4COP Liquor/Beer/Wine	2014	Sept. 30th

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Since 1979, Nordstrom, Inc. has held FEIN number 91-0515058, tax return serial number 1987-177-015-023. To date, Nordstrom, Inc. has alcoholic beverage licenses at the following Nordstrom Stores:

Store/Address	DBA/Restaurant Name	License Number/Type	Since	Expires
GEORGIA				
#760 Perimeter Mall 4390 Ashford Dunwoody Rd. Atlanta, GA 30346-1504	Nordstrom Ruscello	#0071173 - State	1998	Dec. 31st
		#3682 - City of Dunwoody Liquor/Beer/Wine	1998	Dec. 31st
#772 Phipps Plaza 3500 Peachtree Road NE Atlanta, GA 30326-1222	Nordstrom Café Bistro	#0048691 - State	2005	Dec. 31st
		#108879/A33 - City Beer & Wine	2005	Dec. 31st
HAWAII				
#706 Ala Moana 1450 Ala Moana Blvd, Suite 2950 Honolulu, HI 96815	Nordstrom Habitant	R1150 Liquor/Beer/Wine	2016	June 30th
	Nordstrom Ruscello	R1149 Liquor/Beer/Wine	2016	June 30th
ILLINOIS				
#220 Michigan Avenue 55 E. Grand Avenue Chicago, IL 60611	Café Nordstrom	#10-1A-0044248* - State Beer & Wine	2000	Aug. 31st
	Nordstrom Habitant	#1021791 - City #1A-1127435 - State #2405484 - City	2015	Mar. 15th July 31st Mar. 15th
#221 Oakbrook Center 10 Oakbrook Center Oak Brook, IL 60521-1830	Nordstrom Ruscello	#11-1A-0081145 - State Liquor/Beer/Wine	1991	Mar. 31st
		#LL-34 Class A1 & B - Village		June 30th
#223 Old Orchard Center 77 Old Orchard Shopping Center Skokie, IL 60077-1406	Nordstrom Marketplace Café	#11-1A-0017115 - State Beer & Wine	1994	Mar. 31st
		#9 - Village		Apr. 30th
#225 Woodfield Shopping Center 6 Woodfield Shopping Center Schaumburg, IL 60173-5012	Nordstrom Marketplace Café	#10-1A-0081146 - State Beer & Wine	1995	Jan. 31st
		#69471 - Village		Dec. 31st
INDIANA				
#238 Keystone 8702 Keystone Crossing Indianapolis, IN 46240	Nordstrom Café Bistro	#RR4923706 Liquor/Beer/Wine	2008	Apr. 4th
KANSAS				
#230 Oak Park 11143 W. 95th St. Overland Park, KS City of Overland Park license	Café Nordstrom	State: 13019106802	1998	Feb. 24th
		City: Caterer ABC-0000125	1998	Feb. 24th
		City: Drink ABC-0005466	1998	Feb. 24th
		City: Cereal Malt ABC-0000262	1998	Dec. 31st
MASSACHUSETTS				
#531 Natick 290 Speen Street Natick, MA 01760	Nordstrom Bazille	#00042-RS-0768 All Alcohol	2007	Dec. 31st
	Nordstrom Café Bistro	#00034-RS-0130 All Alcohol	2010	Dec. 31st
#535 Burlington 57 Middlesex Turnpike Burlington, MA 01803	Nordstrom Bazille	#00043-RS-0160 Wine & Malt	2008	Dec. 31st
	Nordstrom Café Bistro	#00017-RS-0956 Wine & Malt	2009	Dec. 31st
MICHIGAN				
#228 Somerset Collection North 2850 W. Big Beaver Road Troy, MI 48040	Nordstrom Marketplace Café	Class C Resort #41004 Beer & Wine Sunday Sales	1996	Apr. 30th
	Nordstrom Café Bistro	Tavern #162492 Beer & Wine Sunday Sales	2007	Apr. 30th
MINNESOTA				
#222 Mall of America 1000 NW Court Bloomington, MN	Nordstrom Grill	Intoxicating Liquor 21250/LCBL200 2004 AGED #13809 All Alcohol		June 30th June 30th

NORDSTROM, INC. LIQUOR LICENSES

Since 1979, Nordstrom, Inc. has held FEIN number 91-0515058, tax return serial number 1987-177-015-023. To date, Nordstrom, Inc. has alcoholic beverage licenses at the following Nordstrom Stores:

Store/Address	DBA/Restaurant Name	License Number/Type	Since	Expires
#283 Ridgedale 12441 Wayzata Boulevard Minnetonka, MN 55305	Nordstrom Ruscello	ONSS 46120 Buyer's Card 46120	2015	Dec. 31st Dec. 31st
MISSOURI				
#232 West County Center 47 West County Center Des Peres, MO 63131	Nordstrom Café Bistro	Beer & Wine	2002	
	City of Des Peres	No number listed		June 30th
	St. Louis County	117486*		Aug. 31st
	St. Louis Sun. Sales	117487*		Aug. 31st
	State of Missouri	131819		June 30th
	State of MO Sun Sales	133195		June 30th
#240 St Louis Galleria 1453 St Louis Galleria Richmond Heights, MO 63117	Nordstrom Café Bistro	Beer & Wine	2011	
	City of Richmond Heights	LIQL8038594		June 30th
	St. Louis County	117278*		July 31st
	St. Louis Sun. Sales	117279*		July 31st
	State of Missouri	200096		June 30th
	State of MO Sun Sales	202223		June 30th
NEVADA				
#386 Fashion Show Mall 3200 Las Vegas Blvd S, Ste 710 Las Vegas, NV 89109	Nordstrom Jeannie's	2004164-LIQ-104 Liquor - Tavern with Restaurant	2002	Mar. 31st June 30th Sept. 30th Dec. 31st
NEW JERSEY				
#520 Garden State Plaza 501 Garden State Plaza Paramus, NJ 07652-2403	Nordstrom Bazille	#0246-33-020-003 Liquor/Beer/Wine	1990	June 30th
#521 Menlo Park 449 Menlo Park Edison, NJ 08837-4404	Nordstrom Marketplace Café	#1205-33-027-007 Liquor/Beer/Wine	1991	June 30th
NEW YORK				
#210 Nordstrom 225 W 57th Street New York, NY 10019	Nordstrom Bistro Verde Nordstrom Broadway Bar Nordstrom Jeannie's/Burger Bar Nordstrom Shoe Bar Nordstrom Wolf	1319395 1319396 1319397 1319398 1319399 Liquor/Beer/Wine	2019	Sept. 30th
#212 Nordstrom 235 W. 57th Street New York, NY 10019	Nordstrom, Inc.	1307010 Liquor/Beer/Wine	2018	Mar. 31st
#523 The Westchester 135 Westchester Ave. White Plains, NY 10601	Nordstrom Marketplace Café	1051974 Beer & Wine	1995	Feb. 28th
#524 Roosevelt Field 630 Old Country Road Garden City, NY 11530-3466	Nordstrom Grill	1016627 Liquor/Beer/Wine	1997	June 30th
NORTH CAROLINA				
NC FILE NUMBER:00112706AJ				
#750 Southpark Mall 4400 Sharon Road Charlotte, NC 28211	Nordstrom Marketplace Cafe State File #00112706AJ-998	#00126703AJ - Beer #00126703AL - Wine #00126703CU - Culinary	2004	Apr. 30th Apr. 30th Apr. 30th
	City Charlotte County Mecklenburg	#0129559 City/County Same	2013	Apr. 30th Apr. 30th
#751 The Mall at Southpoint 6910 Fayetteville Road, Suite 500 Durham, NC 27713	Nordstrom Café Bistro State File #00112706AJ-999	#00112706AJ - Beer #00112706AL - Wine	2002	Apr. 30th Apr. 30th
	County of Durham City of Durham	#2207 #9205	2002	Apr. 30th Apr. 29th
OHIO				
#227 Beachwood Place 26300 Cedar Rd. Beachwood, OH 44122	Nordstrom Grill	#6432705 Liquor/Beer/Wine	1997	Oct. 1st
#234 Easton Town Center 4000 Worth Avenue Columbus, OH 43219	Nordstrom Café Bistro	#6432705-0010 Liquor/Beer/Wine	2001	Feb. 1st
#239 Kenwood 7801 Montgomery Road Cincinnati, OH 45236	Nordstrom Café Bistro	#6432705-0015 Liquor/Beer/Wine	2009	June 1st

NORDSTROM, INC. LIQUOR LICENSES

Since 1979, Nordstrom, Inc. has held FEIN number 91-0515058, tax return serial number 1987-177-015-023. To date, Nordstrom, Inc. has alcoholic beverage licenses at the following Nordstrom Stores:

Store/Address	DBA/Restaurant Name	License Number/Type	Since	Expires
OREGON				
#20 Downtown Portland 701 SW Broadway Portland, OR 97205	Café Nordstrom	367235* Beer & Wine	2009	June 30th
#25 Tigard 9700 SW WashingtonSquare Blvd Tigard, OR 97223	Nordstrom Marketplace Café	362620* Beer & Wine	2009	Mar. 31st
PENNSYLVANIA				
#237 Ross Park 1000 Ross Park Mall Dr Pittsburgh, PA 15237	Nordstrom Marketplace Café	#R-689 Liquor/Beer/Wine Sunday Sales	2008	May 31st
#629 King of Prussia 190 N Gulph Rd King of Prussia, PA 19406	Nordstrom Marketplace Café	#R-20890 Liquor/Beer/Wine Sunday Sales	2013	Apr. 30th
TENNESSEE				
#759 Nashville 2130 Abbott Martin Rd Nashville, TN 37215	Nordstrom Grill	LBDRST-DAV-1900260 State Liquor/Wine 20266 City/County Beer 105495 City/County Liquor Tax	2011	Feb. 18th Feb. 24th
TEXAS				
#720 Dallas Galleria 5220 Alpha Rd Dallas, TX 75240	Nordstrom Marketplace Café	2021 State license # changed from RM768333 to 102725909MB City of Dallas 1196612 County of Dallas Mixed Beverage	2011	Feb. 21st Feb. 21st Feb. 21st
#723 Northpark 8687 North Central Expressway 2000 Northpark Center Dallas, TX 75225	Nordstrom Bazille	2021 State license # changed from MB612706 to 101118359MB City of Dallas 1148715 County of Dallas Mixed Beverage & Late Hours	2005	Oct. 26th Oct. 26th Oct. 26th
#724 Stonebriar 2613 Preston Road Frisco, TX 75034	Nordstrom Bazille	2021 State license # changed from RM991696 to 105377735MB City of Frisco A17-00045 Collin County Mixed Beverage	2017	Aug. 16th June 20th Nov. 15th
#730 Houston Galleria 5192 Hidalgo Street Houston, TX 77056	Nordstrom Bazille	2021 State license # changed from MB796500 to 103058810MB City of Houston Harris County Mixed Beverage	2003	Jan. 30th Jan. 30th Jan. 30th
#731 Barton Creek 2901 Capital of Texas Hwy S Austin, TX 78746	Nordstrom Cafe Bistro	2021 State license # changed from BG539881 to 100033000BG City of Austin/Travis County Beer & Wine	2003	July 13th July 13th
#732 La Cantera 15900 La Cantera Parkway, Bldg. 13 San Antonio, TX 78256	Nordstrom Bazille	2021 State license # changed from MB1066113 to 106354750MB Bexar County City of San Antonio Mixed Beverage	2005	Sept. 9th Sept. 9th Sept. 9th
#733 The Domain 3111 Palm Way Austin, TX 78758	Nordstrom Bazille	2021 State license # changed from MB951938 to 104846550MB City of Austin Mixed Beverage	2016	July 20th July 20th
#746 The Woodlands 1201 Lake Woodlands Dr. Suite 1 The Woodlands, TX 77380	Nordstrom Bazille	2021 State license # changed from MB875581 to 103973721MB Montgomery County Mixed Beverage	2014	June 19th June 19th
UTAH				
#32 Murray 6191 S State St STE 300 Murray, UT 84107	Nordstrom Café Bistro	RL00497 - State 12862 - City Beer & Wine	2009	Oct. 31st Feb. 28th
VIRGINIA				
#600 Tyson's Corner 1961 Chainbridge Rd. McLean, VA 22102	Nordstrom Marketplace Café	#046373 Wine & Beer On and Off Premises	1988	Mar. 31st

