

MBTA Bartlett Yard
2565 Washington Street, Roxbury, MA

Dated – Italic text note revisions to the 4th Draft that was issued on September 9th, 2006

FINAL DRAFT – September 25TH, 2006

This draft is for RSMPOC and community discussion only
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*9/25/06 – Appendices **to be** revised to reflect Bartlett Yard site and MBTA sale of property*

1 INTRODUCTION

The Massachusetts Bay Transportation Authority ("MBTA") in cooperation with the Boston Redevelopment Authority ("BRA") invite interested parties to bid on the sale of a property consisting of 872,654± square feet (or 8.55± acres) of land. The MBTA Bartlett Yard site (the "Project Site") located at 2565 Washington Street, the Roxbury section of Boston.

The MBTA Bartlett Yard site is one of seven parcels to be disposed of through the process described in the Roxbury Strategic Master Plan ("Master Plan"). This RFP is based on the Master Plan and additional work by the Roxbury Strategic Master Plan Oversight Committee ("RSMPOC"), which is charged with overseeing implementation of the Master Plan. With the goal of implementing key provisions of the Master Plan and key community objectives, the Project Site is viewed by the MBTA, the BRA, and the community as an important opportunity to stimulate development that will improve the physical, economic, and social conditions in Roxbury.

In its planning work for the Bartlett Yard, the RSMPOC has arrived at a preference for "wealth-generating" uses that create jobs, equity, and business ownership opportunities for Roxbury residents. The Site is available for sale and redevelopment to create a mixed-use development including retail and residential uses that provides quality residential opportunities to citizens of the City of Boston across a variety of income ranges as well as provides the revitalization of the Washington Street, Dudley Square, and Highland Park neighborhoods. The retail mix should include cultural and community uses serving Roxbury and Boston residents of all ages

The RSMPOC, the MBTA, and the BRA recognize the value and potential of the Bartlett Yard and believe that highly creative strategies and innovative partnerships are necessary to achieve the goals for the Project Site. This RFP is designed to inform respondents about the vision and objectives for the Bartlett Yard and to guide and assist interested respondents in submitting their development proposals to the MBTA.

This RFP is made available to all interested parties who have the ability to undertake the development work and to complete it without undue delay. The MBTA will review all proposals on the basis of the criteria contained in **Section 5 Selection and Sale**.

The preparation and submission of all proposals by any person, group, or organization, is entirely at the expense of such person, group, or organization. All proposals must include at a minimum all the items specified in Chapter 6: BID Submission REQUIREMENTS. Interested parties can contact Mark Davis, Senior Project Manager for Transit Realty Advisors, LLC, at (617) 482-2525 ext. 224 with regard to any questions about this RFP. Additional information and regulatory forms can be located at: www.transitrealty.com

2 PROPERTY DESCRIPTION

2.1 Location and Access

The site incorporates approximately 8.55 acres, located at 2503 Washington Street, and surrounded by Bartlett Street to the north, Lambert Avenue to the west, and Guild Street to the south. Generally rectangular in shape, the site slopes to the East, and is mostly paved. The site is dominated by two large single-story, high bay industrial structures. One small office area is located at the northeast corner of the site. A fence surrounds the entire property, with the frontage along Guild and Lambert Streets mostly wooded.

Research to date has not indicated any permanent easements through or on this property. Currently it is served by all public utilities.

The Property transferred, along with its other assets, to the Metropolitan Transit Authority in 1947, which was merged into the MBTA in the 1960s. The Property is currently owned by the MBTA. The Property was acquired legislatively by the MBTA from its predecessor entity, the Metropolitan Transit Authority (the "MTA"), which also acquired the property pursuant to legislation.

2.2 Existing Conditions

MBTA has operated a bus storage and maintenance facility at the Property since 1970. The site contains two maintenance garages and outbuildings for the use of vehicle maintenance and repair, fueling, washing of buses, bus storage and operation of a bus terminal. Prior uses included repair and maintenance of horse-drawn then electric street cars and busses.

Prior to 1970 the property was operated as a transportation storage and maintenance facility by the Metropolitan Transit Authority (MTA) (1930's-1970's); the Boston Elevated Railway Company (1900's-1930's); and the West End Street Railroad Company (1888-1900's).

Bus maintenance and storage has been discontinued at this location with the facility being closed in early 2005. The property has been declared surplus to the operational needs of the MBTA and is available for sale and redevelopment.

Figure 1 and Figure 2 show the location of the MBTA Bartlett Yard site and its immediate and larger contexts.



Figure 1: Aerial Photo of MBTA Bartlett Yard site and surrounding context

2.2.1 Existing Structures and Uses

The two structures currently occupying the MBTA Bartlett Yard site are listed with the Massachusetts Historical Commission.

The MBTA requires that the purchaser, its successors, and assigns (the “Purchaser”) act in all ways with respect to the Massachusetts Historical Commission (MHC) as if it were a “state body” as defined under M.G.L. Chapter 9, Sections 26 through 27C, as amended by Chapter 254 of the Acts of 1988 and that the Purchaser must comply with all regulations promulgated to implement those sections of the General Laws, including, without limitation, 950 CMR 71.00. This obligation will be incorporated into both the Purchase and Sale Agreement and the Deed.

2.2.2 Existing Streets and Underground Utilities

The four roadways surrounding the Bartlett Yard site are public ways owned and maintained by the City of Boston Department of Public Works. Any and all modifications or alterations to these roadways including new curb cuts for accessing the site require the permission and approval of the Boston Public Improvement Commission, Department of Public Works and the Boston Transportation Department.

There are several major underground utilities (gas, electric, water, sewer and storm drains) in the area which serve the existing site. The MBTA and the BRA make no representations or

warranties as to the completeness or accuracy of the utility information contained in this RFP. Respondents are responsible for independently verifying all utility information and assessing capacities of various utilities to service this site for its intended use.

The site plan distributed with this RFP shows the boundaries of the Project Site – see Appendix Item ??. The MBTA and BRA make no representations or warranties as to the completeness or accuracy of the property information contained in this RFP. Respondents are responsible for independently verifying all such information.

[Verify Appendix reference above]



Figure 2: Aerial photo of the MBTA Bartlett Yard site and immediate context

2.2.3 Environmental Investigation and Indemnity

The Successful Bidder, at Bidder's expense, may complete an environmental investigation of the Property. Such investigation, if conducted, must be completed within **Sixty (60) days** of the Board of Directors vote and after the Successful Bidder has executed the Purchase and Sale Agreement. Bidder shall waive its right to conduct or complete such investigation if it is not completed within said time period. Bidder shall submit all investigatory test results and reports obtained by the Bidder to the MBTA and/or its consultants and Transit Realty Associates (TRA) within one week of Bidder's receipt of the test results and within one week of each analytic review or other report based on the test results.

The Successful Bidder will indemnify the MBTA and agree to defend the MBTA and save the MBTA harmless from and against any and all liabilities, losses, damages, costs, expenses (including reasonable attorneys' expenses and fees), causes of action, suits, claims, demands or judgments of any nature whatsoever including, without limitation, those related to personal injuries or death, that may be imposed upon, incurred by, or asserted against the MBTA because of the condition of the Property as a result of the Successful Bidder, its employees, contractors or consultants being on the Property to conduct the environmental investigation permitted in this Paragraph E or the Survey required in Section IV F. below.

Prior to entry on the Property pursuant to this Paragraph E, Successful Bidder (or its environmental consultant) shall provide the MBTA with a certificate or certificates of insurance covering all days that Bidder and Bidder's consultants and contractors will be on the Property before closing, evidencing the insurance of the activities permitted hereunder, and Bidder's covenant of indemnification hereinabove, with companies that are reasonably acceptable to the MBTA, in which Bidder and others hereinafter specified are additional insureds as their interests may appear and which provides coverage as more particularly stated in Paragraph 13 of the Purchase and Sale Agreement attached as Appendix Item E.

