



November 2019

Request for Proposals

Blair Lot

Dudley Square, Roxbury, MA

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Boston Planning & Development Agency)
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TABLE OF CONTENTS

Introduction & Instructions 3

Instructions 4

Property Description 6

Site Description..... 6

Development Objectives and Guidelines..... 10

Submission Requirements..... 28

Evaluation of Proposals 42

Contract Terms and Conditions 52

APPENDICES

Appendix A Information Resources

Appendix B Plan of Land

Appendix C Financial Template Workbook

Appendix D Disclosure Statement Concerning Beneficial Interest

Appendix E City of Boston and BPDA Disclosure Statement

Appendix F Certification of Tax, Employment Security and Contract Compliance

Appendix G HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility

Appendix H Price Proposal Form

Appendix I Submission Checklist

01

Introduction & Instructions

Purpose

The purpose of this Request for Proposals ("RFP") is to solicit proposals for the disposition and redevelopment of property owned by the Boston Redevelopment Authority d/b/a Boston Planning & Development Agency (the "BPDA"), consisting of approximately 87,879 square feet of vacant land located between Washington Street and Harrison Avenue in the Roxbury neighborhood of Boston, at 2148 Washington Street, 2180-2190 Washington Street, 12-4 Palmer Street, 2-6 Renfrew Street and 29 Eustis Street (the "Property").

The BPDA seeks to convey the Property to allow mixed use development, consisting of residential housing with ground floor commercial and/ or retail use. Proposals will be subject to review and approval by the BPDA and the City of Boston, including applicable planning and zoning controls, and the development objectives and guidelines described herein. Proposals must meet all minimum submission requirements, complete the enclosed proposal form and price summary form, and include the requested documents.

The BPDA has attempted to be as accurate as possible in this RFP, but is not responsible for any unintentional errors herein. No statement in this RFP shall imply a guarantee or commitment on the part of the BPDA as to potential relief from state, federal or local regulation. The BPDA reserves the right to cancel this RFP at any time until proposals are opened or reject all proposals after the proposals are opened if it determines that it is in the best

interest of the BPDA to do so. The BPDA reserves the right to waive any minor informalities.

Instructions

The RFP will be available for download beginning on November 20, 2019 on the BPDA website at bit.ly/PlanDudley and

<http://www.bostonplans.org/work-with-us/rfps-rfqs-bids>.

Proponents must register when downloading the RFP to ensure they receive any addenda. Requests for clarification or any questions about the RFP must be submitted in writing to:

Muge Undemir, Senior Planner

Morgan McDaniel, Real Estate Development Officer

Boston Planning & Development Agency (BPDA)

One City Hall Square

Boston, MA 02210

Mugzy.Undemir@boston.gov

Morgan.E.McDaniel@boston.gov

No requests or questions regarding the RFP will be accepted after February 5, 2020. Proponents must include their name, address, telephone number and email address with any questions. An addendum with questions and answers will be emailed to all Proponents on record and posted on the BPDA website ten days prior to the RFP deadline.

A pre-bid conference will be held on January 6, 2020 at 10:00 AM at the Bruce C. Bolling Municipal Building, 6th Floor Community Space, 2300 Washington St, Roxbury. Attendance at the pre-bid conference is optional. However, all bidders are strongly encouraged to attend. A site tour will follow the pre-bid conference.

There is a fee of One Hundred Dollars (\$100.00) to submit the RFP, which check should be made payable to the Boston Redevelopment Authority.

Eight (8) sealed copies of the Development Submission and Disclosures (as defined in the Submission Requirements Section) are required. The Design Submission shall include: one (1) full set of reduced drawings in an 8 1/2" x 11" format; and one (1) set of the drawings at full scale; and one (1) set of drawings mounted on boards, no smaller than 30"x 40" in presentation form. The Development and Design Submissions must also be submitted on a flash drive.

Three (3) sealed copies and one (1) original of the Financial Submission must be provided separately from the Development Submission and Disclosures and Design Submission. The Financial submission must also be submitted on a flash drive. Proposals must be submitted no later than **Wednesday, February 19, 2020 at 12:00 pm (noon) to:**

Teresa Polhemus
Executive Director/Secretary
Boston Planning & Development Agency
Room 910
Boston City Hall
One City Hall Square
Boston, MA 02201

No late proposals will be accepted. Any proposals received after the date and time specified in this RFP will be rejected as non-responsive, and not considered for evaluation.

02

Property Description

Site Description

The Property consists of approximately 87,879 square feet (approximately 1.9 acres) of vacant land, comprised of five (5) parcels with the following addresses: 2148 Washington Street, 2180-2190 Washington Street, 12-4 Palmer Street, 2-6 Renfrew Street, 29 Eustis Street. Renfrew Street, a public way and Renfrew Court, a private way, are contained within the boundaries of the Property, as shown on the map below.

Originally a parking lot for the long-shuttered grocery store Blair's Foodland, the BPDA purchased the blighted Property from a private owner on December 23, 1985. It is centrally located in the heart of the Dudley Square commercial and retail district and is a short walk from the Dudley Square Bus Station, providing access to all major MBTA routes. In addition, proximity to major thoroughfares provides vehicular access to the Property.

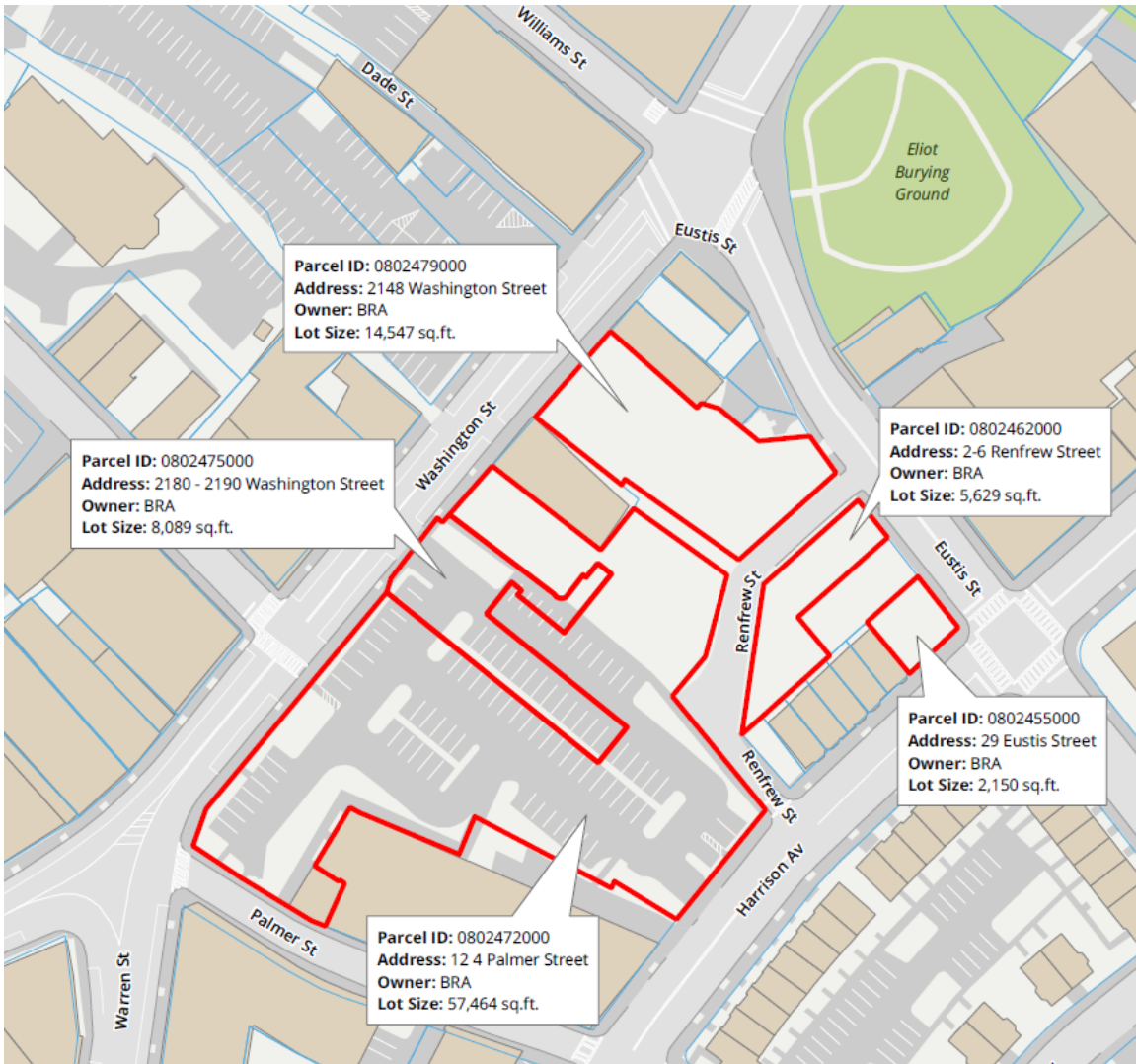
The Property is partially paved and is currently unencumbered, and is not subject to any existing leases or licenses. It is presently used for parking by local employees and visitors to Dudley Square. Currently 94 public parking spots exist on the Property, which are available to the public free of charge.

Address	Assessor's Parcel Number	Lot Size(approximate square feet)
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12-4 Palmer Street	0802472000	57,464 square feet
2180-2190 Washington Street	0802475000	8,089 square feet
2148 Washington Street	0802479000	14,547 square feet
2-6 Renfrew Street	0802462000	5,629 square feet
29-33 Eustis Street (formerly 1105 Harrison Avenue)	0802455000	2,150 square feet
Total		87,879 square feet

Planning and Zoning Context

The Property is part of the Dudley Square Economic Development Area ("EDA") as shown on Map 6A-6C of the Boston Zoning Maps in the Roxbury District, and therefore is principally governed by the provisions of Article 50 of the Boston Zoning Code ("Code"). For details on zoning, please consult: https://library.municode.com/ma/boston/codes/redevelopment_authority?nodeId=ART50TA.



The Property is also located within a Boulevard Planning District ("BPD") with overlays to underlying sub-districts as noted in Section 50-37. Within BPDs, special design review requirements and design guidelines apply as set forth in Subsection 50-38.1, Section 50-39, and Section 50-40; and screening and buffering requirements apply as set forth in Section 50-41. The Code and maps can be found at www.bostonplans.org/zoning. Zoning relief may be required to achieve the requirements of this RFP.

Part of the Property (Assessor's Parcel Number 0802479000) is located in the Eustis Street Protection Area for the Eustis Street Architectural Conservation District. As a result of this distinction as a historic district, the selected

proponent will be subject to Architectural Conservation District guidelines and oversight by the Boston Landmarks Commission.

Title

Proponents are fully responsible for conducting their own title examination to ensure that the title to the Property is clear. The BPDA, to the best of its knowledge, is the owner of the Property. However, the BPDA makes no warranty as to the accuracy of any title examinations it may have conducted and recommends that proponents conduct their own title examinations. The BPDA further recommends that proponents commission their own boundary surveys to determine the existence of any encroachments that could exist.

Parcel 0802472000 (1, 2 and 4 Palmer Street) is subject to the fee interest of the owners of Parcel 0802478000 (2164-2168 Washington Street) in a passageway that extends in a southerly direction behind 2164-2168 Washington Street to Renfrew Street.

Parcels 0802472000, 0802475000 and 0802479000 are subject to a temporary license agreement with the Boston Public School Department for employee parking.

03

Development Objectives and Guidelines

Overview

Given its location in the heart of the Dudley Square Main Streets District, the Property has transformative potential as a complement to the existing area retail and commercial uses, such as those in the Bruce C. Bolling Municipal Building. Redevelopment of the Property should contribute vibrancy to the area as a potential cultural and entertainment destination, as well as have synergy with the other sites analyzed through PLAN: Dudley Square (see Appendix A). Redevelopment of the Property should strive for the creation of a continuous “Main Streets” experience from the Property site to the Dudley Commercial site (see site map in Appendix B).

After careful analysis of the Property, BPDA, working with the City of Boston Department of Neighborhood Development (“DND”), in collaboration with neighborhood residents and the Roxbury Strategic Master Plan Oversight Committee (“RSMPOC”), has established the following guidelines as part of PLAN: Dudley Square.

The Proponent must respond to each of the Development Objectives below in a development concept narrative, construction description narrative and within design documents as appropriate. Further, Proponents must agree to work with the BPDA and the community to address issues or concerns that may arise as the development project moves forward.

Development Objectives

Consistency with Area Planning History

In addition to PLAN: Dudley Square, the area has also been the subject of the [Roxbury Strategic Master Plan](#) (“RSMP”) and [Dudley Vision](#). Proponents must incorporate the combined visions of these planning documents, while capturing and addressing the current needs of the community for affordable housing, economic development and job opportunities. In 2017, the area was designated by the Mass Cultural Council as a “Cultural District”. (See Appendix A).

As articulated in the planning documents and as embodied in the Cultural District designation, mindfulness regarding the rich cultural history of this important neighborhood is paramount. Proponents should use development as a catalyst to promote the arts, culture, education, commercial, and retail enterprise in the area. Neighborhood cultural amenities such as museums, art galleries, bookstores, entertainment venues, performance spaces and artist live/work spaces are strongly favored. Amenities and programming associated with the Property should activate the area in the evening, encouraging residents to “stay local” to support Dudley Square businesses for their entertainment, shopping and dining experiences. Preference will be given to projects that include uses that support neighborhood control and/or household wealth creation, whether it be through homeownership, the creation of a cooperative and/or control by a community land trust.

