



**CITY OF TORRINGTON**

**PURCHASING DEPARTMENT**  
140 Main Street, Room 206  
Torrington, CT 06790

**Pennie Zucco, Purchasing Agent**  
Phone: (860)-489-2225  
Fax (860)-489-2547  
Email: pennie\_zucco@torringtonct.org

February 15, 2018

Mayor Elinor Carbone  
Members of the City Council

**RE: RFP #AHL-011-020718 ADMINISTRATIVE AND TECHNICAL SUPPORT FOR THE CITY'S  
SMALL CITIES PROGRAM INCOME HOUSING REHABILITATION LOAN PROGRAM**

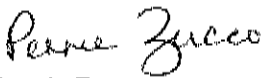
The City of Torrington received two (2) proposals regarding Administrative Services for the Small Cities Program Income Housing Rehabilitation Loan Program for the City of Torrington. The companies were:

**Lisa Low & Associates**  
Oxford, CT

**A&E Services Group, LLC**  
Wolcott, CT

After reviewing the submitted proposals with the selected committee, the recommendation for City Council to authorize the Mayor to award the Administrative Services for Torrington's Small Cities Income Housing Rehabilitation Loan Program to Lisa Low & Associates, LLC, Oxford, CT.

Thank you for your consideration on this matter.

  
Pennie Zucco  
Purchasing Agent

2018 FEB 15 PM 4:04  
RECEIVED FOR RECORD  
TORRINGTON TOWN CLERK

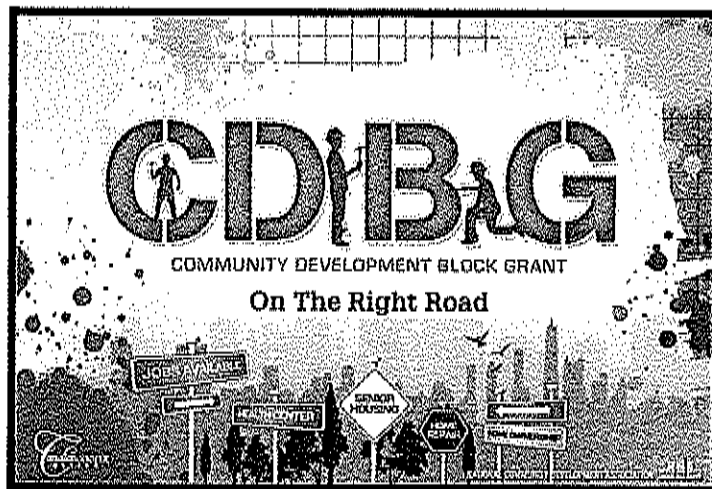


City of Torrington

Bid Name Admin for Administrative & Technical Bid Number A42-011-020718  
Date of Opening 2/7/18 Support for City of Torrington Time of Opening 11:30  
Support for the City of Torrington

VENDOR Lisa Law & Assoc. BID BOND 295 Ruggs St. NON-COLLUSION Oxford, CT 06458 BID AMOUNT A/E Services group, LLC ADDENDUM 145 Brook Hill Rd  
Wolcott, CT 06716

**Response to RFP for  
Small Cities  
Grant Writing & Technical Assistance:**



Prepared for Pennie Zucco, Purchasing Agent  
Town of Torrington

Prepared by  
Lisa Low, Ph.D.  
Lisa Low & Associates  
293 Riggs Street  
Oxford, CT 06478  
(203) 888-5624  
Come visit us at:  
[www.lisalowassociates.com](http://www.lisalowassociates.com)

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## ABOUT LISA LOW & ASSOCIATES

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- Lisa Low & Associates specializes in assisting Connecticut Municipalities and Non-Profits in Community and Economic Development, primarily through writing and administering Small Cities and other grants; services include construction management;
- Lisa Low & Associates is currently Small Cities grant writer and administrator/construction manager for over twenty Connecticut municipalities: Ansonia, Beacon Falls, Bethlehem, Brookfield, Cheshire, Hamden, Hebron, Lisbon, Monroe, Montville, Morris, New Fairfield, North Stonington, Oxford, Preston, Putnam, Salem, Seymour, Shelton, Southbury, Southington, Voluntown, Waterford, Woodbridge and Woodbury;
- Lisa Low & Associates is available to assist on an as needed basis with other municipal grants including Assistance to Firefighter Grants; Transportation and Energy Grants, Social Service Grants, Hazard Mitigation Grants, Open Space Grants, STEAP grants, Energy Efficiency Grants, and Recreational Trail Grants among others
- Lisa Low & Associates has a history of success in raising and administering funds for municipalities and non-profit organizations through competitive grant opportunities and implementing construction projects, including through construction management;

*Small Cities Grant Writing & Administration Services*

For municipalities, Lisa Low & Associates offers Small Cities and other state and federal grant writing & administration services including inspection, scope of work development, architectural services, contract administration, and oversight of state and federal laws including fair housing, section 3, women's and minority businesses, and Davis-Bacon. Our grant and project management services include general administration and coordination; inspections; scope of work preparation; bidding; contract and mortgage document preparation; closings; attorney services; correspondence and communications; compliance; establishment of file and record keeping systems; fulfilling state and federal regulations, including prevailing wage oversight; quarterly report preparation; funds management assistance; liaison and coordination work with funding agencies; project monitoring, trouble shooting, and close out.

