

March 11, 2022

Maureen O'Meara, Town Planner  
320 Ocean House Rd  
Cape Elizabeth, Maine 04107  
207-799-0115  
maureen.omeara@capeelizabeth.org

**RE: Housing Diversity Study**

Dear Maureen,

We are excited to submit this proposal for consulting work to support the Town of Cape Elizabeth's goal to commission a Housing Diversity Study to assess current housing conditions and provide options to create affordable housing.

Our team, based in southern Maine, includes professionals with combined over 75 years experience in housing development, data and demographic analysis, urban planning and zoning, and municipal land use laws and ordinances.

We appreciate the opportunity to discuss this important work with the Town. We look forward to generating more housing options for Cape Elizabeth. Andy will be the lead contact for this proposal and he can be reached at 207-332-1421 or [andy@dovetailME.com](mailto:andy@dovetailME.com).

Sincerely,



Andy Jackson  
Dovetail Consulting LLC



Jen Dionne  
The Signal Group



Jeff Levine  
Levine Planning Strategies



Patrick Lyons  
Eaton Peabody

# **Consulting Proposal**

## Cape Elizabeth, Maine Housing Diversity Study

### **Contents**

0. Summary
1. Workplan
2. List of Principals
3. Schedule Statement
4. Examples of Completed Work
5. Cost to Perform the Project
6. Consultant Availability for Additional Work

### **Attachments**

- A: Workplan
- B: Resumes of Key Team Members

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0. *Overview*

Our group of consultants is based in southern Maine with deep, practical analysis, planning, and development experience grounded in real projects across the state. We are experts in affordable housing development, housing data and demographic analysis, town planning and land use, and drafting and reviewing of municipal ordinances.

We propose to complete the work outlined in the RFP to collect and analyze data related to the local housing stock; interview local stakeholders such as property owners, renters, employers, real estate brokers and builders; draft specific affordable housing creation goals; outline land use regulations that could help spur the development of affordable housing; and develop a list of affordable housing production options.

The fees for this work are estimated to be approximately \$42,150.

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1. *Workplan responding to the scope of work.*

Attachment A outlines the tasks, the lead consultant on each task, and a fee estimate for completing the work. The workplan includes time for meetings and correspondence with the Town Council, Town staff, and other stakeholders and includes major subtasks required to complete the work.

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2. *The principal doing the work, as well as any partnering firms or entities, should be identified, with contact information, and their qualifications provided. Three references shall be provided.*

Andy Jackson (207-332-1421, [andy@dovetailME.com](mailto:andy@dovetailME.com)) will be the principal respondent and primary contact.

There are four major consultants that will contribute to the work:

- **Andy Jackson of Dovetail Consulting LLC**, a housing development consultant based in Portland. Andy has 22 years experience in the real estate, design and construction industries with the past 15 years focused on multifamily housing development, including several hundred units of affordable housing in Maine. Andy's work includes all aspects of the real estate development process, including initial feasibility studies, site selection, design oversight, permitting, financing (including low income housing tax credits, HUD financing such as Housing Trust Fund and Community Development Block Grants, and historic tax credits), construction oversight, and post-occupancy asset management. The Dovetail Consulting team also includes assistant project manager Angelina Buzzelli and research associate Forrest Butler.
- **Jen Dionne of The Signal Group**, a woman-owned consulting firm based in South Portland that for 25 years has been assisting affordable housing owners, state agencies, equity providers and lenders in providing of data analysis, demographic studies, market studies, rent comparability studies, and underwriting services.
- **Jeff Levine of Levine Planning Strategies**, based in Portland. Jeff is a policy and municipal planning expert 25 years of experience working with cities, towns & regional agencies to create the right environment for positive change. In 2021 Jeff was a key member of the State's Commission to Increase Housing Opportunities in Maine by Studying Zoning and Land Use Restrictions.
- **Patrick Lyons, an attorney at Eaton Peabody** with 7 years experience. Patrick specializes in land use, municipal, and permitting, and is a member of the Ellsworth Planning Board. Patrick has advised numerous municipalities regarding land use ordinance enactments and amendments, including drafting entire ordinances and helping craft significant amendments to the same and advising municipalities on the enactment process (public hearings, Town Meetings, etc). Patrick is a South Portland native that now lives in Ellsworth and practices throughout the state.