Economic Development

Proposals with commercial uses must promote local business and job creation, with special emphasis on providing maximum opportunities for local, small and disadvantaged businesses and job creation and training for people of color and women. This emphasis should take place in all aspects of redevelopment -- the construction phase, business development phase, in the procurement of goods and services, as well as in permanent jobs created. Wages associated with all jobs should be appropriate for their associated categories and provide for an enhanced quality of life and the prospect of economic mobility for area residents.

The community has expressed a preference for proposals that include the creation of commercial condominiums for small businesses. Creative equity building strategies such as rent-to-own business condominium ownership are encouraged. Developers should include proactive marketing and outreach practices within the immediate community to locate commercial tenants. Developers should place a special emphasis on commercial tenants that are locally-based, employ from within the community, are minority-owned business enterprises (MBEs), or are women-owned business enterprises (WBEs). See Section 4 for definitions of WBEs and MBEs. The community has suggested outreach strategies such as community business tenant fairs and “speed dating” events to match potential tenants / commercial condo buyers with available spaces.

In addition, the Property should be developed in a manner that supports the economic growth of the district by providing opportunities for area residents to participate in expanding sectors of Boston’s economy. Proponents should describe how their proposed uses will generate new employment prospects in education, health, medicine, bio and life sciences and/or finance. Proponents should also describe their experience in and capacity to attract such new local employment opportunities through the uses they propose.

Parking

Proponents should also describe the extent to which they are able to provide public parking within the new development which meets the needs of the adjoining retail beyond meeting the parking needs of the proposed development on the site. Projects that are able to replace the existing public parking on site are encouraged. In addition to the parking requirements created by the new development, proposals must provide hourly public parking on the site. The most advantageous proposal will provide a full replacement of the 94 existing public parking spaces, in addition to the parking spaces required for the development itself.

Affordable/Income Restricted Housing

100% of residential units developed on the property are required to be homeownership units.

Homeownership developments should include a minimum of two-thirds of the units targeted to households with a range of incomes, from 60% to 100% of AMI, with the average AMI not to exceed 80% of AMI. The remaining one-third of units may be market rate.

Community members have expressed a strong preference for projects which can exceed these minimum affordability standards. Developments which can reach deeper levels of affordability and/or a higher percentage of income-restricted housing are preferred. Preference will also be given to projects that include affordability at many income levels (e.g. 30%, 40%, 50%, 60%, 80%, 100% of AMI, etc.). In addition, while the AMI is defined by the U.S. Department of Housing and Urban Development for the Greater Boston region, developers are encouraged to present their affordable housing proposals using both AMI and the corresponding, qualifying income ranges.

DND and BPDA affordability requirements require owner occupancy of income restricted homeownership units and prohibit subleasing of income restricted rental units.

All housing developments utilizing City funds or City land must comply with the City's Affirmative Marketing Program requirements. Proposals that include 1 to 4 units of housing (small housing developments) must also comply as follows:

- Proposers of small housing developments using City funds or City Land must advertise in a neighborhood newspaper or daily general and list on Metrolist.
- Owner-occupants of City-funded projects with fewer than five units must be informed of the services provided by Metrolist and encouraged to list vacancies for rental units through the [Metrolist listing form](#).
- DND will notify the Boston Fair Housing Commission of these projects by sending the Affirmative Marketing Program a copy of the project approval letter to affirmativemarketing@boston.gov.

- DND provides the following link to the listing form: <https://www.boston.gov/metrolist/metrolist-listing-form>

Sustainable, Resilient, and Healthy Development

Proposals should support and exemplify the community's and the City's goals for sustainable, resilient and healthy new construction including Mayor Walsh's Carbon Neutral Boston 2050 commitment. Proposals should target net zero energy or net zero carbon performance. New buildings should be designed as green, low-energy, all-electric structures that prioritize enhanced building envelope solutions and passive system strategies, and that are optimized for and include onsite solar renewable energy generation. As necessary projects should identify off site and procured renewable energy solutions sufficient for achieving net zero carbon emissions.

Proposals should include strategies that extend beyond the specific development site and enhance the sustainability, resiliency, and health of the surrounding community. The community has identified increased extreme heat conditions as a leading concern and seeks proposals that reduce Heat Island conditions in the DSMS district and development site.

Whittier Choice Neighborhoods Funding Availability

The Property is located within the target area of the Whittier Choice Neighborhoods program, jointly administered by the Boston Housing Authority ("BHA") and DND. This federally-funded HUD initiative, seeks to rebuild the existing Whittier BHA development as well as to deconcentrate poverty and invest in the people and places surrounding Dudley Square. Because this initiative includes enhanced assistance for target area homebuyers, BHA and DND are encouraging the creation of homeownership opportunities in nearby developments. Proponents should contact Andrew Gouldson at the BHA at Andrew.Gouldson@bostonhousing.org for more information.

Development without Displacement

Proposals must describe measures they will take to avoid displacement of existing residents of the Roxbury neighborhood. As part of their submission, Proponents must include a narrative describing how their proposal supports

the community's goal of "development without displacement." Proponents must discuss how their proposed development will assist the current residents of Roxbury to afford to remain living in their community and to find pathways to economic opportunity. Such discussion should address the affordable housing production goals of the project and how the proposed rents and sale prices meet the needs of Boston and Roxbury residents. This discussion should also identify how the development's composition of unit sizes meets the needs of the community. Community members have suggested that larger unit sizes (two, three and four bedroom units) are needed for local families, while smaller unit sizes may be appropriate for seniors.

The Proponent should include details on its development team's track record of supporting projects and policies that promote development without displacement and should discuss their experience with preventing eviction of tenants when acquiring, developing and operating property. The Proponent must disclose if the proposed development will result in the direct eviction of any current tenants, being aware that such a situation will detract from the advantageousness of its proposal.

Community members have expressed interest in innovative strategies to support community stability such as cooperative ownership, land trust participation and rent-to-own strategies. Proponents are encouraged to include these and any other innovative strategies to prevent displacement.

Community Benefits

Proponents must also describe specific contributions that will ensue as a result of their proposed redevelopment of the Property that are above and beyond the development objectives described above. These contributions should bolster the PLAN: Dudley vision through direct support of programming, creation of institutions, financial support of existing institutions and furthering direct initiatives that will promote and maintain the underlying vision of the community as articulated in this RFP and in the RSMP. Community benefits could take many forms, such as:

- incorporating specific uses into the proposal such as cultural, arts, entertainment and performance uses;
- furthering initiatives that foster the incubation of new entrepreneurs and educational opportunities that prepare local residents and young adults for future career opportunities; and
- contributing seed funding and organizational support to existing local and/or non-profit organizations including organizations that support business improvement or the cultural district within Dudley Square.

In order to achieve the development objectives of housing affordability, good jobs, economic development opportunities and development without displacement as set forth in this RFP, there may need to be a significant contribution of city resources. Therefore, proposals that rely heavily on government subsidies to achieve the development objectives may lack sufficient additional resources to commit to such community benefits.

Regardless, all proposals must submit a community benefits narrative to discuss the overall community contribution that will ensue from their proposed development.

Development Guidelines for the Property

The development is subject to both BPDA and DND Development Review Guidelines which can be found on the BPDA and DND websites at:

<http://www.bostonplans.org/projects/development-review>

<https://www.boston.gov/departments/neighborhood-development/neighborhood-development-housing-policies#addendum>

and to the following guidelines as set forth below:

Urban Design Guidelines

Overview

All guidelines are reflective of the PLAN: Dudley Square community engagement process and are set forth to ensure that submitted proposals are in alignment with community desires.

Redevelopment of the Property must contribute to creating a new, high quality public realm in the center of Dudley Square that is engaging, community focused and supports continuous pedestrian activity along the Washington Street corridor. Proposals should make full use of the Property's central location in Dudley Square to create a strong link to connect Parcels 8, 9 and 10 to the new anchor uses at Bruce C. Bolling Municipal Building and the Dudley Commercial site (see map in Appendix B).

Accordingly, redevelopment of the Property must bolster the Dudley Main Streets District with both its mix of uses and with an innovative and contextual-pedestrian oriented design towards Washington Street. It is anticipated that commercial and retail uses, combined with a mix of a significant number of residential units, will activate the heart of Dudley Square with an increased residential population to support the area retail businesses.

Use Guidelines

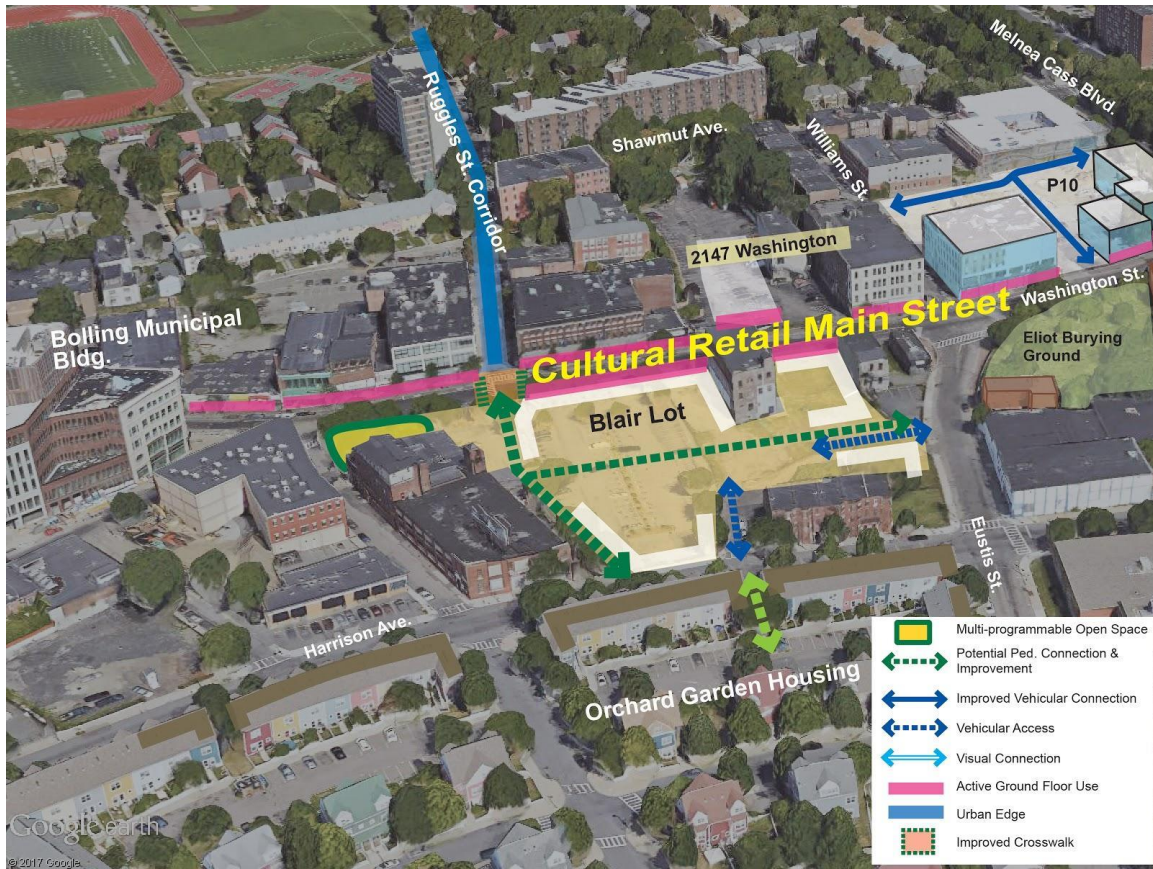
The base of the building must be a combination of retail, cultural and/or entertainment uses that contribute to the identity of the Dudley Square Cultural District, particularly because Roxbury is one of three designated cultural districts in the City of Boston. This designation, coupled with the Property's location in the heart of Dudley Square, provides an opportunity to advance creative approaches to artist live/work space and cultural economic development strategies.

Commercial uses are permissible at the ground floor as long as they create an active and engaging streetscape and an animated night time facade to the street. The upper levels must have residential uses that address the housing needs in Dudley Square. Office uses could be incorporated on the upper floors in addition to housing, as appropriate.

Access, Circulation, Connectivity and Continuity

1. Proposals that combine adjoining parcels to increase economic feasibility, create jobs, and improve vehicular and pedestrian access are encouraged. If the proposed design makes use of adjacent parcels, the Proponent must demonstrate site control of such other parcels by including a copy of a fully executed, and currently dated, Purchase and Sale Agreement or a signed, and currently dated, Option Agreement.
2. The Property's location between smaller scale residential buildings along Harrison Avenue and the retail and commercial uses along Washington Street is an important site consideration. Wherever possible, primary building entrances should be on Washington Street to enhance the pedestrian experience. Service access should use Harrison Avenue or Eustis Street in order to reduce traffic congestion on Washington Street.
3. Building configuration should include an extension of Ruggles Street through the site to Harrison Avenue as a vehicular and/or pedestrian connection. New vehicular and pedestrian paths that create and strengthen major public corridors with north-south connections from the Ruggles Street corridor towards Harrison Avenue and east-west connections through the Property are encouraged. Such strategic connections through the site should strive to incorporate publicly accessible interior spaces such as lobbies, atriums and courtyards as intermediate public zones to promote community interaction and engagement and allow for pedestrian passage to other destinations within the district, including transit stations, landmarks and public parks. Such connections should be designed to be public in nature and actively programmed to be inviting to all residents of the area.
4. Parking spaces for car sharing that are easily accessible to local area residents and businesses, should be included to reduce car dependency and encourage and promote public transit and bicycle use.