## GRANT WRITING & ADMINISTRATION PRINCIPLES

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- Lisa Low & Associates brings a team approach that includes a close working relationship with your town or organizations's staff and officials;
- Lisa Low & Associates places special emphasis on government grants;
- Lisa Low & Associates will suggest other grant opportunities with an emphasis on the town's needs and interests;
- Lisa Low & Associates will prepare a concise and informative prospectus of the project opportunity and the mission of the town's application prior to submission to DOH;

## PROPOSED PROJECT APPROACH & SCOPE OF WORK

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For Small Cities work, Lisa Low & Associates provides comprehensive Small Cities Grant Application services including pre-application, application, and implementation. The scope of work for each of 3 phases of Small Cities Application and Award can be summarized as follows:

### **Phase 1. Pre-Application Phase**

In Phase 1, the Pre-Application Phase, Lisa Low & Associates will work with the city to accomplish any/all of the following tasks, as required by town:

1. Provide ongoing information as needed to local officials on fundamental aspects of small cities grants;
2. Act as liaison between DOH and town officials;
3. Formulate a citizen participation plan;
4. Organize and advertise public hearing required by DOH;
5. Distribute advertisement to DOH-required locations at appropriate times;
6. Moderate the public hearing, including informing the public of the nature of the program and the opportunities available and working with the town and public to determine appropriate application goals;
7. Undertake required background research for selected application goal;
8. Prepare the pre-application and submit to appropriate town officials for review;
9. Acquire appropriate board resolutions, signatures, and supplementary documents for pre-application/letter of intent;
10. Coordinate timely submission of pre-application/letter of intent;
11. Provide ongoing communications with DOH and town regarding status of letter of intent;
12. Be available for consultation with city on any small cities grant matter pending invitation for complete application;

### **Phase 2. Application Phase.**

In Phase 2, the application phase, Lisa Low & Associates will work with the city to accomplish any/all of the following tasks, as required by the town:

1. Do appropriate background research;
2. Work with maps, budget summaries, cost estimates, schematic plans, supporting data or other information provided by town;
3. Interview public officials and staff as necessary;
4. Compile appropriate maps and surveys;
5. Prepare the site and building report;
6. Prepare and/or update section 3 and fair housing plans for town;
7. Arrange for phase 1 environmental review;
8. Publicize results of environmental review;
9. Submit findings and request for release of funds to DOH;
10. Attend and coordinate with appropriate staff at municipal building & other relevant committee meetings;
11. Work as liaison between town and awarding agency, including attending all required



- application workshops;
- 12. Prepare all relevant correspondence and narratives;
- 13. Recruit letters of support from key in-house and affiliated bodies and individuals, including state representatives and senators;
- 14. Establish roster of intended beneficiaries of the grant;
- 15. Ensure that all formalities of the application, including required documents, are prepared and distributed to appropriate town officials and bodies for board resolution, approvals, and signatures;
- 16. Be available for consultation on all aspects of application, including legal documentation;
- 17. Meet all legal requirements and time constraints of the application process;
- 18. Submit up to 3 draft applications to the town for review; revise application as required;
- 19. Coordinate submission of final application to DOH;
- 20. Distribute copies of application to appropriate bodies including city, RPA, & sub-recipients, if applicable;
- 21. Respond to inquiries during DOH application review phase and assist in preparation of any required supplementary information/documentation required for final project approval and contract execution.

### **Phase 3. Implementation Phase.**

If awarded, Lisa Low & Associates will provide grant administration services, working with the town on any/all of the following tasks as required or requested by the town:

- 1. Start to finish grant & project coordination;
- 2. Assistance agreement document preparation;
- 3. Establishment of appropriate file & record-keeping system to document fulfillment of all legal requirements of grant;
- 4. Ongoing participation in meetings with appropriate town officials including, but not limited to, the First Selectman, Town Operations Manager, Finance Director, Senior Center Director, town building committee and architect;
- 5. For construction project, Assist in all phases of construction bidding;
- 6. Assist Architect and city Building Committee in preparation of bid documents
- 7. Assist Architect and city purchasing agent in preparing the ITB and guiding these in location and duration of advertisements as required by DOH;
- 8. Assist Architect and appropriate town officials in site walk, if required by project;
- 9. Assist in selection of low bidding contractor;
- 10. Report bid opening results to DOH;
- 11. Conduct pre-construction meeting with low bidder;
- 12. Carry out on-site interviews with workers during construction;
- 13. Davis-Bacon Oversight
- 14. Section 3 Oversight
- 15. Fair Housing oversight
- 16. Women's & Minority Business Cultivation & oversight;
- 17. Contract compliance;
- 18. Work with Finance Department on Methodology for Funds Management;
- 19. Preparation and submission of Quarterly Reports to and ongoing liaison work with DOH
- 20. Ensure that all legal requirements of the grant are fulfilled;
- 21. Project management to ensure forward movement and completion of awarded project;
- 22. Assistance with preparation for DOH oversight including monitoring, audit, & close out
- 23. For housing rehabilitation project, manage the rehabilitation of each individual home through

the various phases required by the program: application preparation and review; coordination with all appropriate town and state bodies for review and approval; eligibility testing, environmental assessments, title search, SHPO review, lead paint and hazardous materials assessment and remediation, contractor search, contractor review, site walks, bid document preparation, appropriate advertisement of bidding opportunities; specification writing, bid openings; contractor selection, coordination with town officials and with homeowners, correspondence, site inspections, contract and mortgage document preparation, oversight of project, all administration activities including invoice oversight, requests for payment, quarterly report preparation and project close outs; audits.

