

Parcel 8 RFP

October 7, 2019

Changes made from the June 16, 2019 community meeting:

- Proponents are encouraged to either coordinate with proponents responding to the Nawn Factory RFP, enter into partnerships with adjacent developments, or respond to both RFPs. (Page 13)
- This coordination is especially encouraged around access and circulation. (Page 23)
- The RFP includes additional emphasis on educational and job training uses. (Page 16)
- An additional urban design guideline was added under Open Space/Public Realm/Public Art to advance the goals of the Roxbury Cultural District. (Page 25)
- BPDA Urban Design has made some technical edits to certain sections within the “Resilient Development and Green Building Design Guidelines” based upon enhanced standards. (Page 25)

Changes made from the July 22, 2019 Community Meeting:

- The community preference for proposals that include the creation of commercial condominiums for small businesses is noted. (Page 15)
- The Good Jobs Standards language was edited to include the following (Page 31):
 - Replacing “employee work hours performed on the Parcel” with “employees working on the Parcel.”
 - Noting the community preference for retail tenants who are committed to hiring Roxbury residents, and encouraging employers to

work with community partners as an element of employee recruitment.

- Reducing the annual revenue threshold for exemption from \$5 million to \$2.5 million.
 - Emphasizing that proponents who believe that their tenants will be exempt should still put forth a good-faith proposal regarding the standards the proponent can commit to.
 - Monitoring will be performed by the Boston Employment Commission. The selected proponent will be responsible for providing requested data.
 - Outlining the elements of a comprehensive and credible strategy that should be included in a proposal.
- A development objective was added, “Sustainable, Resilient, and Healthy Development,” to emphasize adherence to carbon-neutral, green, low-energy, all-electric design, per Mayor Walsh’s Carbon Neutral Boston 2050 commitment. (Page 14)

Changes made from September 9, 2019 Roxbury Strategic Master Plan Oversight Committee Meeting:

- The Good Jobs Standards language was edited as follows (Page 31):
 - Change language from “Proponents are **encouraged** to work with community partners as an element of their employee recruitment” to “Proponents are **expected** to work with community partners as an element of their employee recruitment.”
 - Change language from “All businesses subject to the GJS will be monitored” to “The City of Boston plans to monitor businesses' performance.”
- The Access and Circulation design guideline states that the successful proponent will be expected to explore shared vehicle access from Harrison Avenue with the adjacent Harrison Supply site, now proposed for redevelopment by the Benjamin Franklin Institute of Technology for the relocation of its South End facility. (Page 23)

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Appendix A Information Resources

Appendix B Plan of Land Dated November 2, 2016

Appendix C Financial Template Workbook – Spreadsheets C1 – C4

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Appendix E Disclosure Statement for Transaction with a Public Agency Concerning Real Property (MGL c. 7C, s. 38)

Appendix F City of Boston and BPDA Disclosure Statement

Appendix G Certification of Tax, Employment Security and Contract Compliance

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 vacant land, consisting of two parcels identified as Assessor's Parcel Number 08-02426-030 with an address of Washington Street ("SR-25"), and Assessor's Parcel Number 08-02426-040 with an address of Harrison Avenue (the "City Parcel"). SR-25 is currently under the care, custody, and control of the Commonwealth of Massachusetts' Department of Conservation and Recreation ("DCR"), and the City Parcel is currently under the care, custody, and control of the City of Boston's Department of Neighborhood Development ("DND"). Together, SR-25 and the City Parcel total approximately 47,333 square feet (the "Proposed Property Site"). The Proposed Property Site fronts Melnea Cass Boulevard and is located on a block bounded by Washington Street, Eustis Street and Harrison Avenue in the Roxbury neighborhood of Boston.

The Boston Redevelopment Authority, doing business as Boston Planning & Development Agency ("BPDA"), is hereby issuing this RFP in conformance with and pursuant to legislation enacted in 2014 by the Massachusetts General Court through Chapter 281 of the Acts of 2014, *An Act Authorizing the Transfer of a Parcel of Land from the Department of Conservation and Recreation to the Boston Redevelopment Authority and the City of Boston* (the "Act"), a copy of which is included in Appendix A of this RFP. The Act permits the transfer of SR-25 from the Commonwealth of Massachusetts to the BPDA and requires,

among other things, that an approximately 8,626 square feet portion of SR-25 located on the corner of Washington Street and Melnea Cass Boulevard (“the Park”), be redeveloped as a public park, subject to preservation and conservation restrictions, included in Appendix A of this RFP. More specifically, in accordance with the Act, the public park shall not disturb any archaeology, shall include appropriate interpretation of the historic former uses of the site and shall serve as a gateway to the Roxbury community.

The BPDA will consider conveying the Proposed Property Site in order to allow the development of commercial uses or mixed use consisting of residential housing with ground floor commercial and/or retail use. Proposals will be subject to review and approval by the BPDA, including applicable planning and zoning controls, and the development objectives and guidelines described herein.