5. Parking needed for the uses on the site must be provided on site and proponents must also replace the existing ninety-four (94) public parking spaces within the proposed development. Public parking on site which meets the needs of the adjoining retail area beyond meeting the parking needs of the proposed development on the site is encouraged.
6. Any structured parking must be well designed and buffered with residential or other uses that limit visibility of the garage use from the public ways.
7. Creative and innovative alternatives are encouraged to minimize the need for the creation of additional parking square footage. Strategies could include co-sponsoring shuttles, the installation of hydraulic parking lifts within proposed buildings, etc.
8. Safety, views, and ease of navigation must be considered in the site design. In particular, night safety is a concern of some neighborhood residents. Therefore, structures must be designed with clear sight lines and exterior lighting design must create well-lit open spaces and streetscapes without dark pockets at night.
9. Selected projects will be required to undergo a transportation/traffic study as part of the Article 80 Review process. If multiple sites in the PLAN: Dudley Square disposition process are being designed at the same time, the project studies will be combined to ensure an accurate and comprehensive analysis.
10. Proponents are encouraged to coordinate with other area developments undergoing pre-construction and construction activities on both privately and publicly owned sites.



Massing, Height and Orientation

1. Building(s) design should use a variety of setbacks that create a volume that is articulated, varied and dynamic. The height on the Property may vary from six to fifteen stories (60 to 150 feet). Building(s) should respond to special views and corridors, and create and reinforce a continuous street wall of about 40-60 feet along Washington Street. The overall massing must fit well into the surrounding context. In particular, buildings must be sited to respect views down Washington Street, with the Bruce C. Bolling Municipal Building as the focal point.

2. Taller building massing should be set towards the center of the site and step down to respond to the scale of the Orchard Gardens housing along Harrison Avenue and existing buildings along Washington Street. Proposals may include a building that is taller than adjacent surrounding buildings along the street if it: a) establishes a gateway to the community while providing a desired mix of cultural

uses and greater affordable housing opportunities to the area, and b) modulates and steps massing; thereby defining a building height that is contextually appropriate with adjacent buildings on the lower floors and sets back upper floor levels.

3. Any separation of buildings should be designed using a network of pedestrian streets and/or programmable open spaces to provide visual relief and reduce the scale of the development through the creation of discreet building blocks that respect the surrounding street and block patterns.
4. Building massing should be configured to allow natural light down the street and into open spaces that are internal and external to the building(s). The proposed interior program should be shaped to make use of natural light within the design of the building(s).
5. A selected project may need to perform wind tunnel testing as part of the Article 80 Review process due to a building's height, relative height, or context. All projects should consider wind patterns at the surrounding pedestrian level while developing their proposal's massing.

Contextual Architectural Design

1. Buildings should echo the identity of Dudley Square by recognizing its rich cultural and architectural history through careful consideration of appropriate, high quality building materials and façade expression. In this vein, Proponents should thoughtfully consider the historical and social context of Dudley Square, as well as recent building precedents, in order to design an exterior façade style that will transcend time.
2. Architectural detailing (windows, doors, exterior cladding, masonry, etc.) must be contextual, compatible with other area buildings, attractive and should be executed using materials of the highest quality. Materials usage should strive to ground the building in the present and convey stability into the future.

3. Designs should express the distinction of retail, commercial, and other public uses at the ground level in order to activate the edges of the street and help define the character of the neighborhood along Washington Street as a neighborhood main street.
4. Proposed buildings must maintain the continuity of the street wall and provide a high percentage of transparency at the ground level to achieve a continuous and engaging pedestrian experience along Washington Street.
5. Disposal areas, accessory storage areas or structures and dumpsters should be placed at the rear of the building(s) and must be appropriately screened from view.

Open Space/Public Realm/Public Art

The quality of the public realm surrounding any new development plays a significant role in shaping the everyday experience of a district. All exterior spaces must be well-maintained throughout the life of the project for the benefit of the neighborhood. Landscape strategies should include the following to foster a sense of place, keeping in mind the context of area as a designated cultural district:

1. Create a public space programmed for civic uses at the west end of the Property along Washington Street towards the Bruce C. Bolling Municipal Building, as well as perhaps the 29 Eustis Street parcel.
2. Utilize innovative landscape design, installation of temporary, permanent and interactive public art and open space to build and maintain a vibrant and enlivened streetscape. Include a mix of distinctive street furniture (light fixtures, benches, street trees) and wider sidewalks that allow for public and semi-public active spaces, creating a continuous public realm experience along Washington Street.
3. Use open and green spaces, internal sidewalks and/or streets to break and organize development on the Property. If open spaces such as

courtyards or gardens are included, the community has expressed a preference that the open space be open to the public.

4. Provide as much green space as possible. Utilize attractive and well maintained plantings throughout the site, with plants that are appropriate to the region, to all seasons and require little or no irrigation or irrigate with collected storm or gray water. Plant trees that will form tree canopies; incorporate neighborhood gardening opportunities; and include rooftop gardens to help to reduce the heat island effect.
5. The design of the public realm should contribute to creating a continuous, enhanced pedestrian Main Streets experience from Parcel 8 to the Bolling Building and the Dudley Square Bus Station.
6. Advance the goals of the Roxbury Cultural District to find and recognize Roxbury's cultural assets, and create tools, strategies, resources, and spaces that elevate the arts in Roxbury.

Resilient Development and Green Building Design Guidelines

Proposed projects should support the community's and City of Boston's Carbon Free, Climate Resilient, and Healthy Community goals including the 2019 Carbon Free Boston report and DND's Zero Emission Buildings guidebook for affordable housing projects. [See Article 37 Green Building and Climate Resiliency Guidelines](#) for additional information.

Based upon Climate Ready Boston 2016, the City's comprehensive climate vulnerability and preparedness study available at:

<https://www.boston.gov/departments/environment/climate-ready-boston>, the Dudley Square area is subject to multiple climate change related hazards.

Proposed projects should include resilient building and site strategies to eliminate, reduce, and mitigate potential impacts, as follows:

- 1. Greenhouse Gas Reduction:** Proposed projects should exemplify Mayor Walsh's Carbon Free Boston 2050 goals by striving for zero carbon emission or energy positive performance. New buildings

should be designed as green low-energy all-electric structures that prioritize enhanced building envelope solutions and passive system strategies and that are optimized for and include onsite solar renewable energy generation. As necessary projects should identify off site and procured renewable energy solutions sufficient for achieving net zero carbon emissions. Proposals should include a preliminary energy model with a Zero Carbon Building Assessment. Projects should assess these strategies in a first and life cycle cost analysis.

- 2. Higher Temperatures & Heat Events:** Proposed projects should reduce heat exposure and heat retention in and around the building(s) and surrounding district. Strategies should include the use of building and paving materials with high Solar Reflectance and Solar Reflectance Index values and increased shade areas through landscaping, expanded tree canopy and shade structures. At a minimum projects should achieve the LEED Sustainable Sites, Heat Island Reduction credit. Consider the inclusion of Green Roofs with plantings, especially for accessible roof spaces and sites limited access to open space.
- 3. More Intense Precipitation:** Proposed projects should integrate strategies to both mitigate the impact of storm water flooding to the site and reduce the Property's contribution to storm water flooding in the neighborhood. Strategies should focus on pervious site materials, enhanced landscaping and Low Impact Development measures to capture, retain, and infiltrate storm water.
- 4. Rising Sea Levels:** Proposed projects should reduce risks of coastal and inland flooding through elevating the base floor, critical utilities, mechanical systems and infrastructure above anticipated flood levels. Proposed projects should utilize flood proof materials below any future flood level and relocate vulnerable uses to higher floors.
- 5. Sheltering in Place:** Proposed projects should provide for a cool/warm community room and essential systems to allow for extended sheltering in place and accommodation of local residents

during an extreme weather event or an extended disruption of utility services.

Green buildings provide a comprehensive approach to reducing the adverse impacts of the built environment and to promoting human health and the wellbeing of our communities. **Proposed projects should exemplify leading green building and sustainable development practices and target zero energy or zero carbon emission performance.**

1. **Green Buildings:** Achieve and surpass the United States Green Building Council's ("USGBC") requirements for LEED Platinum and LEED Zero with a minimum requirement of achieving LEED Gold utilizing the most appropriate LEED rating system. Projects should seek USGBC certification and should be registered upon tentative designation and certified by the USGBC within one year of construction completion.
2. **Integrated Project Planning:** Projects should fulfill the Integrated Process requirements and include a LEED Accredited Professional(s) with the appropriate specialty(s) and, for residential uses, a LEED Homes Rater. Proposals should describe the team's approach to integrated project planning, including the use of preliminary and whole building energy modeling.
3. **Site Development:** Employ strategies to eliminate construction phase environmental impacts including off-site tracking of soils and construction debris. Site designs should include strategies to reduce heat island and storm water runoff impacts, and promote area natural habitats. Projects should include storm water systems and strategies for retaining and infiltrating the first 1.25" of rain water.
4. **Connectivity:** Promote and support non-personal vehicle means of travel including walking, bicycling, public transit, and reduced personal vehicle travel. Strategies should include easily accessible, secure and enclosed bicycle storage space (see [Boston Bicycle Parking Guidelines](#)), shared parking, transit pass programs, and car and bike share programs. Other elements that promote connectivity include open

space courtyards with landscaping and seating, desire-line footpaths, public viewing areas, and communal gardening spaces.

5. **Water Efficiency:** Minimize water use and reuse storm and wastewater. Strategies should include low flow plumbing fixtures; rainwater harvesting for gardens and building systems; and drought resistant planting and non-potable water irrigation.
6. **Energy Efficiency:** Buildings should be designed as low-energy, all-electric structures that prioritize enhanced building envelope solutions and passive system strategies. Small residential buildings should target a HERS Index of 40 or lower (based on a current Commonwealth of Massachusetts Stretch Code of 55). Large residential / commercial buildings should target modeled performance at least 25% below the current Commonwealth of Massachusetts Stretch Code. Projects seeking DND funding for affordable housing should adhere to DND's Zero Emission Buildings guidelines.
 - a. Passive building strategies should include optimized building orientation and massing; high performance building envelopes that are airtight, well insulated, have appropriate window to wall ratios, and include high efficiency windows and doors; and natural ventilation and daylighting.
 - b. Active building strategies should include Energy Star high efficiency equipment, dedicated outside air systems with energy recovery ventilation, air and ground source heat pump systems for building thermal conditioning and hot water systems, and high efficiency LED lighting fixtures and advanced lighting control systems and technologies. Residential appliances should be Energy Star rated and all electric.
7. **Renewable Energy Generation and Storage:** Buildings should be designed to maximize the potential for onsite renewable energy generation and include installed solar photo voltaic (PV) systems. Building roof tops and vehicular parking areas should designed to

maximize the solar PV system performance. Additionally, electric battery and thermal energy storage systems should be considered.

8. **Energy Efficiency Assistance and Incentives:** Fully utilize any available federal, state, and utility energy efficiency and renewable energy programs, funding, and assistance. Proposals should identify potential assistance and funding resources.
9. **Indoor Environmental Quality:** Provide high quality healthy indoor environments by utilizing strategies including: extended roof overhangs, proper ground surface drainage and non-paper gypsum board in moist areas to reduce mold risks; passive and active dedicated outdoor (fresh and filtered) air systems; active ventilation at moisture and no indoor combustion; building products and construction materials that are be free of VOC's, toxins, hazardous chemicals, pollutants and other contaminants; entryway walk-off mats and smooth floors that reduce the presence of asthma triggers, allergens and respiratory irritants; easily cleaned and maintained finishes; and green cleaning and maintenance practices.
10. **Materials Selection:** Include sustainably harvested and responsibly processed materials. Strategies should include low embodied carbon products made with recycled and reclaimed materials; materials and products from responsibly harvested and rapidly renewable sources; and locally sourced products and materials (within 500 miles).
11. **Innovation:** Utilize both "off-the-shelf" products and practices as well as innovative strategies and "cutting edge" products to increase the sustainability and performance of the building.

04

Submission Requirements

Proposals must include the Submission Requirements set forth in this section. These Submission Requirements must also be submitted in accordance with the instructions set forth in Section 01 of this RFP.

Development Submission

In addition to the required forms listed in the submission checklist, the following information shall be submitted in the written Proposal Summary. This is an opportunity for the Proponent to convey how the proposed property will be a highly-beneficial use of the Proposed Property Site that will be cost-effective, completed in a timely fashion, and provide options superior to those currently available to the community.

Omission of any of the required information may lead to a determination that the proposal is non-responsive. Please provide the following items as listed:

Introduction/Development Team. A letter of interest signed by the principal(s) of the Proponent. This letter should introduce the development team and organization structure, including the developer, attorney, architect, contractor, marketing agent/broker, management company, and any other consultants for the proposed development. For joint ventures, the Proponent shall provide a copy of the Partnership Agreement detailing the authority and participation of all parties. A chief contact person for each specialty must be listed. The proponent shall provide a listing/description of any lawsuits brought against the Proponent or any principals of the Proponents in courts

situated within the United States within the past five years should also be included.