NORDSTROM, INC. LIQUOR LICENSES

Since 1979, Nordstrom, Inc. has held FEIN number 91-0515058, tax return serial number 1987-177-015-023. To date, Nordstrom, Inc. has alcoholic beverage licenses at the following Nordstrom Stores:

Store/Address	DBA/Restaurant Name	License Number/Type	Since	Expires
#621 Fashion Centre at Pentagon 1400 South Hayes St. Arlington, VA 22202-5007	Nordstrom Marketplace Café	#059515 Wine & Beer On and Off Premises	1989	Feb. 28th
WASHINGTON				
#1 Downtown Seattle 500 Pine Street Seattle, WA 98101-1603	Nordstrom Grill	#365720	1998	Sept. 30th
	Café Nordstrom	#365720	1998	Sept. 30th
	Nordstrom Habitant	#365720	2014	Sept. 30th
	JWN Room	#365720	1998	Sept. 30th
	Wedding Suite	#365720	2017	Sept. 30th
	Personal Styling	#365720	2018	Sept. 30th
	Collectors	#365720	2018	Sept. 30th
	Burberry/Individualist	#365720	2018	Sept. 30th
	Dior Collectors	#365720	2018	Sept. 30th
	Fashion Bowl	#365720	2022	Sept. 30th
#4 Bellevue Square 100 Bellevue Square Bellevue, WA 98004-5021		Liquor/Beer/Wine/Caterer		
	Nordstrom Grill	#073289	1995	Sept. 30th
	Nordstrom Marketplace Café	#073289	1988	Sept. 30th
	Nordstrom Habitant	#073289		Sept. 30th
	Beauty Haven	#073289	2023	Sept. 30th
#5 Southcenter 100 Southcenter Shopping Center Tukwila, WA 98188-2896		Liquor/Beer/Wine/Caterer		
	Nordstrom Marketplace Café	#073920 Beer & Wine/Caterer	1988	Sept. 30th
#6 Tacoma Mall 4502 South Steele #800 Tacoma, WA 98409-7273	Nordstrom Café Bistro	#403964 Beer & Wine/Caterer	1990	Sept. 30th
#9 Spokane 828 West Main Avenue Spokane, WA	Nordstrom Marketplace Café	#081864 Beer & Wine/Caterer		Sept. 30th
#10 Alderwood Mall 3200 184th St. SW Lynnwood, WA 98037-4795	Nordstrom Bazille	#086400 Liquor/Beer/Wine/Caterer	1990	Sept. 30th
WISCONSIN				
#282 Mayfair 2424 North Mayfair Road Wauwatosa, WI 53226	Nordstrom Ruscello	2022-75*	2014	June 30th
		Class B Beer		
		2022-19* Class B Liquor - Reserve		June 30th

* Liquor license number changes yearly.

ENTITY VOTE

The Board of Directors or LLC Managers of

Nordstrom, Inc.

Entity Name

duly voted to apply to the Licensing Authority of

Natick

City/Town

and the

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on

May 9, 2023

Date of Meeting

For the following transactions (Check all that apply):

☒ Change of Officers/Directors/LLC Manager

☐ Change of Ownership Interest (LLC Members, LLP Partners, Trustees)

☐ Issuance/Transfer of Stock/New Stockholder

☐ Management/Operating Agreement

☐ Other

"VOTED: To authorize

Catherine Rae Smith

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."

A true copy attest,

For Corporations ONLY

A true copy attest,

Corporate Officer /LLC Manager Signature

(Print Name)

DocuSigned by:

Cathy Smith

Corporation Clerk's Signature

Catherine Smith, Chief Financial Officer & Treasurer

(Print Name)

Farnsworth, Trish

From: customerservice@nCourt.com
Sent: Monday, February 12, 2024 11:48 AM
To: Farnsworth, Trish
Subject: Receipt from nCourt

YOUR RECEIPT >>

Please include the payment receipt with your application. Thank you.

Paid To

Name: Massachusetts Alcoholic Beverages Control Commission - Retail
Address 1: 95 Fourth Street, Suite 3
City: Chelsea
State: Massachusetts
Zip: 02150

Payment On Behalf Of

First Name: Erik
Address 1: 290 Speen Street
City: Natick
Phone: (617) 439-4990
Last Name: Nordstrom
State/Territory: MA
Zip: 01760

Description	ID	Service Fee	Amount
FILING FEES-RETAIL	00042-RS-0768	\$4.70	\$200.00

Receipt Date: 2/12/2024 11:48:01 AM EST
Invoice Number: e5bcd2c2-baa4-4e8e-b5b7-6207785b1c4d

Total Amount Paid: \$204.70

Billing Information

First Name mary
Last Name Sweeney
Address 1 88 black falcon avenue suite 345
City boston
State/Territory MA
Zip 02210
Email tfarnsworth@lawson-weitzen.com

Credit / Debit Card Information

Card Type MasterCard
Card Number *****2562

IMPORTANT INFORMATION >>

Please include the payment receipt with your application. Thank you.

Please verify the information shown above. Your payment has been submitted to the location listed above.

UNITED STATES OF AMERICA

The State of



Washington

Secretary of State

I, Sam Reed, Secretary of State of the State of Washington and custodian of its seal,
hereby issue this

certificate that the attached is a true and correct copy of

ARTICLES OF AMENDMENT

of

NORDSTROM, INC.

as filed in this office on May 25, 2005.

Date: May 25, 2005



Given under my hand and the Seal of the State
of Washington at Olympia, the State Capital

Sam Reed, Secretary of State

AMENDED AND RESTATED ARTICLES OF INCORPORATION
OF
NORDSTROM, INC.

Pursuant to the provisions of the Washington Business Corporation Act and RCW 23B.10.020 and RCW 23B.10.070, the following Amended and Restated Articles of Incorporation are hereby submitted for filing.

ARTICLE I

The name of the corporation is Nordstrom, Inc.

ARTICLE II

The period of duration of the corporation is perpetual.

ARTICLE III

The purpose of the corporation is to engage in any and all business, the conduct of which is not forbidden to corporations by the Constitution, statutes or common law of the state of Washington.

ARTICLE IV

1. The aggregate number of shares which the Corporation shall have authority to issue is 1,000,000,000 shares of Common Stock, all of which are without par value.
2. The shareholders of the corporation shall not have preemptive rights to acquire additional shares or securities convertible into shares offered for sale or otherwise issued by the corporation.
3. No shareholder will be permitted to cumulate his votes at any election of directors.

ARTICLE V

The number of directors constituting the Board of Directors shall be such number, not less than three, as may be specified from time to time in the Bylaws.

ARTICLE VI

The corporation shall have the right to purchase its own shares to the extent of unreserved and unrestricted surplus available therefor, whether capital surplus or earned surplus. The Board of Directors may, from time to time, distribute to the shareholders a portion of the assets of this corporation, in cash or property, out of the capital surplus of this corporation.

FILED
SECRETARY OF STATE
MAY 25 2005
STATE OF WASHINGTON

ARTICLE VII

The power to adopt, alter, amend or repeal the Bylaws shall be vested in the Board of Directors.

ARTICLE VIII

This corporation reserves the right to amend, change or repeal any provision of these Amended and Restated Articles of Incorporation in the manner now or hereafter prescribed by law, and all rights conferred upon shareholders herein are subject to this reserved power.

ARTICLE IX


Any personal liability of a director to the corporation or its shareholders for monetary damages for conduct as a director is eliminated, except for any liability for any acts or omissions that involve intentional misconduct by a director or a knowing violation of law by a director, for conduct violating RCW 23B.08.310, for any transaction from which the director will personally receive a benefit in money, property, or services to which the director is not legally entitled, or for any act or omission occurring prior to the date when this Article becomes effective. If hereafter the Washington Business Corporation Act is amended to change the corporation's power to eliminate or limit the liability of a director to the corporation, then, upon the effective date of the amendment and without further act:

if the amendment permits further elimination or limitation of liability, the liability of a director shall be additionally eliminated and limited to such further extent, or

if the amendment changes to power to eliminate the liability of a director in any other respect, the liability of a director shall be eliminated and limited with respect to acts or omissions occurring after the effective date of the amendment to the fullest extent permitted by the Washington Business Corporation Act as so amended.

No amendment or repeal of these Amended and Restated Articles of Incorporation shall adversely affect any right or any elimination or limitation of liability of a director existing immediately prior to the amendment or repeal.

IN WITNESS WHEREOF, the undersigned submits these Amended and Restated Articles of Incorporation as of May 24, 2005.



David L. Mackie
Secretary

**CERTIFICATE OF AMENDMENT TO THE
AMENDED AND RESTATED ARTICLES OF INCORPORATION OF
NORDSTROM, INC.**

Pursuant to the provisions of the Washington Business Corporation Act and RCW 23B.10.060, the undersigned corporation hereby submits this Certificate of Amendment to the Articles of Incorporation for filing.

1. The name of the corporation is Nordstrom, Inc.
2. The text of paragraph 1 of Article IV shall be deleted in its entirety and replaced with the following (the "Amendment"):

ARTICLE IV

1. The aggregate number of shares which the Corporation shall have authority to issue is 1,000,000,000 shares of Common Stock, all of which are without par value.
3. The Amendment does not provide for an exchange, reclassification or cancellation of issued shares.
4. The Amendment was duly approved by the board of directors of the corporation on May 24, 2005.
5. The Amendment was approved by the board of directors of the corporation in accordance with the provisions of RCW 23B.10.020(4)(a) and shareholder action was not required.

DATED: May 24, 2005

NORDSTROM, INC.

By David L. Mackie
David L. Mackie
Secretary

**F
FPC**

The Commonwealth of Massachusetts

William Francis Galvin
Secretary of the Commonwealth
One Ashburton Place, Boston, Massachusetts 02108-1512

FORM MUST BE TYPED

**Foreign Corporation
Certificate of Registration**

FORM MUST BE TYPED

(General Laws, Chapter 156D, Section 15.03; 950 CMR 113.48)

- (1) Exact name of the corporation, including any words or abbreviations indicating incorporation:

NORDSTROM, INC.

- (2) Name under which the corporation will transact business in the commonwealth that satisfies the requirements of G.L. Chapter 156D, Section 15.06:

~~NORDSTROM, INC.~~

If applicable, please attach:

- an agreement to refrain from use of the unavailable name in the commonwealth; and
- a copy of the doing business certificate filed in the city or town where it maintains its registered office; and
- a copy of the resolution of the corporation's board of directors, certified by its secretary, the name under which the corporation will transact business in the commonwealth pursuant to 950 CMR 113.50(4).

- (3) Jurisdiction of incorporation: WASHINGTON

Date of incorporation: 09/28/1946 Duration if not perpetual: Perpetual
(month, day, year)

- (4) Street address of principal office: 1617 6th AVENUE, SEATTLE, WASHINGTON 98101-1742
(number, street, city or town, state, zip code)

- (5) Street address of registered office in the commonwealth: 101 FEDERAL STREET, BOSTON, MA 02110
(number, street, city or town, state, zip code)

Name of registered agent in the commonwealth at the above address: C T CORPORATION SYSTEM

I, Lori D. Stuhlman Lori D. Stuhlman, Asst Secy of CT Corporation System
registered agent of the above corporation consent to my appointment as registered agent pursuant to G. L. Chapter 156D, Section 5.02.*

* Or attach registered agent's consent hereto.

(6) Fiscal year end: JANUARY 31
(month, day)

(7) Brief description of the corporation's activities to be conducted in the commonwealth:

RETAIL SALES OF CLOTHING, FOOTWEAR, ACCESSORIES, COSMETICS AND GIFTS

(8) Names and business addresses of its current officers and directors:

NAME

BUSINESS ADDRESS

President: SEE ATTACHED LIST

Vice-president:

Treasurer:

Secretary:

Assistant secretary:

Director(s):

Attach certificate of legal existence or a certificate of good standing issued by an officer or agency properly authorized in the jurisdiction of organization. If the certificate is in a foreign language, a translation thereof under oath of the translator shall be attached.