Resumes for the key team members are in attachment B. References for our work are listed in the Dovetail Consulting LLC resume. Contact information for additional references is available on request.

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3. *The proposer shall indicate that they have sufficient time to dedicate to the Housing Diversity Study and to complete work to be performed no later than August 30, 2022 unless extended by the Town of Cape Elizabeth.*

If this proposal is accepted, we expect to create a more detailed contract that will outline a schedule for the key deliverables and terms and conditions of our consulting work. The Town's timing expectations outlined in the RFP are optimistic and we would like to discuss them in detail, including accounting for Town review and comment periods, before committing to specific dates.

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4. *The proposer shall provide examples of similar completed work (links are preferred).*

Examples of similar completed work can be downloaded from this link:

<https://www.dropbox.com/sh/mbq2lfn2xa3lz2d/AAAsVnGa99lcFwUQxTMuL1d3a?dl=0>

Our work includes:

<b>Document number</b>	<b>Description</b>
1	Augusta, Maine Housing Market Summary, Vision and Best Practices, Recommendations for Policy Development
2	Bath, Maine Housing Market Summary, Vision & Best Practices, Recommendations for Policy Development
3	Greater Portland Council of Governments Multifamily Housing & Land Use Regulation Report
4	Malden, Massachusetts Inclusionary Zoning Feasibility Study
5	Data analysis, demographic analysis, market study for proposed affordable housing project in Portland, Maine

6	Data analysis, demographic analysis, market study for proposed affordable housing project in Scarborough, Maine
7	Feasibility Study for proposed affordable housing project in Presque Isle, Maine.
8	Feasibility Study for proposed affordable housing / domestic violence shelter project in Maine. Due to client security concerns the location information in this study has been redacted.
9	Feasibility Study for proposed affordable housing / historic mill renovation project in Maine. Due to client confidentiality the location information in this study has been redacted.
10	Gardiner Green (project in Gardiner, Maine) memo outlining an affordability program for a project seeking a housing density bonus.
11	Town of Mount Desert amended Land Use Zoning Ordinance
12	Town of Mount Desert amended Harbor Ordinance
13	2021 report by the Commission to Increase Housing Opportunities in Maine by Studying Zoning and Land Use Restrictions

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5. *Cost to perform the project.*

The total estimated fees to complete the work are \$42,150.

We are asking for a retainer of \$2,500 once the contract work scope and schedule are agreed. The retainer fee will be applied against the balance of the final invoice.

A detailed breakdown of this fee estimate is shown in attachment A, which states our expectations for meetings, correspondence, and deliverables. The fee estimate includes a

contingency for miscellaneous tasks, unforeseen changes in scope, and other events that may trigger additional consulting work. In any case, we propose to perform this work on a time and materials basis due to uncertainties around the municipal and political processes that may be required to produce the study.

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6. *Optional. Is the consultant available for additional work after the study is done to provide staff support to an ad hoc affordable housing committee?*

We would be happy to participate in additional work with an affordable housing committee, with the timing and expectations for deliverables and other time commitments to be determined following completion of the initial study.

# **Attachment A**

## **Project Workplan**

Attachment A  
**Housing Diversity Study**  
 Workplan and Fee Estimate

Consultants:

AJ Andy Jackson, Dovetail Consulting LLC, project principal, housing / affordable housing development consultant  
 JD Jen Dionne, The Signal Group, data analysis, demographic analysis, market studies  
 JL Jeff Levine, Levine Planning Strategies, planning and policy expert  
 PL Patrick Lyons, Eaton Peabody, municipal law expert  
 FB Forrest Butler, assistant project manager, interviewer, communications and presentations  
 AB Angelina Buzzelli, assistant project manager, researcher, interviewer, report writing