Development Plan. A description that demonstrates that the Proponent understands the development plan to be performed. The Proponent must indicate and fully explain their plan for development and how it coincides with BPDA's stated scope for PLAN: Dudley Square and the project requirements. Additionally, the Proponent must provide a credible scheme for accomplishing its stated goals and/or objectives, a proposed time schedule to accomplish the tasks listed in the development timetable, a project scope and an articulation of the goals and objectives unique to the submitted proposal.

Operational Plan. A summary of the plan for the operation of the Proposed Development upon development completion. Include the anticipated annual costs, as well as the planned sources of funding.

Boston Residents Jobs Policy. Proposals must describe the planned approach to meeting the goals outlined in the Boston Residents Jobs Policy which can be accessed via the following link:

<https://www.boston.gov/departments/economic-development/boston-residents-jobs-policy-construction-projects>

Good Jobs Strategy Plan: Proponents must include a narrative explaining how their proposal supports the community's expressed priorities regarding the creation and sustainment of good permanent jobs in all phases of the development and in particular, end user jobs that will be located in the development. This includes engaging in fair hiring practices which will foster and encourage the participation of the people of Roxbury and the immediate neighborhood. The narrative should include the proponent's commitments towards achieving the seven (7) "Good Jobs Standards criteria" ("GJS") listed below. Proponents will be required to make their commitments public and these commitments will be evaluated and enforced on a long term basis after construction is complete. While the Boston Residents Jobs Policy is focused primarily on construction hiring, GJS are not only more expansive,

but focus more on the people employed at the Property after construction is complete.

If the proponent believes that it is not able to achieve any of the individual GJS listed below, this should be clearly indicated in the narrative and an alternative commitment should be crafted.

The seven (7) priority “good job standards” are:

1. At least 51% of the total employees working on the parcel shall be bona fide Boston Residents. Please note that the community has expressed a preference for developers to select tenants for retail spaces who are committed to hiring Roxbury residents specifically. Proponents are expected to work with community partners as an element of their employee recruitment.
2. At least 51% of the total employees working on the parcel shall be people of color.
3. At least 51% of the total employees working on the parcel shall be women.
4. All employees shall be paid a “**good wage**”, defined as a salary or hourly wage equal to or greater than the Boston Living Wage, which shall be defined as \$17.62 on January 1, 2019 and thereafter increasing annually by the rate of inflation.
5. At least 75% of all employees working on the Property, and at least 75% of all employees of each lessee, sub-lessee, or tenant working on the Property, shall be **full-time employees**. “Full time” shall mean at least 30 hours per week.
6. All employees shall work “**stable shifts**,” which include a predictable schedule that is appropriate for the particular field of work. Such a work schedule allows employees to reasonably schedule other family care, educational, and work obligations. A schedule that does not

include “on-call” time and has a set weekly pattern that does not change more than two times per year shall be presumed to be stable.

7. All full-time employees shall be offered benefits, defined as the opportunity to opt into a company sponsored health insurance plan with coverage that meets Massachusetts Minimum Creditable Coverage (“MCC”).

The BPDA does not believe these job standards are applicable to small businesses, defined as those with fewer than 15 employees and less than \$2.5 million in annual revenue. However, the BPDA expects all proponents to make their best-faith efforts to meet the GJS to the extent that is economically feasible. Therefore, if all commercial businesses proposed are intended to be small businesses of this size or smaller, the proponent should submit a good jobs narrative describing which of the GJS the proponent can commit to, which GJS the proponent will make a good faith effort to achieve, and which are not economically feasible.

The City of Boston plans to monitor businesses' performance. Monitoring will be performed by the Boston Employment Commission. The selected proponent will be responsible for providing requested data.

The most advantageous proposals will include a comprehensive and credible GJS strategy. This may include elements such as:

- an explanation of how the proponent’s vision for retail tenants meets the spirit of the GJS;
- the proponent’s strategy to recruit tenants demonstrating an ability to comply with the GJS;
- the plan for the development’s property management office to meet the GJS.

Diversity and Inclusion Plan. Proponents must include a narrative setting forth a plan (hereinafter, a “Diversity and Inclusion Plan”) for establishing and overseeing a minority outreach program aimed at creating increased

opportunities for people of color, women, and Commonwealth of Massachusetts-certified Minority and Women-Owned Business Enterprises (“M/WBEs”) to participate in the development of the Proposed Property Site. Proposals should reflect the extent to which the proponent plans to include meaningful participation by people of color, women, and M/WBEs in the following professional fields:

- Construction;
- Design;
- Development;
- Financing;
- Operations; and
- Ownership.

A Minority Business Enterprise or “MBE” is a firm that is owned, operated, and controlled by one or more individuals who are African American, Hispanic American, Native American, or Asian American who have at least 51% ownership of the firm.

A Woman Business Enterprise or “WBE” is a firm that is owned, operated, and controlled by one or more women who has or have at least 51% ownership of the firm.

Proposals will be considered and rated based on the comprehensiveness of the Proponent’s Diversity and Inclusion Plan for creating increased opportunities for people of color, women and M/WBEs to participate in the development of the Proposed Property Site, including specific strategies to achieve maximum participation by people of color, women, and M/WBEs in the fields of construction, design, development, financing, operations, and/or ownership. The Diversity and Inclusion Plan should be realistic and executable.

Developer Qualifications, Experience and References. A narrative supported by relevant data regarding qualifications and past experience with similar projects. Proponents must provide detailed descriptions of previous relevant work completed and the results or outcome of that work. Proponents shall also furnish three (3) current references including: names, addresses, e-mail addresses, phone numbers, and principal contacts in which the Proponent has provided comparable services.

Permits/Licenses. A list of relevant business permits/licenses including expiration dates.

Subcontractors or Partnerships. If applicable, explain the relationship(s) between the Proponent and any third-party developers, subcontractors, or community partners that might influence the Proponent's development plan.

Development without Displacement Plan. Proponents must include a narrative explaining how their proposal supports the community's goal of "development without displacement." Specifically, this narrative should address how the proposed development will assist the current residents of Roxbury to remain in their community in the future, afford housing, and find pathways to economic opportunity. At a minimum this narrative should include the affordable housing production goals of the project and articulate how the proposed rents meet the needs of Roxbury residents, as well as other local residents. This discussion should also identify how proposed sizes of units meet the needs of community members, taking into consideration that community members have suggested that larger unit sizes of two, three and four bedrooms are needed for local families, while smaller unit sizes may be appropriate for seniors.

The development team's track record for supporting projects and policies which promote development without displacement should also be included.

If applicable, the development team should include their experience preventing eviction of tenants when acquiring, developing and operating property. Proponents must disclose if the proposed development of the Proposed Property Site will result in the direct eviction of any current tenants living in property owned or acquired by the development team. (Note that

while the property being disposed of by the BPDA in this RFP is vacant, proponents including any abutting or nearby properties in their proposals should disclose if any direct evictions are contemplated on these properties).

Community members have expressed enthusiasm for innovative strategies that support community stability such as cooperative ownership, land trust participation, and rent-to-own strategies. The inclusion of these or similar elements and/or other innovative strategies to prevent displacement will increase the advantageousness of the proposal.

Community Benefits Plan. As described in the Development Objectives, proposals must include a narrative of the community benefits supported by the development, including any benefits to the local community that are above those generated by the development itself.

Additional Data. Any other relevant information the Proponent believes is essential to the evaluation of the proposal (i.e., aesthetic designs, environmental sustainability goals, property management plans, ideas for selection of subcontractors, methods of obtaining community engagement, etc.).

Development Concept:

1. Describe the proposed property uses and the total square footage of each use, along with a description of how the proposed uses and design will satisfy the Development Objectives and Development Guidelines of this RFP.
2. Describe how the proposed property will benefit the surrounding community.
3. Estimate the number of construction and permanent jobs that will be generated by the proposed property.
4. Provide an outline of all required regulatory approvals and a projected timeline to obtain these approvals. The proponent should note the

currently applicable zoning districts, overlays and provisions that govern development of the Proposed Property Site and discuss the type of zoning amendments or variances that are required for the proposed development, or indicate if the proposed development can be constructed “as-of-right” under existing zoning.

Design Submission

All drawings must be submitted in both hard copy and digital format (PDF or JPEG, at minimum 300 DPI). The design submission should include, but not be limited to, the following materials:

1. A written and graphic description explaining how the proposed design will meet the Development Objectives & Design Guidelines of this RFP and the PLAN: Dudley Square document (Appendix A). These descriptions must describe and illustrate all program elements and the organization of these spaces within the building.
2. A neighborhood plan (at appropriate scale, e.g. 1"=40') as well as a site plan (1" = 20') showing how the proposed design will fit within the immediate context of existing buildings and within the larger context of the Dudley Square neighborhood. The purpose of the neighborhood plan is to illustrate how the project meets the Urban Design Guidelines set forth in this RFP. Therefore, the proposed building(s), existing building footprints, lot lines, streets, street names and any other relevant contextual information should be included in the neighborhood plan. The purpose of the site plan is to illustrate the building footprint and its placement on the site, the general building organization, open space, landscape elements, driveways, curb cuts, fencing, walkways and streetscape improvements. The neighborhood plan and site plan should coordinate through the inclusion of renderings, perspective drawings and aerial views of the project.
3. Schematic floor plans (1/8" = 1'-0" scale) showing the basement, ground floor, upper floor(s), and roof, including room dimensions,

square footage of rooms, overall building dimensions, and the gross square footage of the building.

4. Building Elevations (1/8" = 1'-0" scale) showing all sides of the proposed building, architectural details, building height and notations of proposed materials.
5. Street elevations (at appropriate scale, e.g. 1/8"=1'-0") showing the relationships of the proposed building to the massing, building height and architectural style of adjacent buildings. This street context drawing may combine drawings with photographs in any manner that clearly depicts the relationship of the new building to existing buildings.
6. Perspective drawings drawn at eye-level and aerial views that show the project in the context of the surrounding area;
7. A description and illustration of the bicycle parking, automobile parking and transportation and circulation plan for the proposed development based on the Urban Design Guidelines set forth in this RFP.
8. A preliminary zoning analysis
9. A written and graphic Sustainability Narrative describing how the proposed project will satisfy the Resilient Development and Green Building Guidelines that includes:
 - a. The team's approach to integrated project design and delivery;
 - b. Preliminary energy modeling including a Carbon Neutral Building Assessment and describing strategies for achieving zero energy or zero carbon performance and targets;
 - c. Preliminary LEED Checklist and narrative describing key green building strategies;

- d. Preliminary Boston Climate Resiliency Checklist reflecting proposed outcomes and describing key resiliency strategies.

Financial Submission

The Financial Submission should include, but not be limited to the information listed below. Proponents must use the financial templates (Excel Workbooks) provided in Appendix C and here:

<https://bpda.box.com/s/dkvip4pi0x8l8elypkkbs4oameicidf>

with separate sources and uses for each project component (e.g. commercial, housing, parking, etc.) or phase, if applicable, as well as a combined budget for the entire project. The financial submission should be provided in both hard copy and flash drive form in Microsoft Excel. **The Financial Submission must be submitted in a separate, sealed envelope and include a formal price offer on the Price Proposal form attached as Appendix H.**

1. Formation Documents:

- a. Articles of Incorporation;
- b. Certificate of Status/Good Standing;
- c. Certificate of Incorporation;
- d. By-laws;
- e. Certificate of Organization(LLC1, or LLP1 in some states, if applicable);
- f. Borrowing Resolution;
- g. Operating/Partnership Agreement (if LLC or LLP); and
- h. Certificate of Registration as a Foreign Entity (if applicable).

2. Financial Documents:

- a. Financial Statements or Annual Reports for the three most recent fiscal years;
- b. Interim Financial Statements for Proponent (if applicable, most recent month ending within thirty days);
- c. Personal Financial Statement of principal owners of Proponent (upon request);
- d. Financial Statements of any tenants, lessees and occupants intended to occupy the premises (if applicable); and financing commitments or project specific letters of interest from recognized funding sources.

3. Financial Submission Workbook: Using the template provided in Appendix C, provide the following information:

a. Sheet C1: Development Program

b. **Sheet C2: Development Cost Pro Forma.** All costs identified must be supported by realistic funding sources and uses must equal sources.

c. **Sheet C3:** Stabilized Operating Pro Forma.

d. **Sheet C4:** Fifteen Year Operating Pro-Forma

4. One-Stop: If the sources of funds for the Proposed Project include City or State subsidies for affordable housing, the financial submission must include a One-Stop Application that can be downloaded from www.mhic.com (see tab "One Stop Center," then "Downloads," then "OneStop2000.") The One Stop should only include financial information for the affordable housing portion of the Proposed Project. Sources must equal uses. If applicable, land costs for privately owned parcels that would be included in the proposed development must be identified in the "Acquisition" line. At the time of application to BPDA, the applicant must have an accepted offer to purchase, an

executed purchase and sale agreement or a deed and the price must be supported by an as-is appraisal for that property.

