

Stepping Stones Road Proposal Evaluation Form – HAC		Overall Rank: 1 (only)		
Name of Reviewer: Cory Metters		Overall Score:		
Date of Review: JAN. 2026				
	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Developer Experience & Capacity (Team):	Overall score			
Demonstrated experience in and capability for designing, permitting, financing, and developing similar residential projects	HAC (1974) SV DESIGN 600 completed units AH KEY STAFF - MULTIPLE YES.			4
Demonstrated experience in affirmative fair housing marketing, conducting lotteries, meeting State requirements	HCEC CORE			4
The quality of the team's reputation and references, particularly in terms of its regulatory track record and ability to complete projects as proposed	HAC - 51 yrs.			4
Affordability:	Overall score			
At least 25% of the units restricted to households at or below 80% AMI	YES 25% plus			4
75% of the units restricted to households between 90% and 200% AMI	120% - 150%		3	
Proposal meets a broad range and distribution of incomes (ie, not just 80% and 200% AMI)	80%, 120%, 150%, 200%			4

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Number of Units/Density:	Overall score			
<ul style="list-style-type: none"> 12 housing units are constructed on the property, OR Fewer than 12 units are constructed but the site layout is maximized (no additional units could reasonably fit), OR More than 12 units are constructed and the density is sensitively achieved 	<p>7 BUILDINGS:</p> <p>(2) one-bedroom</p> <p>(4) two bedroom</p> <p>(4) three bedroom</p> <p>(TOTAL = 30 bedrooms)</p> <p>KEEP 1 BDR</p> <p>6 Buildings?</p>		3	
Site Design:	Overall score			
Thoughtful and efficient site design including: Thoughtful building siting; Safe and efficient internal traffic flow and parking; Safe and separate internal pedestrian walkways; Bike racks; Screened trash/recycling; Designated area for snow	<p>INTERIOR PARKING</p> <p>space locations USE</p> <p>BIKE SHEDS - needed?</p> <p>indiv. trash/unit</p> <p>- snow area - good</p> <p>add MAIL BOX AREA</p>		3	
Provides private outdoor space for each unit	PATIO/UNIT		3	
Provides adequate parking for residents and visitors	14 UNITS / 30 SPACES 2 HL SPACES SPACE LOCATIONS?		2	
Curb cuts onto Stepping Stones Road are minimized	SINGLE ACCESS ROAD			5
Retains much of the natural buffer to Stepping Stones Road	EXISTING TREES SS REMAIN " " BIKE TRAIL IN-FILL NEEDED		2	
Landscape plan includes native plantings that enhance rather than replace existing vegetation	SHADE TREES? VARIETY PLANTINGS irrigation?		3	

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Infrastructure and Green Design:	Overall score			
Underground utilities; ✓ Stormwater management uses standards of low impact development; ✓ Landscaping is native and drought tolerant ✓	YES		3	
Buildings are located for maximum solar potential and solar panels are provided	ROOFS SOLAR READY (SHOULD DO SOLAR NOW)		2	
Each unit has the ability to park and charge an EV	CLARIFY PARKING PLAN ASSIGNED PARKING? EV OUTLETS?		2	
Meets green design standards for LEED, Passive House, or other comparable programs	ENERGY STAR RATED		2	
Building Design:	Overall score			
Exterior design is reflective of Chatham architectural style and materials are durable and long-lasting	YES - PORCH (WOOD) SHINGLES - NAT. CEDAR SHINGLE WHITE TRIM 1/4 WINDOW			4
Creative design that is cost effective, high quality, and energy efficient	YES MODULAR CONSTRUCTION		3	
Mix of unit types, sizes, and interior layouts that meet a variety of household sizes and needs	GOLD MIX CLOSETS NEEDED (FB)		3	
Provides adequate interior storage space	BASEMENT (NO F-BAR) CLOSETS LOCATIONS		2	
Project meets ADA required units and incorporates universal design	NOT REQUIRED		2	

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Financial Feasibility:	Overall score			
Adequacy of proposed development budget	TDC \$150K/UNIT		3	
Appropriateness of sale prices in relation to the market	REASONABLE		3	
Track record of securing proposed financing	YES			4
References:	Overall score			
Three references from projects within the last 10 years that reflect projects completed on time and within budget	YES		3	