This certificate is effective at the time and on the date approved by the Division, unless a later effective date not more than 90 days from the date of filing is specified: _____

Nordstrom, Inc.
Director & Corporate Officer List
as of August 16, 2006

Title	Name	Work Address
Directors:	Phyllis J. Campbell	1200 Fifth Avenue, Seattle, WA 98101
	Enrique Hernandez, Jr.	210 South DeLacey Avenue, Pasadena, CA 91105
	Jeanne P. Jackson	537 Newport Center Drive, Newport Beach, CA 92660
	Robert G. Miller	1881 SW Naito Parkway, Portland, OR 97201
	Blake W. Nordstrom	1617 Sixth Avenue, Seattle, WA 98101
	Erik B. Nordstrom	1617 Sixth Avenue, Seattle, WA 98101
	Peter E. Nordstrom	1617 Sixth Avenue, Seattle, WA 98101
	Philip G. Satre	219 N Center Street, Reno, NV 89501
	Alison A. Winter	1180 S Oak Knoll Avenue, Pasadena, CA 91106
Chairman of the Board:	Enrique Hernandez, Jr.	210 South DeLacey Avenue, Pasadena, CA 91105
President:	Blake W. Nordstrom	1617 Sixth Avenue, Seattle, WA 98101
Chief Financial Officer:	Michael G. Koppel	1617 Sixth Avenue, Seattle, WA 98101
Treasurer:	David Loretta	1700 Seventh Avenue, Seattle, WA 98101
Secretary:	David L. Mackie	1700 Seventh Avenue, Seattle, WA 98101
Executive Vice Presidents:	Laurie M. Black	1700 Seventh Avenue, Seattle, WA 98101
	Mark S. Brashear	1617 Sixth Avenue, Seattle, WA 98101
	Paul F. Favaro	1617 Sixth Avenue, Seattle, WA 98101
	Linda T. Finn	1617 Sixth Avenue, Seattle, WA 98101
	Kevin T. Knight	1617 Sixth Avenue, Seattle, WA 98101
	Michael G. Koppel	1617 Sixth Avenue, Seattle, WA 98101
	Llynn (Len) Kuntz	1617 Sixth Avenue, Seattle, WA 98101
	Daniel F. Little	1617 Sixth Avenue, Seattle, WA 98101
	Scott A. Meden	1700 Seventh Avenue, Seattle, WA 98101
	Robert J. Middlemas	701 Harger Road, Oak Brook, IL 60253
	Jack H. Minuk	1617 Sixth Avenue, Seattle, WA 98101
	Margaret Myers	1617 Sixth Avenue, Seattle, WA 98101
	Erik B. Nordstrom	1617 Sixth Avenue, Seattle, WA 98101
	James F. Nordstrom, Jr.	1700 Seventh Avenue, Seattle, WA 98101
	Peter E. Nordstrom	1617 Sixth Avenue, Seattle, WA 98101
	James R. O'Neal	1617 Sixth Avenue, Seattle, WA 98101
	Delena M. Sunday	1617 Sixth Avenue, Seattle, WA 98101
	Loretta Soffe	1617 Sixth Avenue, Seattle, WA 98101
	Geevy S. K. Thomas	4310 Ponce de Leon Blvd., Coral Gables, FL 33146
	David M. Witman	1617 Sixth Avenue, Seattle, WA 98101
Vice Presidents:	Robert E. Campbell	1617 Sixth Avenue, Seattle, WA 98101
	David P. Lindsey	1700 Seventh Avenue, Seattle, WA 98101
	David L. Mackie	1700 Seventh Avenue, Seattle, WA 98101
	R. Michael Richardson	1220 Howell Street, Seattle, WA 98101

Signed by: Andrew C. Vukobratovic
(signature of authorized individual)

- ☐ Chairman of the board of directors,
- ☐ President,
- ☒ Other officer, VICE President, TAX
- ☐ Court-appointed fiduciary,

on this 12 day of December, 2008.

UNITED STATES OF AMERICA

The State of  Washington

Secretary of State

I, **SAM REED**, Secretary of State of the State of Washington and custodian of its seal, hereby issue this

CERTIFICATE OF EXISTENCE/AUTHORIZATION
OF
NORDSTROM, INC.

I FURTHER CERTIFY that the records on file in this office show that the above named Profit Corporation was formed under the laws of the State of WA and was issued a Certificate Of Incorporation in Washington on 9/28/1946.

I FURTHER CERTIFY that as of the date of this certificate, **NORDSTROM, INC.** remains active and has complied with the filing requirements of this office.

Date: December 19, 2006

UBI: 178-071-138



Given under my hand and the Seal of the State of Washington at Olympia, the State Capital

A handwritten signature in cursive script that reads "Sam Reed".

Sam Reed, Secretary of State

COMMONWEALTH OF MASSACHUSETTS

William Francis Galvin
Secretary of the Commonwealth
One Ashburton Place, Boston, Massachusetts 02108-1512

**Foreign Corporation
Certificate of Registration**
(General Laws, Chapter 156D, Section 15.03; 950 CMR 113.48)

I hereby certify that upon examination of this foreign corporation certificate, duly submitted to me, it appears that the provisions of the General Laws relative thereto have been complied with, and I hereby approve said certificate; and the filing fee in the amount of \$400, having been paid, said certificate is deemed to have been filed with me this 18th day of January, 2007, at 10:37 a.m./p.m.

Effective date: _____
(must be within 90 days of date submitted)

William Francis Galvin
WILLIAM FRANCIS GALVIN
Secretary of the Commonwealth

Filing fee: \$400

Examiner

Name approval

C

M

TO BE FILLED IN BY CORPORATION
Contact Information:

Nordstrom, Inc., Attn: Tax Dept.

PO Box 2229

Seattle, WA 98111-2229

Telephone: 206-303-3028

Email: laura.gordon@nordstrom.com

Upon filing, a copy of this filing will be available at www.sec.state.ma.us/cor.
If the document is rejected, a copy of the rejection sheet and rejected document will be available in the rejected queue.

Galvin

RECEIVED
SEC. OF STATE
2007 JAN 19 AM 10:37
CORPORATION DIVISION

1006395



ALC-76

police Review

Alcohol License Application

Status: Complete

Became Active: Feb 20, 2024

Assignee: Brian Lauzon

Completed: Feb 23, 2024

Applicant

Liam Hughes
lpatrickhughes@lawson-weitzen.com
88 Black Falcon Ave, Suite 345 Boston, MA
02210
Boston, Massachusetts 02210
617-439-4990

Primary Location

290 SPEEN ST Unit Nordstrom Bazille
Unit Nordstrom Bazille
Natick, MA 01760

Owner:

Natick Mall

Comments

Brian Lauzon, Feb 23, 2024

After review, we would recommend that the Select Board, acting as the Local Licensing Authority for the Town of Natick, approve the following applicants as the new Corporate Officers for the liquor license at Nordstom Bazille, located at 290 Speen Street in Natick: Erik Nordstrom, Catherine Smith, Ann Steines, and Vincent Rossetti.

ITEM TITLE: Approve Bagging of Meters for the 2024 Elections
ITEM SUMMARY: March 5th, March 26th, September 3rd and November 5th, 2024

ATTACHMENTS:

Description	Upload Date	Type
Memo from Town CLerk	2/26/2024	Cover Memo

MEMO

**Town of Natick
Town Clerk's Office
13 East Central Street
Natick, MA 01760**

To: Natick Select Board
cc: Chief Hicks, Deputy Chief Lauzon

From: Lynn Kelly

Date: February 26, 2024

Re: Parking on Election Days

The Morse Institute Library is the only polling location in Natick where there is metered parking. Chief Hicks, and Deputy Chief Lauzon informed me to petition the Select Board to allow for temporary changes to downtown parking as follows:

- Pay at Kiosk spaces in the Town Hall parking lot to be temporary permit parking spaces for election officials on election day only
- Cover metered parking with bags that say "Voter Parking" on East Central Street in front of and across from the Library, and metered spaces on both sides of Washington Street, from East Central Street to Court Street

The election dates for 2024 are March 5th, March 26th, September 3rd, and November 5th.

This will not change any of the permit parking spaces.

Thank you for your consideration.

ITEM TITLE: Support Recommendation from Audit Advisory Committee on RFP

ITEM SUMMARY:

ATTACHMENTS:

Description	Upload Date	Type
RFP Auditing Services v3.5- 012624	3/4/2024	Exhibit
RFP_Auditing_Services_v3.5-_012624	3/5/2024	Cover Memo
AAC Recommendation	3/6/2024	Cover Memo

**Town of Natick
Natick, Massachusetts**

**REQUEST FOR PROPOSALS FOR THE PROCUREMENT OF
PROFESSIONAL AUDITING SERVICES
FOR THE TOWN OF NATICK**

PROPOSALS DUE:

April 30, 2024, 9:00 A.M. LOCAL TIME

Late Proposals Will Be Rejected

DELIVER COMPLETED PROPOSALS TO:

Town of Natick
c/o Procurement Officer
Natick Public Works
75 West Street
Natick, MA 01760
Phone: 508-647-6438

NOTICE TO PROPOSERS

Pursuant to Chapter 30B, Section 6 of the Massachusetts General Laws (M.G.L. c. 30B, §6), the Town of Natick, Natick Town Hall, 13 East Central Street, Natick, MA 01760 (“the Town”) invites the submission of sealed proposals for the procurement of professional auditing services for the Town of Natick. The Request for Proposals (“RFP”) may be obtained from the electronically from the Procurement Office, Natick Public Works, 75 West Street, Natick, MA 01760, at bleblanc@natickma.org, between 8:00 A.M. and 4:00 P.M. local time, Monday through Thursday, and between 8:00 A.M. and 12:00 P.M. (noon) local time, Friday, beginning on April 1, 2024. Ten (10) copies of each sealed Proposal, contained in separately sealed envelopes marked, respectively, “RFP: Procurement of Professional Auditing Services for the Town of Natick – Price Proposal” and “RFP: Procurement of Professional Auditing Services for the Town of Natick – Non-Price Proposal” will be received until **9:00 A.M. local time, April 30, 2024**, at the Procurement Office, Natick Public Works, 75 West Street, Natick, MA 01760. Proposers shall also include an electronic copy of their non-price proposal in the non-price proposal envelope. All Proposals shall comply with the RFP issued by the Town of Natick, including, without limitation, Section 1, Instructions to Proposers, and Proposal Submission Requirements. The Town reserves the right to waive any informality in or to reject any, any part of, or all Proposals in the best interest of the Town. Any Proposal submitted will be binding for sixty (60) days subsequent to the deadline date for receipt of sealed Proposals. Award of a contract shall be subject to appropriation and shall be subject to vote by the Natick Select Board.

I. INTRODUCTION

Pursuant to Chapter 30B, Section 6 of the Massachusetts General Laws (M.G.L. c. 30B, §6), the Town of Natick, Natick Town Hall, 13 East Central Street, Natick, MA 01760 (“the Town”) invites the submission of sealed proposals for the procurement of professional auditing services for the Town of Natick. For a full description of such services, please refer to Section III (A) of the Request for Proposals (“RFP”).

The Request for Proposals (“RFP”) may be obtained from the electronically from the Procurement Office, Natick Public Works, 75 West Street, Natick, MA 01760, at bleblanc@natickma.org, between 8:00 A.M. and 4:00 P.M. local time, Monday through Thursday, and between 8:00 A.M. and 12:00 P.M. (noon) local time, Friday, beginning on April 1, 2024.

A non-mandatory pre-proposal conference will be held on April 16, 2024 at 10:00 A.M. at Comptroller’s Office Natick Town Hall, 13 East Central Street Natick, MA 01760

Questions regarding this RFP shall be submitted in writing and shall be delivered to the Procurement Office by the close of business (4:00 P.M. local time, Monday through Thursday, and 12:00 P.M. (noon) local time, Friday) by email to bleblanc@natickma.org on April 16, 2024. Questions presented after this time shall not be considered. No question shall be considered which is not submitted in writing. Any questions requiring consideration shall be answered in an addendum delivered to all registered Proposers.