- 5. Financial Narrative:** In addition to the pro forma spreadsheets, the Proposal must include a narrative which describes the following:
- a. An implementation plan for the proposed development, including a development schedule with key milestone dates and a projected occupancy date. The development schedule should outline the required regulatory approvals for the proposed development and the anticipated timing for obtaining such approvals;
 - b. All contingencies, specifying whether for hard costs, soft costs or total costs, design or construction, financing or other critical components of the total project costs;
 - c. Sources of debt and equity for the total project cost;
 - d. All assumptions regarding financing terms on acquisitions, pre-development, construction, and permanent loans;
 - e. Any other project related expense not included in the above categories; and
 - f. Calculation of total project costs.
- 6. Ground Lease Price Proposal:** Using Appendix H as described in Section 6, clearly outline the financial offer to the BPDA by indicating the amount of your offer per gross square foot of floor area and total annual ground lease offer. This form must be signed by the authorized principal.
- 7. Preliminary market study,** using empirical market data, that demonstrates the feasibility of the proposed sale and/or lease rates of the project.

8. Financing

- a. Developer Equity: The Proponent must demonstrate the availability of financial resources to fund working capital and equity requirements for the proposed project. Acceptable documentation includes current bank statements, brokerage statements, and/or audited financial statements; and
- b. Financing Commitments: Letters of interest and/or commitment from debt and equity sources for construction and permanent financing. Letters should include a term sheet that provides the Loan-To-Value ("LTV") and Debt Service Coverage ("DSC") requirements, fees, term, amortization, etc.

9. Good Standing:

- a. The proposal shall also certify that the proponent, its principals and affiliated stakeholders are all in good corporate and fiscal standing with the City of Boston and are current with respect to any and all taxes, charges and assessments levied by the City of Boston (i.e. real estate tax, excise tax, rents, fees, water and sewer charges, motor vehicle moving violations, etc.). The proponent and all affiliates must also document that they have no outstanding sanitary code violations documented by the Inspectional Services Department on properties owned by the proponent and no record of conviction for arson, as certified in the City of Boston and BPDA Disclosure Statement (Appendix E). Failure to correct such violations in a timely manner may cause the proponent's proposal to be deemed non-responsive and failure to meet any certification as requested in any of the Appendices attached herewith will cause a proposal to be deemed non-responsive.
- b. The proponent must not have any violations pending before any federal, state or local instrumentality as certified in the Certificate of Tax, Employment Security and Contract Compliance (Appendix F).

- c. The proponent must affirm that they are in compliance with applicable statutes governing conflict of interest as certified in the City of Boston and BPDA Disclosure Form (Appendix E).

Submission Checklist

- 1.** Submission Fee of \$100.00
- 2.** Development Submission
- 3.** Design Submission
- 4.** Financial Submission (Appendix C)
- 5.** Disclosure Statement Concerning Beneficial Interest (Appendix D)
- 6.** City of Boston and BPDA Disclosure Statement (Appendix E)
- 7.** Certificate of Tax, Employment Security, and Contract Compliance (Appendix F)
- 8.** HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility (Appendix G)
- 9.** Price Proposal Form (Appendix H)
- 10.** Submission Checklist (Appendix I)

(Items 5-8 on the Submission Checklist are referred to as the “Disclosures”)

05

Evaluation of Proposals

Description of Evaluation Process

Proposals must meet the Minimum Threshold Requirements as described below. Only proposals that satisfy the Minimum Threshold Requirements will be comparatively evaluated based on the Comparative Evaluation Criteria below. A ranking of Highly Advantageous, Advantageous or Not Advantageous will be decided for each criterion. The Selection Committee shall then assign a composite ranking for each proposal it evaluates based upon the Comparative Evaluation Criteria as described below.

To facilitate final evaluation of Comparative Evaluation Criteria, Proponents that meet the Minimum Threshold Requirements will be required to present their plans of development to the community and respond to questions and comments from the RSMPOC. The Selection Committee will then factor community input received at this presentation into the final overall rating.

Rule for Award

The most advantageous proposal from a responsive and responsible proponent, taking into consideration price and all comparative evaluation criteria set forth in this RFP, shall be recommended to the BPDA Board for Tentative Designation.

Minimum Threshold Requirements

All proposals must meet the following minimum threshold criteria:

1. Only proposals that are received by the date, time, and at the location indicated in Section 1 of this RFP will be accepted.

2. Proposals must include all documentation specified under Submission Requirements.
3. The proponent shall have the necessary finances in place to pursue this project.
4. The proponent must demonstrate that it has adequate insurance.
5. Proponents shall comply with the Conflict of Interest Law.

Comparative Evaluation Criteria

The BPDA will use the following Comparative Evaluation Criteria to compare the merits of all qualifying proposals. For each evaluation criterion set forth below, the BPDA's selection committee, in collaboration with DND, shall assign a rating of Highly Advantageous, Advantageous or Not Advantageous. The selection committee will then assign a composite rating of Highly Advantageous, Advantageous or Not Advantageous for each proposal it evaluates.

To facilitate evaluation of these criteria, the BPDA will take into account community input received as a result of developers' presentations with opportunity for public comment that will be scheduled by the BPDA as supported by the RSMPOC.

1. Development Concept

This Criterion is an evaluation of the Proponent's development plan relative to the Development Objectives set out in Section 03. Proposals that better fulfill the Development Objectives, parking preferences, and affordability requirements relative to other proposals will be considered to be more advantageous. Proposals that do not meet all of the objectives specified in the Development Objectives will be considered less advantageous. ***To facilitate its evaluation of this criterion, the selection committee will seek community input in the form of a developer's presentation with opportunity for public comment.***

Detailed, realistic proposals for development of the Property that are fully consistent with and which successfully address all of the Development Objectives and Development Guidelines, including delivering affordable housing options that are more deeply affordable than that of other proposals submitted, will be ranked as **Highly Advantageous**.

Realistic proposals for development of the Property that are consistent with the Development Objectives and Development Guidelines but do not completely or satisfactorily address all issues identified in them, and deliver affordable housing options that are comparable in affordability to those of other proposals submitted, will be ranked as **Advantageous**.

Proposals for development of the Property that are not consistent with the Development Objectives or Development Guidelines, and deliver affordable housing options that are less deeply affordable than other proposals submitted, will be ranked as **Not Advantageous**.

2. Design Concept

This Criterion is an evaluation of the proponent's development plan relative to the Urban Design Guidelines set out in Section 03. Proposals that better fulfill the Urban Design Guidelines relative to other proposals will be considered to be more advantageous. Proposals that do not meet the objectives specified in the Urban Design Guidelines will be considered less advantageous. ***To facilitate its evaluation of this criterion, the selection committee will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that are highly compatible with the Urban Design section of this RFP and fully address each subsection, provide more detail and meet more of the identified objectives than other proposals will be ranked as **Highly Advantageous**.

Proposals that are mostly compatible with the Urban Design section of this RFP and address each subsection), provide less detail and meet fewer of the identified objectives than other proposals will be ranked as **Advantageous**.

Proposals that are not compatible with the Urban Design section of this RFP and fully address each subsection provide little detail and meet fewer or none of the identified objectives than other proposals will be ranked as **Not Advantageous**.

3. Sustainable Development

This criterion is an evaluation of the extent to which the proponent addresses the Resilient Development and Green Building Design Guidelines as specified in section 03. Proposals that better fulfill these objectives relative to other proposals will be considered to be more advantageous. Proposals that do not fully address the Resilient Development and Green Building Design Guidelines will be considered less advantageous. ***To facilitate its evaluation of this Criterion, the selection committee will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that provide a detailed plan that addresses all subsections, exceeds LEED Gold certifiability, and exceeds the other requirements outlined in the Resilient Development and Green Building Design Guidelines, will be ranked as Highly Advantageous.

Proposals that address most subsections, provide a feasible plan for LEED Gold certifiability, and meet Resilient Development and Green Building Design Guidelines will be ranked as Advantageous.

Proposals that address few subsections, do not provide a plan for LEED Gold certifiability, and do not meet minimum Resilient Development and Green Building Design Guidelines will be ranked as Not Advantageous.

4. Development Team Experience

This Criterion is an evaluation of the Proponent's experience and capacity to undertake the proposed project. This will be evaluated based on the proponent's experience relative to that of other proponents. Newly formed development teams and or Joint venture partnerships will be evaluated based on their combined development experience. Development teams with the greatest experience, especially experience in the city of Boston, will be

considered to be more advantageous than development teams with less experience.

Proposals that provide the greatest detail in the required information regarding the development team's experience and capacity and demonstrate that the development team has successfully completed one or more similar projects to the one proposed that are located in the city of Boston in the last five years, will be ranked as **Highly Advantageous**.

Proposals that provide adequate detail in the requested information regarding the development team's experience and capacity and illustrate that, although the development team has not successfully completed any similar projects in the city of Boston, it has successfully completed one or more similar projects elsewhere, or can demonstrate transferable experience from another type of project, will be ranked as **Advantageous**.

Proposals that provide less detail in the requested information regarding the development team's experience and capacity and do not demonstrate that the development team has successfully completed a similar project to the one proposed, will be ranked as **Not Advantageous**.

5. Financial Capacity

This Criterion evaluates the relative strength of the proponent's financing plan relative to other proposals. Proposals that provide evidence of confirmed financing offers to generate sufficient capital to fund most or all of their development budget will be considered to be more advantageous. Proposals that do not provide evidence of confirmed financing sources or only partially confirmed financing will be considered less advantageous.

Proposals that provide a complete financial submission, along with financial commitments and/or letters of interest from lenders, funders and/or equity investors; documentation of liquid equity and/or evidence of fundraising or financing to fully satisfy the development budget as presented; and demonstrate experience in previously successfully financing a similar development will be ranked as **Highly Advantageous**.

Proposals that provide a mostly complete financial submission, along with financial commitments and/or letters of interest from lenders, funders and/or equity investors, documentation of liquid equity and/or evidence of financing to fully satisfy the development budget as presented; but do not specifically demonstrate previous experience in successfully financing a similar development will be ranked as **Advantageous**.

Proposals that do not provide a complete financial submission nor evidence of, or documentation for any financing, funding sources or equity to satisfy the development budget; or the documentation or evidence of financing is insufficient or outdated, will be ranked as **Not Advantageous**.

Proposals that offer less than the appraised value of the Property and do not justify the basis for the reduction will be ranked as **Not Advantageous**.

6. Development and Operating Cost Feasibility

This Criterion evaluates the relative strength and completeness of the proponent's development budget relative to other proposals. Proposals that most completely specify all anticipated costs and contingencies, are most reasonable in any subsidy assumptions, and are consistent with current industry standards will be ranked as more advantageous. Proposals that contain incomplete development budgets or costs that are inconsistent with industry standards, will be ranked as less advantageous.

Proposals with development and operating pro formas that include cost estimates that are appropriate for the proposed project and its ongoing operations, include reasonable subsidy assumptions if applying for subsidies, and are supported by documents such as estimates from recognized professionals or price quotes from licensed builders or contractors, will be ranked as **Highly Advantageous**.

Proposals with development and operating pro formas that include cost estimates that are appropriate for the proposed project and its ongoing operations, include reasonable subsidy assumptions if applying for subsidies, but do not provide supporting documentation for the most significant costs will be ranked as **Advantageous**.

Proposals that do not submit development and operating pro formas or include development and operating pro formas that lack in detail, or are not realistic or appropriate for the project and its ongoing operations, or include unreasonable subsidy assumptions if applying for subsidies will be ranked as **Not Advantageous**.

7. Diversity and Inclusion Plan

This is an evaluation of the relative strength of the proposal for achieving diversity and inclusion in the proposed project. Proposals will be considered and rated based on the comprehensiveness of the proponent's planned approach to achieving participation, including specific strategies to achieve maximum participation of MWBEs in non-traditional functions as defined in the Diversity and Inclusion Plan in the Minimum Submission Requirements. The planned approach should be realistic and executable. ***To facilitate its evaluation of this criterion, BPDA will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that provide a detailed and documented Diversity and Inclusion Plan that is superior to that of other proposals and is able to clearly demonstrate how it will attain its objectives, will be ranked **Highly Advantageous**.

Proposals that provide a reasonable and justifiable Diversity and Inclusion Plan for a project of the type proposed that is similar or equal to all other submitted proposals will be ranked **Advantageous**.

Proposals that do not provide a credible or detailed Diversity and Inclusion Plan for a project of the type proposed, and/or propose a Diversity and Inclusion Plan that is substantively inferior to all other submitted proposals will be ranked **Not Advantageous**.

8. Development Timetable

This Criterion evaluates the relative strength of the proponent's development timetable relative to that of other proponents. Proposals that are able to start construction in a timely manner and have a realistic construction schedule will be considered to be more advantageous. Proposals that are

unable to commence in a timely manner, or have unrealistic construction schedules will be considered to be less advantageous proposals.

Proposals that provide a detailed development timetable that is feasible, demonstrates an understanding of the development process, and provides clear indication that the project will be completed within a time frame that is efficient and reasonable for a project of its type, will be ranked as **Highly Advantageous**.

Proposals that provide a feasible development timetable, demonstrate a general understanding of the development process, but either lack detail and/or indicate that the project will be completed in a longer time period than other similar projects will be ranked as **Advantageous**.

Proposals that fail to provide a development timetable or propose a development timetable that is not timely or practical and/or demonstrates a lack of understanding of the development process will be ranked as **Not Advantageous**.