Task	Subtasks	Lead	Ass't	Hours	Rate	Fees	
0. Startup and mobilization	Meet and clarify project goals with Town staff, outline key deliverables and schedule expectations.	AJ		4	150	600	
1: Data Package	Collect and package housing data on current housing inventory, occupancy, diversity of units and affordability in the Town of Cape Elizabeth and comparison communities, utilizing public and proprietary sources.	JD		20	200	4,000	
	Data gathering, analysis, interpretation, and preparation of results.	JD		25	200	5,000	
	Meetings, calls, and correspondence to review results of task 1 with Town staff, Town Council, and other stakeholders. Review and respond to feedback.	JD		8	200	1,600	
		AJ	FB, AB	4	150	600	
		AJ	FB, AB	12	150	1,800	
	Draft specific affordable housing creation goals, which shall include a targeted total number of affordable housing homes to create over the next 10 years, and may also include types of housing, size of housing units (bedrooms), split of rental/ownership housing and range of affordability (50%-120% of area median income).	JD		4	200	800	
		PL		4	240	960	
		JL		3	175	525	
	2: Specific Housing Creation Goals	Research and synthesize findings related to municipal incentives for housing development including tax increment financing, density relief, municipal housing trust funds, allocation of federal funding such as CDBG, etc. Research case studies from comparable communities.	AJ	FB, AB	16	150	2,400
			PL		8	240	1,920
JL			3	175	525		
Interview and summarize responses from key stakeholders including Town residents, Town staff, local housing developers, construction companies, architects, funders such as MaineHousing, etc. The goal of these interviews is to solicit a wide array of inputs from stakeholders in housing development and consolidate the findings into themes that can be conveyed in a final report.		FB / AB		24	100	2,400	
	Web-based survey of Town residents and business owners	FB / AB		8	100	800	

Attachment A  
**Housing Diversity Study**  
 Workplan and Fee Estimate

	Meetings, calls, and correspondence to review task 2 conclusions with Town staff, Town Council, and other stakeholders. Review and respond to feedback.	AJ	FB, AB	4	150	600
		JL		2	175	350
3a: Land Use Changes	Outline land use regulation options to align town development requirements with affordable housing targets. Options should be wide ranging and potentially include affordable housing creation methods not currently in use in the Town. Options should align with available affordable housing funding programs, reflect the limited amount of land available for development and ready availability of infrastructure.	JL		5	175	875
		AJ	FB, AB	4	150	600
		PL		4	240	960
	Synthesize findings from the State of Maine <i>Commission to Increase Housing Opportunities in Maine by Studying Zoning and Land Use Restrictions</i> that are most relevant for the Town of Cape Elizabeth.	JL		3	175	525
		AJ		4	150	600
	Meetings, calls, and correspondence to review task 3a conclusions with Town staff, Town Council, and other stakeholders. Review and respond to feedback.	PL		4	240	960
		JL		2	175	350
3b: Other Municipal Actions	Develop a list of other affordable housing production options, including but not limited to use of municipal land or town purchase of land for development of affordable housing and transfer payments to service center communities to create affordable housing.	AJ		4	150	600
		PL		8	240	1,920
		JL		3	175	525
		AJ		4	150	600
	Meetings, calls, and correspondence to review task 3b conclusions with Town staff, Town Council, and other stakeholders. Review and respond to feedback.	PL		4	240	960
		JL		1	175	175
Other		AJ	FB, AB	4	150	600
	Finalize and publish results, meetings with Town staff and Council to discuss results and findings. Final graphics integration, formatting, etc.	JL		3	175	525
						<i>graphic design firm tbd</i>
						1,000
					Subtotal	36,655
	15% Contingency for miscellaneous tasks not listed, unforeseen adjustments to scope and duration of the work, etc. (May not be required if the assumptions outlined above are conservative.)				15%	5,498
					<b>TOTAL</b>	<b>\$ 42,153</b>

**Attachment B**  
Team Resumes

## The Signal Group

The Signal Group is a woman-owned and operated company located in Maine specializes in market analysis for multi-family housing. Services include market and feasibility studies, rent comparability studies, due diligence and underwriting services. The Signal Group is a member of National Council of Housing Market Analysts, Maine Real Estate & Development Association, Maine Affordable Housing Coalition and National Leased Housing Association.

### Key Personnel

**Laura E. Burns, President, Chief Operating Officer and Partner.** Ms. Burns has more than 30 years of experience in the affordable housing development business. She is a nationally recognized expert in the affordable housing finance business. In 1995, Ms. Burns formed The Signal Group to leverage her expertise in affordable housing finance and regulatory programs. In 2000, Ms. Burns and her partners formed an affiliated development company, Eagle Point, which has subsequently expanded into affordable housing investment and property management firms, owning, and managing over 5,500 apartments nationwide. Ms. Burns serves on the Board of the National Leased Housing Association, the Editorial Board of Affordable Housing Finance and is a frequent speaker at national industry conferences. Her role in helping to develop housing policy includes testifying before the U.S. House Committee on Financial Services and participating in policy development working groups with HUD/GSEs and Treasury.