[Verify Appendix reference above]

Respondents are responsible for making their own determination of existing conditions and conducting their own environmental investigation of the Project Site and surrounding area, and the designated developer will be required to assume all responsibility for Project Site conditions pursuant to the proposed ground lease. Respondents should refer to the environmental documentation listed in Appendix Item ??.

[Verify Appendix reference above]

2.3 Abutting and Surrounding Uses

The Bartlett Yard site is located on Washington Street in the Highland Park neighborhood just outside of the Dudley Square commercial district. Bounded by Washington Street to east, Guild Street to the south, Lambert Avenue to the west, and Bartlett Street to the north, the site is edged by public roadways on all four sides.

[9/25/06 – Added “Tommy’s Rock Neighborhood” to list.](#)

With the exception of along Washington Street, the site is surrounded by residential and related community uses of the Highland Park neighborhood. The area features numerous historic properties and institutions including the following:

- John Eliot Square - one block north / east of the site features the First Church of Roxbury, the Dillaway-Thomas House, Ionic Hall / St. John's - St. James Church, Norfolk House, Spooner-Lambert House, and the Timilty School
- The Fort Hill Monument
- [Tommy's Rock neighborhood - St. James Street development](#)
- Kittredge Square – Alvah Kittredge House, and Edward Everett Hale house
- Hale Elementary School
- Cedar Street Playground

The following is a more detailed description of directly adjacent uses along each of the streets surrounding the site:

- Washington Street – Along Washington Street, uses transition at the Bartlett Yard site from commercial to the north and housing to the east. At the north are the one story commercial buildings of the Hurley Wire Company and a transportation related ware house use. At the south are the St. Joseph's Community townhouses and recently completed wood frame townhouse development.
- Guild Street – rises up steeply from Washington Street and is entirely residential in use. The street is lined with a mix of building types including two family and three family wood frame buildings and three story brick row houses with stone front stoops.
- Lambert Avenue – runs parallel to Washington Street and has a mix of community and residential uses. Residential uses are mostly two family wood frame homes. Community uses include the Refuge Church of Christ [Fellows Athenaeum] and Lambert Avenue Playground.
- Bartlett Street – rises up gently from Washington Street and has a mix of commercial, community and residential uses. Residential uses include both wood frame two family buildings and a small cluster of three story brick row houses. Community uses include the Holy Temple Church. At the Washington Street end is a one story commercial building with automotive use and an open air lot with car storage.

2.4 Policy Context

Development proposals will be subject to the provisions of the City of Boston zoning and building regulations and procedures, as well as applicable State (including without limitation M.G.L. Chapter 30, Sections 61 and 62) and City environmental reviews, the Boston Residents Construction Employment Standards which implement the Boston Residents Jobs Policy, and any other applicable City policies.

The preparation and submission of all proposals by any person, group, or organization is entirely at the expense of such person, group, or organization. The designated developer shall be responsible for any and all costs incurred in connection with the planning and development of the Project Site. The MBTA, BRA and the City of Boston shall not be liable for any such costs nor shall either be required to reimburse the developer for such costs.

Additional policies that should be taken into consideration and/or programs that may be available for helping to finance portions of the development are described below.

2.4.1 Roxbury Strategic Master Plan

The Roxbury Strategic Master Plan represents a commitment to continue to build a socially and economically vibrant Roxbury and serves as a guide to shape future policy and activities in the

neighborhood over the next ten to twenty years. This community-based plan is a product of a three-year partnership with community members, residents' groups, and City and elected officials.

In addition to presenting broad goals for Roxbury at large, the Master Plan sets out a process for the disposition of seven publicly-owned parcels, including the MBTA Bartlett Yard site. The roles of the RSMPOC and Project Review Committee ("PRC") are described in the Master Plan, which is available from the BRA.

2.4.2 Zoning

Under current zoning, the MBTA Bartlett Yard site is located in a 3F - 4000 Subdistrict, is a Housing Priority Area, and fronts on Washington Street Boulevard Planning Overlay District of the Roxbury Neighborhood District. Zoning for the area is described in Article 50 of the Boston Zoning Code, adopted by the Zoning Commission in 1991 and shown on the associated Map 6A/6B/6C. Copies of the Boston Zoning Code may be obtained from the BRA, 9th Floor, City Hall or on the BRA website at: www.cityofboston.gov/bra/zoning/zoning.asp

Article 50 establishes Housing Priority Areas for the Roxbury Neighborhood District as follows:

Housing Priority Areas. This Section establishes several Housing Priority Areas in order to promote and encourage the construction of Affordable Housing. All parcels of land within these areas are owned by a Public Agency and comprise at least one acre, either individually or in combination with contiguous parcels owned by another public agency. Notwithstanding any contrary provision hereof, for any Proposed Project within these areas a minimum of three (3) square feet of Gross Floor Area shall be devoted to allowed Residential Uses for each square foot of Gross Floor Area devoted to other uses, In addition, seventy-five (75%) percent of all Dwelling Units in any such Proposed Project shall be Affordable. The provision of Affordable Housing within the Roxbury Neighborhood District shall not be limited to these areas, and is, in fact, encouraged throughout the Roxbury Neighborhood District.

The Housing Priority Areas within the Roxbury Neighborhood District include the following sites:

- (a) Parcel 9 in the Dudley Square EDA;
- (b) the Bartlett Yards presently owned by the MBTA, as bounded by Washington Street, Bartlett Street, Guild Street, and Lambert Avenue.

The Roxbury Neighborhood District 3F-4000 establishes the current underlying zoning for the MBTA Bartlett Yard site. Under current zoning, the maximum Floor Area Ratio ("FAR") is 0.8 and the maximum building height is 35 feet. Article 50 also contains additional design, use, and dimensional regulations that govern redevelopment of this site.

The Development Goals and Urban Design Goals and Guidelines of this RFP include a wide range of use, urban design, and building design goals that may or may not be allowed as of right by the zoning code.

Respondents to this RFP are encouraged to submit proposals that best respond to the Goals and Guidelines stated within this document. In order to fully realize the Goals and Guidelines of Sections 3 and 4 of this RFP, it is expected that respondents shall seek approval for any deviations from the code through the Board of Appeal.

2.4.3 Economic Development Incentives and Assistance

The City of Boston, the Commonwealth of Massachusetts, and the federal government offer a wide range of programs to help stimulate economic development. Some of the financing and technical assistance services which are potentially available for real estate development or business development of the MBTA Bartlett Yard site are briefly described below.

- Boston's Department of Neighborhood Development operates the Boston Business Assistance Center in Roxbury's Dudley Square. The Center provides access to technical, financial, and administrative resources for entrepreneurs, neighborhood small business owners, and business owners interested in expanding or relocating to Boston.
- The Boston Industrial Development Financing Authority (BIDFA) issues bonds that promote economic growth and increased employment. BIDFA offers both taxable bonds and tax-exempt bonds to help finance the capital needs of Boston's businesses and institutions. Tax-exempt bonds are available for non-profit institutions, for certain industrial facilities, and for qualified businesses in federally designated Empowerment Zones.
- The Boston Local Development Corporation (BLDC) provides loans to businesses located in, or relocating to, the City of Boston. Funds can be used to meet a wide variety of needs, including purchasing equipment and hiring new employees. BLDC loan funds can be used in conjunction with bank funds and the BLDC actively pursues loan participations with local banks.
- MassDevelopment offers a wide range of financing tools including tax-exempt bonds and a variety of loan and guarantee programs.
- Massachusetts Community Development Finance Corporation provides financing for small businesses, real estate projects, and community development programs throughout the Commonwealth's low and moderate income communities.