9. Good Jobs Standards for Full Time Employees

This criterion evaluates the relative strength of the proponent's employment strategy narrative to respond to the seven point "Good Jobs" standard as articulated in the Submission Requirements section of this RFP. Narratives that are more comprehensive, complete and are able to document a credible implementation plan, will be ranked more highly advantageously. ***To facilitate its evaluation of this Criterion, BPDA will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that provide a comprehensive, complete and documented GJS Plan narrative that is superior to that of other proposals and is able to clearly explain its strategy for how it will attain its objectives, will be ranked **Highly Advantageous**.

Proposals that provide a comprehensive, complete and documented Good Jobs Plan that is similar or equal to all other submitted proposals will be ranked **Advantageous**.

Proposals that do not provide a comprehensive, complete and documented Good Jobs Plan that is inferior to other submitted proposals will be ranked **Not Advantageous**.

10. Development Without Displacement

This is an evaluation of the relative strength of the proposal for achieving the objective of development without displacement as articulated by the community. Proposals will be considered and rated based on the comprehensiveness of the Proponent's planned approach to assisting the current residents of Roxbury to remain in their community in the future, afford housing, and find pathways to economic opportunity. **BPDA will seek community input in the form of developer(s)' presentation(s) with opportunity for public comment.**

Proposals that provide a comprehensive, highly reasonable, and achievable development without displacement strategy for a project of the type proposed that is clearly superior to that of all other proposals shall be ranked **Highly Advantageous**.

Proposals that provide a reasonable and justifiable development without displacement strategy for a project of the type proposed that is similar or equal to all other submitted proposals shall be ranked **Advantageous**.

Proposals that do not provide a credible or detailed development without displacement strategy for a project of the type proposed, and/or propose a development without displacement strategy that is substantively inferior to all other submitted proposals shall be ranked **Not Advantageous**.

11. Additional Community Benefits

This Criterion evaluates the proponent's relative ability to provide benefits to the local community that are above those generated by the development itself. Proposals that offer benefits that the community most desires will be

considered to be more advantageous. Proposals that offer less or no community benefits will be considered to be less advantageous. ***To facilitate its evaluation of this Criterion, the BPDA will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that describe and quantify specific benefits that will be provided to the community, aside from the development of the property, that are clearly superior to those provided by other proponents will be ranked as **Highly Advantageous**.

Proposals that describe and quantify specific benefits that will be provided to the community, aside from the development of the property, that are equal to those provided by other proponents will be ranked as **Advantageous**.

Proposals that do not sufficiently describe and / or quantify specific benefits to the community, aside from the development of the property, and/or provide benefits that are inferior to those provided by other proponents will be ranked as **Not Advantageous**.

06

Contract Terms and Conditions

Ground Lease Price Proposal

The selected proponent will enter into a 70 year ground lease with the BRA. The full and fair market value of the Property, as determined through a valuation done by a professional appraiser(s) licensed by the Commonwealth of Massachusetts, was determined to be \$2.25 per gross square foot per year. For the purpose of preparing a development and operating pro forma, proponents should use these amounts.

While the BPDA expects a ground lease price offer of at least \$2.25 per gross square foot of floor area per year, a lower price proposal will not be automatically rejected. A proponent offering less than \$2.25 per gross square foot of floor shall provide with their price proposal a compelling and quantifiable narrative as to the merits and strengths of their proposal while also setting forth the reasons as to why the proposal cannot meet the \$2.25 per gross square foot of floor area price threshold.

Proponent Designation and Conveyance

After the evaluation process is complete, BPDA staff will recommend that the BPDA Board approve tentative designation to the proponent submitting the most advantageous proposal. The designated proponent must meet the terms and conditions for final designation within 270 days or the tentative designation will be rescinded without prejudice and without further action by the BPDA Board.

Upon a satisfactory review of all proposals submitted to the BPDA pursuant to this RFP, as well as the completion of any subsequent applicable reviews

resulting therefrom and relating thereto, BPDA staff will request Board approval to award a single proponent Tentative Designation status. The Tentative Designation status shall be for a nine-month period. Pending sufficient progress during the Tentative Designation period, BPDA staff will then request that the BPDA Board award Final Designation status to the selected proponent, prior to the expiration of the Tentative Designation period. During the Tentative Designation period, the selected proponent shall accomplish, among other things, the following in order to be considered for Final Designation status:

- Provide evidence of necessary financing and equity;
- approval of its development schedule including submittal of development plans;
- BPDA Design Review;
- Article 37 Initial Filing Compliance;
- Completion of the Article 80 process with the BPDA;
- Issuance of all required building permits; and
- Negotiated terms and conditions of a ground lease.

Final designation will be granted upon satisfactorily completing all required terms and conditions. The proposal will be subject to subsequent stages of BPDA development and design review, including Article 80 if required. The final designation will be automatically rescinded without prejudice and without any further authorization or approvals by the BPDA's Board, if the Property has not been conveyed by a designated time frame established by the BPDA Board.

Additional Terms and Conditions

Boston Resident Jobs Policy. Construction on this project must comply with the Boston Residents Jobs Policy. Compliance review includes an assessment of whether the project is meeting the following employment standards:

- At least 51 percent of the total work hours of journey people and fifty-one percent of the total work hours of apprentices in each trade must go to Boston residents;

- at least 40 percent of the total work hours of journey people and forty percent of the total work hours of apprentices in each trade must go to people of color, and
- at least 12 percent of the total work hours of journey people and twelve percent of the total work hours of apprentices in each trade must go to women.

For more information on how to achieve compliance with the Boston Residents Jobs Policy, please see City of Boston Code, Ordinances, Section 8-9, and Appendix A.

Development Costs. The preparation and submission of all proposals by any person, group or organization is at the sole expense of such person, group or organization. Proponents shall be responsible for any and all costs incurred in connection with the planning and development of the Property. The BPDA and the City of Boston shall not be liable for any such costs nor shall the BPDA or the City of Boston be required to reimburse the applicants for such costs.

Site improvements. All site improvements, including sidewalks, street lights and street trees, shall be paid for by the selected proponent, and the estimated costs for such improvements must be documented in the development pro forma. The selected proponent will pay for the cost of any utility relocation not paid by a utility company. The selected proponent will assume any and all liability for any environmental clean-up pursuant to Chapter 21E of the Massachusetts General Laws. The selected proponent may be responsible for having the Property surveyed, with plans that are suitable for recording, at the expense of the proponent.

Policies and Regulations. Development of the Property shall comply with the City of Boston's zoning and building regulations, procedures and any other applicable City and/or State code(s). The project will be assessed and taxed by the City of Boston pursuant to M.G.L. Chapter 59.

Signage During Construction. During construction at the Property, the selected proponent shall provide and display, at their expense, appropriate signage as required by the BPDA. Such signage must be approved by the BPDA prior to installation. The selected proponent should also provide signage that describes the project, including the number of affordable units, if applicable.

In addition, the selected proponent agrees to use a construction wrap for the Property approved by BPDA design staff in its reasonable discretion. The selected proponent shall be responsible for any and all costs associated with designing, printing and installing the construction wrap.

Compliance with City of Boston Eviction Prevention Efforts. Data collected from Boston Housing Court in 2015 indicates that at least 67% of evicted tenants were evicted from subsidized units. Because tenants that are evicted are often unable to secure alternate housing and also may be disqualified from future affordable housing opportunities, the City of Boston and BPDA are implementing eviction prevention strategies. Selected proponents developing affordable housing financed with public resources will be required to submit data on the number of evictions and terminated tenancies that exist in their portfolio of property during the previous twelve month period. They may also be asked to submit an eviction prevention plan. If the information received from selected proponents receiving City of Boston funding indicates a significant presence of evictions or terminated tenancies, the award of these funds may be suspended.

Appendix A

Information Resources

Roxbury Strategic Master Plan: <http://www.bostonplans.org/planning/planning-initiatives/roxbury-strategic-master-plan>

Dudley Square Vision: <http://www.bostonplans.org/planning/planning-initiatives/dudley-square-vision>

PLAN: Dudley Square: <http://www.bostonplans.org/planning/planning-initiatives/plan-dudley-square>

Roxbury Cultural District: <https://www.boston.gov/departments/arts-and-culture/cultural-districts/roxbury-cultural-district>

Zoning Map: 6A/6B Roxbury North

<http://www.bostonplans.org/getattachment/2509d570-54a9-4450-8a1e-9300e6650d52/>

BPDA Development Review Information, including Article 80 and Article 37 (Green Building): <http://www.bostonplans.org/projects/development-review>

Boston Residents Jobs Policy: <https://www.boston.gov/departments/economic-development/boston-residents-jobs-policy-construction-projects>

Appendix B

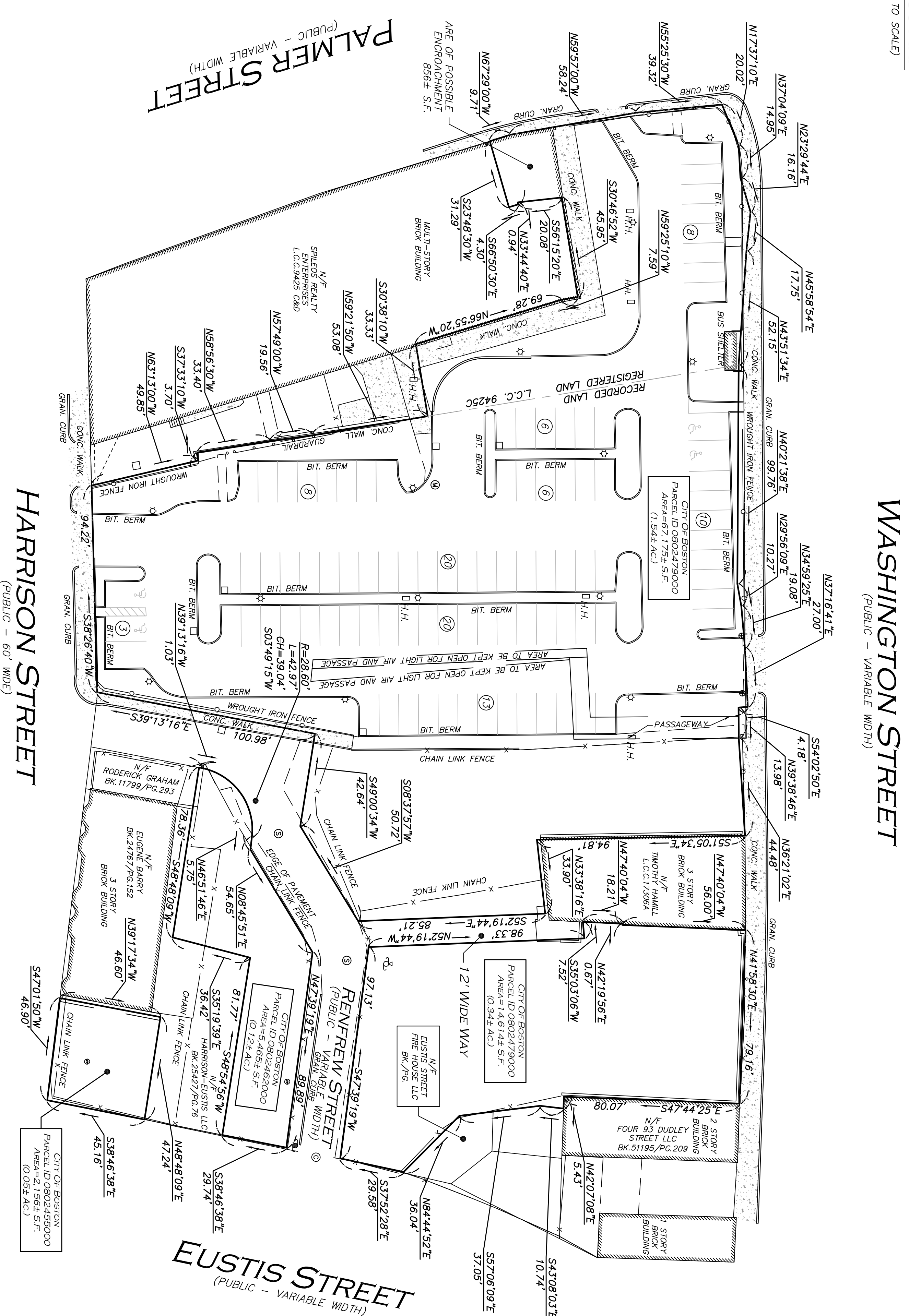


LOCUS MAP
(NOT TO SCALE)

- LOCUS REFERENCES**
- CITY OF BOSTON PARCEL NO. 0802472000, 0802475000, 0802479000 & 0802455000
 - DEED BOOK 9020, PAGE 373
 - DEED BOOK 9020, PAGE 373
 - DEED BOOK 10112, PAGE 248
 - DEED BOOK 10112, PAGE 248
 - DEED BOOK 12155, PAGE 33
 - DEED BOOK 12683, PAGE 314

- PLAN REFERENCES**
- CITY OF BOSTON ENGINEERING PLAN L-971
 - CITY OF BOSTON ENGINEERING PLAN L-987
 - CITY OF BOSTON ENGINEERING PLAN L-989
 - CITY OF BOSTON ENGINEERING PLAN L-1075
 - CITY OF BOSTON ENGINEERING PLAN L-1853
 - CITY OF BOSTON ENGINEERING PLAN L-11344
 - PLAN IN BOOK 4443, PAGE 50
 - PLAN IN BOOK 4555, PAGE 141
 - PLAN IN BOOK 5830, PAGE 398
 - PLAN IN BOOK 5893, PAGE 142
 - PLAN IN BOOK 6751, PAGE 472
 - L.C.C. 9425C&D
 - L.C.C. 17306A