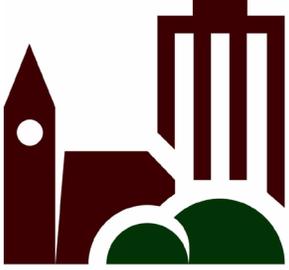
**Jennifer S.G. Dionne, President and Partner.** Ms. Dionne is responsible for the oversight of the operations of The Signal Group. Since joining the company in 2006, Ms. Dionne has prepared or overseen the submission of thousands of rent comparability studies and market studies. Ms. Dionne manages all client relations which include both private companies and government contracts. She holds a Certificate of Professional Designation and is a member in good standing of the National Council of Housing Market Analyst. Between 2010 and 2020, Ms. Dionne was one of the lead contract underwriters for Section 232/223f and 232/223(a)(7) loans for healthcare facilities under a contract with HUD's Office of Healthcare Programs. In addition to providing market analysis services on a national basis, Ms. Dionne is one of the leading market analysts providing Comprehensive Market Studies for Developers seeking Maine's Tax Credits.

**Brandon Simpson, Certified General Appraiser, Vice President, Partner.** Mr. Simpson is responsible for production of rent comparability studies and market analyses for The Signal Group. Mr. Simpson is a certified general appraiser that was first licensed in 2007. Since joining the Company in 2016, Mr. Simpson has completed hundreds of Rent Comparability Studies throughout the country and Rent Comparability Study Reviews in Maine, Ohio, District of Columbia, and Tennessee. Mr. Simpson is also one of the lead market analysts providing Market Studies on a national level for a major affordable housing lender and tax credit syndicator. Before joining The Signal Group, Mr. Simpson worked for the State of Alaska appraising various property types throughout the state. Mr. Simpson has experience in the financial industry previously working for Merrill Lynch and Charles Schwab as a licensed stockbroker and investment consultant. Mr. Simpson is a 1998 graduate of the University of Colorado at Denver, where he earned a Bachelor of Arts Degree in Economics.

**DJ Nelson, Partner.** Mr. Nelson has over 20 years of experience in the affordable housing industry. Mr. Nelson is a nationally recognized affordable housing professional with extensive experience in many aspects of the industry including the structuring, underwriting, financing, and development of preservation transactions. Mr. Nelson is active in the strategic planning and oversight of operations of The Signal Group. He spearheaded the firm’s entry into a recent HUD contracting assignment as overseeing closing functions for HUD-insured healthcare facility loans. Mr. Nelson has experience raising private equity, acquiring, and turning around troubled assets, evaluating new business opportunities, and operations management for growing firms. Prior to joining Eagle Point, he was a Senior Financial Analyst & Underwriter for a national tax credit syndication firm, where he analyzed hundreds of tax credit transactions and coordinated underwriting activities. In 2010 Mr. Nelson was recognized as a “Young Leader” in the affordable housing industry by Affordable Housing Finance Magazine. Mr. Nelson is a former board member with the Institute for Responsible Housing Preservation (IRHP).

#### Previous Experience:

- 1999** Hired by HUD Headquarters to draft the Procedures of Preparing, Submitting & Reviewing Rent Comparability Studies (Notice 00-12)
- 2001 – Present** Completion of thousands of Rent Comparability Studies and Market Studies in 49 states and Washington, D.C. on behalf of government agencies, investors, developers, owners, and managers of Section 8 and LIHTC multi-family properties.
- 2007 – 2011** Completed market analysis for more than 700 properties in 44 states under a contract with USDA – Rural Development to provided rent comparability studies pursuant to Chapter 9 of the HUD Section 8 Renewal Guidebook.
- 2010 – 2020** Providing underwriting and closing services for Section 232/223f and 232/223(a)(7) loans for healthcare facilities under a contract with HUD’s Office of Healthcare Programs.