## OUR TEAM

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**Lisa Low, Ph.D., Founder and President**, is Small Cities or CDBG consultant to over twenty Connecticut municipalities including Ansonia, Beacon Falls, Bethlehem, Brookfield, Cheshire, Hamden, Hebron, Lisbon, Monroe, Montville, Morris, New Fairfield, North Stonington, Oxford, Preston, Putnam, Salem, Seymour, Shelton, Southbury, Southington, Voluntown, Waterford, Woodbridge and Woodbury. She has a doctorate in English Literature and 25 years of grant writing, grant administration, public relations, and teaching experience. She is a consummate writer and communications professional with a history of success in Small Cities Applications for Connecticut Municipalities. She is skilled at forming partnerships with funders, and in working with a wide range of grant recipients and clients.

**Peter B. Hance**, Finance and Management Consultant, specializes in providing consulting services—in fundraising, management, administration, and troubleshooting—to Connecticut Housing Authorities and Non-Profit Organizations. Thoroughly versed in funding options, Mr. Hance is an expert in putting together complex finance packages using a variety of funding sources including Low Income Housing Tax Credits, CHFA, DOH, HUD, CHAMP, SSHP, predev loans, federal home loan bank and section 8 project-based vouchers. Over the course of a 45-year career, Mr. Hance has raised over \$150 million in funds. Recent housing authorities served include Waterbury, Bridgeport, New Haven, Shelton, Derby, Torrington, Milford, Griswold, East Hartford, Vernon, and Cheshire. For Small Cities grant writing and administration services, Mr. Hance coordinates with Small Cities Consultant, Lisa Low & Associates.

**Steven Lazarus**, AIA, is affiliated architect for Lisa Low & Associates. A partner in the Wallingford-based architecture firm Lazarus & Sargeant since 1986, Mr. Lazarus provides cost design services, and on-site contract administration for special projects. Mr. Lazarus is a graduate of Cornell University where he received a Bachelor of Arts degree in English and Columbia University where he received his Master of Architecture Degree. Mr. Lazarus has experience in renovation planning; LEED design; historic preservation, senior center design, and housing rehabilitation design. Mr. Lazarus is on-site architect for the Choate School in Wallingford, CT.

**Louis Severino**, Housing Rehab Specialist, has a BA in Communications from University of New Haven. Mr. Severino has been working with Lisa Low & Associates as a Housing Rehabilitation Specialist since 2012. His duties include home inspection, creation of work write ups, specifications, project manuals, conducting site walks, opening and analyzing bids, leading pre-construction meetings, and overseeing project payments. He has owned his own construction firm, Blue Sky Home Improvement, and worked as Clerk of the Works for Nafis & Young Engineers. In the latter role, he has managed commercial projects including Spooner House, Shelton; the Boys and Girls Club, Ansonia and Shelton; North Branford Intermediate School; and the Roger Sherman Elementary School in Fairfield, CT.

**Thomas Foley**, Housing Rehab Specialist for Lisa Low and Associates, April 2015 to Present. Tom's educational background includes a bachelors and master's degree in History from Assumption College in Worcester, Mass. and a Law Degree from the University of Massachusetts, Dartmouth. His business experience includes cooperative management of a multi-generational family construction business. Tom is one of three managers of our small cities-based housing rehabilitation program. In charge of 5 towns, Tom carries 10 to 15 projects

at a time. Projects involve home inspection; scope of work development; cost estimation; bidding; bid award, contract and mortgage document preparation and signing, project management and close out. Mr. Foley also assists with handling legal questions within the firm.

**Carl Giannettino**, Housing Rehab Specialist, has had thirty five years of experience in the construction industry. Carl is thoroughly versed in the Construction Specifications Institute standards. His responsibilities include home inspections; scope of work and specification writing, and project supervision. He is a graduate of Platt Regional Vocational Technical School with a concentration in the field of architectural drafting

**Helen Chung**, Office Manager. A graduate of McGill University in Montreal, with a degree in Marketing and Management Information Systems, Ms. Chung spent eleven years working in marketing, sales, and promotions for Warner Music Canada before coming to Connecticut and finding a management position with Lisa Low & Associates. Ms. Chung's responsibilities include eligibility review; client information services; contract and mortgage document preparation; overall office systems management, and IT.

**Meredith Papst**, Finance Manager, has been providing Accounting/Bookkeeping Services in Small Business environments since 2001; she has been running the finance department at Lisa Low & Associates since 2014. She is expert in accounts payable/receivable, quarterly reporting, finance systems management, telecommunications, office management, and software and technology literacy.