- CITY OF BOSTON FIELD BOOK REFERENCES**
- BOOK 163, PAGES 74-77
 - BOOK 176, PAGES 146-147
 - BOOK 279, PAGES 112-113
 - BOOK 335, PAGE 3
 - BOOK 484, PAGES 130-131
 - BOOK 481, PAGE 21
 - BOOK 703, PAGE 21
 - BOOK 835, PAGES 52-53
 - BOOK 840, PAGES 138-19
 - BOOK 849, PAGE 156

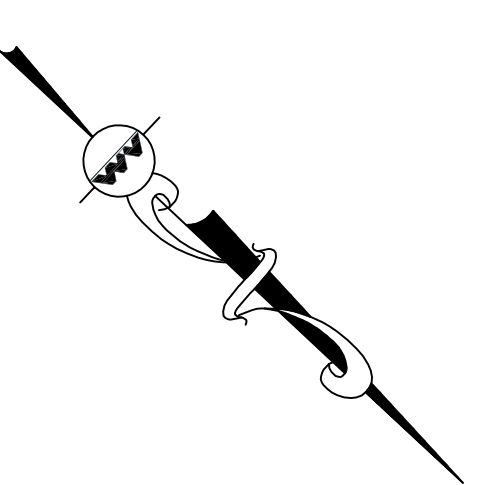


WASHINGTON STREET
(PUBLIC - VARIABLE WIDTH)

HARRISON STREET
(PUBLIC - 60' WIDE)

PALMER STREET
(PUBLIC - VARIABLE WIDTH)

EUSTIS STREET
(PUBLIC - VARIABLE WIDTH)



FOR REGISTRY USE ONLY

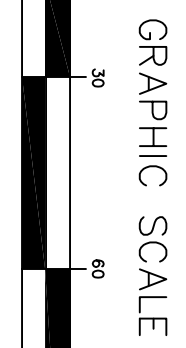
PARKING SUMMARY

STANDARD STALLS	90
HANDICAPPED STALLS	4
TOTAL STALLS	94

LEGEND

⊙	CABLE MANHOLE (CMH)
⊗	SEWER MANHOLE (SMH)
⊕	MISC. MANHOLE (MMH)
□	CATCH BASIN (CB)
☉	LIGHT
☼	HAND HOLE
☽	UTILITY POLE
☿	UTILITY POLE W/ RISER
♁	UTILITY POLE W/ LIGHT
♂	HAND HOLE
♆	MONITOR WELL
⊗	HANDICAPPED PARKING SPACE
⊕	PARKING SPACE COUNT
▭	CONCRETE
▨	BUILDING OVERHANG
▧	BUILDING
▩	PROPERTY LINE
▫	EASEMENT LINE
▬	EDGE OF PAVEMENT
⋯	EDGE OF GRAVEL
⊗	CHAIN LINK FENCE
⊕	WROUGHT IRON FENCE
⊖	BITUMINOUS
—	CONCRETE
- - -	GRANITE
⋯	NOW OR FORMERLY
⋯	BOOK PAGE

- NOTES**
- NORTH ARROW IS BASED ON MASSACHUSETTS GRID COORDINATE SYSTEM (MAINLAND ZONE) (NAD 83)
 - BOOK/PAGE AND PLAN REFERENCES ARE TAKEN FROM SUFFOLK COUNTY REGISTRY OF DEEDS IN BOSTON, MA.



N:\PROJECTS\0894-04(4)P\SURVEY DRAWINGS\CURRENT\3-894-04-PLDWG

ISSUED FOR REVIEW
MAY 14, 2019

PROFESSIONAL LAND SURVEYOR FOR ALLEN & MAJOR ASSOCIATES, INC.

THIS PLAN IS THE RESULT OF AN ACTUAL ON THE GROUND SURVEY CONDUCTED ON MAY 1, 2019 BETWEEN APRIL 24 AND MAY 1, 2019. THIS PLAN WAS PREPARED IN ACCORDANCE WITH THE RULES AND REGULATIONS OF THE REGISTRY OF DEEDS DATED JANUARY 1, 1976 AND REVISED JANUARY 12, 1988. THE CITY OF BOSTON HAS NOT ADOPTED THE SUBDIVISION CONTROL LAW. IS INTENDED TO BE A RECORDING OF DEEDS REQUIRED FOR THE REGISTRY OF DEEDS. OWNERSHIP ADJOINING PROPERTIES ARE SHOWN ACCORDING TO CURRENT CITY OF BOSTON ASSESSOR'S INFORMATION. THE ABOVE IS CERTIFIED TO THE BEST OF MY PROFESSIONAL KNOWLEDGE, INFORMATION AND BELIEF.

ALLEN & MAJOR ASSOCIATES, INC.

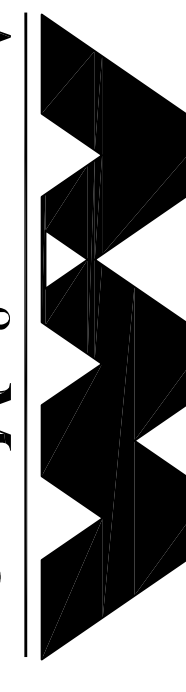
REV	DATE	DESCRIPTION

APPLICATION OWNER:
BOSTON PLANNING & DEVELOPMENT AGENCY
22 DROVACK AVENUE
BOSTON, MA 02210

PROJECT:
PALMER STREET AND WASHINGTON STREET PARCELS
BOSTON, MA

PROJECT NO. 88404 DATE: 5/29/19
SCALE: 1" = 30' DWG. NAME: S088405-PL
DRAWN BY: AIR CHECKED BY: NIL
REVIEWED BY:

ALLEN & MAJOR ASSOCIATES, INC.
civil & structural engineering • land surveying
environmental consulting • landscape architecture
100 COMMERCIAL WAY
WOBURN MA 01801-8501
TEL: (781) 935-6889
FAX: (781) 935-8886



WOBURN, MA • LANSHIRE, MA • MANCHESTER, NH

THIS DRAWING HAS BEEN PREPARED IN ELECTRONIC FORMAT. DATA REPRESENTATIVE ON CONSULTANT WORK SHEETS OR REVISIONS REPRESENTATIVE ON CONSULTANT WORK SHEETS FOR HIGH-LEVEL INFORMATION AND USE FOR SPECIFIC APPLICATION TO THIS PROJECT. DUE TO THE POTENTIAL THAT THE MAGNETIC INFORMATION MAY BE MODIFIED INTERNATIONALLY, INDICATION OF THE DOCUMENT'S AUTHORSHIP ON THE MAGNETIC MEDIA, PRINTED REPRESENTATIONS OF THE DRAWINGS AND SPECIFICATIONS ISSUED SHALL BE THE ONLY RECORD CORNERS OF ALL EN & MAJOR ASSOCIATES, INC.'S WORK PRODUCT.

DRAWING TITLE: **PLAN OF LAND** SHEET No. **1**

Appendix C

Blair Lot Financial Submissions
 Development Program Summary

Proponent Name: *Insert Development Sponsor Name*

Program Component	GSF	RSF or Spaces	Floor Location/Description
Residential Space - Rental	0	0	
Residential Space - Homeownership	0	0	
Retail Space	0	0	
Commercial Space	0	0	
Other Space ⁽²⁾ (specify type in description)	0	0	
Parking	0	0	
Total SF	0	0	

Rental Housing Detail	SRO	0 BR	1 BR	2 BR	3 BR	4 BR	Totals
Section 8							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
30% of AMI							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
50% of AMI							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
60% of AMI							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
80% of AMI (Federal Limits)							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
70% Rents - IDP							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
80% Rents - Non Federal							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
100% Rents - Non Federal							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
110% Rents - Non Federal							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
Market (Unrestricted)							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
Total Units							0

Homeownership Detail	SRO	0 BR	1 BR	2 BR	3 BR	4 BR	Totals
Up to <80% AMI							
Sales Price	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
Up to <100% AMI							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
Market (Unrestricted)							
Rent	0	0	0	0	0	0	0
Units	0	0	0	0	0	0	0
Total Units							0

Blair Lot Financial Submissions
 Development Cost Pro Forma

Proponent Name: Insert Development Sponsor Name

	Rental Housing - Market	Rental Housing - Affordable	Homeownership - Market	Homeownership - Affordable	Commercial	Retail	Parking	Other	Total
Uses of Funds									
Land Cost									
Land Closing Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Hard Cost									
Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Site Work	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Public Realm - Onsite	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Public Realm - Offsite	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Hard Cost Escalation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Hard Cost Contingency	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Tenant Improvements	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Hard Cost	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<i>Per GSF</i>	#DIV/0!				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	
Soft Cost									
Architecture & Engineering	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Administrative	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Legal/Audit	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Permits/Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Marketing/Advertising	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Leasing Commissions	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
RE Taxes	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Insurance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Brokerage, legal, and other conveyance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Developer Fee*	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Developer Overhead*	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Soft Cost Contingency	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Soft Cost	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<i>% of Hard Costs</i>	#DIV/0!				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Finance Cost										
Construction Interest	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Debt Placement/Closing Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Equity Placement/Closing Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Development Cost (TDC)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

ie BPDA Ground Rent

Sources of Funds										
Construction Financing										
Construction Loan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Developer Equity	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Deferred Developer Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LIHTC Equity (4% or 9%)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
State Tax Credit Equity	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DHCD - HOME or HSF	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DHCD - HIF or CIPF or Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
AHT Funds	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DND - HOME - CDBG	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DND - IDO - HB 2030	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
NHT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Permanent Financing										
Condo Sales Revenue	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Permanent Loan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Deferred Developer Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

LIHTC Equity (4% or 9%)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
State Tax Credit Equity	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DHCD - HOME or HSF	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DHCD - HIF or CIPF or Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
AHT Funds	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DND - HOME - CDBG	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DND - IDO - HB 2030	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
NHT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Notes:

* If the proponent plans on applying for DND subsidy funds, the proposed developer fee and developer overhead must comply with DND requirements.

Blair Lot Financial Submissions

Stabilized Operating Pro Forma (All Inputs in 2020 Dollars)

Proponent Name: Insert Development Sponsor Name

	Rental Housing - Market	Rental Housing - Affordable	Commercial	Retail	Parking	Other	Annual Total
Revenue							
Gross Lease Income	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Vacancy Rate	0%	0%	0%	0%	0%	0%	
Vacancy	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Effective Gross Income	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Revenue	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Effective Gross Income (EGI)							\$0
Expenses							
Ground Lease Payment	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0
RE Taxes	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Insurance	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Op Ex	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Management Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Administrative Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Annual Reserves							\$0
Total Operating Expenses							\$0
Stabilized Net Operating Income							\$0

Blair Lot Financial Submissions
 10-Year Cash Flow Forecast
 From Lease Execution through Year 15
 Proponent Name: Insert Development Sponsor Name

Lease Year/Fiscal Year	Annual Escalation	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
		Dec-20	Dec-21	Dec-22	Dec-23	Dec-24	Dec-25	Dec-26	Dec-27	Dec-28	Dec-29	Dec-30	Dec-31	Dec-32	Dec-33	Dec-34
Rental Revenue																
Gross Lease Income - Residential	0.00%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Gross Lease Income - Commercial	0.00%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Gross Lease Income - Retail	0.00%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Gross Lease Income - Parking	0.00%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Vacancy	0.00%	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Revenue		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Revenue		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Effective Gross Income		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Expenses																
Ground Lease Payment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Maintenance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
RE Taxes		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Insurance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Utilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Op Ex		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Management Fee		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Administrative Expenses		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Expenses		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Annual Reserves		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Operating Expenses		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Net Operating Income		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Debt Service																
1st Mortgage		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Debt Service		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Debt Service Coverage Ratio	NOI/DS	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Equity CF																
Developer		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Investor		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Equity CF		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Notes:

Appendix D

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

APPENDIX D: INSTRUCTION SHEET

NOTE: The Division of Capital Asset Management and Maintenance (DCAMM) shall have no responsibility for insuring that the Disclosure Statement has been properly completed as required by law. Acceptance by DCAMM of a Disclosure Statement for filing does not constitute DCAMM's approval of this Disclosure Statement or the information contained therein. Please carefully read M.G.L. c. 7C, s. 38 which is reprinted in Section 8 of this Disclosure Statement.

Section (1): Identify the real property, including its street address, and city or town. If there is no street address then identify the property in some other manner such as the nearest cross street and its tax assessors' parcel number.

Section (2): Identify the type of transaction to which this Disclosure Statement pertains --such as a sale, purchase, lease, etc.

Section (3): Insert the exact legal name of the Public Agency participating in this Transaction with the Disclosing Party. The Public Agency may be a Department of the Commonwealth of Massachusetts, or some other public entity. Please do not abbreviate.

Section (4): Insert the exact legal name of the Disclosing Party. Indicate whether the Disclosing Party is an individual, tenants in common, tenants by the entirety, corporation, general partnership, limited partnership, LLC, or other entity. If the Disclosing Party is the trustees of a trust then identify the trustees by name, indicate that they are trustees, and add the name of the trust.

Section (5): Indicate the role of the Disclosing Party in the transaction by checking one of the blanks. If the Disclosing Party's role in the transaction is not covered by one of the listed roles then describe the role in words.