Ten (10) copies of each sealed Proposal, contained in separately sealed envelopes marked, respectively, “RFP: Procurement of Professional Auditing Services for the Town of Natick – Price Proposal” and “RFP: Procurement of Professional Auditing Services for the Town of Natick – Non-Price Proposal” will be received until **9:00 A.M. local time, April 30, 2024**, at this address:

Procurement Office
Natick Public Works
75 West Street
Natick, MA 01760.

Proposers shall also include an electronic copy of their non-price proposal in the non-price proposal envelope.

Each Proposer’s name, address and contact phone number shall be clearly visible from the outside of each sealed envelope. The clock in the Procurement Office shall be considered official. No Proposals received after the date and time specified in the previous paragraph shall be accepted. No faxed Proposals shall be accepted. Conditional Proposals will not be accepted.

Please refrain from using staples and binders, if this is at all possible.

Each Proposal shall be submitted in accordance with the Submission Requirements in order to be considered for award. Any Proposal submitted shall be binding for sixty (60) days subsequent to the time of the opening of Proposals.

The Town **will not** reimburse Proposers for any costs incurred in preparing Proposals in response to this RFP.

Submission of a Proposal shall be conclusive evidence that the Proposer has examined this RFP and is familiar with terms of this RFP and all provisions of the contract included with this RFP. Upon finding any omissions or discrepancy in this RFP, each Proposer shall notify the Town immediately so that any necessary addenda may be issued. Failure of a Proposer to investigate completely the RFP and/or to be thoroughly familiar with this RFP shall in no way relieve any such Proposer from any obligation with respect to the Proposal.

By submission of a Proposal, the Proposer agrees that if its Proposal is accepted, then it shall enter into a Contract with the Town which incorporates all of the requirements of this RFP. By submission of a Proposal, the Proposer further indicates acceptance of all terms and conditions of this RFP.

Changes, modifications or withdrawal of Proposals shall be submitted in writing to the Town prior to the deadline and shall be contained in a sealed envelope clearly marked, as appropriate, “CORRECTION, MODIFICATION OR WITHDRAWAL OF SEALED PROPOSAL FOR THE PROCUREMENT OF PROFESSIONAL AUDITING SERVICES FOR THE TOWN OF NATICK– PRICE PROPOSAL” or “CORRECTION, MODIFICATION OR WITHDRAWAL OF SEALED PROPOSAL FOR PROCUREMENT OF PROFESSIONAL AUDITING SERVICES FOR THE TOWN OF NATICK - NON-PRICE PROPOSAL.” No corrections, modifications, or withdrawal of Proposals shall be permitted after the deadline for receipt of Proposals.

For further information, please refer to the succeeding sections, with which each Proposer shall comply in submitting a Proposal.

II. PRE-PROPOSAL CONFERENCE/QUESTIONS

A non-mandatory pre-proposal conference will be held on April 16, 2024 at 10:00 A.M. at Comptroller’s Office Natick Town Hall, 13 East Central Street Natick, MA.

Questions regarding this RFP shall be submitted in writing and shall be delivered to the Procurement Office by the close of business (4:00 P.M. local time, Monday through Thursday, and 12:00 P.M. (noon) local time, Friday) by email to bleblanc@natickma.org on April 16, 2024. Questions presented after this time shall not be considered. No question shall be considered which is not submitted in writing. Any questions requiring consideration shall be answered in an addendum delivered to all registered Proposers.

III. BACKGROUND

A. Description of Work

The Town of Natick (the "Town"), as Awarding Authority, invites sealed proposals for the procurement set forth below: Auditing of the Town's financial accounts and records in accordance with the specifications below.

Background

The Town of Natick is a municipality in Middlesex County with a population of approximately 36,000 people and a total budget for Fiscal Year 2024 of \$192,867,907 inclusive of schools and enterprise funds. Special revenue funds, including revolving, trust, agency, grants, and other funds generate additional revenue. The current workforce of the Town (including schools) is approximately 1,060 benefited employees and 554 hourly employees.

The most recent Town audit was performed in 2023 - 2024 for the fiscal year ending June 30, 2023. A copy of the report, along with other financial and budget documents, is available at <https://www.natickma.gov/171/Financial-Statements-Audit-Related-Docum>.

The Town maintains its general records in accordance with the Uniform Municipal Accounting System (UMAS) established by the Bureau of Accounts. The records of the Town are fully computerized using MUNIS financial software. Interdepartmental, accounts receivable, and cash reconciliations will be made by the Town at year end.

Tasks

1. Conduct audit in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) and *Government Auditing Standards* of the Comptroller General of the United States of America; and the audit requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).
2. Examine the Town's and all its funds, organizations, agencies, boards, commissions, enterprise funds and institutions not legally separate from the town financial records, including its component units, the Natick Contributory Retirement System and Morse Institute Library of all activities, including cash and receipts, expenditures, special revenues, trusts, grants, outstanding taxes, etc. The contract will cover audits for the fiscal years ending June 30, 2024, 2025, 2026, 2027, and 2028. Vendor staff shall be given access to Town physical files and must be willing to access them with minimal Town staff assistance.
3. Examine the Natick Public School's end of year report, in compliance with the standards from item 1, and agreed-upon procedures based on the Massachusetts Department of Elementary and Secondary Education's Compliance Supplement for Massachusetts School Districts Agreed- Upon Procedures Engagements which will be applied to the End-of-Year Financial Report.
4. Conduct an audit of the Natick Affordable Housing Trust, in compliance with the standards

from item 1.

5. Conduct an audit of the Town's major federal award program(s) compliance in accordance with the requirements of the Single Audit Act, as amended, and the Uniform Guidance. This compliance audit shall cover the fiscal years ending June 30, 2024, 2025, 2026, 2027, and 2028.
6. At the conclusion of the audit engagement, communicate to those charged with governance the following significant findings from the audit:
 - The qualitative aspects of significant accounting practices.
 - Significant difficulties or issues, if any, encountered during the audit.
 - Uncorrected misstatements, other than those believed to be trivial, if any.
 - Disagreements with management, if any.
 - Material, corrected misstatements that were brought to the attention of management as a result of our audit procedures.
7. Appear before the Select Board and Finance Committee, as requested, to discuss findings and results at the conclusion of the audit.
8. In addition to the annual audit, be available during normal business hours throughout the contract period to provide advice and guidance on financial accounting and reporting issues, and shall keep the Town abreast of the working requirements of all new accounting and financial pronouncements of the Governmental Accounting Standards Board, the United States Office of Management and Budget, and the Commonwealth of Massachusetts.

The Town will endeavor to cooperate with requests for assistance including:

1. Preparation of a working trial balance.
2. Location of appropriate records.
3. Photocopying of documents is limited to one (1) copy of each original, if not available electronically.
4. Completion of information requests.
5. Meetings and conferences (by appointment if necessary).

Deliverables

1. Vendor shall hold an exit conference with the Deputy Town Administrator/Director of Finance and Town Comptroller to review draft copies of the report below before such reports are issued no later than December 31st of each year.
2. One (1) report in Adobe pdf format submitted to the Comptroller's Office.
 - a. For the Town:
 - i. An auditor's opinion whether the general-purpose financial statements fairly

present the financial position of the Town and the results of its financial operations in accordance with generally accepted accounting principles. In addition, the audit must contain an auditor's opinion whether the supplemental statement of federal assistance presents fairly the actual grant data in relation to the general-purpose financial statements. The supplemental statement of federal assistance must show the total expenditures for each federal assistance program.

- ii. An auditor's statement whether an internal control system exists to provide reasonable assurance that federal funds are managed in compliance with applicable laws and regulations. Further, the auditor's report must identify the Town's significant internal accounting controls designed to provide for compliance. The auditor shall report the controls that were evaluated, and any material weaknesses identified as a result of the evaluation.
 - iii. An auditor's statement on compliance with grant requirements. The statement shall include:
 - 1. A statement of positive assurance with respect to those items tested for compliance, including compliance with law and regulations pertaining to financial reports and claims for advances and reimbursements.
 - 2. Negative assurance on those items not tested.
 - 3. A summary of all instances of noncompliance
 - 4. An identification of total amounts questioned, if any, for each federal assistance award, as a result of noncompliance.
 - iv. A management letter of comments and recommendations.
- b. For the schools: end-of-year report in accordance with Compliance Supplement for Massachusetts School Districts Agreed Upon Procedures, updated January 2024: <https://www.doe.mass.edu/finance/accounting/compliance-supp.docx>
- c. For the Municipal Affordable Housing Trust:
- i. An auditor's opinion whether the general-purpose financial statements fairly present the financial position of the Town and the results of its financial operations in accordance with generally accepted accounting principles.
 - ii. An auditor's statement whether an internal control system exists to provide reasonable assurance that federal funds are managed in compliance with applicable laws and regulations. Further, the auditor's report must identify the Town's significant internal accounting controls designed to provide for compliance. The auditor shall report the controls that were evaluated, and any material weaknesses identified as a result of the evaluation.
 - iii. A management letter of comments and recommendations.

The final audit report for each fiscal year will be completed no later than January 31st following the fiscal year under audit.

Plan of Services

The Successful Proposer shall submit a plan of service that details the following:

- Proposed staffing
- Timeline
 - All fieldwork must be completed by November 31st.
 - Final report shall be submitted by January 31st following the fiscal year under audit..
- Method of secure data transmission
- Transition plan

Minimum Requirements

Lead Audit Staff must have been in the field of providing municipal auditing services for at least ten (10) consecutive years.

Vendor must have successful experience providing municipal auditing services to at least five (5) Massachusetts governmental units of similar size (in population and budget) to Natick.

Vendor must be able to complete all field work by October 31.

Documents Incorporated by Reference

- A. Standards for Audits and Governmental Organizations, Programs, Activities and Functions, 1981 revision, United States General Accounting Office.
- B. Single Audit Act of 1984 as codified in Chapter 75 of Title 31 of the United States Code
- C. Circular A-128, Office of Management and Budget

B. Successful Proposer's Personnel

The Successful Proposer shall be responsible for any training of his/her/its personnel. The Successful Proposer's personnel shall be adequately trained by the Successful Proposer, shall be experienced in the provision of services specified in this RFP, and shall be of good moral character. All of the Successful Proposer's employees assigned to the work under any contract with the Town shall pass Criminal Background Screening.

The Successful Proposer shall provide the Town with the following information:

1. Name, business address, telephone, and cell phone numbers of the person(s) in charge of the work under any contract with the Town.
2. Name, address, and telephone number of all employees assigned to the work under any contract with the Town. The Successful Proposer will update this list whenever there is a change in personnel.

IV. PROPOSAL SUBMISSION REQUIREMENTS

I. PRICE PROPOSAL

To be considered responsible and responsive and eligible to submit a Proposal for consideration of having the most advantageous Proposal, Proposers shall submit their price Proposals on the form entitled "Price Proposal Form" that is enclosed herewith as Attachment A. The **Price Proposal Form** shall include a price that includes the furnishing of all payments, insurance, and other costs incurred in the performance under the Contract, and signed by an individual authorized to bind the Proposer contractually.

The total price shall be a fixed sum for all work performed (not an hourly rate) and shall be all inclusive including travel, printing, telephone and any other outside expense.

II. NON-PRICE PROPOSAL

To be considered responsible and responsive and eligible to submit a Proposal for consideration of having the most advantageous Proposal, Proposers shall submit non-price Proposals that comply with the following requirements:

A. Letter of Transmittal

Proposers shall submit cover letters with their Proposals. Each cover letter shall be signed by the Proposer, stating that the Proposal is effective for at least sixty (60) calendar days from the deadline date for receipt of sealed Proposals, or from the date upon which this RFP is cancelled, whichever occurs first.

B. Table of Contents

Proposals shall include a table of contents, properly indicating the section and page numbers of the information included.

C. A Fully-Executed Scope of Services

Each Proposer shall submit a written narrative which explains in detail the scope of services to be provided by that Proposer.