Stepping Stones Road Proposal Evaluation Form – HAC				Overall Rank: 1
Name of Reviewer: Karolyn McClelland				Overall Score: 12A
Date of Review: 2/1/26				
	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Developer Experience & Capacity (Team):	Overall score			15
Demonstrated experience in and capability for designing, permitting, financing, and developing similar residential projects	Has extensive history of successful projects			5
Demonstrated experience in affirmative fair housing marketing, conducting lotteries, meeting State requirements	HAC has been doing lotteries on the case for years			5
The quality of the team's reputation and references, particularly in terms of its regulatory track record and ability to complete projects as proposed	HAC has demonstrated a keen understanding and capacity to evolve and innovate to enhance the value they deliver. Not only in the units they build but also in the quality of life for leaseholders			5
Affordability:	Overall score			15
At least 25% of the units restricted to households at or below 80% AMI				5
75% of the units restricted to households between 90% and 200% AMI				5
Proposal meets a broad range and distribution of incomes (ie, not just 80% and 200% AMI)	they have a great spread in AMI range			5

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	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Number of Units/Density:	Overall score			5
<ul style="list-style-type: none"> 12 housing units are constructed on the property, OR Fewer than 12 units are constructed but the site layout is maximized (no additional units could reasonably fit), OR More than 12 units are constructed and the density is sensitively achieved 	<p>Great design that accommodates 14 units</p> <p>Proving that certainly less than 12 would be an under-utilization of the lot</p>			5
Site Design:	Overall score			30
Thoughtful and efficient site design including: Thoughtful building siting; Safe and efficient internal traffic flow and parking; Safe and separate internal pedestrian walkways; Bike racks; Screened trash/recycling; Designated area for snow	<p>Very well done on attractive including space</p> <p>no need for bike rack</p>			5
Provides private outdoor space for each unit	love the individual spaces provided for each unit			5
Provides adequate parking for residents and visitors	enough spaces maybe reorganize so that individual homes have a designated spot			5
Curb cuts onto Stepping Stones Road are minimized				5
Retains much of the natural buffer to Stepping Stones Road				5
Landscape plan includes native plantings that enhance rather than replace existing vegetation				5

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	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Infrastructure and Green Design:	Overall score			19
Underground utilities; Stormwater management uses standards of low impact development; Landscaping is native and drought tolerant				5
Buildings are located for maximum solar potential and solar panels are provided	would insist that solar panels be provided			4
Each unit has the ability to park and charge an EV				5
Meets green design standards for LEED, Passive House, or other comparable programs				5
Building Design:				
	Overall score			25
Exterior design is reflective of Chatham architectural style and materials are durable and long-lasting				5
Creative design that is cost effective, high quality, and energy efficient				5
Mix of unit types, sizes, and interior layouts that meet a variety of household sizes and needs	-great AMI distribution - love the one bed room units being included in this type of development			5
Provides adequate interior storage space	Must have access to basement from the interior of all units			5
Project meets ADA required units and incorporates universal design				5

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Financial Feasibility:	Overall score			5
Adequacy of proposed development budget				5
Appropriateness of sale prices in relation to the market				5
Track record of securing proposed financing	See note below			5
References:	Overall score			5
Three references from projects within the last 10 years that reflect projects completed on time and within budget				5

Really appreciate the effort they made to successfully complete the Orleans build. Its a great example of their ability to problem solve under pressure, pivot and deliver a Quality Product. I appreciate their resilience and their commitment to their vision.

Stepping Stones Road Proposal Evaluation Form – HAC				Overall Rank:
Name of Reviewer: JJ Schock				Overall Score:
Date of Review:				
	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Developer Experience & Capacity (Team):	Overall score			12
Demonstrated experience in and capability for designing, permitting, financing, and developing similar residential projects	- 6 OWNERSHIP OF 29 TOTAL PROJECTS - Worked w/PARTNERS ON OTHER PROJECTS			4
Demonstrated experience in affirmative fair housing marketing, conducting lotteries, meeting State requirements	Yes 29 similar projects on CAPE COD + ISLANDS			4
The quality of the team's reputation and references, particularly in terms of its regulatory track record and ability to complete projects as proposed	Strong completion			4
Affordability:	Overall score			12
At least 25% of the units restricted to households at or below 80% AMI	4 of 14 29% at least one of each floor plan			4
75% of the units restricted to households between 90% and 200% AMI	10 of 14 72%			4
Proposal meets a broad range and distribution of incomes (ie, not just 80% and 200% AMI)	80% 120% 150%			4