2.4.4 Transit Oriented Development Infrastructure and Housing Support Funding

Projects built on the Bartlett Yard parcel may be eligible for funding from the Transit Oriented Development (TOD) Infrastructure and Housing Support Program, a relatively new Commonwealth Capital Program intended to provide funding of up to \$2.5 million for housing, pedestrian improvements, bicycle facilities, and/or parking facilities in mixed use developments within ¼ mile of a transit station. At least 25 percent of the housing units in any housing development funded by the program would have to be affordable to households earning no more than 80 percent of the area median income. To compete for funding, projects must be part of a "high quality TOD" containing a mix of uses, higher densities, pedestrian oriented design, facilities for non-motorized transportation (such as bicycling), parking requirements suited to TOD, and convenient access to transit.

For more information about TOD Infrastructure and Housing Support Program requirements and funding cycles, go to www.mass.gov/TOD, and click on "Transit Oriented Development". Or you can call Tad Read, TOD Planning Manager, at (617) 573-1392 or Jane Healy, TOD Program Coordinator, at (617) 573-1388.

2.4.5 Financing from MassHousing for Projects on MBTA-Owned Sites

Developers seeking to build *housing* on an MBTA-owned site may want to consider financing from MassHousing. MassHousing has financed numerous transit-oriented development sites on private land, and is currently seeking to build upon its relationship with the MBTA to finance housing on MBTA-owned or controlled sites.

MassHousing can provide housing developers with attractive rates on both construction and permanent loan financing. MassHousing can provide both a competitive financing package and an attractive means for marketing their development, a high degree of affordability, and the ability to include substantial preferences for local residents. Additional information about what MassHousing financing for projects on MBTA owned sites is provided see Appendix Item ???. To find out more about MassHousing financing, you may also contact Nancy Anderson at (617) 854-1360 or refer to: www.masshousing.com/imageserver/businesspartners/pdf_brochure.pdf.

[Verify Appendix reference above]

3 DEVELOPMENT GOALS

3.1 Overall Development Goals

9/1/06—Revised to clarify OC use of Goals and Guidelines in determining responsiveness.

A series of public community meetings were held to discuss the proposed disposition and redevelopment of the MBTA Bartlett Yard property and to craft site specific Development Goals and Use & Design Guidelines which are described in Sections 3 and 4 of this RFP. These Development Goals and Use & Design Guidelines will be used by the RSMPOC, City and the MBTA to determine responsiveness of proposals. It is important that Bidders understand that the PRC, BRA and MBTA focus on this property will be intense and the Development Goals and Use & Design Guidelines described herein will be used in the bidder selection process per Section 5.

The following are the broad goals for development on the MBTA Bartlett Yard site:

- Implement the Roxbury Strategic Master Plan, with special emphasis on maximizing economic development and job creation potential.
- Generate wealth for the Roxbury community. Wealth generation is considered to include five principal elements: (1) economic linkages to the larger economy; (2) jobs and careers for Roxbury residents; (3) community and/or minority equity and ownership; and (4) opportunities for local small business development, and (5) more home ownership opportunities.
- Reinforce the physical, social, and economic fabric of Roxbury by replacing a vacant lot with a project that provides high-quality architecture and urban design, creates community facilities and public gathering spaces, enhances physical connections and creates an integrated and active urban environment, lays the groundwork for long-term economic benefits for the neighborhood, and creates sustained economic opportunity for local residents.
- Leverage the resources of Roxbury at large, including its workforce, youth population, demographic diversity, investment capital, and existing businesses.

- Build a highly sustainable development employing the principals and best practices of Sustainability and Green Building design to maximize the social, economical and environmental sustainability of the project and to minimize project related environmental impacts and energy consumption.
- Create a successful transit-oriented development by providing a mix of uses, appropriate parking ratios, a strong pedestrian environment, mobility options (e.g., bicycling), safe and easy access to transit, and urban design that is fitting to the area.
- Maximize the value of the Bartlett Yard as an economic development asset for Roxbury and the City. The value is based on the Bartlett Yard's size, its favorable location within Boston, and its proximity to transportation infrastructure, significant economic engines, and local educational and workforce training infrastructure.

Respondents are encouraged to confer with and, when appropriate, form partnerships with area organizations, institutions, and businesses including educational institutions, hospitals, local investors and developers, and local small businesses—in order to devise creative proposals that address all of these development goals.

3.2 Specific Development Goals

~~9/1/06—Revised to clarify OC use of Goals and Guidelines in determining responsiveness, and
9/1/06—Revised with the addition of “respond creatively”, and
9/1/06—Clarify that goals are not requirements, and
9/1/06—Add “...failure to provide a response... will result in a proposal being deemed “non-responsive”.~~

This section presents specific Programmatic and Economic Development Goals for the MBTA Bartlett Yard site. Each stated goal is followed by a list of desired outcomes and/or more detailed descriptions intended to help respondents understand more fully the vision for development of the site.

Bidders are encouraged to respond creatively to each goal and should describe in as much detail as possible how the proposed development will accomplish the stated outcomes. Respondents should provide both data and analysis, as necessary, to support stated outcomes, particularly those related to the potential economic development benefits of the proposed project. The Project Review Committee (“PRC”), BRA, and MBTA will review and evaluate proposals to determine if each bidder has provided a response to each Programmatic and Economic Development Goal. Respondents are expected to make a “best faith effort” to meet the specifics of each Programmatic and Economic Development Goal.

While it is understood that proposals may not satisfy each goal, failure to provide a response for each specific goal will result in a proposal being deemed “non-responsive”.

Programmatic and Economic Development Goals

~~9/1/06—Goals reordered to reflect housing focus of Bartlett Yard site; Goal 4 moved up to become Goal 1.~~

Goal 1: Create a mix of new housing with a range of residential building types and ownership opportunities.

9/25/06 – Discussion issue: Affordability Ratio

9/25/06 – Shortened City of Boston Inclusionary Development Policy bullet.

~~New bullet added to clarify housing at 85% market rate versus 15% affordable.~~

- Housing is a key component of the MBTA Bartlett Yard development site and the community has expressed a strong preference for homeownership versus residential rental and a strong preference for market rate versus affordable housing for this site.

eGoal Statement to be reviewed

- The community has articulated different goals for affordable and market rate housing including a ratio of ~~has set a goal of 85% market rate housing and/ 15% affordable housing and/or a ratio of 1/3rd market rate / 1/3rd moderate income / 1/3rd affordable. Proposed development should provide for the maximum amount of affordable housing feasible while meeting the requirements of the Section 3 - Development Goals and Section 4 - Use & Design Guidelines.~~

~~spread across the mix of unit types, sizes and locations within the development.~~

- The proposed development must be consistent with the City of Boston's goals and objectives for housing development in Roxbury and Boston at large, and enhance existing and planned housing and retail in the surrounding neighborhood.
- New housing development is encouraged to exceed but must comply with the provisions of the City of Boston's Inclusionary Development Policy, as amended, ~~by ensuring that: at least 15 percent of the market-rate ownership units in the proposed project be affordable to those earning less than 160 percent of the Boston Median Income ("BMI") as adjusted for household size, and 15 percent of the rental units be affordable to those earning less than 125 percent of the BMI as adjusted for household size. Sale prices and rental rates will be set to be affordable to 130 percent and 100 percent respectively and adjusted for household size.~~
- The developer will also be required to comply with the City's fair housing plans (the Affirmative Fair Housing Marketing Plan and/or the Affirmative Marketing and Buyer/Tenant Selection Plan) to guarantee equal access to all housing.
- Proposals should contain a small- or moderate-scale retail component that can support the development on the Project Site, serve the broader neighborhood, and provide business opportunities for local residents without undermining the role of Dudley Square as Roxbury's commercial center.
- Respondents should also consider incorporating supportive quality of life uses such as: local retail and service stores, cultural facilities, and social services.