D. Other Documents.

Each Proposer shall submit the following:

- 1) A fully executed Certificate of Non-Collusion (Attachment B).
- 2) A fully executed Certificate of Tax Compliance (M.G.L., c.62C, §49A) (Attachment C).
- 3) A fully executed Conflict of Interest Certification (M.G.L. c.268A) (Attachment D).
- 4) A fully executed Certificate of Corporate Proposer (Attachment E).
- 5) A fully executed Certificate of Compliance with M.G.L. c. 151B (Attachment F).
- 6) A fully executed Certificate of Non-Debarment (Attachment G).
- 7) A certificate of insurability from an insurance company that is licensed to do business in the Commonwealth of Massachusetts indicating that all the provisions of the specifications can be met, shall be submitted with the proposal documents.
- 8) The identity of the individual, partnership or corporation applying for contract award and credentials of the personnel who would actually perform the work, as well as their managers, and the nature of the supervision. State the responsibilities of each of the work personnel. If the proposer intends to sub-contract or any work required in the scope of services, the sub-contractor shall be identified. Sample work products are required for all personnel. This item is a major determinant in assessing the proposer's qualifications and shall be incorporated as a condition in the contract to be awarded.
- 9) An applicant qualifications statement, including professional qualifications and work experience attesting to capacity to perform the required work program. Include résumé(s), detailing academic and professional work experience attesting to capacity to perform the required work program. Résumés are required for all work personnel.
- 10) A detailed explanation of the proposer's approach to the work: methodology, demonstrated understanding of the scope of work, and the proposer's expectations of assistance and services from the Town. A technical work plan and timeline for accomplishing the tasks described in the scope of services shall be provided. Proposal shall describe the local and/or regional office's audit experience with local governments in the past ten (10) years and identify the supervisors and staff who are expected to work on the audit. Provide résumés showing relevant past experience, education, training, etc. Describe the firm's participation in any professional, sponsored quality assessment review of comparable programs. Proposal shall state Vendor's understanding of the services to be performed and deliverables to be provided.
- 11) A client reference list, with names, addresses, telephone numbers, and e-mail addresses (if available) for clients for whom the proposer has performed similar services within the past five (5) years.
- 12) Any other information deemed relevant to the work, and which the proposer believes will further the competitiveness of the proposal.
- 13) A statement of any legal proceedings pending or concluded within the past five (5) years relating to the performance of services by the Proposer.
- 14) A sample audit letter and a sample management letter.

V. SELECTION CRITERIA

1. Minimum Evaluation Criteria

In order to be considered a responsive and responsible Proposer, a Proposal shall comply with the Proposal Submission Requirements set forth in Section IV above.

2. Comparative Evaluation Criteria

All responsive proposals will be judged against the **Comparative Evaluation Criteria** detailed below. The Town will rank each proposal as:

- a. Highly Advantageous – the proposal exceeds the standards of the specific criterion;
- b. Advantageous – the proposal fully satisfies the standards of the specific criterion;
- c. Not Advantageous – the proposal does not fully satisfy the standards of the specific criterion, or is incomplete and/or unclear.

2.1. **Quality and Depth of Work Experience**

Highly Advantageous – The proposal demonstrates experience with at least twenty (20) or more similar projects.

Advantageous – The proposal demonstrates experience with fifteen (15) to nineteen (19) similar projects.

Not Advantageous – The proposal demonstrates experience with fourteen (14) or fewer similar projects.

2.2. **Qualifications of the Proposer**

Highly Advantageous – The proposer's résumé(s) demonstrate(s) that proposer has superior training, educational background and work experience (at least twenty (20) years') appropriate to the work described herein and all key work personnel demonstrate (s) professional experience well beyond the minimum requirements.

Advantageous – The proposer's résumé(s) do/does not meet the above category for highly advantageous, but demonstrate(s) that proposer has adequate training, educational background and work experience (between fifteen (15) to nineteen (19) years') appropriate to the work described herein and all key work personnel demonstrate(s) professional experience that meets or exceeds the minimum requirements.

Not Advantageous – The proposer's résumé(s) do/does not demonstrate that proposer has adequate training, educational background and work experience appropriate to the work described herein. Less than fifteen (15) years' total experience.

2.3. **Desirability of approach to the work, demonstrated understanding of the community's needs, and proposer's ability to undertake and complete this work.**

Highly Advantageous – The proposal demonstrates a superior approach to the subject material and a superior understanding of the issues addressed by the work.

Advantageous – The proposal does not meet the above category for highly advantageous, but demonstrates an acceptable approach to the subject material and an acceptable understanding of the issues addressed by the work.

Not Advantageous – The proposal does not demonstrate an acceptable approach to the subject material and an acceptable understanding of the issues addressed by the work, and/or the proposal fails to indicate a time schedule that meets the work requirements.

2.4. Overall Quality of Client References

Highly Advantageous – All references contacted spoke favorably of the work performed by the proposer and would use them again for similar work without hesitation.

Advantageous – Not used.

Not Advantageous – One (1) or more references stated that there had been difficulty with the proposer's ability to deliver the contracted services and deliverables.

2.5. Completeness and Quality of Proposal

Highly Advantageous – The proposal is complete, concise, informative, and highly detailed. Proposal reflects that proposer is able to perform in a superior manner acceptable to the Town.

Advantageous – The proposal does not meet the above criteria for highly advantageous, but the proposal is complete, informative, and meets criteria for responsiveness.

Not Advantageous – The proposal is not complete, informative, and responsive.

2.6 Interview (If Used)

Highly Advantageous – Proposer brings all planned auditing team members to interview, offers clear and concise answers to interview questions comprehensible to the layperson, and demonstrates enthusiasm for working in a collaborative manner with Town staff and elected officials.

Advantageous Proposer brings most planned auditing team members, offers clear and concise answers to interview questions but occasionally succumbs to jargon, and demonstrates enthusiasm for working in a collaborative manner with Town staff and elected officials.

Not Advantageous Proposer brings only one planned auditing team member to interview, offers answers that frequently succumb to jargon or are not comprehensible to a layperson, and appears willing to work in a collaborative manner with Town staff and elected officials.

Any proposal that fails to meet the minimum submission requirements shall be deemed Unacceptable for the foregoing categories.

VI. PROPOSAL SUBMISSION

Ten (10) copies of each sealed Proposal, in separate envelopes, as described above, shall be submitted by **9:00 A.M. LOCAL TIME, April 30, 2024**, to this address:

Town of Natick
c/o Procurement Officer
Natick Public Works
75 West Street
Natick, MA 01760.

Proposers shall also include an electronic copy of their non-price proposal in the non-price proposal envelope. After this time, they will be opened in confidence. **Proposals received after the date and time specified in this Section VI for receipt of Proposals will not be accepted.**

VII. INTERVIEWS

After review of the technical proposals, the Screening Committee may, **at its discretion**, schedule interviews with any or all of the proposers for the purpose of further evaluation of the proposer's qualifications and ability to provide the required service. Interviewees will be ranked on their presentation.

VIII. FINAL SELECTION AND AWARD

The Screening Committee will review the non-price proposals. The Screening Committee will determine which non-price proposals meet the minimum evaluation criteria set forth in Section IV above. The Screening Committee will rank such non-price proposals in accordance with the comparative evaluation criteria set forth in the Section V above. The Screening Committee will then open and review the envelopes labeled "Price Proposals" and rank them.

Based upon the Screening Committee's analysis of both the Price-Proposal and the Non-Price Proposal, the Screening Committee will make a recommendation to the Natick Select Board concerning which Proposal, if any, the Town should accept. The Natick Select Board will then decide whether a Contract will be awarded. Any Contract will be awarded, if at all, pursuant to all applicable provisions of the Massachusetts General Laws, to a responsive and responsible Proposer who has submitted the most advantageous Proposal, taking into consideration price and all other evaluation criteria set forth in the RFP.

IX. COMPLIANCE WITH LAWS

The Successful Proposer shall comply with all provisions of Federal, Massachusetts and Town of Natick law applicable to his work including, without limitation, statutes, by-laws, rules, regulations, orders and directives, as amended, and including, without limitation, the Williams-Steiger Occupational Safety and Health Act, as amended, and related regulations, as amended, in effect throughout the term of this Lease and any extension or renewal thereof. Without limitation, the Successful Proposer shall comply with the applicable provisions of Chapter 149, Section 26 to 27D of the Massachusetts General Laws (M.G.L.), as amended, and with all applicable minimum prevailing wage rates as determined by the

Massachusetts Commissioner of Labor and Industries. Any Contract shall be considered to include in their entirety all terms respecting workers' compensation insurance and other terms required to be included in it by Chapter 152 of the Massachusetts General Laws, as amended, and any other laws, as though such terms were set forth in their entirety herein.

X. INSURANCE

The Successful Proposer shall keep in force throughout the term of the Contract and any extension or renewal thereof the amount of insurance described in the Contract which is a part of this RFP and is incorporated herein by reference. Without limitation of other requirements of this RFP, no Contract shall be entered into by the parties unless the successful Proposer complies with all applicable insurance requirements, including, without limitation, the requirement to submit endorsements or riders which include the required language concerning notice of cancellation or amendment of any and all insurance policies required under the Contract, and which include the required language mandating that the Town of Natick shall be named as an additional insured on the required policies of commercial general liability insurance, automobile liability insurance, and excess liability insurance, umbrella form.

XI. INDEMNIFICATION

The Successful Proposer shall assume the indemnification responsibilities described in the Contract which is a part of this RFP and is incorporated herein by reference.

XII. PERFORMANCE BOND REQUIREMENTS

DELETED – NOT APPLICABLE

XIII. LABOR AND MATERIALS PAYMENT BOND REQUIREMENTS

DELETED – NOT APPLICABLE

XIV. INDEPENDENT CONTRACTOR STATUS

The Successful Proposer shall provide services as an independent contractor with the Town of Natick and the Successful Proposer and his/her/its employees shall not be entitled to receive any benefits of employment with the Town of Natick, including without limitation salary, overtime, vacation pay, holiday pay, health insurance, life insurance, pension or deferred compensation.

XV. CRIMINAL BACKGROUND SCREENING

For each employee of the Successful Proposer who is performing services under any Contract awarded by the Town of Natick, the Successful Proposer shall, subject to its confidentiality and privacy obligations owing to its employees and third parties, provide a written confirmation to the Town that such employee passed the Successful Proposer's pre-employment criminal background screen. In the event that any employee refuses to permit the Successful Proposer to provide such information to the Town, the Successful Proposer shall not assign such employee to perform services for the Town, and such employee shall not be authorized to perform services for the Town. The Town shall be permitted to

keep such information in its files.

XVI. USE OF ALCOHOL AND CONTROLLED SUBSTANCES PROHIBITED

The use of alcoholic beverages, narcotics, and mood altering substances, except for current valid, legal prescriptions, by any officer, employee, agent, or representative of the Successful Proposer is prohibited on Town of Natick property which is the subject matter of this RFP and during all hours of work under any contract with the Town. If any officer, employee, agent, or representative of the Successful Proposer violates the foregoing provision, the Town of Natick shall have the right to order that such officer, employee, agent, or representative of the Successful Proposer shall not be permitted to return to work under any contract with the Town. Under such circumstances, the Successful Proposer shall promptly remove the subject officer, employee, agent, or representative from the job site and shall not permit the subject officer, employee, agent, or representative to perform further work in conjunction with any contract with the Town.

XVII. NO SMOKING/USE OF TOBACCO PRODUCTS

Pursuant to M.G.L. c. 270, §22, the Commonwealth of Massachusetts Smokefree Workplace Law, the Successful Proposer, its officers, employees, agents, and representatives are prohibited from smoking tobacco products, or any non-tobacco products designed to be combusted or inhaled, in any public building.

XVIII. INDEX OF ATTACHMENTS

Attachment A - Price Proposal Form
Attachment B - Certificate of Non-Collusion
Attachment C - Certificate of Tax Compliance (M.G.L., c.62C, §49A)
Attachment D - Conflict of Interest Certification (M.G.L. c.268A).
Attachment E - Certificate of Corporate Proposer
Attachment F - Certificate of Compliance with M.G.L. c. 151B
Attachment G - Certificate of Non-Debarment
Attachment H - Form of Contract

**ATTACHMENT A
TOWN OF NATICK
PRICE PROPOSAL FORM**

The undersigned Proposer hereby submits a price proposal for the provision of professional auditing services for the Town of Natick.