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Number of Units/Density:	Overall score			4
<ul style="list-style-type: none"> 12 housing units are constructed on the property, OR Fewer than 12 units are constructed but the site layout is maximized (no additional units could reasonably fit), OR More than 12 units are constructed and the density is sensitively achieved 	<ul style="list-style-type: none"> - 14 units - Green space - Private outdoor space - A little tight on boundaries - Great use of a town resource to provide maximum affordable housing. 		3	4
Site Design:	Overall score			23
Thoughtful and efficient site design including: Thoughtful building siting; ✓ Safe and efficient internal traffic flow and parking; ✓ Safe and separate internal pedestrian walkways; ✓ Bike racks; ✓ Screened trash/recycling; ? Designated area for snow ~	<ul style="list-style-type: none"> - Meets most criteria - Tight to the bike Park 		3	
Provides private outdoor space for each unit	Yes!			4
Provides adequate parking for residents and visitors	Yes ~ 2 cars/unit - could it be assigned?		3	
Curb cuts onto Stepping Stones Road are minimized	Thoughtfully located			5
Retains much of the natural buffer to Stepping Stones Road	Yes - could be augmented			4
Landscape plan includes native plantings that enhance rather than replace existing vegetation	✓			4

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Infrastructure and Green Design:	Overall score			14
Underground utilities; ✓ Stormwater management ✓ uses standards of low impact ✓ development; ✓ Landscaping is native and ✓ drought tolerant	Meets req			4
Buildings are located for maximum solar potential and solar panels are provided	Solar ready roofs No panels provided		3	
Each unit has the ability to park and charge an EV	EV Ready No chargers provided		3	
Meets green design standards for LEED, Passive House, or other comparable programs	IEC + MASS AMENDMENTS			4
Building Design:	Overall score			19
Exterior design is reflective of Chatham architectural style and materials are durable and long-lasting	Appears appropriate			4
Creative design that is cost effective, high quality, and energy efficient	Energy star IEC ALL ELECTRIC			4
Mix of unit types, sizes, and interior layouts that meet a variety of household sizes and needs	Yes!			4
Provides adequate interior storage space	could use more linen + other closets / basements area +		3	
Project meets ADA required units and incorporates universal design	UNIVERSAL DESIGN ✓			4

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Financial Feasibility:	Overall score			12
Adequacy of proposed development budget				4
Appropriateness of sale prices in relation to the market	Appears appropriate			4
Track record of securing proposed financing	Several Projects executed			4
References:	Overall score			5
Three references from projects within the last 10 years that reflect projects completed on time and within budget	Yes			5

Stepping Stones Road Proposal Evaluation Form – HAC				Overall Rank:
Name of Reviewer: Tim Smith				Overall Score:
Date of Review:				
	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Developer Experience & Capacity (Team):	Overall score			
Demonstrated experience in and capability for designing, permitting, financing, and developing similar residential projects				5
Demonstrated experience in affirmative fair housing marketing, conducting lotteries, meeting State requirements				5
The quality of the team's reputation and references, particularly in terms of its regulatory track record and ability to complete projects as proposed				5
Affordability:	Overall score			
At least 25% of the units restricted to households at or below 80% AMI				5
75% of the units restricted to households between 90% and 200% AMI				5
Proposal meets a broad range and distribution of incomes (ie, not just 80% and 200% AMI)				5

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Number of Units/Density:	Overall score			
<ul style="list-style-type: none"> 12 housing units are constructed on the property, OR Fewer than 12 units are constructed but the site layout is maximized (no additional units could reasonably fit), OR More than 12 units are constructed and the density is sensitively achieved 				5
Site Design:	Overall score			
Thoughtful and efficient site design including: Thoughtful building siting; Safe and efficient internal traffic flow and parking; Safe and separate internal pedestrian walkways; Bike racks; Screened trash/recycling; Designated area for snow	WOULD NEED SOME BUFFER ALONG BIKE PATH. COULD USE MORE EV PARKING			5
Provides private outdoor space for each unit			3	
Provides adequate parking for residents and visitors				4
Curb cuts onto Stepping Stones Road are minimized				5
Retains much of the natural buffer to Stepping Stones Road	COULD USE SOME MORE EVERGREENS			5
Landscape plan includes native plantings that enhance rather than replace existing vegetation			3	