Goal 2: Support community and minority ownership.

9/1/06 – clarify development "entity".

- Proposals by minority business enterprises ("MBEs"), community-based investors and developers, and community-based nonprofit organizations, as well as joint ventures with these groups are especially encouraged.
- The Roxbury community has set a goal of at least 51 percent minority equity in the development entity. All proposals should strive to maximize the participation of the

above groups in the equity and decision-making roles of the proposed development entity.

Goal 3: *Generate benefits and opportunities for Roxbury businesses and minority business enterprises.*

~~9/1/06—removed text: “A significant portion” from second bullet.~~

- Development should create short-term opportunities for Roxbury-based businesses to participate in the development planning and construction process, as well as long-term opportunities for increased business ownership by local residents, creation of new Roxbury-based businesses, and expansion and capacity-building of existing local businesses through joint ventures, subcontracting, and other avenues.
- The Roxbury community has set the following goals related to business development:
 - 51% or more, of pre-construction contracts (e.g. architecture and engineering) be awarded to Roxbury businesses and MBEs.
 - 51% or more, of the development contracts be awarded to Roxbury businesses and MBEs.
 - 51% or more, of ongoing / permanent service contracts (e.g. marketing and leasing, [maintenance](#), security, etc.) be awarded to Roxbury businesses and MBEs.
- The designated developer will be asked to prepare and implement a plan to ensure that the participation of local businesses and MBEs is maximized.
- After developer designation and at various stages before, during, and after the construction of the selected project, the BRA will host a clearing house with the designated the developer(s) for potential subcontractors, and job seekers in order to highlight the opportunities and resources available to meet the employment and subcontracting goals described above.

Goal 4: *Create concrete jobs and career opportunities for Roxbury residents and other residents of Boston.*

- Development must include and attract economic activities with a diversity of occupations, wage levels, and skill requirements. Full-time jobs with benefits and a living wage are a priority.
- Jobs created should be primarily net new jobs, whether in new or expanding businesses, rather than relocation of employees from other locations in Boston.
- Projects should create a significant number of jobs with skill requirements that match the range of skill levels of the population living in Roxbury or jobs for which current residents could be trained. *See Appendix ?? [section to be added]:* Format for Employment, Occupation and Wage Data, for more information.
- Development should create a significant number of lower-skill jobs that fit into a career ladder whereby employees can move on to higher-skill and higher-pay jobs within the same firm or in other firms and industries.
- The Roxbury community and the BRA have set the following goal for employment related to the development of the Project Site: at least 50 percent of the pre-construction jobs should be targeted to City of Boston Residents, at least 50 percent to minorities, and at least 50 percent to women.
- Respondents will solicit the input of major employers, local educational institutions, training providers, social service agencies, unions, and other entities regarding the training needs of Roxbury residents and possible strategies for meeting the

community's employment goals, but should not enter into specific commitments with such entities at this stage. Respondents are encouraged to integrate employment and training strategy concepts into their development proposals.

- The designated developer will be expected to work with the BRA (including Jobs and Community Services), the Boston Employment Commission, and all other appropriate entities, including a potential community-based initiative, to develop a plan to meet the City's and the community's hiring, job referral, and training goals through the use of existing or new community jobs banks, job referral systems, coordinated apprentice education and training programs, and community-based monitoring and oversight processes.
- Respondents must be able to demonstrate a history of success meeting hiring and training goals.

Goal 5: *Diversify the Roxbury economy and increase economic ties between Roxbury and the larger Boston and regional economy.*

9/1/06 – revised to clarify intent.

- To best meet the overall goal of wealth generation, bidders are encouraged to respond creatively to fostering economic activities that diversify Roxbury's economic base and bring new resources into the broader Roxbury community.
- Development proposals must document and demonstrate the ability to forge connections between economic activities on the MBTA Bartlett Yard site and the rest of the Roxbury economy so that wealth is circulated as broadly as possible. Connections should include the purchases of goods and services from Roxbury businesses or other opportunities for local businesses.
- Add "best practices".

Goal 6: *Maximize the economic development potential of the Project Site without adversely impacting surrounding uses.*

- Development should be of appropriate type and of sufficient density to allow the creation of a significant number of jobs and to make an ambitious and creative program financially feasible, without being out of scale with the surrounding uses or generating excessive traffic and parking or other environmental impacts.
- Uses should be compatible with the existing residential and educational uses that abut the MBTA Bartlett Yard site.
- New development and uses should be compatible with the transportation, urban design, and other goals described in this document. For example, less parking-intensive and more transit-compatible uses will be favored, e.g. office uses are preferable to large-scale "big box" retail. Complementary uses that allow for shared parking arrangements are encouraged.

4 USE & URBAN DESIGN GUIDELINES

The following guidelines are intended to describe the desired physical qualities of development on the MBTA Bartlett Yard site, to ensure that development enhances the adjacent neighborhoods, and to realize the goals developed during the community visioning process.

Designs should be creative in interpreting these guidelines in order to achieve the overall goals outlined in this RFP.

4.1 Roxbury Strategic Master Plan and Oversight Committee Development Vision

RSMPOC directed the BRA to conduct a series of public meetings for the purpose of crafting site specific Use & Urban Design Guidelines. The general recommendations put forth in the Roxbury Strategic Master Plan have guided these public discussions and are reflected in these recommendations. In the Fall of 2005 and Winter of 2006, two Community Workshops were conducted. The following recommendations and illustrations are products of those and subsequent meetings. At the second and final Community Workshop the following visuals were presented to illustrate the Use & Urban Design recommendations from the first Community Workshop.



FAR 1.0



FAR 1.5



FAR 2.0

The three options illustrated included a variety of uses and building types, heights, and massing; the resulting schemes ranged in Floor to Area Ratios ("FAR") from 1:1.0 to 1:2.0. These illustrations depicted a range of building types from 3-story row houses and town-houses (approximately 35 feet in height) to 7-story mixed-use residential over commercial buildings (approximately 85 feet in height). Some of the heights and configurations illustrated in the three options exceed what is allowed under current zoning. The purpose of the illustrations was not to suggest changes to the existing zoning limits but to show how different uses, building heights and massing could be manipulated to create development options that realize the community's vision.

Key urban design ideas developed with the extensive input of the community and RSMPOC are:

- Reduce the scale of the MBTA Bartlett Yard site by introducing new roadways and pathways.
- Provide pedestrian friendly streetscapes with frequent public entrances, active and visually transparent ground floor uses, and seasonal uses of sidewalks.
- Create a strong visual presence along the Washington Street façade that is compatible with the surrounding urban fabric.

9/1/06 – Urban Design Goals consolidated in to Section 4.2 MBTA Bartlett Yard Urban Design Guidelines.

4.2 MBTA Bartlett Yard Use & Urban Design Guidelines

9/1/06 – revised to clarify PRC use of Use & Urban Design Guidelines in the review of proposals.

The RSMPOC and area community envision the redeveloped MBTA Bartlett Yard site as a compact, complete community with a diverse mix of homes, apartments, retail and community services. Following are specific Use & Urban Design Guidelines based on meetings and workshops held in the Roxbury Community in the last year. Each guideline item is followed by a list of desired outcomes and/or more detailed descriptions intended to help respondents understand more fully the use and urban design vision for development of the site.