Proposals must meet all minimum evaluation criteria, complete the enclosed proposal form and price summary form, and include all required documents. In accordance with the Act, any development or other improvement on SR-25 shall delineate and preserve the northeast corner of the parcel as a public park. The public park shall not disturb any archaeology, shall include appropriate interpretation of the historic former uses of the site and shall serve as a gateway to the Roxbury community. Further, the park design shall be subject to the approval of DCR. The park shall be constructed, operated, maintained and repaired at the sole cost of the selected Proponent, the park shall be subject to the rules and regulations of the City of Boston (“City”), as approved by DCR, and the park shall be open to the general public.

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 TBD 2019 on the BPDA website at <http://www.bostonplans.org/work-with-us/rfps-rfqs-bids>. Proponents must register when downloading the RFP to ensure they receive any addendums.

Requests for clarification or any questions concerning the RFP must be submitted in writing to:

Muge Undemir, Senior Planner or
Morgan McDaniel, Real Estate Development Officer
Boston Planning & Development Agency (BPDA)
One City Hall Square
Boston, MA 02210
muge.undemir@boston.gov
morgan.e.mcdaniel@boston.gov

The BPDA will not respond to any requests for clarification or questions concerning the RFP received after TBD 2019. With any request for clarification or question, proponents must include their name, address, telephone number and email address. An addendum with questions and answers will be emailed to all prospective responders on record and posted on the BPDA website prior to the RFP deadline.

Proponents may visit the Proposed Property Site with BPDA staff on TBD 2019 at 10:00a.m. Staff will not be answering questions, but will take written questions to answer in an addendum, if necessary.

There is a fee of One Hundred Dollars (\$100.00) to submit a response to 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; 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.

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. Proposals must be submitted no later than TBD 2018 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 Proposed Property Site consists of approximately 47,333 square feet of vacant land fronting on Melnea Cass Boulevard on a block bounded by Washington Street, Eustis Street and Harrison Avenue. This block also includes the historic Owen Nawn Factory building and adjacent land, the Eliot Burying Ground and Eustis Street Firehouse at 20 Eustis Street, and the privately-owned Harrison Supply Company building which occupies the Harrison Avenue and Eustis Street corner of the block. The Harrison Supply Company building was recently acquired by the Benjamin Franklin Institute of Technology. Located to the west is Madison Tropical Foods and the Melnea Hotel and Residences. The Boston Water and Sewer Commission headquarters and the Morgan Memorial Goodwill Industries building are located to the north and east, respectively.

Parcel ID No.s	Street Address	Square Feet	Survey ID #	Owner
0802426040	Harrison Ave.	9,068	38-1-c	City of Boston
0802426030	Washington Street	38,265	SR-25	MA DEP (DCR)
Total		47,333		

The Proposed Property Site is formed by an assemblage of the City Parcel and SR-25 shown on the survey attached hereto as Appendix B (the “Plan”). Parcel SR-25, as described on the Plan, is currently owned by the Commonwealth. Parcel 38-1-C as shown on the Plan (the “City Parcel”) is currently owned by the City of Boston. At closing, the BPDA will acquire SR-25 from the Commonwealth of Massachusetts (the “Commonwealth”), acting by its Division of Capital Asset Management and Maintenance (“DCAMM”), and the City Parcel from the City of Boston and simultaneously thereafter convey the Proposed Property Site to the selected Proponent.

Explanation of Mandated Disposition Transaction

As authorized by the Act, BPDA anticipates that the Commonwealth will convey SR-25 to the BPDA. At the same time, the City of Boston will convey the City Parcel to BPDA; the Proposed Property Site will ultimately be conveyed to the selected Proponent. This conveyance is subject to a number of requirements explained as follows:

1. To ensure a no-net-loss of lands protected under Article 97 of the Amendments to the State Constitution, the Act requires that the consideration for SR-25 shall be the full and fair market value for SR-25, as established by an independent professional appraisal commissioned by DCAMM and prepared by a professional appraiser licensed by the Commonwealth of Massachusetts. As a result of this appraisal, the value of SR-25 is determined to be \$5,010,000 (the “Necessary Cash Proceeds”) according to the appraisal commissioned by DCAMM, dated October 15, 2018. The Act requires that the Necessary Cash Proceeds be used for improvements to the DCR’s Roxbury Heritage Park (the “Park Property”). DCR is required to make improvements on the Park Property with the Necessary Cash Proceeds derived from the sale of SR-25 and paid to the DCR at the closing for this purpose. Therefore, the selected Proponent’s offer price must equal or exceed the Necessary Cash Proceeds, which shall be paid by the Proponent to DCR at the closing conveying SR-25 in order to sufficiently fund

the obligations of DCR for improvements to the properties of the Roxbury Heritage State Park as described in the Act.