**Mary Ann McAuliffe**, Housing Rehab Administrative Assistant: Her role is to assist in application preparation and in a variety of other office duties. She is a skilled and efficient assistant capable of finding effective solutions for a diverse array of problems in areas of data management, research, and outreach. She has experience in bookkeeping, and has been an Administrative and Technical Assistant for several small businesses since 2006. From 1999-2006, Ms. McAuliffe worked as an IT computer programmer for Oxford Health Plans in Trumbull, CT. Ms. McAuliffe has an Associates Degree from Briarwood College, Southington.

**Lori Forster**, Housing Rehab Administrative Assistant, is the newest member of our team. She comes to us from the Oxford school district where she was employed as a para-educator. In this role, she worked with special needs children ages 3-13 with math and reading. Before that, she worked briefly as a caregiver to Alzheimer's patients. She spent the majority of her career at General Electric Company. Her time was split between the GE Capital businesses and GE Corporate. She worked in Litigation, Legal, Corporate Environmental Protection, Finance and Human Resources. She managed the schedules of lawyers and executives and coordinated training classes in the U.S. and Europe in environmental, health and safety, executive development and finance. She brings a wealth of organizational experience to the team.

## RESUMES

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### **Lisa Low, Ph.D.**

Lisa Low & Associates

293 Riggs Street

Oxford, CT 06478

203-888-5624

[www.lisalowassociates.com](http://www.lisalowassociates.com)

[lisalowassociates@comcast.net](mailto:lisalowassociates@comcast.net)

Founder and President of grant writing, grant administration, and construction management firm specializing in Small Cities and CDBG grant implementation; community and economic development; and public policy advocacy for Connecticut municipalities

- Outstanding communication, marketing, and writing skills
- Consensus building
- Project development
- Multiple party mediation and negotiation
- Small Cities grant writing and administration

### **EDUCATION**

1986: Ph.D. (doctorate) English Literature; Univ. of Mass., Amherst, MA

1984: M.A. (masters) English Literature, Univ. of Mass., Amherst, MA

1974: B.A. (bachelors) English Literature; Univ. of Wisconsin, Madison, WI

2007: Certification, American Grant Writers' Association, New London, CT

### **Professional Experience**

#### **President, Lisa Low & Associates**

Currently or recently under contract with twenty five Connecticut municipalities for Small Cities grant writing and administration services including Ansonia, Beacon Falls, Bethlehem, Brookfield, Cheshire, Hamden, Hebron, Lisbon, Monroe, Montville, Morris, New Fairfield, North Stonington, Oxford, Preston, Putnam, Salem, Seymour, Shelton, Southbury, Southington, Voluntown, Waterford, Woodbridge and Woodbury. Woman-Owned, DAS Certified. Strong affiliations with outstanding engineering and architecture firms.

#### **Small Cities Grant Awards/Applications:**

##### **2017**

\$400,000 Beacon Falls, Housing Rehabilitation

\$400,000 Brookfield, Housing Rehabilitation

\$700,000 Hebron, Public Housing Modernization

\$400,000 Monroe, Housing Rehabilitation

\$400,000 Morris, Housing Rehabilitation

\$400,000 New Fairfield, Housing Rehabilitation

\$400,000 Southington, Housing Rehabilitation

\$700,000 Voluntown, Public Housing Modernization

##### **2016**

\$400,000 Ansonia, Housing Rehabilitation

\$400,000 Cheshire, Housing Rehabilitation

\$400,000 Seymour, Housing Rehabilitation

\$800,000 Shelton, Public Housing Modernization

\$400,000 Southbury, Housing Rehabilitation

\$700,000 Voluntown, Public Housing Modernization

\$400,000 Woodbury, Housing Rehabilitation

**2015**

\$400,000 Ansonia, Housing Rehabilitation  
\$400,000 Lisbon, Housing Rehabilitation  
\$400,000 Montville, Housing Rehabilitation  
\$400,000 Southbury, Housing Rehabilitation  
\$400,000 Southington, Housing Rehabilitation

**2014:**

\$400,000 Bethlehem, Housing Rehabilitation  
\$400,000 North Stonington, Housing Rehabilitation  
\$400,000 Oxford, Housing Rehabilitation  
\$400,000 Salem, Housing Rehabilitation  
\$400,000 Seymour, Housing Rehabilitation

**2013:**

\$400,000 City of Ansonia, Housing Rehabilitation;  
\$400,000 Town of Beacon Falls, Housing Rehabilitation;  
\$400,000 Town of Brookfield, Housing Rehabilitation;  
\$400,000 Town of New Fairfield, Housing Rehabilitation;  
\$400,000 Town of Putnam, Housing Rehabilitation;  
\$400,000 Town of Southbury, Housing Rehabilitation;  
\$400,000 Town of Waterford, Housing Rehabilitation;

**2012:**

\$300,000 City of Ansonia, Housing Rehabilitation;  
\$300,000 Beacon Falls, Housing Rehabilitation;  
\$300,000 Bethlehem, Housing Rehabilitation;  
\$300,000 Brookfield, Housing Rehabilitation;  
\$300,000 Preston, Housing Rehabilitation;  
\$300,000 Putnam, Housing Rehabilitation;  
\$300,000 Waterford, Housing Rehabilitation