Bidders are encouraged to respond creatively to each guideline and should describe in as much detail as possible how the proposed development meets the stated requirements. Respondents should provide illustrations and descriptions, as necessary, to evidence compliance with each guideline. The Project Review Committee (“PRC”), BRA, and MBTA will review and evaluate proposals to determine if each bidder has met the requirements of Section 4 - Use & Urban Design Guidelines.

Additionally these guidelines are intended to assist respondents to this RFP in crafting proposals that fulfill community expectations for redevelopment of the Bartlett Yard site.

4.3.1 Access, Connectivity & Neighborhood Structure

A. Access

9/1/06 – Item 2 Parking and Loading has been moved and combined with item 4.3.2 C. Parking and Loading Requirements, and

9/1/06 – Added note on required

1. Site access

The selected developer will be required to complete a comprehensive transportation and traffic study of the MBTA Bartlett Yard site and surrounding area including the impacts of new development. The study should define existing conditions and remaining capacity of the multi-modal transportation system (including pedestrian, bicycle, private vehicle and public transit) as well as all proposed transportation, traffic and infrastructure improvements related new development and mitigating any adverse impacts.

- All four edges of the site should provide pedestrian access including the use of steps and overlooks. Access locations should build on the existing network of streets and paths and provide for safe pedestrian movement on and around the site.
- Principal vehicle access into and off of the site should be via Washington and Bartlett Streets.
- Service and truck access should be from Washington Street and lower Bartlett Street and generally limited to the front of the site.
-

9/1/06 – Goal #1 has been moved and consolidated into the new item 2 below.

2. Minimize traffic and parking impacts

- Parking ratios should be as low as possible in order to encourage alternatives to driving without creating excessive parking and transportation impact in the surrounding neighborhoods.
- Projects should include creative transportation demand management (“TDM”) programs including subsidized MBTA passes, provision of on-site shared vehicles, provision of bicycle facilities, and similar strategies.
- Development should create safe, pleasant, and clear pedestrian and bicycle connections to transit facilities, the local street network, and existing and planned bicycle/pedestrian trails (the Southwest Corridor and the planned South Bay Harbor Trail) in order to encourage use of alternatives to the automobile.



ACCESS

Enhance the Project Site's visual and physical connectivity

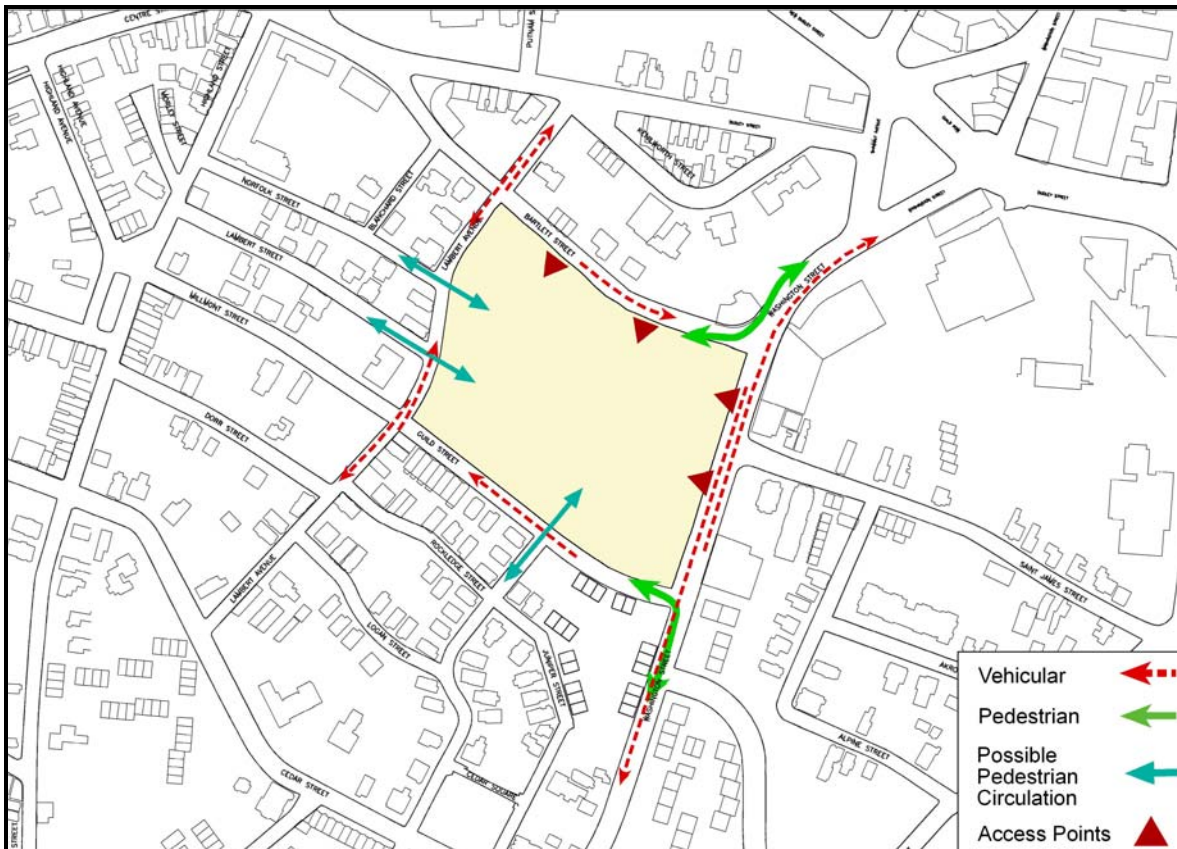
B. Connectivity

1. Street and roadway network

- New roadways should extend the neighborhood network of streets servicing the area in to the site and reflect the character and scale of adjacent streets.
- Where possible, new and modified existing roadways should be sized and configured so as to improve traffic circulation surrounding the Bartlett Yard site.
- The selected developer will be required to complete a comprehensive traffic study analyzing the vehicular impacts of new uses at the Bartlett Yard site and to implement actions to minimize private automobile and truck uses and related adverse impacts.

2. Pedestrian and bicycle pathway network

- New pathways should extend the neighborhood network of pedestrian and bicycle pathways in to the site connecting the site with local transit facilities, and existing and planned bicycle/pedestrian trails (the Southwest Corridor and the planned South Bay Harbor Trail) and the surrounding area.
- New pathways should be inviting, well light and configured to allow for passive visual supervision. Build on the success of existing area pathways in the Hawthorn & Highland Park neighborhoods.
- Development should create safe, pleasant, and clear pedestrian and bicycle connections to
- Special consideration should be given to providing access at Guild and Lambert Ave for Highland Park residents wanting to cross diagonally to and from Washington St. and on to Dudley Sq.
- Pathways and sidewalks should include street furniture as follows:
 - Bus shelter appropriate and unique for Washington Street.
 - Public bike racks for visitors
 - Ornamental waste and recycling receptacles
 - Benches or seating where appropriate
 - Consistent outdoor Lighting types where appropriate
- A maintenance, management, and security plan should be provide for all new pathways.



CIRCULATION
 Create efficient and safe vehicular circulation

C. Neighborhood Structure
1. Scale of site

- Reduce the scale of the site by introducing new roadways and pedestrian pathways so as to create a seamless transition through site.

2. Edge conditions

- Provide green strips (verge) between curbs and sidewalks and sidewalk plaza areas with tree plantings. Planting areas should be at least 3'-0" to 4'-0" wide and separate from sidewalk requirements.
- Consider non fruit-bearing versions of native trees to recall the fruit orchards that were once common in the area.
- New buildings along the site's edges should reflect and enhance the scale and characteristics of the existing neighborhood buildings.