2. As required by Section 5 of the Act, certain areas of the Proposed Property Site as shown on the Plan will be conveyed subject to a Preservation Restriction retained in the deed in the form included in Appendix A. The Preservation Restriction will be held by the Massachusetts Historical Commission ("MHC"). In addition, the same area of the Proposed Property Site shown on the Plan will be conveyed subject to a Conservation Restriction in the form included in Appendix A. These forms have been negotiated and agreed upon by BPDA, the DCAMM, the Massachusetts Historical Commission ("MHC") and the City of Boston Department of Neighborhood Development ("DND").

3. SR-25 will be conveyed by DCAMM, in consultation with DCR, to the BPDA/selected Proponent subject to a requirement that the selected Proponent construct and perpetually maintain a public park on an 8,626 square feet portion of Parcel SR-25 shown on Appendix B. A credit for the Park was determined within the appraisal that established the Necessary Cash Proceeds. No further credit will be made against the Necessary Cash Proceeds. The requirements for the Park, will be agreed upon by the BPDA (with input from the City of Boston Parks & Recreation Department, Boston Conservation Commission and Boston Landmarks Commission) and DCR and with input from MHC, and are also discussed in Section 0X of this RFP and in the deed included in Appendix A.

4. Because SR-25 is DCR "Article 97" property, its conveyance from DCR to the BPDA/selected Proponent requires prior compliance with the Massachusetts Environmental Policy Act, G.L. c. 30, §§ 61-62I and its implementing regulations at 301 CMR 11.00 ("MEPA"). MEPA requires the filing of an Environmental Notification Form ("ENF") at least due to the proposed "land transfer" involving SR-25) and, if the Secretary of the Executive Office of Energy and Environmental Affairs (EOEEA) so requires, an Environmental Impact Report. The selected Proponent will be required to complete and

submit the ENF and complete the MEPA process prior to the closing on any transfer of the Proposed Property Site. As such, the BPDA will require that the selected proponent complete and submit an ENF to EOEEA and if required an EIR, and complete the MEPA process as part of BPDA's Article 80 project review, prior to any land transfer by DCAMM involving SR-25. As part of the MEPA process, DCR's Section 61 Finding under MEPA will confirm that the required Necessary Cash Proceeds will be received by DCR at the closing on SR-25 and used by DCR for improvements to Roxbury Heritage State Park. The Secretary's MEPA Certificate on the ENF (or EIR) also is expected to make the receipt and use of the Necessary Cash Proceeds a project mitigation condition for the conveyance of SR-25 consistent with the Act and the EOEEA Article 97 Land Disposition Policy.

5. As part of the Proposed Property Site, the City Parcel will be simultaneously deeded to BPDA/selected proponent at this closing as well.

Planning and Zoning Context

The neighborhood has been the subject of several extensive planning initiatives, including the [Roxbury Strategic Master Plan](#), [Dudley Vision](#), and most recently, [PLAN: Dudley Square](#). Proponents should familiarize themselves with these documents and prepare their proposals based upon the principles discussed therein.

For zoning purposes, the Proposed Property Site is part of the Roxbury Heritage State Park Community Facilities zoning district and Eustis Street Protection Area 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"). Please consult:

https://library.municode.com/ma/boston/codes/redevelopment_authority?nodeId=ART50TA for details on zoning.

As a result of its location in the Eustis Street Protection Area for the Eustis Street Architectural Conservation District, the selected proponent will be

subject to Architectural Conservation District guidelines and oversight by the Boston Landmarks Commission. The Proposed Property Site is also located within a Boulevard Planning District ("BPD") with overlays to underlying sub-districts. 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.

Draft for Discussion

03

Development Objectives and Design Guidelines

Development Objectives

After careful analysis of the Proposed Property Site, BPDA and DND, in collaboration with neighborhood residents and the Roxbury Strategic Master Plan Oversight Committee (the “RSMPOC”), have established development objectives for the Proposed Property Site.

The Proponent must address the development objectives below in a development concept narrative, construction description narrative, and design documents as appropriate. Further, the Proponent must agree to work with the BPDA and the community to resolve any future issues or concerns that may arise as the development project moves forward.

Conservation and Preservation Requirements for the Park.

DCR envisions a passive park with minimal hardscape that functions as a gateway to Dudley Square historical interpretive installations. Proponents must include detailed plans for the Park as well as outline how they will: a) comply with the mandatory obligation to build and maintain the public park and; b) comply with the mandatory conservation and preservation restrictions on the Park. **The design of the Park is subject to review and approval by DCR.**

The following guidelines should be used for design of the Park:

DCR Minimum Park Requirements:

The park should:

- Serve as a Gateway to the Dudley Square neighborhood,
- Provide a passive recreational opportunity, and
- Celebrate the historic and cultural values of the site.