Printed Name of Proposer:

Address: _____

The PROPOSER hereby pledges to deliver the complete scope of services required for price shown below:

	Town Report	School end-of-year report	Affordable Housing Trust report	Subtotal
Year 1 Price in Figures	\$	\$	\$	\$
Year 2 Price in Figures OPTION YEAR 1	\$	\$	\$	\$
Year 3 Price in Figures OPTION YEAR 2	\$	\$	\$	\$

The PROPOSER acknowledges receipt of addenda nos. _____

Please write out all addenda issued. For example, for four (4) addenda issued, please write: "1, 2, 3, and 4." Do not write "1-4" or "4."

Authorized Signature

Printed Name

Printed Title

Date

Full Legal Name

Officers of Corporation and Addresses

State of Incorporation

Principal Place of Business

Tel. _____

Qualified in Massachusetts **Yes** _____ **No** _____

Principal Place of Business in MA

Tel. _____

TOWN OF NATICK

ATTACHMENT B

CERTIFICATE OF NON-COLLUSION

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

Name of Proposer

Address of Proposer

Telephone Number

By: _____
(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT C
CERTIFICATE OF TAX COMPLIANCE

Pursuant to Massachusetts General Laws (M.G.L.) c. 62C, §49A, I certify under the penalties of perjury that the Proposer named below has complied with all laws of the Commonwealth of Massachusetts pertaining to the payment of taxes, to the reporting of employees and contractors, and to the withholding and remitting of child support.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____
(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT D
CONFLICT OF INTEREST CERTIFICATION

The Proposer hereby certifies that:

1. The Proposer has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of a Contract pursuant to this RFP.
2. No consultant to, or subcontractor for, the Proposer has given, offered, or agreed to give any gift, contribution, or offer of employment to the Proposer, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a Contract by the Proposer.
3. No person, corporation, or other entity, other than a bona fide full time employee of the Proposer has been retained or hired to solicit for or in any way assist the Proposer in obtaining a Contract pursuant to this RFP upon an agreement or understanding that such person, corporation or entity be paid a fee or other compensation contingent upon the award of a Contract to the Proposer.
4. The Proposer understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws (M.G.L.), applies to the Proposer and its officers, employees, agents, subcontractors, and affiliated entities with respect to the transaction outlined in the Request for Proposals.
5. The Proposer understands that the Proposer and its officers, employees, agents, subcontractors, and affiliated entities, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____

(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT E

CERTIFICATE OF CORPORATE PROPOSER

I, _____, certify that I am the Clerk of the Corporation named as Proposer in the attached Proposal Form; that _____, who signed said Proposal on behalf of the Proposer was then _____ of said Corporation and was duly authorized to sign said Proposal Form; and that I know his/her signature thereto is genuine.

(Corporate Seal)

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____

(Signature)

Printed Name

Printed Title

Date

This Certificate shall be completed where Proposer is a Corporation and shall be so completed by its Clerk. In the event that the Clerk is the person signing the Proposal on behalf of the Corporation, this certificate shall be completed by another officer of the Corporation.

TOWN OF NATICK

ATTACHMENT F

CERTIFICATE OF COMPLIANCE WITH M.G.L. c. 151B

The Proposer hereby certifies that it is in compliance with and shall remain in compliance with Massachusetts General Laws (M.G.L.) Chapter 151B and shall not discriminate on any prohibited basis outlined therein. The Proposer also hereby certifies that it shall comply with any and all applicable Supplier Diversity Office (SDO) thresholds that have been established in conjunction with this Request for Proposals.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____

(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT G

CERTIFICATE OF NON-DEBARMENT

The Proposer hereby certifies that it is presently not debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, and that, should any proceeding arise in which it is debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, the Proposer shall inform the Town of Natick within one (1) business day of such debarment, suspension, or prohibition from practice.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____
(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

**ATTACHMENT H
FORM OF CONTRACT**

(SEE ATTACHED DOCUMENT.)

**Town of Natick
Natick, Massachusetts**

**REQUEST FOR PROPOSALS FOR THE PROCUREMENT OF
PROFESSIONAL AUDITING SERVICES
FOR THE TOWN OF NATICK**

PROPOSALS DUE:

April 30, 2024, 9:00 A.M. LOCAL TIME

Late Proposals Will Be Rejected

DELIVER COMPLETED PROPOSALS TO:

Town of Natick
c/o Procurement Officer
Natick Public Works
75 West Street
Natick, MA 01760
Phone: 508-647-6438

NOTICE TO PROPOSERS

Pursuant to Chapter 30B, Section 6 of the Massachusetts General Laws (M.G.L. c. 30B, §6), the Town of Natick, Natick Town Hall, 13 East Central Street, Natick, MA 01760 (“the Town”) invites the submission of sealed proposals for the procurement of professional auditing services for the Town of Natick. The Request for Proposals (“RFP”) may be obtained from the electronically from the Procurement Office, Natick Public Works, 75 West Street, Natick, MA 01760, at bleblanc@natickma.org, between 8:00 A.M. and 4:00 P.M. local time, Monday through Thursday, and between 8:00 A.M. and 12:00 P.M. (noon) local time, Friday, beginning on April 1, 2024. Ten (10) copies of each sealed Proposal, contained in separately sealed envelopes marked, respectively, “RFP: Procurement of Professional Auditing Services for the Town of Natick – Price Proposal” and “RFP: Procurement of Professional Auditing Services for the Town of Natick – Non-Price Proposal” will be received until **9:00 A.M. local time, April 30, 2024**, at the Procurement Office, Natick Public Works, 75 West Street, Natick, MA 01760. Proposers shall also include an electronic copy of their non-price proposal in the non-price proposal envelope. All Proposals shall comply with the RFP issued by the Town of Natick, including, without limitation, Section 1, Instructions to Proposers, and Proposal Submission Requirements. The Town reserves the right to waive any informality in or to reject any, any part of, or all Proposals in the best interest of the Town. Any Proposal submitted will be binding for sixty (60) days subsequent to the deadline date for receipt of sealed Proposals. Award of a contract shall be subject to appropriation and shall be subject to vote by the Natick Select Board.

I. INTRODUCTION

Pursuant to Chapter 30B, Section 6 of the Massachusetts General Laws (M.G.L. c. 30B, §6), the Town of Natick, Natick Town Hall, 13 East Central Street, Natick, MA 01760 (“the Town”) invites the submission of sealed proposals for the procurement of professional auditing services for the Town of Natick. For a full description of such services, please refer to Section III (A) of the Request for Proposals (“RFP”).

The Request for Proposals (“RFP”) may be obtained from the electronically from the Procurement Office, Natick Public Works, 75 West Street, Natick, MA 01760, at bleblanc@natickma.org, between 8:00 A.M. and 4:00 P.M. local time, Monday through Thursday, and between 8:00 A.M. and 12:00 P.M. (noon) local time, Friday, beginning on April 1, 2024.

A non-mandatory pre-proposal conference will be held on April 16, 2024 at 10:00 A.M. at Comptroller’s Office Natick Town Hall, 13 East Central Street Natick, MA 01760

Questions regarding this RFP shall be submitted in writing and shall be delivered to the Procurement Office by the close of business (4:00 P.M. local time, Monday through Thursday, and 12:00 P.M. (noon) local time, Friday) by email to bleblanc@natickma.org on April 16, 2024. Questions presented after this time shall not be considered. No question shall be considered which is not submitted in writing. Any questions requiring consideration shall be answered in an addendum delivered to all registered Proposers.

Ten (10) copies of each sealed Proposal, contained in separately sealed envelopes marked, respectively, “RFP: Procurement of Professional Auditing Services for the Town of Natick – Price Proposal” and “RFP: Procurement of Professional Auditing Services for the Town of Natick – Non-Price Proposal” will be received until **9:00 A.M. local time, April 30, 2024**, at this address:

Procurement Office
Natick Public Works
75 West Street
Natick, MA 01760.

Proposers shall also include an electronic copy of their non-price proposal in the non-price proposal envelope.

Each Proposer’s name, address and contact phone number shall be clearly visible from the outside of each sealed envelope. The clock in the Procurement Office shall be considered official. No Proposals received after the date and time specified in the previous paragraph shall be accepted. No faxed Proposals shall be accepted. Conditional Proposals will not be accepted.

Please refrain from using staples and binders, if this is at all possible.

Each Proposal shall be submitted in accordance with the Submission Requirements in order to be considered for award. Any Proposal submitted shall be binding for sixty (60) days subsequent to the time of the opening of Proposals.

The Town **will not** reimburse Proposers for any costs incurred in preparing Proposals in response to this RFP.

Submission of a Proposal shall be conclusive evidence that the Proposer has examined this RFP and is familiar with terms of this RFP and all provisions of the contract included with this RFP. Upon finding any omissions or discrepancy in this RFP, each Proposer shall notify the Town immediately so that any necessary addenda may be issued. Failure of a Proposer to investigate completely the RFP and/or to be thoroughly familiar with this RFP shall in no way relieve any such Proposer from any obligation with respect to the Proposal.

By submission of a Proposal, the Proposer agrees that if its Proposal is accepted, then it shall enter into a Contract with the Town which incorporates all of the requirements of this RFP. By submission of a Proposal, the Proposer further indicates acceptance of all terms and conditions of this RFP.

Changes, modifications or withdrawal of Proposals shall be submitted in writing to the Town prior to the deadline and shall be contained in a sealed envelope clearly marked, as appropriate, “CORRECTION, MODIFICATION OR WITHDRAWAL OF SEALED PROPOSAL FOR THE PROCUREMENT OF PROFESSIONAL AUDITING SERVICES FOR THE TOWN OF NATICK– PRICE PROPOSAL” or “CORRECTION, MODIFICATION OR WITHDRAWAL OF SEALED PROPOSAL FOR PROCUREMENT OF PROFESSIONAL AUDITING SERVICES FOR THE TOWN OF NATICK - NON-PRICE PROPOSAL.” No corrections, modifications, or withdrawal of Proposals shall be permitted after the deadline for receipt of Proposals.

For further information, please refer to the succeeding sections, with which each Proposer shall comply in submitting a Proposal.

II. PRE-PROPOSAL CONFERENCE/QUESTIONS

A non-mandatory pre-proposal conference will be held on April 16, 2024 at 10:00 A.M. at Comptroller’s Office Natick Town Hall, 13 East Central Street Natick, MA.

Questions regarding this RFP shall be submitted in writing and shall be delivered to the Procurement Office by the close of business (4:00 P.M. local time, Monday through Thursday, and 12:00 P.M. (noon) local time, Friday) by email to bleblanc@natickma.org on April 16, 2024. Questions presented after this time shall not be considered. No question shall be considered which is not submitted in writing. Any questions requiring consideration shall be answered in an addendum delivered to all registered Proposers.

III. BACKGROUND

A. Description of Work

The Town of Natick (the "Town"), as Awarding Authority, invites sealed proposals for the procurement set forth below: Auditing of the Town's financial accounts and records in accordance with the specifications below.

Background

The Town of Natick is a municipality in Middlesex County with a population of approximately 36,000 people and a total budget for Fiscal Year 2024 of \$192,867,907 inclusive of schools and enterprise funds. Special revenue funds, including revolving, trust, agency, grants, and other funds generate additional revenue. The current workforce of the Town (including schools) is approximately 1,060 benefited employees and 554 hourly employees.

The most recent Town audit was performed in 2023 - 2024 for the fiscal year ending June 30, 2023. A copy of the report, along with other financial and budget documents, is available at <https://www.natickma.gov/171/Financial-Statements-Audit-Related-Docum>.

The Town maintains its general records in accordance with the Uniform Municipal Accounting System (UMAS) established by the Bureau of Accounts. The records of the Town are fully computerized using MUNIS financial software. Interdepartmental, accounts receivable, and cash reconciliations will be made by the Town at year end.

Tasks

1. Conduct audit in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) and *Government Auditing Standards* of the Comptroller General of the United States of America; and the audit requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).
2. Examine the Town's and all its funds, organizations, agencies, boards, commissions, enterprise funds and institutions not legally separate from the town financial records, including its component units, the Natick Contributory Retirement System and Morse Institute Library of all activities, including cash and receipts, expenditures, special revenues, trusts, grants, outstanding taxes, etc. The contract will cover audits for the fiscal years ending June 30, 2024, 2025, 2026, 2027, and 2028. Vendor staff shall be given access to Town physical files and must be willing to access them with minimal Town staff assistance.
3. Examine the Natick Public School's end of year report, in compliance with the standards from item 1, and agreed-upon procedures based on the Massachusetts Department of Elementary and Secondary Education's Compliance Supplement for Massachusetts School Districts Agreed- Upon Procedures Engagements which will be applied to the End-of-Year Financial Report.
4. Conduct an audit of the Natick Affordable Housing Trust, in compliance with the standards

from item 1.