BUILT EDGE DIAGRAM

Building edges with use characteristics surrounding the development site.

4.3.2 Use & Density

A. Types of uses

1. Commercial uses and character

9/1/06 – Added bullet on “...creative mix of businesses” and “...wealth generation”

- Provide a creative mix of new businesses that give opportunity to locally owned retail and service businesses and promote the local recirculation of money and wealth generation.

- Provide for ground floor retail and service business that will compliment new uses of the site and provide for the daily needs of the local community. Priority should be given to quality locally owned independent businesses that complement but not compete with existing Dudley Square businesses.
- Noted retail and service uses include: drug store, hardware store, office supply, coffee shop, sit down restaurant, barber shop, dry-cleaners, shoe repair, and specialty grocery store. Other noted commercial uses include: light/limited manufacturing, health clinic, community / youth center, and a community movie theater. Large format (big box) retail is not desired.

2. Housing types and character

- Provide for a range of residential building and unit types including: senior independent living and assisted living, young professional and family housing. Special consideration should be given to the community need for senior and / or progressive care housing and assisted living residential uses.
- Focus on residential homeownership but include a mix of rental residential units.
- Provide for mixed income residential ownership and rental properties.

3. Use locations and configurations

- Retail, service, and commercial uses are desired along the Washington Street and lower Bartlett Street edges of the site with active retail and service uses on the ground floor and other commercial uses limited to the second floor. The most substantial commercial uses should be oriented toward Dudley Square at the corner of Bartlett and Washington Streets.
- Commercial uses should be integrated into mixed use buildings with residential uses on the floors above.
- At the sides and interior of the site, provide a range of residential building types including row houses and town houses. New housing should fit in with existing neighborhood housing including architectural elements such as stoops, window bays, architectural cornices and metal work.
- New buildings should be configured so as to create view corridors and to preserve existing views from the site to the surrounding area.

B. Range of densities

9/1/06 – Inserted new item 1 with stated density range of 1:1.3 to 1:1.8 FAR.

1. Density

- Provide for the minimum density necessary for a feasible project and meeting the requirements of the Section 3 - Development Goals and Section 4 - Use & Design Guidelines. Proposed projects should have an overall Floor to Area Ratio ("FAR") in the range of 1:1.3 to 1:1.8.

2. Street specific conditions

- Washington St: 4-6 story mixed use, residential over retail signature buildings. Use set backs to minimize building heights.
- Site Interior: 4-6 story buildings with open space.
- Guild St: 2-3 story row houses with front stoops.
- Lambert St: 2-3 story row houses with front stoops.
- Bartlett St: 2-3 story row houses toward the rear, larger toward the front.

3. Site specific conditions

9/1/06 – Added bullet "...strong visual presence along Washington Street."

- Buildings should be configured so as to create a strong visual presence along Washington Street.
- Taller buildings should be limited to the Washington St. edge and adjacent interior of the site. Building shadow and view impacts on abutters should be minimized.
- Building heights should decrease from front to back and as the ground elevation rises.

9/1/06 – Goal 1 parking and loading items have been folded into the sections below.

C. Parking and Loading Requirements

1. Parking needs – housing, commercial and other uses

- Provide for a mix of parking opportunities that recognizes the walk-ability of the neighborhood and access to public transit.
- New on site parking should serve only the new development uses and should not serve area-wide parking needs. As stated in the Master Plan, there should be no stand-alone or satellite parking facilities.
- Parking fees should reflect the cost of building, operating, and maintaining parking (other than short-term customer parking and resident parking) and should be high enough to encourage use of transit and other alternative modes of transportation (i.e. at least equivalent to the cost of transit).
- Provided on-street parking for visitors and residents including Washington St.
- Parking ratios:
 - Residential: 0.75 to 1.25 spaces per unit, less for senior residential units.
 - Commercial: 0.75 to 1.25 spaces per 1,000 square feet of space.
 Final parking ratios should consider specific development uses, characteristics, and degree of shared parking.

2. Location and access

- Loading areas should be internal to commercial buildings and include screening and landscaping to improve the appearance.
- Where possible provide adjacent residential unit specific parking. For larger residential buildings provide limited access structured or underground parking.
- Retail parking should be limited and located close to business uses on Washington St.

3. Characteristics of Parking - driveway, roadway, lots, structured garages

- New development should employ a range of parking solutions including residential driveways, on-street parking, and parking garages. Surface parking lots should be fully landscaped, limited in size, and limited to commercial uses only.
- Surface parking lots should be fully landscaped, limited in size, and limited to commercial uses only.

4.3.3 Quality of Life & Sustainability

A. Quality of Life and Environmental conditions

1. Open space

- Use open space as a site feature and organizing element.
- All open spaces should have programmed and designed for specific uses.
- Use a variety of plant specimens appropriate for region, climate and use.
- Design and construct attractive landscapes for all seasons in public spaces.
- Provide contained play area(s) with play structure(s) suitable for children.
- Provide for a variety of public, shared, and private open spaces specific to new building types and uses (e.g. private yards behind row houses).

- Implement drainage maintenance program.



OPEN SPACE

Create a high-quality open space system for both the development and the neighborhood

2. Views, air and water

- Maintain existing and create new view corridors from within and through the site.
- Configure buildings and site features to allow for the greatest amount of sunlight areas and minimal amount of deeply shadowed areas.
- Implement drainage maintenance program.

3. Site soils and remediation

- Redevelopment of the site must result in the remediation necessary to achieve the proposed development program.
- The designee will assume any and all liability for any environmental cleanup pursuant to Chapter 21E of the Massachusetts General Laws and the Massachusetts Contingency Plan, as well as any other applicable laws or regulations, e.g. the Massachusetts Department of Environmental Protection's air quality regulations (310 CMR 7.00 and 7.15) and solid waste regulations (310 CMR 19.00).
- Implement drainage maintenance program.

4. Green building and healthy home standards

- New buildings shall be planned, designed and constructed to minimize any adverse environmental and health impacts of the project by integrating green building principles and practices into all stages of project planning design and construction.
- The project team must include LEED-accredited project design, engineering, and construction planning professionals from the initial planning phase of the project.
- Developer commitments to green building outcomes including LEED Score will be considered in determining responsiveness of proposals. A minimum goal of LEED certifiable design and construction is required.
- New buildings should be ultra-energy efficient so as to reduce the occupant utility expenses and minimize demand impacts on existing utility infrastructure.

5. Architectural and building standards

- New buildings shall be of high quality design and feature architectural elements characteristic of the best existing buildings in the surrounding neighborhood.
- Building materials and construction shall be of the highest quality on both the exterior and interior of buildings. At a minimum, materials should include brick masonry, cast stone, high quality windows, architectural metal work, and landscaping.

9/1/06 Added bullet on bicycle storage requirements

6. Transit oriented development and reduced dependency on personal vehicle use

- New development should include a mix of uses to best meet the principle daily needs of existing and new residents and reduce the need for personal vehicle trips.
- Site and building design should allow for easy access to existing and future public transit service and related amenities such as shelters should be incorporated into the project.
- Provide secure in-building bicycle storage for all residential units and secure on-site bicycle storage for the use of visitors and commercial / retail shoppers.

B. Economic sustainability

1. Community economic sustainability

- Job creation should be considered along with potential new uses.
- Recognize homeownership as a means of wealth creation.

2. Economic viability

- New development must have a comprehensive management and maintenance plan so as to remain economically strong over the long term and retain its value over time.

9/1/06 Urban Design Goal #2 folded into new section below.