**2011:**

\$300,000 Ansonia, Housing Rehabilitation;  
\$300,000 New Fairfield, Housing Rehabilitation;  
\$500,000 Seymour, Infrastructure  
\$300,000 Shelton, Housing Rehabilitation;

**2010:**

\$300,000 New Fairfield, Housing Rehabilitation;  
\$461,000 Bethlehem, Public Housing Modernization;  
\$300,000 Ansonia, Housing Rehabilitation;

**2009:**

\$700,000 New Fairfield, Senior Center;

**2007:**

\$750,000 Brookfield, Senior Center;

**2006:**

\$750,000 Oxford, Senior Center;

**FEMA AWARDS**

2011: \$250,000 Hazard Mitigation Grant, New Fairfield;  
2010: \$609,000 Award: Assistance to Firefighters' Radio Communications Grant, New Fairfield;  
2009: \$139,000 Award: Assistance to Firefighters' Turn Out Gear Grant, Brookfield (Candlewood Company);  
2008: \$129,000 Award: Assistance to Firefighters' Extrapolation Tools Grant, Brookfield Volunteer Fire Department, Brookfield;

### **SELECTED STEAP, ARRA, and OTHER GRANTS**

2012: \$250,000 Hartford Housing Authority Security Grant, HUD;  
2011: \$24,000 Historical Commission Inventory Grant (Administration Only);  
2010: \$250,000 Radio Tower Construction Grant, New Fairfield;  
2010: \$68,000 Energy Efficiency Grant, New Fairfield, CT;  
2010: \$9,100 Justice Assistance Grant, New Fairfield, CT;  
2010: \$220,000 Commuter Lot Grant, New Fairfield, CT;  
2010: \$160,000 Streetscape Grant, New Fairfield, CT;  
2009: \$468,000 DSS Grant, New Fairfield, CT.

### **NON-PROFIT SERVICES**

2003-2007 Lisa Low & Associates

Grant writing, administration, public relations work for Connecticut non-profit organizations. List available upon request.

### **OTHER WORK EXPERIENCE**

Grant Writer & Administrator, Town of Oxford, CT, 2006-7  
Lisa Low & Associates, Freelance Marketing & Public Relations, 2001-2005 (Clients include GE Industrial Systems; GE; TEAM Inc; CCCD, Scott Tucker Expeditions)  
English Professor, Tenured, Pace University, NYC, 1989-2001  
Associate English Professor, Colby College, Waterville, Maine, 1987-89  
Assistant English Professor, Cornell College, Mt. Vernon, Iowa, 1986-87  
Teaching Associate, Boston University, Boston, MA, 1983-85  
Teaching Fellow, University of Massachusetts, Amherst, MA, 1982-83  
Theatre Critic, Christian Science Broadcasting Television and Radio, 1989  
Freelance Theatre Critic/Interviewer, Boston Herald, 1984-85

### **AWARDS**

Graduate Fellowship, University of Massachusetts, Amherst, MA, 1984; 1985  
Distinguished Teaching Award (Runner-Up), 1984  
Shakespeare Prize, University of Massachusetts (Runner-Up), 1984  
Lucy Stebbins Memorial Scholarship, University of California, Berkeley, 1972  
Atlantic Monthly Scholarly Essay Award, Second Place, Student Category, Boston, Ma, 1969

### **PUBLICATIONS**

Milton, the Metaphysicals, and Romanticism, Book co-edited with Anthony Harding on Milton and Romantics.  
Cambridge University Press, Cambridge, UK, 1984.  
Co-Editor with Jane Lilienfeld and Jeffrey Oxford, Woolf Studies Annual, Volumes 9 & 10, Pace University Press, New York, New York, 2003-2004.  
Scholarly Essays: Approximately a dozen scholarly essays on a variety of subjects including Shakespeare, Milton, and Virginia Woolf and the Profession of Teaching Literature published in professional journals.  
Journalism: Essays and interviews with cultural figures including John Cage and Susan Sontag; Theatre and Film Reviews for Major Newspapers and individually authored books including The Boston Herald; Portland Press Herald, Boston Review, Crosscurrents; Conversations with Cage.

### **References**

Leonard Assard, First Selectman, Bethelchem, CT 203-266-7677  
Steven Lazarus, Architect, Lazarus & Sargent, Wallingford, CT; 203-265-3194 x115  
Chris Bielik, First Selectman, Beacon Falls, CT 203-729-4340  
David Cassetti, Mayor, Ansonia, CT 203-736-5927  
Tom Sparkman, First Selectman, Lisbon, CT 860-376-3400  
Delpha Very, Director of Putnam Redevelopment Agency, 860-963-6834  
Jeffrey Manville, First Selectman, Southbury, CT 203-262-0647

## LOUIS SEVERINO

Lisa Low & Associates  
293 Riggs Street  
Oxford, CT 06478  
203-888-5624 (office)  
203-668-2546 (mobile)

Housing Rehab Specialist with extensive experience in project management including specification writing, cost estimating, coordination, and construction management.