5. Conduct an audit of the Town's major federal award program(s) compliance in accordance with the requirements of the Single Audit Act, as amended, and the Uniform Guidance. This compliance audit shall cover the fiscal years ending June 30, 2024, 2025, 2026, 2027, and 2028.
6. At the conclusion of the audit engagement, communicate to those charged with governance the following significant findings from the audit:
 - The qualitative aspects of significant accounting practices.
 - Significant difficulties or issues, if any, encountered during the audit.
 - Uncorrected misstatements, other than those believed to be trivial, if any.
 - Disagreements with management, if any.
 - Material, corrected misstatements that were brought to the attention of management as a result of our audit procedures.
7. Appear before the Select Board and Finance Committee, as requested, to discuss findings and results at the conclusion of the audit.
8. In addition to the annual audit, be available during normal business hours throughout the contract period to provide advice and guidance on financial accounting and reporting issues, and shall keep the Town abreast of the working requirements of all new accounting and financial pronouncements of the Governmental Accounting Standards Board, the United States Office of Management and Budget, and the Commonwealth of Massachusetts.

The Town will endeavor to cooperate with requests for assistance including:

1. Preparation of a working trial balance.
2. Location of appropriate records.
3. Photocopying of documents is limited to one (1) copy of each original, if not available electronically.
4. Completion of information requests.
5. Meetings and conferences (by appointment if necessary).

Deliverables

1. Vendor shall hold an exit conference with the Deputy Town Administrator/Director of Finance and Town Comptroller to review draft copies of the report below before such reports are issued no later than December 31st of each year.
2. One (1) report in Adobe pdf format submitted to the Comptroller's Office.
 - a. For the Town:
 - i. An auditor's opinion whether the general-purpose financial statements fairly

present the financial position of the Town and the results of its financial operations in accordance with generally accepted accounting principles. In addition, the audit must contain an auditor's opinion whether the supplemental statement of federal assistance presents fairly the actual grant data in relation to the general-purpose financial statements. The supplemental statement of federal assistance must show the total expenditures for each federal assistance program.

- ii. An auditor's statement whether an internal control system exists to provide reasonable assurance that federal funds are managed in compliance with applicable laws and regulations. Further, the auditor's report must identify the Town's significant internal accounting controls designed to provide for compliance. The auditor shall report the controls that were evaluated, and any material weaknesses identified as a result of the evaluation.
 - iii. An auditor's statement on compliance with grant requirements. The statement shall include:
 - 1. A statement of positive assurance with respect to those items tested for compliance, including compliance with law and regulations pertaining to financial reports and claims for advances and reimbursements.
 - 2. Negative assurance on those items not tested.
 - 3. A summary of all instances of noncompliance
 - 4. An identification of total amounts questioned, if any, for each federal assistance award, as a result of noncompliance.
 - iv. A management letter of comments and recommendations.
- b. For the schools: end-of-year report in accordance with Compliance Supplement for Massachusetts School Districts Agreed Upon Procedures, updated January 2024: <https://www.doe.mass.edu/finance/accounting/compliance-supp.docx>
- c. For the Municipal Affordable Housing Trust:
- i. An auditor's opinion whether the general-purpose financial statements fairly present the financial position of the Town and the results of its financial operations in accordance with generally accepted accounting principles.
 - ii. An auditor's statement whether an internal control system exists to provide reasonable assurance that federal funds are managed in compliance with applicable laws and regulations. Further, the auditor's report must identify the Town's significant internal accounting controls designed to provide for compliance. The auditor shall report the controls that were evaluated, and any material weaknesses identified as a result of the evaluation.
 - iii. A management letter of comments and recommendations.

The final audit report for each fiscal year will be completed no later than January 31st following the fiscal year under audit.

Plan of Services

The Successful Proposer shall submit a plan of service that details the following:

- Proposed staffing
- Timeline
 - All fieldwork must be completed by November 31st.
 - Final report shall be submitted by January 31st following the fiscal year under audit..
- Method of secure data transmission
- Transition plan

Minimum Requirements

Lead Audit Staff must have been in the field of providing municipal auditing services for at least ten (10) consecutive years.

Vendor must have successful experience providing municipal auditing services to at least five (5) Massachusetts governmental units of similar size (in population and budget) to Natick.

Vendor must be able to complete all field work by October 31.

Documents Incorporated by Reference

- A. Standards for Audits and Governmental Organizations, Programs, Activities and Functions, 1981 revision, United States General Accounting Office.
- B. Single Audit Act of 1984 as codified in Chapter 75 of Title 31 of the United States Code
- C. Circular A-128, Office of Management and Budget

B. Successful Proposer's Personnel

The Successful Proposer shall be responsible for any training of his/her/its personnel. The Successful Proposer's personnel shall be adequately trained by the Successful Proposer, shall be experienced in the provision of services specified in this RFP, and shall be of good moral character. All of the Successful Proposer's employees assigned to the work under any contract with the Town shall pass Criminal Background Screening.

The Successful Proposer shall provide the Town with the following information:

1. Name, business address, telephone, and cell phone numbers of the person(s) in charge of the work under any contract with the Town.
2. Name, address, and telephone number of all employees assigned to the work under any contract with the Town. The Successful Proposer will update this list whenever there is a change in personnel.

IV. PROPOSAL SUBMISSION REQUIREMENTS

I. PRICE PROPOSAL

To be considered responsible and responsive and eligible to submit a Proposal for consideration of having the most advantageous Proposal, Proposers shall submit their price Proposals on the form entitled "Price Proposal Form" that is enclosed herewith as Attachment A. The **Price Proposal Form** shall include a price that includes the furnishing of all payments, insurance, and other costs incurred in the performance under the Contract, and signed by an individual authorized to bind the Proposer contractually.

The total price shall be a fixed sum for all work performed (not an hourly rate) and shall be all inclusive including travel, printing, telephone and any other outside expense.

II. NON-PRICE PROPOSAL

To be considered responsible and responsive and eligible to submit a Proposal for consideration of having the most advantageous Proposal, Proposers shall submit non-price Proposals that comply with the following requirements:

A. Letter of Transmittal

Proposers shall submit cover letters with their Proposals. Each cover letter shall be signed by the Proposer, stating that the Proposal is effective for at least sixty (60) calendar days from the deadline date for receipt of sealed Proposals, or from the date upon which this RFP is cancelled, whichever occurs first.

B. Table of Contents

Proposals shall include a table of contents, properly indicating the section and page numbers of the information included.

C. A Fully-Executed Scope of Services

Each Proposer shall submit a written narrative which explains in detail the scope of services to be provided by that Proposer.

D. Other Documents.

Each Proposer shall submit the following:

- 1) A fully executed Certificate of Non-Collusion (Attachment B).
- 2) A fully executed Certificate of Tax Compliance (M.G.L., c.62C, §49A) (Attachment C).
- 3) A fully executed Conflict of Interest Certification (M.G.L. c.268A) (Attachment D).
- 4) A fully executed Certificate of Corporate Proposer (Attachment E).
- 5) A fully executed Certificate of Compliance with M.G.L. c. 151B (Attachment F).
- 6) A fully executed Certificate of Non-Debarment (Attachment G).
- 7) A certificate of insurability from an insurance company that is licensed to do business in the Commonwealth of Massachusetts indicating that all the provisions of the specifications can be met, shall be submitted with the proposal documents.
- 8) The identity of the individual, partnership or corporation applying for contract award and credentials of the personnel who would actually perform the work, as well as their managers, and the nature of the supervision. State the responsibilities of each of the work personnel. If the proposer intends to sub-contract or any work required in the scope of services, the sub-contractor shall be identified. Sample work products are required for all personnel. This item is a major determinant in assessing the proposer's qualifications and shall be incorporated as a condition in the contract to be awarded.
- 9) An applicant qualifications statement, including professional qualifications and work experience attesting to capacity to perform the required work program. Include résumé(s), detailing academic and professional work experience attesting to capacity to perform the required work program. Résumés are required for all work personnel.
- 10) A detailed explanation of the proposer's approach to the work: methodology, demonstrated understanding of the scope of work, and the proposer's expectations of assistance and services from the Town. A technical work plan and timeline for accomplishing the tasks described in the scope of services shall be provided. Proposal shall describe the local and/or regional office's audit experience with local governments in the past ten (10) years and identify the supervisors and staff who are expected to work on the audit. Provide résumés showing relevant past experience, education, training, etc. Describe the firm's participation in any professional, sponsored quality assessment review of comparable programs. Proposal shall state Vendor's understanding of the services to be performed and deliverables to be provided.
- 11) A client reference list, with names, addresses, telephone numbers, and e-mail addresses (if available) for clients for whom the proposer has performed similar services within the past five (5) years.
- 12) Any other information deemed relevant to the work, and which the proposer believes will further the competitiveness of the proposal.
- 13) A statement of any legal proceedings pending or concluded within the past five (5) years relating to the performance of services by the Proposer.
- 14) A sample audit letter and a sample management letter.

V. SELECTION CRITERIA

1. Minimum Evaluation Criteria

In order to be considered a responsive and responsible Proposer, a Proposal shall comply with the Proposal Submission Requirements set forth in Section IV above.

2. Comparative Evaluation Criteria

All responsive proposals will be judged against the **Comparative Evaluation Criteria** detailed below. The Town will rank each proposal as:

- a. Highly Advantageous – the proposal exceeds the standards of the specific criterion;
- b. Advantageous – the proposal fully satisfies the standards of the specific criterion;
- c. Not Advantageous – the proposal does not fully satisfy the standards of the specific criterion, or is incomplete and/or unclear.

2.1. **Quality and Depth of Work Experience**

Highly Advantageous – The proposal demonstrates experience with at least twenty (20) or more similar projects.

Advantageous – The proposal demonstrates experience with fifteen (15) to nineteen (19) similar projects.

Not Advantageous – The proposal demonstrates experience with fourteen (14) or fewer similar projects.

2.2. **Qualifications of the Proposer**

Highly Advantageous – The proposer's résumé(s) demonstrate(s) that proposer has superior training, educational background and work experience (at least twenty (20) years') appropriate to the work described herein and all key work personnel demonstrate (s) professional experience well beyond the minimum requirements.

Advantageous – The proposer's résumé(s) do/does not meet the above category for highly advantageous, but demonstrate(s) that proposer has adequate training, educational background and work experience (between fifteen (15) to nineteen (19) years') appropriate to the work described herein and all key work personnel demonstrate(s) professional experience that meets or exceeds the minimum requirements.

Not Advantageous – The proposer's résumé(s) do/does not demonstrate that proposer has adequate training, educational background and work experience appropriate to the work described herein. Less than fifteen (15) years' total experience.

2.3. **Desirability of approach to the work, demonstrated understanding of the community's needs, and proposer's ability to undertake and complete this work.**

Highly Advantageous – The proposal demonstrates a superior approach to the subject material and a superior understanding of the issues addressed by the work.

Advantageous – The proposal does not meet the above category for highly advantageous, but demonstrates an acceptable approach to the subject material and an acceptable understanding of the issues addressed by the work.

Not Advantageous – The proposal does not demonstrate an acceptable approach to the subject material and an acceptable understanding of the issues addressed by the work, and/or the proposal fails to indicate a time schedule that meets the work requirements.

2.4. Overall Quality of Client References

Highly Advantageous – All references contacted spoke favorably of the work performed by the proposer and would use them again for similar work without hesitation.

Advantageous – Not used.

Not Advantageous – One (1) or more references stated that there had been difficulty with the proposer's ability to deliver the contracted services and deliverables.

2.5. Completeness and Quality of Proposal

Highly Advantageous – The proposal is complete, concise, informative, and highly detailed. Proposal reflects that proposer is able to perform in a superior manner acceptable to the Town.

Advantageous – The proposal does not meet the above criteria for highly advantageous, but the proposal is complete, informative, and meets criteria for responsiveness.