# LEVINE PLANNING STRATEGIES

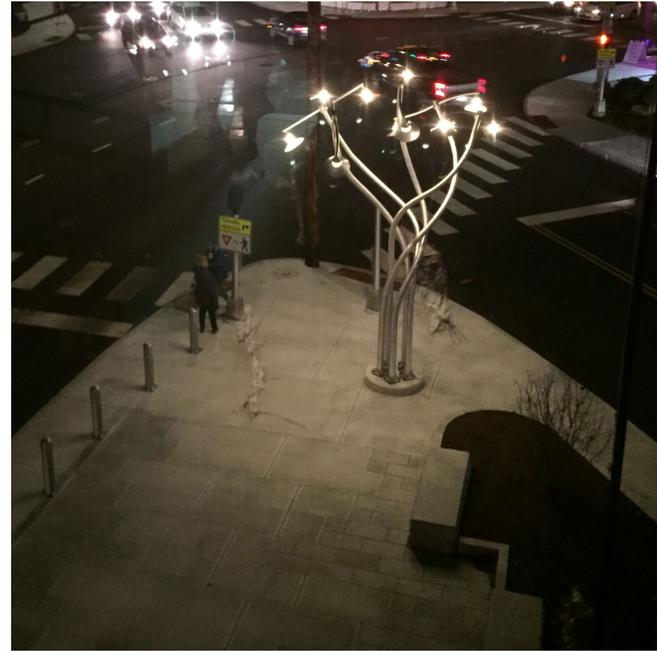
Tools for Building Communities

## FIRM OVERVIEW

Levine Planning Strategies, LLC, is a small, New England-based firm committed to building communities by using good processes and effective planning tools. Whether helping a developer coordinate a good concept into implementation, or working with municipal staff on their land use code, or helping a community develop realistic and dynamic policies and plans, we see the value of planning for developers, and the value of developments to implement plans.

We have experience in planning for vibrant village centers, as well as drafting and revising zoning bylaws and ordinances, especially in Maine. We also understand public finance and how capital planning, annual budgeting, and use of tools such as tax increment finance can be used for policy objectives.

We also have extensive experience on affordable housing policy, and have developed and refined housing tools ranging from Housing Trusts to inclusionary zoning bylaws. We know that the right housing tools to use depend on the specific circumstances and the needs of the community, and work to customize solutions to the place.



## LEVINE PLANNING STRATEGIES LLC

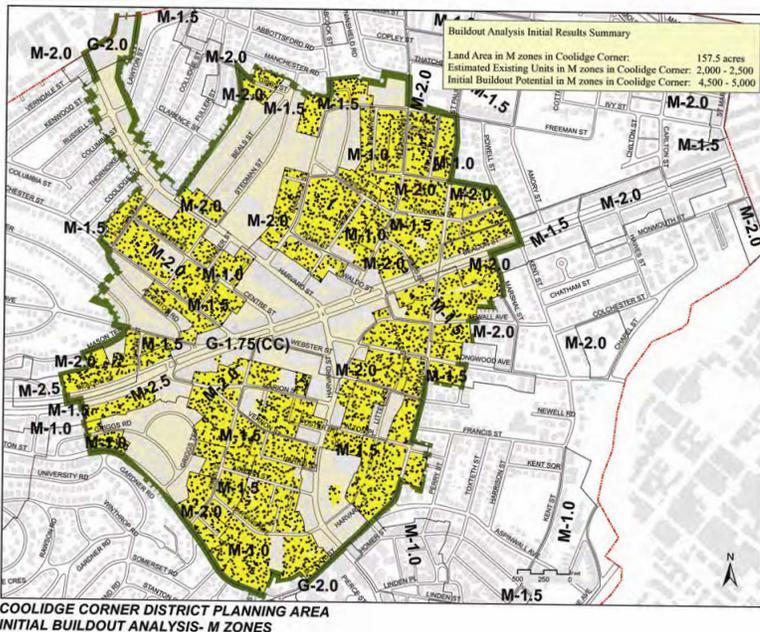
PO Box 7215

Portland, ME 04112-7215

617-817-0424

[jlevine@levineplans.com](mailto:jlevine@levineplans.com)

<https://www.levineplans.com>



# JEFFREY ROBERT LEVINE, AICP



## **PROFESSIONAL EXPERIENCE**

### **LEVINE PLANNING STRATEGIES**

**2019-**

#### ***Owner and Principal***

Operating consulting firm in the areas of land use development and redevelopment, planning, real estate development, economic development services, and demographic analysis. Recent clients include the Malden Redevelopment Authority, the City of Hallowell (ME); the City of Augusta (ME); and the Greater Portland Council of Governments.