- Cost estimating and specification writing
- Home inspections
- Project supervision
- Excellent communication skills
- Award winning sales and marketing background

### PROFESSIONAL EXPERIENCE

Project Manager, Lisa Low & Associates, Oxford, CT 2012-Present  
Home Inspections; Preparation of Scopes of Work and Cost Estimates; Environmental Reviews; Municipal and Private Homeowner Client Interface; Bidding; Construction Management; Project Close Out

Project Inspector & Clerk of the Works, Nafis & Young Engineers, Branford, CT 2004-2011  
Director of Team of 10 Surveyors; Road Project Inspection and Supervision (Reconstruction of Chamberlain Road; Seymour; Christian Street, Oxford); Project Management and Close Out; Clerk of the Works (Shelton Boys & Girls Club; Branford Middle School); Marketing and Sales

President, Blue Sky Home Improvement 1994-2004  
Independent contractor. Owner of contracting firm remodeling homes.

Sales Executive, Pitney Bowes 1993-1999  
Top order producer 1994 and 1996; meter leader award for New Haven District 1997; maintained 95% lease to sales ratio 1994-1997; developed centralized purchasing with Mariner Health Care with over 120 locations.

Account Manager, Food Enterprises (Food Brokerage Firm) 1981-1993  
Responsible for selling product lines from 70 different manufacturers; primary accounts serviced include Stop & Shop, A&P, Bozzuto's; managed 6 person sales team calling on retail grocery trade in Connecticut; Salesman of the Year Award in 1991 and 1992 (highest F.E. Award).

### EDUCATION

1978 Bachelor of Arts in Communications, University of New Haven, West Haven, CT



## THOMAS M. FOLEY

Lisa Low & Associates ■ 293 Riggs Street, Oxford, CT 06478 ■ 203-888-5624  
[tfoley@lisalowassociates.com](mailto:tfoley@lisalowassociates.com)

### Housing Rehab Specialist

Housing Rehab Specialist for Lisa Low and Associates, April 2015 to Present. Tom's educational background includes a bachelors and master's degree in History from Assumption College in Worcester, Mass. and a Law Degree from the University of Massachusetts, Dartmouth. His business experience includes cooperative management of a multi-generational family construction business. Tom is one of three managers of our small cities-based housing rehabilitation program. In charge of 5 towns, Tom carries 10 to 15 projects at a time. Projects involve home inspection; scope of work development; cost estimation; bidding; bid award, contract and mortgage document preparation and signing, project management and close out. Mr. Foley also assists with handling legal questions within the firm.

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### Home Improvement Contractor

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- Licensed General Contractor with over 15 years of residential construction experience in all aspects of home improvement and remodeling. Strong knowledge of residential construction and remodeling techniques, tools, equipment and materials.
- Ability to manage multiple projects at a time.
- Highly detailed and organized, providing optimal work quality and customer service.
- Impeccable references.

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### Construction Skills

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- |                             |                    |                                      |
|-----------------------------|--------------------|--------------------------------------|
| ■ Insulation & drywall work | ■ Roofing & siding | ■ Windows & doors installation       |
| ■ Painting & finishing      | ■ Tile & trim work | ■ Cabinets & appliances installation |
| ■ Demolition                | ■ Electrical       | ■ Handicap accessibility projects    |
| ■ Landscaping               | ■ Woodworking      | ■ Plumbing                           |

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### Professional Experience

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#### Lisa Low & Associates- Housing Rehab Specialist. 2015-present

Housing Rehabilitation Specialist at Lisa Low & Associates including inspection, scope of work development, bidding, project oversight, close out, audits.

#### Foley Home Services - Home Improvement Company, New Haven and Fairfield Counties

August 2009-2015.

##### **General Contractor**

- Provides expert level day-to-day management and leadership for residential remodeling projects with a wide range of sizes and costs involving renovations or restoration.
- Responsible for the financial management of all projects including submitting bids and creating a budget.

- Ensures projects are completed in a timely manner, within budget parameters and meet building codes, rules, regulation and specifications.
- Obtains necessary permits and licenses from Building Inspector.
- Conducts hiring, managing of staff and training. Schedules and reviews the progress and quality of the work performed by outside contractors (plumbers, electricians, etc.) and a variety of trade workers.
- Resolves conflicting issues of design contract and schedule, construction quality and schedule, limited funding and technical problems.
- Projects completed include: multiple bathroom remodels/renovations, kitchen remodel/renovations, roof replacement, porches and deck builds, entire house restorations.

#### Environmental Data Resources Inc. (EDR), Milford, CT

September 2007 - June 2009

#### **Regional Manager-Corporate, Legal & Government Environmental Data Sales**

Regional Manager responsible for identifying new business relationships with customers including environmental professionals, lenders, corporations, law firms, insurance companies, government agencies and real estate professionals. Managed, developed and maintained relationships for clients within a defined territory including Chrysler, MasterLock, Sears, Sara Lee and Motorola.