Minimum park design elements should include:

- A combination of lawn areas and hardscape, i.e. paving,
- Planting beds and trees,
- Benches,
- Lighting,
- Trash receptacles, and
- Signage and interpretive features.

The value of these minimum park requirements should run between \$80 and \$90/sq. foot

Nawn Factory Disposition

The City of Boston was the recipient of a HUD Choice Neighborhoods grant in 2015. Concurrent to this RFP process, DND is issuing an RFP for the disposition of the adjacent Owen Nawn Factory building and land (the “Nawn Factory”) as shown on the Plan as SR-26 and 38-2-C, in order to access funding available from the HUD Choice Neighborhoods grant. Proponents are encouraged to either coordinate with proponents responding to the Nawn Factory RFP, enter into partnerships with adjacent developments, or respond to both RFPs in order to best fulfill the community’s vision for development of these Dudley Square parcels, including maximizing affordable housing construction, advancing neighborhood stability, and

providing local development opportunities. In order to create synergy between the two development sites, elements such as common access and circulation routes and paths and inclusion of historic detailing in architectural and landscape design are encouraged.

Consistency with Area Planning History

In addition to PLAN: Dudley Square, the area has also been the subject of the Roxbury Strategic Master Plan and Dudley Vision (See Appendix A). 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. The area is also part of the designated Roxbury Cultural District. As articulated in these documents, being mindful of the rich cultural history of this important neighborhood is paramount. Proponents should use development as a catalyst to promote the arts, culture, 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 Proposed Property Site should activate the area in the evening, encouraging residents to “stay local” to support Dudley Square businesses for their entertainment, shopping and dining experiences.

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.

Economic Development

Proposals with commercial uses must promote local business and job training and 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 Proposed Property Site 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 preparation and job 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.

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.

Affordable/Income-Restricted Housing

Proposals that include rental housing must be consistent with the affordable housing goals identified in the most recent series of public discussions with the community as part of the Plan: Dudley Square process. Specifically, a minimum of two-thirds of all housing units must be income-restricted affordable housing with one third targeting low and moderate income households and one third targeting middle income households. These requirements vary for homeownership versus rental development. Proposals should target one resident minimum per bedroom for affordable units.

- Rental housing proposals must provide a minimum of one-third of units to low-income households (ranging from less than 30% to 50% of Area Median Income (“AMI”)) as defined by the U.S. Department of Housing and Urban Development), with the maximum AMI for these units not to exceed 50% of AMI. For projects seeking affordable housing subsidy DND requires that the project provide a minimum of 10% of the overall units (i.e. one third of the required low income units) as homeless set-aside units at 30% or less of AMI. The middle income units should also include a range of affordability options with the average AMI not to exceed 80% AMI. Up to but not more than one-third of units may be market rate. Additionally, proposals must describe measures they will take to avoid displacement of existing residents of the Roxbury neighborhood.

- Where homeownership units are included, a minimum of two-thirds of the units must be targeted to households with a range of incomes, from 60% to 100% of AMI, with the maximum AMI not to exceed 80% of AMI, and 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. On this proposed property site, DND and BPDA will also require that market rate rental units have rental periods of at least one year. Market rate rental units will also be subject to sub-leasing restrictions, prohibiting either short-term rentals or rental services.

Please note that since this Proposed Property Site is in the vicinity of the Whittier Choice Neighborhoods program, this HUD funded initiative seeks not only to rebuild the existing Whittier BHA development, but also to deconcentrate poverty and invest in the people and places surrounding Dudley Square. Because the initiative includes enhanced assistance for target area homebuyers, the Boston Housing Authority (“BHA”) and BPDA are encouraging the creation of homeownership opportunities in nearby developments. If rental units are proposed, project-based Section 8 vouchers may be available to assist with more deeply affordable units. 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." More details on the requirements of the development without displacement narrative can be found below in section 04 - Submission Requirements.

Community Benefits

Proposals must also describe specific contributions to the project above and beyond the development objectives described above. These contributions should support the PLAN: Dudley Square vision through direct support of programming, creation of institutions, financial support of existing institutions, and direct initiatives with missions to promote and maintain the underlying vision of the community represented in this RFP and the Roxbury Strategic Master Plan. Community Benefits could take many forms, such as:

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

In order to achieve the development goals of housing affordability, good jobs, economic development opportunities and development without displacement, a significant contribution of public resources may be necessary. Proponents that rely heavily on public subsidy to achieve the development objectives of this RFP may lack the additional resources to commit to offering community benefits. However, all proposals must include

a community benefits narrative in order to address the overall community contribution of the proposed development.