### **MASSACHUSETTS INSTITUTE OF TECHNOLOGY 2019-**

#### ***Faculty, Department of Urban Studies and Planning***

Teach courses in the Masters of City Planning curriculum. Provide student mentoring and advise. Conduct research on urban planning topics. Recently completed study on [Main Streets After COVID-19](#) on long-term strategies for post-pandemic recovery in downtowns.

### **CITY OF PORTLAND, MAINE**

**2012 - 2019**

#### ***Director of Planning and Urban Development***

Led a department of 25 staff in urban planning, community development, housing, preservation, inspections and other land use activities in a regional core city. Represent the City in state, regional, and private venues. Worked with the City Manager, Mayor and City Council to advance common core goals.

Accomplishments include:

- Managing land disposition for City goals in housing and economic development through development of requests for proposals; selecting recommended redevelopers; and supporting City leadership in choosing redevelopment partners. Negotiated land disposition agreements and monitored redevelopment projects to ensure that City goals were met.
- Leveraging City and Federal funds through grant writing and seeking in-kind assistance for planning projects. Grantors include the U.S. Environmental Protection agency and Portland (OR) State University. Partnership with the Portland Society for Architecture resulted in leverage of City resources.
- Guiding City through rezoning process to allow infill development in urban

neighborhoods and proactive inclusionary zoning ordinance amendments to address workforce housing issues.

- Completing of new Comprehensive Plan for the City (<https://portlandsplan.me>) and initiated City-wide land use code overhaul (<https://www.recodeportland.me>)

## **TOWN OF BROOKLINE, MASSACHUSETTS**

**2004 - 2012**

### ***Director of Planning and Community Development (2005-2012)***

Oversaw Town's land use planning and development office in a community of 60,000 residents, including dense neighborhoods and commercial areas. Led planning team in affordable housing, economic development, comprehensive planning, zoning, and historic preservation activities. Analyzed land use issues and present recommendations to the Town Boards/Commissions and the public. Represented the Town at state and regional activities. Managed \$1 million annual operating budget and a staff of 15 FTE. Maintained high level of communication with a demanding set of stakeholders, including neighborhood groups, Town Boards/Commissions, Town Meeting, the Board of Selectmen and the public.

Accomplishments included:

- Guidance of the \$32 million 40B adaptive reuse project at the former Saint Aidan's church into a 59-unit mixed income development with significant preservation of historic structures and open space.
- Working with commercial and residential developers on several significant new developments valued at over \$250 million.
- Working with selected developer for former Town-owned reservoir site to develop mixed income housing, including financing and marketing of lots.
- Designing and financing approximately \$4 million in public improvements in the Village Square/Gateway East area.
- Completion of neighborhood plan for the Coolidge Corner district of Town, a dense, mixed-use, transit oriented regional center.
- Restructuring of staffing in order to better serve the Town and the public.
- Significant zoning amendments to protect neighborhoods from inappropriate demolition of historic homes.
- Preparing for the launch of Hubway bicycle sharing in Brookline, including fundraising, coalition building, & development of regional partnerships.

## **TOWN OF BROOKLINE, MASSACHUSETTS**

### ***Assistant Director, Planning & Community Development (2004-2005)***

Assisted Planning & Community Development Director in day-to-day operations of the Department. Staffed several Boards, Commissions, and citizen advisory committees. Accomplishments included:

- Managing completion of the **Brookline Comprehensive Plan: 2005-2015**, winner of an award from the Massachusetts Chapter of the APA.

- Completing the Town's Five-Year Consolidated Plan.

## **CITY OF SOMERVILLE, MASSACHUSETTS**

**1998 - 2004**

### ***Director of Transportation and Long-Range Planning (2000-2004)***

Responsible for a division of the City's Office of Housing and Community Development that focused on land use transformations in formerly industrial areas. Completed overall reuse plan for the 145-acre Assembly Square district that began the redevelopment process of the district into a \$30 million mixed-use, transit-oriented development. Represented the Mayor at regional organizations and before citizen groups. Managed disposition of a 9.1-acre site owned by the Somerville Redevelopment Authority, including development of a Request for Proposals and completion of a Land Disposition Agreement.