#### Condon & Savitt – Attorneys at Law, Ansonia, CT

June 2004 - August 2007

#### **Legal Coordinator**

Provided services to both individual and institutional clients with a concentration on personal injury, real estate, workers compensation and probate law fields. Gathered documents, organized litigation files, drafted correspondence, memoranda, pleadings, motions, discovery responses and disclosure statements. Coordinated and resolved outstanding liens from medical providers/vendors for the purpose of cost savings/reduction for company. Interviewed clients and communicated with law enforcement agencies, insurance carriers and medical providers. Researched court and administrative agency records to determine the status of property titles, liens, mortgages, etc. Assisted with commercial and residential real estate transactions including closings; reviewed lending commitments and prepared a schedule of documents to satisfy all legal and lending requirements; prepared initial drafts of closing documents; prepared settlement statements and managed funds distribution; recorded executed documents and prepared documents books. Estate Planning including gathering asset information, helping to administer trusts, assisting with trust funding and determining asset allocations, interviewing and drafting last will and testament, power of attorney healthcare agent appointment.

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### **Education**

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University of Massachusetts School of Law, Dartmouth, MA, Juris Doctor, 2001  
Assumption College, Worcester, MA, B.A., History, 1998

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### **Technology**

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CAD experience, Home Design Software, Microsoft Office, QuickBooks and Web Trends.

## RESUME

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### Carl Giannettino

Lisa Low & Associates  
293 Riggs Street  
Oxford, CT 06478  
203-888-5624  
203-515-6091 (c)

**HOUSING REHAB SPECIALIST** with expertise in architectural drafting, construction management, and carpentry.

- Project planning and management
- Cost Estimating
- Specification Writing
- Construction Management
- Budgeting and time management
- CSI Software

Project Manager, Lisa Low & Associates 2014-Present  
Home Inspections; Preparation of Scopes of Work and Cost Estimates; Environmental Reviews; Municipal and Private Homeowner Client Interface; Bidding; Construction Management; Project Close Out

General Contractor, Carl Giannettino Construction 1986-2013

Draftsman Designer, Cablevision 1979-1985

Corbetta Construction, Draftsman 1978-1979

### EDUCATION:

Platt Regional Vocational Technical School with a concentration in Architectural Drafting.

**HELEN CHUNG**  
Lisa Low & Associates  
293 Riggs Street  
Oxford, CT 06478  
203-888-5624  
[hchung@lisalowassociates.com](mailto:hchung@lisalowassociates.com)

Resourceful Office Manager with extensive experience in providing support to internal departments and customers. Skilled in coordinating projects, meeting stringent deadlines and facilitating decision-making in complex situations. Able to balance the needs of management, provide excellent customer service, and maintain schedules with ease. Utilizes strong organizational, planning, and communication skills towards improving operational efficiency. Competencies include:

- Outstanding Administrative Skills
- Cost / Budget Planning
- Loan-to-Value Ratios
- Strong Customer Relations
- Account Management
- Revenue & Sales Forecasting
- Merchandising / Advertising Programs
- Event Management

#### PROFESSIONAL EXPERIENCE

LISA LOW & ASSOCIATES, Oxford, CT

2010 – Present

##### Office Manager

Management of business-minded grant writers and project managers specializing in assisting Connecticut municipalities and non-profit organizations in community and economic development, primarily through writing and administering Small Cities and other grants.

- Creates and maintains cohesive and productive work environment, ensuring timeliness and efficiency of a seven-person staff;
- Reviews all applications for income eligibility, loan-to-value ratio, tax currency and historical status as per program guidelines.

WARNER MUSIC CANADA, Montreal, Canada

1989 – 2000

##### Account Manager

A division of the Warner Music Group, a collection of record labels in the music industry with a catalog of more than one million copyrights worldwide. Worked in a cross-matrix environment to sell, promote and distribute products and services.

- Monitored the account performance according to yearly sales forecast to proactively identify situations that require rapid intervention and customer satisfaction.
- Led business development and marketing efforts to introduce new products into the different English/French radio stations.
- Created monthly advertising campaigns and promotions (e.g., TV/radio/print media, window displays, product placement, etc.).

UNISYS, Montreal, Canada

1986 – 1988

##### Receptionist

Part of a worldwide information technology company with a wide portfolio of IT services, software, and technology. Accountable for the efficient organization of the reception area for visitors and staff.

- Responded to a high volume of telephone inquiries with friendliness and professionalism, referring callers to appropriate resources.

#### EDUCATION

BComm, Marketing & Management Information Systems, McGill University, Montreal, Canada  
DEC (Diplôme d'études collégiales), Health Sciences, Vanier College, Montreal, Canada

# MEREDITH PAPST

## Finance Manager

Lisa Low & Associates \* 293 Riggs Street \* Oxford, CT 06478 \* 203-888-5624

### Professional Summary

Bookkeeping and office professional proficient with a wide variety of software applications including QuickBooks.

### Skills

- |  |                           |
|--|---------------------------|
| *Intuit QuickBooks Specialist                  | *Flexible                 |
| *Exceptional Organization                      | *Filing                   |
| *Superior Attention in Detail                  | *Faxing and Emailing      |
| *Expertise in Invoice and Payment Transactions | *Scheduling Service Calls |
| *Accounts Payable Specialist                   | *Talented Multi-Tasker    |
| *Customer-Oriented                             | *Microsoft Word           |

### Work History

**2014 to Present**      **Finance Manager--Lisa Low & Associates – 293 Riggs Street, Oxford, CT 06478**

Complete and mail bills, contracts, policies, invoices, and checks.  
Communicate with homeowners, contractors, and town finance personnel to identify and resolve outstanding payments.  
Reconcile accounts receivable/payable.  
Prepare and keep track of payment requisitions and drawdowns.  
Collect information for; prepare, and send Quarterly Reports.  
Collect information for; prepare, and send LAMPP Quarterly Reports.  
Maintain QuickBooks accounting system to reflect accurate financial records.  
Streamline daily reporting information entry for efficient record keeping purposes.  
Answer all financial inquiries timely and accurately.  
Generate invoices upon receipt of billing information and track collection progress.