Development Guidelines

The development is subject to both BPDA and DND Development Review Guidelines as well as the guidelines as set forth below. The agencies' guidelines can be found online at:

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

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

https://www.boston.gov/sites/default/files/design_standards-revised-2017-08-17.pdf

and to the following guidelines as set forth below:

Urban Design Guidelines

Planning and Urban Design Context

Proposed buildings and site design must be consistent with the PLAN: Dudley Square Urban Design Guidelines. The Proposed Property Site along with Parcels 9 and 10 forms the "gateway" into Dudley Square along Washington Street from the north. Therefore, along with use, the massing, architecture, façade articulation, and location of entries must be reflective of the role that the Proposed Property Site plays in the larger context of the square. To reflect the site's location within the Dudley Square Cultural District, any development must incorporate a complementary mix of uses and design that is innovative, contextually appropriate, and highlights the historic sites that are adjacent to the Proposed Property Site.

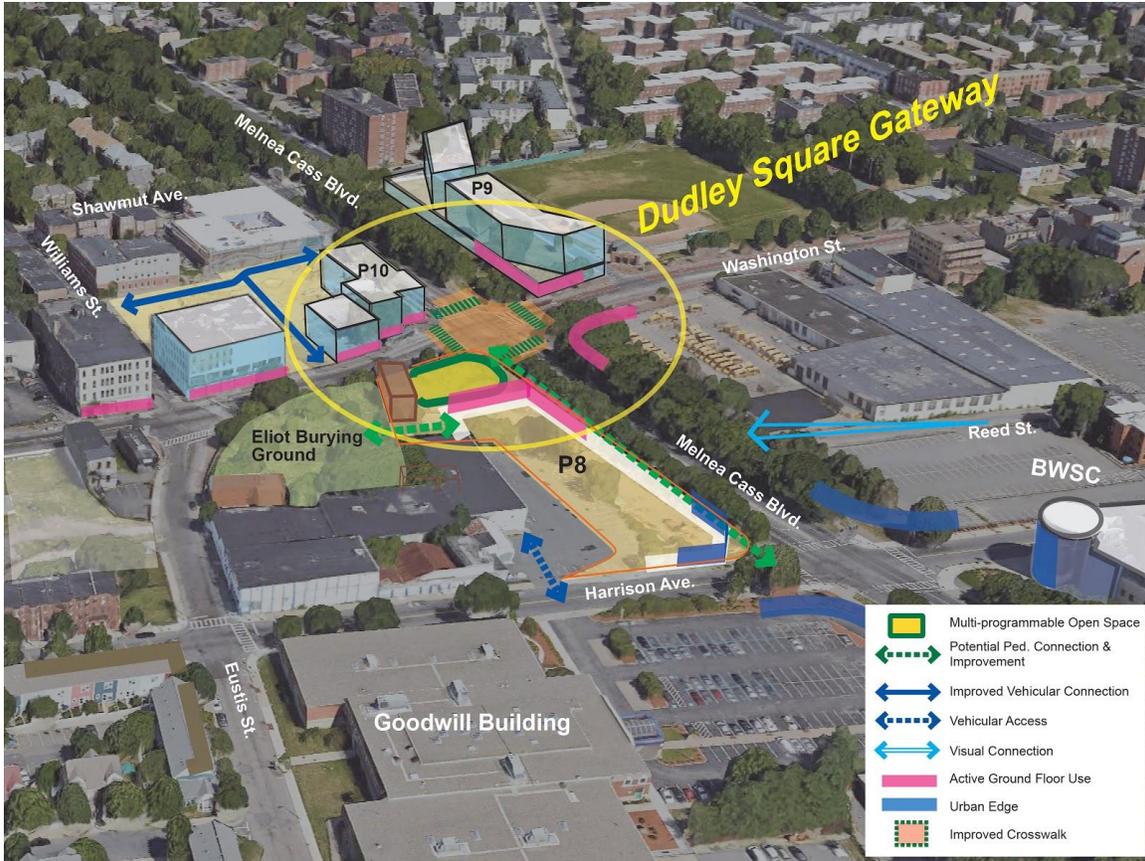
Proposals that combine adjoining parcels to increase economic feasibility, public benefits and improve vehicular and pedestrian access are encouraged. If the proposed design makes use of adjacent parcels, the Proponent must demonstrate site control of such other parcels by way of a fully executed,

and currently dated, Purchase and Sale Agreement or a signed, and currently dated, Option Agreement.

Use Guidelines

The use guidelines are reflective of the engagement process and are set forth to ensure alignment with community desires. Key use guidelines are as follows:

1. The base of the building must be a combination of retail, cultural and/or entertainment uses that contribute to the identity of Dudley Square Cultural District. Office uses are permissible at the ground floor level, provided that they create an active and engaging streetscape to enliven the neighborhood.
2. The upper levels are required to have residential uses in order to address the housing needs in Dudley Square. However, partial commercial use is also permitted, as long as housing is a majority of the use of the upper floors.



Massing, Height and Orientation

Buildings should employ a variety of setbacks and building heights that create a volume that is articulated, varied and dynamic, responds to special views and corridors, and reinforces existing street wall conditions making certain the building fits well into its surrounding context.