### ***Land Use Planning Manager (1998-2000)***

Worked with developers on site plan review of their proposals to develop improved projects. Represented the City in public meetings on development issues.

## **CAPE COD COMMISSION**

**1996 - 1998**

### ***Regional/Transportation Planner***

Performed a variety of planning and regulatory studies and activities for a regional land use planning and regulatory agency.

## **EDUCATION**

### **University of Minnesota (Humphrey Institute of Public Affairs)**

Masters of Planning in Economic Development, 1995.

Awarded Hubert H. Humphrey Scholarship to study public affairs

### **Wesleyan University**

Bachelor of Arts in Public Policy with Departmental Honors, 1991

Washington Semester in Public Policy at The American University

## **PROFESSIONAL ACTIVITIES, AWARDS AND MEMBERSHIPS**

Maine Real Estate & Development Association 2019 *Public Policy* Award.

Maine Association of Planners "Plan of the Year" Award for *Portland's Plan 2030*, 2019.

Board of Directors, GrowSmart Maine, 2020-present

Public Information Officer, Northern New England Chapter, American Planning Association, 2019-present

Muskie School of Public Service Advisory Board, 2015-present.

Lambda Alpha International Land Economics Society, 2009-present.

METRO (Portland, ME) Board of Directors, 2014-2018, 2019-present.

Somerville Redevelopment Authority, 2005-2012.

Breakwater School Board of Trustees, 2013-2016.  
PACTS (Portland, ME) Policy Committee, 2013-2015.  
Urban Ring Citizens Advisory Committee, 2002-2012.  
Metropolitan Area Planning Council, 2005-2012; Executive Committee, 2011-2012.  
County Roads Regional Adjudicatory Board, 2007-2012.  
Member, New Building Committee, Agassiz Cooperative Preschool, 2010-2012.  
Somerville Charter Advisory Committee, 2008-2009.  
Metropolitan Highway System Advisory Board, 2008-2010.  
Honorable Mention for the *Brookline Comprehensive Plan 2005-2015*, Massachusetts Chapter-American Planning Association Annual Awards, 2006.  
Boston Region Metropolitan Planning Organization, 2004-5.  
Regional Transportation Advisory Council, Boston MPO, 2001-2012; Chair, 2004-2005.  
Chair, Inner Core Committee, Metropolitan Area Planning Council, 2002-6.  
Beyond Lechmere Citizens Advisory Committee, MBTA, 2004-2005.  
Board of Directors, Massachusetts Chapter-American Planning Association, 2000-2003.



# Patrick W. Lyons

Municipal Law & Finance  
Economic Development  
Environmental & Land Use  
Litigation / Dispute Resolution  
Natural Resources & Timberlands

## Shareholder

Patrick's practice focuses on land use, municipal, and environmental law and permitting, representing clients before Maine courts and in local, state, and federal proceedings. He serves as legal counsel for a number of Maine municipalities, advising them on general administration, economic development, zoning, ordinance drafting, and enforcement actions, among other issues.

In addition, Patrick works with a number of businesses in Maine's aquaculture industry, advising on issues such as permitting, compliance, contracts, and litigation. He also counsels cannabis businesses and municipalities on Maine's adult use and medical marijuana laws.

Prior to joining Eaton Peabody, Patrick was a Term Law Clerk for the Hon. John A. Woodcock, Jr., United States District Court, District of Maine.

Patrick serves on the Ellsworth Planning Board and on the Board of Directors for Healthy Acadia. Patrick's wife, Kourtney Collum, is a professor at the College of the Atlantic where she holds the Partridge Chair in Food and Sustainable Agriculture Systems. They live in Ellsworth with their son and many animals. Patrick's hobbies include, but are not limited to, hiking, hunting, canoeing, disc golf, and spending time at his family's camp.