Not Advantageous – The proposal is not complete, informative, and responsive.

2.6 Interview (If Used)

Highly Advantageous – Proposer brings all planned auditing team members to interview, offers clear and concise answers to interview questions comprehensible to the layperson, and demonstrates enthusiasm for working in a collaborative manner with Town staff and elected officials.

Advantageous Proposer brings most planned auditing team members, offers clear and concise answers to interview questions but occasionally succumbs to jargon, and demonstrates enthusiasm for working in a collaborative manner with Town staff and elected officials.

Not Advantageous Proposer brings only one planned auditing team member to interview, offers answers that frequently succumb to jargon or are not comprehensible to a layperson, and appears willing to work in a collaborative manner with Town staff and elected officials.

Any proposal that fails to meet the minimum submission requirements shall be deemed Unacceptable for the foregoing categories.

VI. PROPOSAL SUBMISSION

Ten (10) copies of each sealed Proposal, in separate envelopes, as described above, shall be submitted by **9:00 A.M. LOCAL TIME, April 30, 2024**, to this address:

Town of Natick
c/o Procurement Officer
Natick Public Works
75 West Street
Natick, MA 01760.

Proposers shall also include an electronic copy of their non-price proposal in the non-price proposal envelope. After this time, they will be opened in confidence. **Proposals received after the date and time specified in this Section VI for receipt of Proposals will not be accepted.**

VII. INTERVIEWS

After review of the technical proposals, the Screening Committee may, **at its discretion**, schedule interviews with any or all of the proposers for the purpose of further evaluation of the proposer's qualifications and ability to provide the required service. Interviewees will be ranked on their presentation.

VIII. FINAL SELECTION AND AWARD

The Screening Committee will review the non-price proposals. The Screening Committee will determine which non-price proposals meet the minimum evaluation criteria set forth in Section IV above. The Screening Committee will rank such non-price proposals in accordance with the comparative evaluation criteria set forth in the Section V above. The Screening Committee will then open and review the envelopes labeled "Price Proposals" and rank them.

Based upon the Screening Committee's analysis of both the Price-Proposal and the Non-Price Proposal, the Screening Committee will make a recommendation to the Natick Select Board concerning which Proposal, if any, the Town should accept. The Natick Select Board will then decide whether a Contract will be awarded. Any Contract will be awarded, if at all, pursuant to all applicable provisions of the Massachusetts General Laws, to a responsive and responsible Proposer who has submitted the most advantageous Proposal, taking into consideration price and all other evaluation criteria set forth in the RFP.

IX. COMPLIANCE WITH LAWS

The Successful Proposer shall comply with all provisions of Federal, Massachusetts and Town of Natick law applicable to his work including, without limitation, statutes, by-laws, rules, regulations, orders and directives, as amended, and including, without limitation, the Williams-Steiger Occupational Safety and Health Act, as amended, and related regulations, as amended, in effect throughout the term of this Lease and any extension or renewal thereof. Without limitation, the Successful Proposer shall comply with the applicable provisions of Chapter 149, Section 26 to 27D of the Massachusetts General Laws (M.G.L.), as amended, and with all applicable minimum prevailing wage rates as determined by the

Massachusetts Commissioner of Labor and Industries. Any Contract shall be considered to include in their entirety all terms respecting workers' compensation insurance and other terms required to be included in it by Chapter 152 of the Massachusetts General Laws, as amended, and any other laws, as though such terms were set forth in their entirety herein.

X. INSURANCE

The Successful Proposer shall keep in force throughout the term of the Contract and any extension or renewal thereof the amount of insurance described in the Contract which is a part of this RFP and is incorporated herein by reference. Without limitation of other requirements of this RFP, no Contract shall be entered into by the parties unless the successful Proposer complies with all applicable insurance requirements, including, without limitation, the requirement to submit endorsements or riders which include the required language concerning notice of cancellation or amendment of any and all insurance policies required under the Contract, and which include the required language mandating that the Town of Natick shall be named as an additional insured on the required policies of commercial general liability insurance, automobile liability insurance, and excess liability insurance, umbrella form.

XI. INDEMNIFICATION

The Successful Proposer shall assume the indemnification responsibilities described in the Contract which is a part of this RFP and is incorporated herein by reference.

XII. PERFORMANCE BOND REQUIREMENTS

DELETED – NOT APPLICABLE

XIII. LABOR AND MATERIALS PAYMENT BOND REQUIREMENTS

DELETED – NOT APPLICABLE

XIV. INDEPENDENT CONTRACTOR STATUS

The Successful Proposer shall provide services as an independent contractor with the Town of Natick and the Successful Proposer and his/her/its employees shall not be entitled to receive any benefits of employment with the Town of Natick, including without limitation salary, overtime, vacation pay, holiday pay, health insurance, life insurance, pension or deferred compensation.

XV. CRIMINAL BACKGROUND SCREENING

For each employee of the Successful Proposer who is performing services under any Contract awarded by the Town of Natick, the Successful Proposer shall, subject to its confidentiality and privacy obligations owing to its employees and third parties, provide a written confirmation to the Town that such employee passed the Successful Proposer's pre-employment criminal background screen. In the event that any employee refuses to permit the Successful Proposer to provide such information to the Town, the Successful Proposer shall not assign such employee to perform services for the Town, and such employee shall not be authorized to perform services for the Town. The Town shall be permitted to

keep such information in its files.

XVI. USE OF ALCOHOL AND CONTROLLED SUBSTANCES PROHIBITED

The use of alcoholic beverages, narcotics, and mood altering substances, except for current valid, legal prescriptions, by any officer, employee, agent, or representative of the Successful Proposer is prohibited on Town of Natick property which is the subject matter of this RFP and during all hours of work under any contract with the Town. If any officer, employee, agent, or representative of the Successful Proposer violates the foregoing provision, the Town of Natick shall have the right to order that such officer, employee, agent, or representative of the Successful Proposer shall not be permitted to return to work under any contract with the Town. Under such circumstances, the Successful Proposer shall promptly remove the subject officer, employee, agent, or representative from the job site and shall not permit the subject officer, employee, agent, or representative to perform further work in conjunction with any contract with the Town.

XVII. NO SMOKING/USE OF TOBACCO PRODUCTS

Pursuant to M.G.L. c. 270, §22, the Commonwealth of Massachusetts Smokefree Workplace Law, the Successful Proposer, its officers, employees, agents, and representatives are prohibited from smoking tobacco products, or any non-tobacco products designed to be combusted or inhaled, in any public building.

XVIII. INDEX OF ATTACHMENTS

Attachment A - Price Proposal Form
Attachment B - Certificate of Non-Collusion
Attachment C - Certificate of Tax Compliance (M.G.L., c.62C, §49A)
Attachment D - Conflict of Interest Certification (M.G.L. c.268A).
Attachment E - Certificate of Corporate Proposer
Attachment F - Certificate of Compliance with M.G.L. c. 151B
Attachment G - Certificate of Non-Debarment
Attachment H - Form of Contract

**ATTACHMENT A
TOWN OF NATICK
PRICE PROPOSAL FORM**

The undersigned Proposer hereby submits a price proposal for the provision of professional auditing services for the Town of Natick.

Printed Name of Proposer:

Address: _____

The PROPOSER hereby pledges to deliver the complete scope of services required for price shown below:

	Town Report	School end-of-year report	Affordable Housing Trust report	Subtotal
Year 1 Price in Figures	\$	\$	\$	\$
Year 2 Price in Figures OPTION YEAR 1	\$	\$	\$	\$
Year 3 Price in Figures OPTION YEAR 2	\$	\$	\$	\$

The PROPOSER acknowledges receipt of addenda nos. _____

Please write out all addenda issued. For example, for four (4) addenda issued, please write: "1, 2, 3, and 4." Do not write "1-4" or "4."

Authorized Signature

Printed Name

Printed Title

Date

Full Legal Name

Officers of Corporation and Addresses

State of Incorporation

Principal Place of Business

Tel. _____

Qualified in Massachusetts **Yes** _____ **No** _____

Principal Place of Business in MA

Tel. _____

TOWN OF NATICK

ATTACHMENT B

CERTIFICATE OF NON-COLLUSION

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

Name of Proposer

Address of Proposer

Telephone Number

By: _____
(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT C
CERTIFICATE OF TAX COMPLIANCE

Pursuant to Massachusetts General Laws (M.G.L.) c. 62C, §49A, I certify under the penalties of perjury that the Proposer named below has complied with all laws of the Commonwealth of Massachusetts pertaining to the payment of taxes, to the reporting of employees and contractors, and to the withholding and remitting of child support.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____
(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT D

CONFLICT OF INTEREST CERTIFICATION

The Proposer hereby certifies that:

1. The Proposer has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of a Contract pursuant to this RFP.
2. No consultant to, or subcontractor for, the Proposer has given, offered, or agreed to give any gift, contribution, or offer of employment to the Proposer, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a Contract by the Proposer.
3. No person, corporation, or other entity, other than a bona fide full time employee of the Proposer has been retained or hired to solicit for or in any way assist the Proposer in obtaining a Contract pursuant to this RFP upon an agreement or understanding that such person, corporation or entity be paid a fee or other compensation contingent upon the award of a Contract to the Proposer.
4. The Proposer understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws (M.G.L.), applies to the Proposer and its officers, employees, agents, subcontractors, and affiliated entities with respect to the transaction outlined in the Request for Proposals.
5. The Proposer understands that the Proposer and its officers, employees, agents, subcontractors, and affiliated entities, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____

(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT E

CERTIFICATE OF CORPORATE PROPOSER

I, _____, certify that I am the Clerk of the Corporation named as Proposer in the attached Proposal Form; that _____, who signed said Proposal on behalf of the Proposer was then _____ of said Corporation and was duly authorized to sign said Proposal Form; and that I know his/her signature thereto is genuine.

(Corporate Seal)

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____

(Signature)

Printed Name

Printed Title

Date

This Certificate shall be completed where Proposer is a Corporation and shall be so completed by its Clerk. In the event that the Clerk is the person signing the Proposal on behalf of the Corporation, this certificate shall be completed by another officer of the Corporation.

TOWN OF NATICK

ATTACHMENT F

CERTIFICATE OF COMPLIANCE WITH M.G.L. c. 151B

The Proposer hereby certifies that it is in compliance with and shall remain in compliance with Massachusetts General Laws (M.G.L.) Chapter 151B and shall not discriminate on any prohibited basis outlined therein. The Proposer also hereby certifies that it shall comply with any and all applicable Supplier Diversity Office (SDO) thresholds that have been established in conjunction with this Request for Proposals.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____

(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

ATTACHMENT G

CERTIFICATE OF NON-DEBARMENT

The Proposer hereby certifies that it is presently not debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, and that, should any proceeding arise in which it is debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, the Proposer shall inform the Town of Natick within one (1) business day of such debarment, suspension, or prohibition from practice.

Name of Proposer

Address of Proposer

Telephone Number _____

By: _____
(Signature)

Printed Name

Printed Title

Date

TOWN OF NATICK

**ATTACHMENT H
FORM OF CONTRACT**

(SEE ATTACHED DOCUMENT.)

**Town of Natick,
Massachusetts**

Memo

To: Bruce Evans, Chair, Natick Select Board

From: Richard Sidney, Chair, Audit Advisory Committee

cc: James Errickson, Town Administrator
John Townsend, Deputy Town Administrator for Finance

Date: 26 January, 2024

Re: Audit Advisory Committee Recommendation to the Select Board

Chair Evans:

At the Audit Advisory Committee meeting of 25 January, the Committee reviewed a draft of a Request for Proposals to hire a firm to perform annual audits for the Town of Natick.

The committee voted 3-0-0 to recommend that the Board issue the RFP.

The proposed schedule for issuing and awarding this RFP are:

1. April 1 - Issue RFP
2. April 16 - Pre-proposal bid conference
3. April 30 - Last date of submission of bids

Upon receipt of bids, the Audit Advisory Committee plans to screen the applicants, including, if necessary, conducting interviews with the respondents. Our plan is to provide a recommendation for the award to the Board no later than the second week of June, in order to have an auditor in place before the end of the current fiscal year.

We request that you add an item to the next available agenda to review and approve issuance of the RFP.