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Infrastructure and Green Design:	Overall score			
Underground utilities; Stormwater management uses standards of low impact development; Landscaping is native and drought tolerant				4
Buildings are located for maximum solar potential and solar panels are provided <i>SOLAR READY</i>			2	
Each unit has the ability to park and charge an EV			2	
Meets green design standards for LEED, Passive House, or other comparable programs				4
Building Design:	Overall score			
Exterior design is reflective of Chatham architectural style and materials are durable and long-lasting				4
Creative design that is cost effective, high quality, and energy efficient				4
Mix of unit types, sizes, and interior layouts that meet a variety of household sizes and needs				4
Provides adequate interior storage space <i>BASMENT</i>	<i>NEEDS MORE INTERIOR CLOSETS</i>		3	
Project meets ADA required units and incorporates universal design	<i>NEEDS 1 ADA</i>		3	4

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Financial Feasibility:	Overall score			
Adequacy of proposed development budget				5
Appropriateness of sale prices in relation to the market				5
Track record of securing proposed financing				5
References:	Overall score			
Three references from projects within the last 10 years that reflect projects completed on time and within budget				

Stepping Stones Road Proposal Evaluation Form – HAC			Overall Rank:	
Name of Reviewer: Terry Whalen			Overall Score:	
Date of Review:				
	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Developer Experience & Capacity (Team):	Overall score			
Demonstrated experience in and capability for designing, permitting, financing, and developing similar residential projects	Quinn, Trott + Haslbuck			4
Demonstrated experience in affirmative fair housing marketing, conducting lotteries, meeting State requirements	Brennen + Kelleher			4
The quality of the team's reputation and references, particularly in terms of its regulatory track record and ability to complete projects as proposed	Full Team			5
Affordability:				
At least 25% of the units restricted to households at or below 80% AMI	Overall score			
At least 25% of the units restricted to households at or below 80% AMI	28.6%			5
75% of the units restricted to households between 90% and 200% AMI	71.4%			4
Proposal meets a broad range and distribution of incomes (ie, not just 80% and 200% AMI)	120% + 150%			5

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Number of Units/Density:	Overall score			
<ul style="list-style-type: none"> 12 housing units are constructed on the property, OR Fewer than 12 units are constructed but the site layout is maximized (no additional units could reasonably fit), OR More than 12 units are constructed and the density is sensitively achieved 	12 UNITS			4
Site Design:	Overall score			
Thoughtful and efficient site design including: Thoughtful building siting; Safe and efficient internal traffic flow and parking; Safe and separate internal pedestrian walkways; Bike racks; Screened trash/recycling; Designated area for snow	RAIL TRAIL OFFSET TO SMALL UNITS #1 + #2			4
Provides private outdoor space for each unit	↘			4
Provides adequate parking for residents and visitors	LARGE CLUSTER PARKING NEED REWORK			
Curb cuts onto Stepping Stones Road are minimized	TWO-USE OF INTERIOR ROAD			4
Retains much of the natural buffer to Stepping Stones Road	NEEDS AUGMENTATION			4
Landscape plan includes native plantings that enhance rather than replace existing vegetation	PLANTING INC. BUFFER ENHANCEMENT			4

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Infrastructure and Green Design:	Overall score			
Underground utilities; Stormwater management uses standards of low impact development; Landscaping is native and drought tolerant	STORMWATER AREA NOTED ONE COULD BE ADDED WEST END			4
Buildings are located for maximum solar potential and solar panels are provided	MANY UNITS SOUTHERLY EXPOSURE			4
Each unit has the ability to park and charge an EV	CONDUIT TO BE INSTALLED		3	
Meets green design standards for LEED, Passive House, or other comparable programs	PAGE 28			4
Building Design:				
Overall score				
Exterior design is reflective of Chatham architectural style and materials are durable and long-lasting	YES			4
Creative design that is cost effective, high quality, and energy efficient	PAGE 28			4
Mix of unit types, sizes, and interior layouts that meet a variety of household sizes and needs	YES 1, 2 + 3 BR			4
Provides adequate interior storage space	(2 BR LIMITED) YES			4
Project meets ADA required units and incorporates universal design	UNITS SHOULD BE ADAPTABLE			2

	Notes	Not Acceptable (0-1)	Advantageous (2-3)	Highly Advantageous (4-5)
Financial Feasibility:	Overall score			
Adequacy of proposed development budget				
Appropriateness of sale prices in relation to the market				
Track record of securing proposed financing				
References:	Overall score			
Three references from projects within the last 10 years that reflect projects completed on time and within budget	FOUR PROVIDED (DID NOT CHECK)			4