C. Maintenance and infrastructure

1. Roads and streetscapes

- All site improvements and necessary off-site improvements, including sidewalks, street lights, and street trees shall be paid by the designated developer, and the estimated costs for such improvements must be documented in the development pro forma.
- All infrastructure must conform to City of Boston standards and be approved by the appropriate public agencies prior to approval of final design.

5 SELECTION AND SALE

All proposals will be reviewed in a two tier process: first for compliance with submission requirements, and Development Goals and Urban Design Goals and Guidelines; and, second for highest bid price,. The MBTA and BRA may request additional information from any and all Bidders. The MBTA reserves the right to reject any or all proposals for any reason or no reason. The MBTA reserves the right to reject any and all Bids and responses, in whole or in part, and then advertise for new proposals or to otherwise deal with the Property, as may be in the best interest of the MBTA. The MBTA also reserves the right to waive any informalities, minor deviations, insignificant mistakes and matters of form rather than substance to seek clarification of the proposal or contract document, which can be waived or corrected without prejudice to other bidders, potential bidders or the MBTA. No officer or agent of the MBTA is authorized to waive this reservation.

5.1 Selection Criteria

All proposals will be evaluated to the extent that they meet the following criteria. Bidders are encouraged to submit evidence supporting the viability of the proposal as evaluated by these criteria, beyond the required information outlined in Chapter 6: BID SUBMISSION REQUIREMENTS.

Bids shall be evaluated on the basis of the highest bid among the responsible and eligible Bidders.

5.1.1 Non-responsive Bids

Bids will be deemed as Non-responsive if the bid amount is less than the minimum bid as specified in Section 6.3 Minimum Acceptable Bid.

5.1.2 Development Criteria:

- A. The Bidders must demonstrate the feasibility and compatibility of the proposed development program with the requirements of Section 3 - Development Goals and Section 4 – Use & Urban Design Guidelines described herein.
- B. The Bidders must demonstrate a positive track record of working in Roxbury, Boston, or Massachusetts in general, and/or a track record of completing and successfully operating urban projects comparable to the proposed project. All members of development teams should be able to demonstrate appropriate qualification for their respective roles.
- C. The ability to complete the development within a reasonable period of time. A schedule of appropriate development phasing should be supported by the market analysis.
- D. Demonstrates the commitment to sustainable design, green building, and transit oriented development.
- E. Any special features which go beyond the minimum criteria for development and which strengthen the project as a whole will be taken into account.
- F. The Bidders must comply with all the submission requirements described in Chapter 6: BID SUBMISSION REQUIREMENTS.

- G. The Bid submission must include firm qualification information that demonstrates that the Bidder meets the minimum standards set for below.
 - (a). Experience – The Bidder must demonstrate success with similar projects within the last three years in which one or more Principals of the Bidder’s firm or other identified team members were involved.
 - (b).Financial – The Bidder must provide proof of sufficient assets to cover all obligation associated with the Bid through closing.
- H. Pro forma financial projections containing usual and customary data sufficient to establish financial feasibility for the project. Bidders may also provide alternative pro formas that would be used by an identified financing source that the Bidders plans to use.
- I. The Bidder must demonstrate that its firm (and/or Principals) are not in default of any outstanding obligations to the MBTA. Bidders must be in good standing with the MBTA, the Commonwealth and the City to be eligible for bid award.
- J. Demonstrate that the Bidder has no violations or issues pending before any federal, state, or local instrumentality as certified in the Certificate of Tax, Employment Security, and Contract Compliance (Appendix _____).
- K. Demonstrate that the Bidder certifies there are no unresolved fair housing complaints. The Bidder must obtain certification from the Boston Fair Housing Commission (Appendix ____).

5.2 Selection Process

5.2.1 Role of the Project Review Committee

9/1/06 – Revised to clarify the role of the PRC, OC members and elected officials in review process.

The Project Review Committee’s (“PRC”) role and process will follow the applicable sections of the Roxbury Master Plan. Upon issuance of this RFP the BRA with RSMPOC and elected officials will form a PRC for the MBTA Bartlett Yard site. The PRC will determine if each proposal is either “responsive” or “non-responsive” to the requirements of Section 3 - Development Goals and Section 4 - Use & Urban Design Guidelines of this RFP. The PRC will make recommendations on these matters to the RSMPOC, BRA, MBTA, as well as to the Roxbury Neighborhood Council (“RNC”), elected officials, and the community at large. The BRA will then make recommendations on these matters to the MBTA.

The PRC for the MBTA Bartlett Yard site will be made up of five (5) members from the RSMPOC. Additional members, between four (4) and ten (10) will be appointed by the BRA Director from a list of at least fifteen (15) nominations by the RNC and Roxbury’s elected officials. The list will include representatives from among such groups as legal abutters, local neighborhood associations, and other district stakeholders.

6 BID SUBMISSION REQUIREMENTS

6.1 Bid Submission

All bids are due by 11:00 AM on *Date to be determined* at TRA, 20 Winthrop Square, 2nd Floor, Boston, Massachusetts 02110 at which time they will be publicly opened and read aloud. No submissions will be accepted after 11:00 AM on *Date to be determined*. All bids must be submitted in a sealed envelope marked "BID SUBMISSION FOR MBTA BARTLETT YARD PROPERTY 2565 WASHINGTON STREET, ROXBURY, MA" and must show the name, address and telephone number of the person(s) submitting the bid and the date.

Applicants should be aware of the following timeline:

- *Date to be determined*: **Issuance of RFP**
- *Date to be determined*: **Question submission deadline**
- *Date to be determined*: **Pre-Bid Conference - site visit and question response issuance**
- *Date to be determined*: **Proposals due**
- *Date to be determined*: **Respondents present proposals to community**
- *Date to be determined*: **respondent selection**

A complete bid package shall include the following:

- Bid Form A - Bid Form
- Bid Form B - Buyer's Affirmations
- Bid Form C - Bank/Financial References
- Bid Form D - Development Program & Firm Qualifications
- Certificate of Good Standing (Corporate Bidders only) or Certificates of Existence (if applicable)
- Bid Deposit Check in the amount of Twenty-Five Thousand (\$25,000.00) Dollars

Please note that a draft Purchase and Sale Agreement is provided in Appendix E. The Successful Bidder (defined below) will be expected to execute a Purchase and Sale Agreement in substantially the same form.

Any bid submitted that substantially alters the terms hereof so as not to be in conformance with the provisions contained herein will be deemed unresponsive. In particular, bids submitted for less than the minimum bid price, or that deviates from the conditions of paragraphs 0 and E of Section IV shall be deemed unresponsive and any and all Deposits submitted hereunder shall be forfeited by the Bidder.

6.2 Pre-Bid Conference, Questions And Changes

A pre-bid conference will be held at 11:00AM on *[date to be determined]* at TRA.

Bidders may submit questions in writing no later than 4:00 PM by *Date to be determined*. Written responses will be provided no later than one week prior to the bid due date. Questions should be addressed to the attention of Mark W. Davis at TRA. A schedule is provided in Appendix F.

If the MBTA amends or changes the information in this Invitation to Bid, the information will be distributed to Registered Bidders in the form of an addendum

6.3 Minimum Acceptable Bid

The minimum acceptable bid is *[price to be determined]* for each and every square foot of land comprising the Property.