Section (6): List the names and addresses of **every** legal entity and **every** natural person that has or will have a **direct or indirect** beneficial interest in the real property. The only exceptions are those stated in the first paragraph of the statute that is reprinted in Section 8 of this Disclosure Statement. If the Disclosing Party is another public entity such as a city or town, insert "inhabitants of the (name of public entity)." If the Disclosing Party is a non-profit with no individual persons having any beneficial interest then indicate the purpose or type of the non-profit entity. If additional space is needed, please attach a separate sheet and incorporate it by reference into Section 6.

Section (7): Write "none" in the blank if none of the persons mentioned in Section 6 is employed by DCAMM. Otherwise list any parties disclosed in Section 6 that are employees of DCAMM.

Section (8): The individual signing this statement on behalf of the Disclosing Party acknowledges that he/she has read the included provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts.

Section (9): Make sure that this Disclosure Statement is signed by the correct person. If the Disclosing Party is a corporation, please make sure that this Disclosure Statement is signed by a duly authorized officer of the corporation as required by the statute reprinted in Section 8 of this Disclosure Statement.

This completed and signed Disclosure Statement should be mailed or otherwise delivered to:

Deputy Commissioner for Real Estate
Division of Capital Asset Management and Maintenance
One Ashburton Place, 15th Floor, Boston, MA 02108

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

- (1) REAL PROPERTY:

- (2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT:

- (3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:

- (4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):

- (5) ROLE OF DISCLOSING PARTY (Check appropriate role):

_____ Lessor/Landlord

_____ Lessee/Tenant

_____ Seller/Grantor

_____ Buyer/Grantee

_____ Other (Please describe): _____

- (6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

NAME

RESIDENCE

- (7) None of the above- named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (insert "none" if none):

- (8) The individual signing this statement on behalf of the above-named party acknowledges that he/she has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been

**DISCLOSURE STATEMENT FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arms length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.

The commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.

(9) This Disclosure Statement is hereby signed under penalties of perjury.

PRINT NAME OF DISCLOSING PARTY (from Section 4, above)

AUTHORIZED SIGNATURE of DISCLOSING PARTY

DATE (MM / DD / YYYY)

PRINT NAME & TITLE of AUTHORIZED SIGNER

Appendix E

APPENDIX E

BOSTON PLANNING & DEVELOPMENT AGENCY and CITY OF BOSTON DISCLOSURE STATEMENT

Any person submitting a development proposal to the City of Boston and/or Boston Redevelopment Authority (“BRA”) must truthfully complete this statement and submit it prior to being designated for any project. (please attach extra sheets if necessary).

1. Do any of the principals owe the City of Boston and/or BRA any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?
2. Are any of the principals employed by the City of Boston and/or BRA? If yes, in what capacity? (Please include name of agency or department and position held in that agency or department).
3. Do any of the principals own any real estate in Boston? If yes, where and what type of property?
4. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?
5. Have any of the principals ever been convicted of any arson related crimes or currently under indictment for any such crimes?
6. Have any of the principals been cited for violating any law, code or ordinance regarding conditions of human habitation within the last three (3) years?

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

SIGNED under the penalty of perjury.

Date: _____

Signature: _____ Signature: _____

Address: _____ Address: _____

Appendix F

CERTIFICATE OF TAX AND EMPLOYMENT SECURITY COMPLIANCE

Pursuant to Massachusetts General Laws, Chapter 62C, §49A¹, and Chapter 151 A, §9A(b)2,

I, _____
(Name)

(Title) (Name of Bidder)

Whose principal place of business is located at _____

_____ do hereby certify that:

- A. The above-named Bidder has made all required filings of state taxes, has paid all state taxes required under law, and has no outstanding obligation to the Commonwealth’s Department of Revenue.
- B. The above-named Bidder / Employer has complied with all laws of the Commonwealth relating to contributions and payments in lieu of contributions.

Signed under the penalties of perjury this _____ day of _____ 20_____

(Name)

Federal Identification Number _____

By: _____

Title: _____

¹ No contract or other agreement for the purpose of providing goods, services or real estate to any... agencies (of the Commonwealth) shall be entered into, renewed or extended with any person unless such person certifies in writing under penalties of perjury, that he has complied with all laws of the Commonwealth relating to taxes.

No contract or other agreement for the purpose of providing... physical space to any agency or instrumentality of the Commonwealth shall be entered into, renewed or extended with any employer unless such employer certifies in writing under penalties of perjury, that said employer has complied with all laws of the Commonwealth relating to contributions and payments in lieu of contributions.

Appendix G

APPENDIX G

HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility

U.S DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE

(If space on this form is inadequate for any requested information, it should be furnished on an attached page, which is referred to under the appropriate numbered item on the form.)

A. Developer and Land

1. Name and address of developer:

2. The land on which the developer proposes to enter into a contract for, or understanding with respect to the purchase or lease of land from:

BOSTON REDEVELOPMENT AUTHORITY

(Name of Local Public Agency)

In:

(Name of Urban Renewal Area)

in the City of Boston, State of Massachusetts, is described as follows:

3. If the developer is not an individual doing business under his own name, the developer has the status indicated below and is organized or operating under the laws of:

- A corporation.
- A nonprofit or charitable institution or corporation.
- A partnership known as
- A business association or joint venture known as
- A federal, State or Local Government or instrumentality thereof.
- Other (explain)

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE *(continued)*

4. If the developer is not an individual or a government agency or instrumentality, give date of organization:

5. Names, addresses, title of position (if any), and nature and extent of the interest of the officers and principal member shareholders and investors of the developers, other than a government agency or instrumentality, are set forth as follows:
 - a. If the developer is a corporation, the officers, directors or trustees, and each stockholder owning more than 10% of any class of stock.
 - b. If the developer is a nonprofit or charitable institution or corporation, the members who constitute the board of trustees or board of directors or similar governing body.
 - c. If the developer is a partnership, each partner, whether a general or limited partner, and either the percent of interest or a description of the character and extent of interest.
 - d. If the developer is a business association or a joint venture, each participant and either the percent of interest or a description of the character and extent of interest.
 - e. If the developer is some other entity, the officers, the members of the governing body, and each person having an interest of more than 10%.

NAME AND ADDRESS

POSITION, TITLE (if any) AND PERCENT OF INTEREST OR
DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

6. Name, address and nature and extent of interest of each person or entity (not named in response to item 5) who has a beneficial interest in any of the shareholders or investors named in response to item 5 which gives such person or entity more than a computed 10% interest in the developer (for example, more than 20% of the stock in a corporation which holds 50% of the stock of the developer; or more than 50% of the stock in a corporation which hold 20% of the stock of the developer):

NAME AND ADDRESS

DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE (continued)

7. Names (if not given above) of officers and directors or trustees of any corporation or firm listed under item 5 or item 6 above:

B. RESIDENTIAL REDEVELOPMENT OR REHABILITATION

(The developer is to furnish the following information, but only if land is to be redeveloped or rehabilitated in whole or in part for residential purposes.)

1. State the developer's estimates, exclusive of payment for the land, for:

- a. Total cost of any residential development..... \$
- b. Cost per dwelling unit of any residential development..... \$

2. a. State the developer's estimate of the average monthly rental (if to be rented) or average sale price (if to be sold) for each type and size of dwelling unit involved in such development:

<u>TYPE AND SIZE OF DWELLING UNIT</u>	<u>ESTIMATED AVERAGE MONTHLY RENTAL</u>	<u>ESTIMATED AVERAGE SALE PRICE</u>
	\$	\$

b. State the utilities and parking facilities, if any, included in the foregoing estimates of rentals:

c. State equipment, such as refrigerators, washing machines, air conditioners, if any, include in the foregoing estimates of sale prices:

U.S DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE (continued)

CERTIFICATION

I (we)¹ _____ certify that this Developer's Statement for Public Disclosure is true and correct to the best of my (our) knowledge and belief.

Dated: _____

Dated: _____

Signature

Signature

Title

Title

Address

Address

¹ If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY

1. Name and address of developer:

2. Is the developer a subsidiary of or affiliated with any other corporation or corporations or any other firm or firms?

YES_____ NO_____

If Yes, list such corporation or firm by name and address. Specify its relationship to the developer, and identify the officers and directors or trustees common to the developer such other corporation or firm.

3. a. The financial condition of the developer as of _____, 20__ is as reflected in the attached financial statement.

NOTE: Attach to this statement a certified financial statement (of the corporation; for each partner in a partnership; or for the individual) showing the assets and the liabilities, including contingent liabilities, fully itemized in accordance with accepted accounting standards and based on a proper audit. (Financial statements for individuals do not need to be audited but they must be dated and signed by the applicant.) If the date of the certified financial statement precedes the date of this submission by more than six months, also attached an interim balance sheet not more than 60 days old.

b. Name and address of auditor or public accountant who performed the audit on which said financial statement is based:

4. If funds for the development of the land are to be obtained from the sources other than the developer's own funds, a statement of the developer's plan for financing the acquisition and development of the land:

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

5. Sources and amount of cash available to developer to meet equity requirements of the proposed undertaking:

a. In banks:

NAME AND ADDRESS OF BANK

AMOUNT

\$

b. By loans from affiliated or associated corporations or firms:

NAME AND ADDRESS OF SOURCE

AMOUNT

\$

c. By sale of readily salable assets:

DESCRIPTION

MARKET VALUE

MORTGAGES OR LIENS

\$

6. Names and addresses of bank references:

7. a. Has the developer or (if any) the parent corporation or any subsidiary or affiliated corporation of the developer or said parent corporation, or any of the developer's officers or principal members shareholders or investors, or other interested parties (as listed in the response to item 5, 6, and 7 of the Developer's Statement for Public Disclosure and referred to herein as "principals of the developer") been adjudged bankrupt, either voluntary or involuntary, within the past 10 years?

YES _____ NO _____

If Yes, give date, place and under what name.

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

- b. Has the developer or anyone referred to above as "principals of the developer" been indicted for or convicted of any felony within the past 10 years?
YES_____ NO_____

If Yes, give for each case (1) date, (2) charge, (3) place, (4) court and (5) action taken. Attach any explanation deemed necessary.

8. a. Undertakings, comparable to the proposed development work which have been completed by the developer or any of the principals of the developer, including identification and brief description of each project and date of completion:

<u>PROPERTY NAME AND ADDRESS</u>	<u>DESCRIPTION</u>	<u>DATE COMPLETED</u>
----------------------------------	--------------------	-----------------------

- b. If the developer or any of the principals of developer has ever been an employee, in such supervisory capacity, for construction contractor or builder on undertaking comparable to the proposed redevelopment work, name of such employee, name and address of employer, title of position, and brief description of work.

9. Other federally aided urban renewal projects under Title I of the Housing Act of 1949, as amended, in which the developer or any of the principals of the developer is or has been the developer, or stockholder, officer, director or trustee or partner of such a developer:

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

10. If the developer or parent corporation, a subsidiary and affiliate or a principal of the developer is to participate in the development of the land as a construction contractor or builder:

a. Name and address of such contractor or builder:

b. Has such contractor or builder within the last 10 years ever failed to qualify as a responsible bidder, refused to enter into a contract after an award has been made, or failed to complete a construction or development contract?

YES _____ NO _____

If Yes explain:

c. Total amount of construction or development work performed by such contractor or builder during the last three years: \$_____

General description of such work:

d. Construction contracts or developments now being performed by such contractor or builder:

<u>IDENTIFICATION OF CONTRACT OR DEVELOPMENT</u>	<u>LOCATION</u>	<u>AMOUNT</u>	<u>DATE TO BE COMPLETED</u>
		\$	

e. Outstanding construction-construction bids of such contractor or builder:

<u>AWARDING AGENCY</u>	<u>AMOUNT</u>	<u>DATE OPENED</u>
	\$	

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

CERTIFICATION

I (we)¹ _____ certify that this Developer's Statement of Qualifications and Financial Responsibility and the attached evidence of the developer's qualifications and financial responsibility, including financial statement are true and correct to the best of my (our) knowledge and belief.

Dated: _____

Dated: _____

Signature

Signature

Title

Title

Address

Address

¹ If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

Appendix H

Price Proposal for Blair Lot

1. Name of the individual or entity submitting proposal: _____

Address: _____

Telephone: _____

E-Mail: _____

2. Please check one of the following:

Corporation, incorporated in the State of: _____

Partnership, names of partners are: _____

Individual: _____

Other: _____

3. Price Proposal Calculation:

Price/GSF		Gross Square Feet		Total
	X		=	

4. Annual Ground Lease Offer \$ _____

In words:

Signature of authorized representative:

In a separately sealed envelope labeled "Financial Submission," Proponents shall provide three (3) sealed copies and one (1) original of the Financial Submission. The Financial Submission MUST include a formal price offer on this Ground Lease Price Proposal form.

Appendix I

Submission Checklist

This checklist should be completed and included as part of the proposal submission. If items are not included, a written explanation of why they have been omitted should be included.

- Submission Fee of \$10,000.00
- Development Submission
- Design Submission
- Financial Submission
- Disclosure Statement Concerning Beneficial Interest (Appendix D)
- City of Boston and BPDA Disclosure Statement (Appendix E)
- Certificate of Tax, Employment Security, and Contract Compliance (Appendix F)
- HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility (Appendix G)
- Price Proposal Form (Appendix H)
- Submission Checklist (Appendix I)

Any other materials deemed necessary to indicate the development team's ability to satisfy the evaluation criteria.