## Bar Admissions

State of Maine  
U.S. District Court, District of Maine

## Education

University of Maine School of Law, J.D., magna cum laude, 2015  
– Faculty Significant Achievement Award  
– Outstanding Scholastic Achievement Award in Environmental Law  
– President of the Environmental Law Society  
– Articles Editor, Ocean and Coastal Law Journal  
– Charles A. Harvey, Jr. Trial Practice Immersion Fellow  
University of Maine, M.S., 2011  
Bowdoin College, B.A., 2006

## Memberships & Affiliations

Healthy Acadia, Board of Directors  
City of Ellsworth Planning Board, Member  
Maine State Bar Association, Member  
John Waldo Ballou Inn of Court, Member  
Penobscot County Bar Association, Member  
E2Tech Council, Member

## Honors

Best Lawyers in America®: Ones to Watch for Environmental Law and Land Use and Zoning Law

**Bangor Office**  
80 Exchange Street  
Bangor, Maine 04401  
Phone: 207-992-4307  
Fax: 207-942-3040  
plyons@eatonpeabody.com

Dovetail Consulting LLC  
Manager: Andy Jackson  
65 Sterling Street, Peaks Island, ME 04108  
andy@dovetailME.com | 207.332.1421

## **Overview**

Dovetail Consulting LLC provides consulting, project management, owner representation, financial modeling, and other development support services to property owners, architects, contractors, and Housing Authorities.

Dovetail Consulting focuses on affordable housing financing and the tax credit and supportive housing programs offered by Maine State Housing Authority. Founder Andy Jackson has 22 years experience in real estate development, project management, and engineering. In addition to project management and owner representation services, Andy has shepherded three successful affordable housing tax credit applications through MaineHousing's highly competitive allocation process since 2015.

## **Services**

- Consulting for affordable housing and historic tax credit projects.
- Analysis of financing scenarios.
- Preparation of grant and brownfield funding applications.
- Coordination with architects, engineers, and contractors.
- Scheduling using critical path modeling to inform project decision-making.
- Negotiating for funding including debt and equity.
- Permitting and land-use approvals consulting.
- Owner representation for construction projects.
- Engineering analysis and project support.

## **Major Affordable Housing Projects**

- Lockwood Mill, Waterville: 65 units in a historic mill complex
- Place Ste Marie, Lewiston: 40 units in a historic residential complex
- Berry Park, Biddeford: 36 units of existing housing to be rehabilitated
- Seton Tower, Waterville: 67 units in a historic hospital
- 48 Hampshire Street, Auburn: 53 units in a new construction building
- Huse School Apartments, Bath: 59 units in a historic school
- Lofts at Saco Falls: 80 units in a historic mill building

Dovetail Consulting LLC  
Manager: Andy Jackson  
65 Sterling Street, Peaks Island, ME 04108  
andy@dovetailME.com | 207.332.1421

#### **Other Projects Completed or in Development**

- Domestic Violence Shelter, Farmington (supportive housing)
- 3i Housing of Maine, Scarborough (housing for people with disabilities)
- Youth and Family Outreach, Portland (feasibility study for affordable housing)
- Pierce Building, Upham's Corner, Boston MA (commercial development using historic tax credits)
- Aroostook County Action Program supportive housing, Presque Isle (supportive housing)
- Gardiner Green, Gardiner, Maine (affordable housing consulting)
- Banded Horn Brewery, Portland (owner representation & project management)
- Three Portland Square, Portland (owner representation & project management)
- 19 Brook Lane, Peaks Island (owner representation & project management)
- 57 Chestnut Street, Bath (development of an affordable for-sale unit)
- Moses-Columbia Block, Bath (feasibility studies and financial modeling of possible LIHTC / HTC development)

#### **References**

- Deb Keller, Executive Director, Bath Housing Authority  
dkeller@bathhousing.org, 207-295-3074
- Josh Benthien, CEO, Northland Enterprises  
josh@northlandUS.com, 207-930-5431
- Camelia Babson-Haley, Executive Director, Youth and Family Outreach  
camelia.haleyfo@gmail.com, 207-874-1073
- Paul Linet, Executive Director, 3i Housing of Maine (3i HoME)  
paul@3ihome.org, 207-712-2232
- Nathan Szanton, President, The Szanton Company  
nszanton@szantoncompany.com, 207-712-1008
- Mariah Monks, Project Manager, North River Company  
mmonks@northriverco.com, 207-321-9943
- Elise Johansen, Executive Director, Safe Voices  
ejohansen@safevoices.org, 561-386-0008
- Jason Parent, Executive Director, Aroostook County Action Program  
ejohansen@safevoices.org, 561-386-0008