1. New buildings must front and define the street edges along Melnea Cass Boulevard and Harrison Avenue. Buildings must remain set back from the corner of Washington Street and Melnea Cass Boulevard to allow for a significant open space that addresses the historic significance of the Nawn Factory building and the Eustis Street Architectural Conservation District.

2. Building heights may vary from six to 15 stories with lower heights/massing stepping down towards Washington Street and the Eliot Burial Ground. Building masses above six stories should be set towards Harrison Avenue. Proponents should be aware of the guidelines associated with the Eustis Street Architectural Conservation District, as taller building heights will require approval from the Landmarks Commission.
3. Building massing along Melnea Cass Boulevard should employ visual or physical breaks to provide for light, air and views and reduce a monolithic feel or wall-like effect along the street.

Architectural Design & Character

New buildings should contribute to the identity of Dudley Square by recognizing its rich cultural and architectural history through careful consideration of building materials and façade expression.

1. Building character should acknowledge the special nature and gateway opportunity of the corner at Washington Street and Melnea Cass Boulevard.
2. The Nawn Factory Site must be considered synergistically and in the design and development of the Proposed Property Site. New buildings may be contemporary in design, but must manifest an awareness of their immediate context by taking into account both the area's history as well as current needs, allowing for a blend of old and new architectural expressions.
3. Proposals shall express the distinction of retail, commercial, and other public uses at the ground level in order to animate the edges of the street and help define the character of the neighborhood along Melnea Cass Boulevard and Washington Street.
4. Proposed buildings must maintain the continuity of the street wall and provide a high percentage of transparency at the ground level in order

to achieve a continuous and engaging pedestrian experience along Melnea Cass Boulevard.

5. Architectural detailing (windows, doors, exterior cladding, masonry, etc.) should be attractive and be executed using materials of the highest quality, as well as being compatible with existing buildings in the area. Materials usage should strive to ground the building in the present and convey stability into the future.

Access and Circulation

New development must be oriented strategically to make easy connections through the building(s) to nearby community amenities such as transit stations, landmarks and public parks as well as create and strengthen major public corridors to enhance pedestrian activity, encourage public transit and promote bicycle use. Proponents are particularly encouraged to coordinate with proponents for the adjacent Nawn Factory site in terms of access and circulation.

1. Primary pedestrian building entrances should be on Melnea Cass and Washington Street, with vehicular and service access from Harrison Avenue. The successful proponent will be expected to explore shared vehicle access from Harrison Avenue with the adjacent Harrison Supply site, now proposed for redevelopment by the Benjamin Franklin Institute of Technology for the relocation of its South End facility. Proponents are encouraged to contact BFIT for more information.
2. Design should respond to landscape, pedestrian and bike accommodation improvements that are part of the Boston Transportation Department's Melnea Cass Design project by providing secure on-site bike storage for users and residents, in order to encourage bike use.
3. Proposals must demonstrate provisions of adequate but not excessive on-site parking for new residents, employees, and/or customers and

strategies to prevent overburdening street parking used by area residents.

4. Safety, views and ease of navigation must be promoted in the design of the Proposed Property Site. Night safety is a particular concern of neighborhood residents, so structures must be designed with clear site lines. In addition, exterior lighting design must create well-lit open spaces and eliminate dark pockets in streetscapes.

Open Space/Public Realm/Public Art

The quality of the public realm surrounding any new development will play a significant role in shaping the everyday experience of the district. A project should strive to define a distinct and memorable public realm with innovative landscape design, enhanced paving, distinctive street furniture (light fixtures, benches, street trees) and create opportunities for temporary and permanent public art. Accordingly, projects should address each of the following, keeping in mind the context of the area as a designated cultural district:

1. Provide a new distinct and memorable public realm, with an enhanced sidewalk experience around the site that creates an active, vibrant, and attractive public area that encourages people to gather.
2. Repair and/or replace, as appropriate, any alteration or damage of existing sidewalks, paving, lights and street trees that occurs during construction.
3. Create an inviting open space at the corner of Washington Street and Melnea Cass Boulevard. This space should recognize the historic character of the adjacent Nawn Factory and Eustis Street Architectural Conservation District.
4. Provide a public realm of sidewalks, street trees, and street furniture that is well integrated into the Proposed Property Site and creates a

continuous and engaging street level activity along Washington Street from Melnea Cass into Dudley Square.

5. Create a bold and inventive site design incorporating public art, particularly installations that are interactive and have a direct influence on the community, encouraging a sense of place.
6. Place disposal areas, accessory storage areas or structures and dumpsters at the rear of the property. Such areas must not abut the Eliot Burying Ground and must be appropriately screened from view.
7. 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 higher albedo building and paving materials and increased shade areas through landscaping, expanded tree canopy and shade structures. 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 be 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 all 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 Submission Requirements 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 and meets the requirements of the Act. 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 business’s performance against GJS commitments. 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.
5. Describe how the proposal addresses the conservation and preservation restrictions and the obligation to construct and perpetually maintain the required public park.