**10/2001 to 2014**      **Office Manager Papst Plumbing & Heating LLC – 29 Jensen Farm road, Oxford, CT 06478**

Completed and mailed bills, contracts, policies, invoices, and checks.  
Communicated with customers to identify and resolve outstanding payments.  
Reconciled company bank, credit card, and line of credit accounts.  
Entered financial information and payments to guarantee that employees and vendors were paid accurately and on time.  
Established a QuickBooks accounting system to reflect accurate financial records.  
Managed and responded to all correspondence and inquiries from customers and vendors.  
Streamlined daily reporting information entry for efficient record keeping purposes.  
Generated invoices upon receipt of billing information and tracked collection progress.

### Education

Associates of Science: Business Management  
Becker College – Leicester, MA

# MARY ANN MCAULIFFE

Lisa Low & Associates  
293 Riggs Street  
Oxford, CT 06478  
203-888-5624  
info@lisalowassociates.com

## Work History

**Lisa Low & Associates Oxford, CT. August 2016 to Present**  
**Position:** Administrative Assistant  
Responsible for customer service, outreach, Small Cities application preparation, and general administrative support immediate to company president.

**Various 2008 to 2016**  
**Primary Position:** Parent

**Neves Plumbing Service. Danbury, CT. 2006 to 2008**  
**Position:** Administrative Assistant  
Responsible for answering phones, scheduling appointments, preparing proposals, scheduling service appointments, accounts billable and filing.  
Reason for leaving: Childbirth

**Oxford Health Plans. Trumbull, CT 1999-2006**

- IT Computer Programming. Created, maintained and supported visual basic and access applications. Worked closely with the business units to understand there software needs and create applications, which would increase productivity.
- Volume Print Operations. Created applications that provided streamlined document printing such as broker statements, checks, and marketing materials.
- Medicare Division. I was responsible for all data submission and corrections for United Healthcare Evercare and SRS business lines.

## Education

**Briarwood College. Southington, CT.**

**Immaculate High School. Danbury, CT.**

## References

Available Upon Request

#### APPLICABLE INSURANCES

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Certification of insurance in the types and amounts specified by DOH Bulletin #94-003 will be provided within ten days if the firm of Lisa Low & Associates is selected for Small Cities Consultation and Technical Assistance.

## FEES

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All fees to Lisa Low & Associates are paid through the awarded grant. Amount allowed per HUD Guidelines

**Housing Rehabilitation:** 20.25% of awarded grant

**Housing Authority**

- For 24 units or less (16% of awarded grant)
- For 25 units or more (15.5% of awarded grant)

No fee for application if grant not awarded.

**Program Income – Housing Rehabilitation**

Per project: 20% of total project costs



# State of Connecticut

Department of Administrative Services  
Supplier Diversity Program

*This Certifies*

Lisa Low & Associates LLC

293 Riggs Street Oxford CT 06478

*Woman Owned*

*Small/Minority Business Enterprise*

*February 01, 2017 through February 01, 2019*

*As a*

Owner(s): Lisa Low

Contact: Lisa Low

E-Mail: [lisalowassociates@comcast.net](mailto:lisalowassociates@comcast.net)

\*\* Affiliate Companies:

Telephone: (203) 888-5624 Ext:

FAX: (203) 888-5624

Web Address: [www.lisalowassociates.com](http://www.lisalowassociates.com)

*Carl A. Wilson*

*DAS Procurement Director*

\*\* A contractor awarded a contract or a portion of a contract under the set-aside program shall not subcontract with any person(s) with whom the contractor is affiliated.

APPENDIX A

CITY OF TORRINGTON  
REQUEST FOR PROPOSAL  
ADMINISTRATIVE AND TECHNICAL SUPPORT FOR  
THE CITY'S SMALL CITIES PROGRAM INCOME  
HOUSING REHABILITATION LOAN PROGRAM  
RFP #AHL-011-020718

Acceptance of Terms of this Agreement

Name of Proposer: Lisa Low & Associates, LLC


Contact Person: Lisa Low, Ph.D.

Address: 293 Riggs Street

City/State/Zip: Oxford, CT 06478

Telephone: 203-888-5624 Fax: 203-888-8800

E-mail: lisalowassociates@comcast.net

Authorized Signature  Title: President

Name Printed: Lisa Low, Ph.D. Date: 1/29/2018

It is agreed by the above signed proposer that the signature and submission of this proposal represents the proposer's acceptance of all terms, conditions, and requirements of the proposal specifications, and, if awarded, the proposal will represent the agreement between the parties.

The proposer agrees that the cost of any work performed, materials furnished, services provided, or expenses incurred, which are not specifically delineated in the proposal documents, but which are incidental to the scope, intent, and completion of this contract, shall be deemed to have been included in the prices for the various items scheduled.