Design Submission

All drawings must be submitted in both hard copy and digital format (PDF or JPEG, at minimum 300 DPI). The Design Submission must 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 and Urban Design Guidelines of this RFP and the PLAN: Dudley Square context document. These documents must describe and illustrate all the 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' scale) showing how the proposed design will fit within the immediate context of existing buildings and within the larger Dudley Square neighborhood. The neighborhood plan must illustrate how the proposed property meets the Urban Design Guidelines set forth in this RFP. The proposed building(s), existing building footprints, lot lines,

streets and street names and any other relevant contextual information should be included in this plan. The site plan should illustrate the building footprint and placement on the Proposed Property Site, the general building organization, open space and landscape elements, driveways, curb cuts, fencing, walkways and streetscape improvements. The neighborhood and site plans should coordinate with renderings, perspective drawings and aerial views of the project and the neighborhood plan should illustrate how the project meets the larger Urban Design Guidelines in relating to Dudley Square.

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 plan for the proposed development based on the Urban Design Guidelines for this site 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.
10. A conceptual drawing of the required public park and all improvements.

Financial Submission

The Financial Submission should include, but not be limited to the information listed below. The pro forma must be submitted on the template Excel spreadsheet included in Appendix C, 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 pro forma 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 (LLC 1, or LLP 1 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. 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 for SR-25 and for the City Parcel. 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 BPDA and City of Boston Disclosure Statement (Appendix F). 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 G).
- c. The proponent must affirm that they are in compliance with applicable statutes governing conflict of interest as certified in the BPDA and City of Boston Disclosure Form (Appendix F).

Submission Checklist

1. Submission Fee of \$100.00
2. Development Submission
3. Design Submission
4. Financial Submission
5. Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility (Appendix D)
6. Disclosure Statement Concerning Beneficial Interest (Appendix E)
7. City of Boston Disclosure Statement (Appendix F)

8. Certificate of Tax, Employment Security, and Contract Compliance (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”)

Draft for Discussion

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 01 of this RFP will be accepted.
2. Proposals must include all documentation specified in the Section 04 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 shall then assign a composite rating of Highly Advantageous, Advantageous or Not Advantageous for each proposal it evaluates.

To facilitate evaluation of the Comparative Evaluation Criteria, BPDA and DND will take into account community input received as a result of developer(s) presentation(s) with opportunity for public comment 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 and affordability requirements relative to other proposals will be considered to be more advantageous. Proposals that do not meet the objectives specified in the Development Objectives will be considered less advantageous. **To facilitate its evaluation of this criterion,**

the BPDA will seek community input in the form of a developer(s) presentation(s) with opportunity for public comment.

Detailed, realistic proposals for development of the Proposed Property Site that are consistent with and which successfully address 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 the Development Objectives or the Development Guidelines 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 outlined in Section 3. 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 the evaluation of this Criterion, BPDA will seek community input in the form of developer(s) presentation(s) with opportunity for public comment.**

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

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

Proposals that are not compatible with the Urban Design Guidelines described in this RFP and do not fully address each subsection, provide little detail, and meet fewer or none of the objectives compared with 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 Guidelines specified in Section 4. Proposals that better fulfill these objective relative to other proposals will be considered to be more advantageous. Proposals that do not meet these objectives will be considered less advantageous. **To facilitate the evaluation of this criterion, BPDA will seek community input in the form of developer(s) presentation(s) with opportunity for public comment.**

Proposals that provide a detailed plan that addresses all subsections, exceeds LEED Platinum certifiability, exceeds Zero Carbon Building performance, 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 property. 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 all of the requested information regarding the development team's experience and capacity, and demonstrate that the development team has successfully completed one or more similar projects in the City of Boston in the last five years, will be ranked as **Highly Advantageous**.

Proposals that provide most of 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 do not include any of 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 or cannot demonstrate transferable experience from another project, 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 can demonstrate confirmed financing to generate sufficient capital to fund most or all of the development budget presented, will be considered to be more

advantageous. Proposals that do not have confirmed financing sources or have confirmed financing for only part of the Development Budget will be considered less advantageous.

Proposals that include evidence of approved or conditionally approved financing to initiate and complete the proposed development within a definitive timeframe and document if the project will require federal, state or local subsidy; and provide a financial plan detailing and evidencing any and all available financial resources will be ranked as **Highly Advantageous**.

Proposals that provide a feasible financing plan that are entirely funded by federal, state or local subsidy and/ or capital campaigns to initiate and complete the development; and include letters of interest for all sources of debt and equity, indicated with timelines for commitments, will be ranked as **Advantageous**.

Proposals that provide a financing plan to initiate and complete the development but do not include letters of interest from funding sources or any other evidence of potential sources of private and public debt and equity; and/or include little to no documentation of a financial plan, 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

This is an evaluation of the relative strength of a proposal's plan to achieve diversity and inclusion in the development and operation of the proposed Project Site. Proposals will be considered and rated based on the comprehensiveness of the Proponent's planned approach to achieving maximum participation of MWBEs and people of color, including specific strategies to fulfill this objective, with particular emphasis on non-traditional functions as defined in the Diversity and Inclusion Plan section of the Minimum Submission Requirements. The Proponent must also demonstrate that its Diversity and Inclusion Plan is realistic and executable. **BPDA will seek community input in the form of developer(s)' presentations with opportunity for public comment.**

Proposals that provide a comprehensive, highly reasonable, and justifiable Diversity and Inclusion Plan for a project of the type proposed that is clearly superior to that of all other proposals will be ranked as **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 as **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 as **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 that provide a detailed development timetable that is feasible, demonstrates an understanding of the development process, and provides clear indication that the project does not need additional funding and can close within twelve (12) months of tentative designation and will be completed within twelve (12) to eighteen (18) months of closing will be ranked as **Highly Advantageous**.

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 close within six (6) months of receiving all necessary funding and be completed within twelve (12) to eighteen (18) months of closing will be ranked as **Advantageous**.

Proposals that do not to provide a development timetable or propose a development timetable that is either impractical, demonstrates a lack of understanding of the development process or indicates that the project will not close within six (6) months of receiving all necessary funding, or that it

will be completed in more than eighteen (18) months following closing 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(s) 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 Benefits

This criterion evaluates the Proponent's relative ability to provide benefits to the local community that are in addition to those generated by the development of the Project Site itself. Proposals that offer benefits that the community most desires will be considered to be more advantageous.

Proposals that offer fewer, or do not offer any additional community benefits will be considered to be less advantageous. **To facilitate its evaluation of this Criterion, BPDA will seek community input in the form of developer(s)' presentation(s) 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, and offer a level of benefits that are superior to those provided by other proposals 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, and the level of benefits provided will be equal to those provided by other proposals will be ranked as **Advantageous**.

Proposals that do not sufficiently describe and quantify specific benefits to the community, other than the development of the property, and the level of benefits provided are inferior to those provided by other proposals will be ranked as **Not Advantageous**.

Draft for Discussion

06

Contract Terms and Conditions

Disposition Price Proposal

In accordance with Section Two of the Act, the Division of Capital Asset Management and Maintenance (“DCAMM”) hired the services of an independent professional appraiser to determine the full and fair market value of SR-25. In accordance with the requirements of Section Two of the Act, DCAMM has established that the full and fair market value of SR-25 is Five Million, Ten Thousand Dollars (\$5,010,000.00). Accordingly, any Proposal for the Proposed Property Site must reflect a minimum purchase price of Five Million, Ten Thousand Dollars (\$5,010,000) for SR-25; a Proposal reflecting anything less than a purchase price of Five Million, Ten Thousand Dollars (\$5,010,000) for SR-25 shall be rejected.

The Price Proposal must also reflect a purchase price for the City Parcel; a minimum purchase price of \$100.00 has been established for the City Parcel. The market appraisal commissioned by DCAMM for SR-25 indicates to BPDA that the value of the City Parcel is \$1,360,200. While BPDA expects a price proposal of at least that value, a lower price proposal will not be automatically rejected. A Proponent offering a lower price 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 appraised value.

The BPDA is selling both SR-25 and the City Parcel (together, “the Parcels”) to one (1) entity; any proposals to purchase only one (1) of the Parcels shall be rejected.

For the purpose of preparing a Development and Operating Pro Forma, proponents should use these amounts (or greater if the offer exceeds them).

The SR-25 proceeds will be provided to the Commonwealth upon conveyance of SR-25 and deposited in the Division of State Parks and Recreation Trust Fund and expended by the Department of Conservation and Recreation (“DCR”) on improvements to the properties of the Roxbury Heritage State Park. “Roxbury Heritage State Park” shall mean: the Dillaway-Thomas House property and adjacent parcels presently under the care and control of DCR, located at 183 Roxbury Street, and any land to be acquired by DCR expressly for addition to Roxbury Heritage State Park.

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 Director of the BPDA will then be authorized for and on behalf of the BPDA to execute and deliver a Land Disposition Agreement (“LDA”), a sample of which is included in Appendix A. The LDA restricts the use of the Property to those specifically approved by the BPDA. 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 Proposed Property Site. The BPDA and the City of Boston shall not be liable for any such costs nor shall the BDPA 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 Proposed Property Site surveyed, with plans that are suitable for recording, at the expense of the Proponent.

Policies and Regulations. Development of the Proposed Property Site 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 the construction of the Proposed Property Site, 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 proponent should also

provide signage that describes the project, including the number of affordable units, if applicable.

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.