6.4 Bid Deposit

All bids must include a Bid Deposit in the form of a banker's or cashier's check for Twenty-Five Thousand (\$25,000.00) Dollars made payable to the order of the MBTA and placed in the sealed bid envelope. The Bid Deposit for the Successful Bidder (defined below), less an Administrative Fee in the amount of Ten Thousand (\$10,000.00) Dollars, will be credited to the purchase price at closing. The Bid Deposit is non-refundable if the Successful Bidder fails to execute the Purchase and Sale Agreement or fails to close within 60 days of the MBTA Board vote. The MBTA will retain the Bid Deposits submitted by the second and third highest bidders until the Successful Bidder executes the Purchase and Sale Agreement. All other Bid Deposits will be returned upon designation of the Successful Bidder

6.5 Evaluation and Acceptance Of Bids

Bidders are required to submit the following:

- A. **Bid Deposit Check – in an unsealed envelope**
- B. **Bid Form A-1 – Certification that the bid submitted meets the minimum bid required, and that all required forms have been submitted (unsealed)**
- C. **Bid Form D-1 – Firm Qualifications (unsealed)**
- D. **Bid Form C, D-2 – Banking, proforma information (sealed envelope)**
- E. **Bid Form A-2 – Price Offered (sealed envelope)**

Bids shall be evaluated on the basis of the highest bid among the responsible and eligible Bidders, A Bidder shall be deemed responsible and eligible if (1) the bid package submittal is complete; (2) the Bidder provides sufficient evidence of project feasibility and compatibility with MBTA requirements and neighborhood goals and interests as described in the "BRA Use and Design Guidelines" (Appendix B); (3) the Bidder provides sufficient proof of its experience developing sites of similar size and complexity; (4) the Bidder provides proof of sufficient assets to cover all obligations through Closing, and (5) the Bidder is in good standing with the MBTA, the City of Boston, and the Commonwealth of Massachusetts.

Acceptance of a Bid shall be subject to a vote of the MBTA's Board of Directors. Any and all costs and expenses incurred by the Successful Bidder with regard to the Property prior to an authorizing vote of the MBTA Board of Directors, will be the responsibility of the Successful Bidder and at its own risk.

The Successful Bidder shall execute the **Purchase and Sale Agreement** substantially in the form attached hereto as Appendix E no later than **forty-five (45) days after Designation**. If the Successful Bidder fails to execute the Purchase and Sale Agreement within the allotted time, then the MBTA may retain the Bid Deposit as liquidated damages, all obligations of the MBTA due to the Successful Bidder shall cease, and the MBTA may award the Bid to the next highest responsible and eligible Bidder or re-advertise the Property. Thereafter, in the event the MBTA notifies the second or third highest Bidder that it is now the Successful Bidder, and the newly designated Successful Bidder fails to execute the Purchase and Sale Agreement within Thirty (30) business days of such notice, then the Bid Deposit of the new Successful Bidder shall be retained as liquidated damages, all obligations of the MBTA due to the new Successful Bidder

shall cease, and the MBTA may award the Bid to the next highest responsible and eligible Bidder or re-advertise the Property.

6.6 Right to Reject Bids

The MBTA reserves the right to reject any and all Bids and responses, in whole or in part, and then to advertise for new proposals or to otherwise deal with the Property, as may be in the best interest of the MBTA. The MBTA also reserves the right to waive any informalities, minor deviations, insignificant mistakes and matters of form rather than substance and to seek clarification of the proposal or contract document, which can be waived or corrected without prejudice to other bidders, potential bidders or the MBTA. No officer or agent of the MBTA is authorized to waive this reservation.

ALL OF THE TERMS, CONDITIONS, SPECIFICATIONS, APPROPRIATES AND INFORMATION LISTED IN THE TABLE OF CONTENTS AND INCLUDED IN THIS INVITATION TO BID SHALL CONSTITUTE THE ENTIRE INVITATION TO BID PACKAGE AND SHALL BE INCORPORATED BY REFERENCE INTO THIS BID SUBMISSION. NO CONDITIONS, OTHER THAN THOSE SPECIFIED IN THIS INVITATION TO BID, WILL BE ACCEPTED AND BIDS SUBJECT TO BIDDER'S CONDITIONS MAY BE DISQUALIFIED EXCEPT AS SPECIFIED IN THIS INVITATION TO BID.

6.7 Development and Design Submission

All proposals must contain a Development and Design Submission with the information and items listed below, although respondents are free to organize this information in ways other than suggested. If it is not possible to provide a given item or piece of information, the proposal should substitute an explanation of why this is the case.

6.7.1 Development and Design Submission: Development Team

- A. A letter of interest signed by the principal(s). This letter should introduce the development team, including the developer(s), attorney, architect, contractor, marketing agent/broker, management company and other consultants and entities. Indicate whether any of the individuals or businesses is a minority- or woman-owned business. Describe the nature of any participation by community-based and/or minority investors, developers, and other entities.. A chief contact person for each should be listed.
- B. A description of qualifications, experience, and relevant background information of all team members. This should include a description of functional relations among team members, in particular the principal owner, partners (if any), the project manager and/or development consultants.

6.7.2 Development and Design Submission: Development Concept

Development Program

- A. A description of the proposed development program, including a tabulation of gross and net square footage of each development type (i.e. retail, office, housing, light industrial, etc.) or project component; a description of the types of commercial spaces proposed (e.g. intended use or user, breakdown of leasable spaces by size, etc.); number and types of housing units, if any; number of parking spaces by project component; and

totals for the complete project.

- B. A listing and description of each proposed building, including overall building dimensions and gross and net square footage.
- C. A description of the planned phasing of the project development.
- D. An explanation of the underlying rationale for the program as a whole, for the mix of development types, and for the proposed phasing, and an explanation of how the proposed project responds to the development goals of this RFP. Note that more specific information requests corresponding to the development objectives are listed below.
- E. In the case of proposals that exceed the dimensional regulations established in Article 50, an explanation of the rationale for the scale and density of the proposed project, as well as a discussion of the required zoning relief and any zoning amendments or variances that would be required for the proposed development.

Housing Component

- A. A detailed description of the types and sizes of all housing units proposed, to the extent this is not provided as part of the description of the overall development program.
- B. An explanation of how any affordable housing, built as part of the project, will meet the affordable housing requirements set forth herein.

Transportation and Parking

- A. A description of the parking program associated with each proposed use.
- B. A description of strategies to minimize automobile use and maximize alternative forms of transportation, e.g. transportation demand management (“TDM”) programs such as provision of shared vehicles on-site, subsidized MBTA passes, provision of bicycle facilities, etc.
- C. A description of the methodology for determining necessary parking ratios.

Infrastructure Provision

- A. A description of the intended approach to the preservation of utility easements and/or the relocation of existing utilities, if any is proposed.
- B. A description of the intended approach to provision of streets, including the approach to the existing public streets.
- C. An explanation of the groundwater evaluation and monitoring strategy to be implemented as part of the development project.
- D. A description of all intended site improvements and off-site improvements, including sidewalks, streetlights, and street trees.

Environmental Remediation and Sustainability

- A. A description of the intended strategy for environmental remediation, including the

results of any determination of existing conditions and environmental investigation of the Project Site and surrounding area carried out by the respondent.

- B. A description of how the project incorporates sustainable design and green building principles, technologies, and practices. Proposals should include the appropriate LEED Project Checklist(s) detailing the anticipated design features and LEED credits and an appropriate narrative description of anticipated green building features. Proposals should also include a list of the LEED-accredited professionals included on the development team.

Economic Development Strategy

- A. An explanation of the role that the project will play in diversifying the Roxbury economy and creating connections to the larger regional economy.
- B. A description of the types of commercial users the project includes or is targeting, the market research performed to ascertain the viability of the proposed project, and the features of the project that support the goal of attracting the target tenants. Note that the Financial Submission requires further detail on the market research performed.
- C. An explanation of the project's ability to accommodate a range of uses, as well as businesses of a variety of sizes and life-cycle stages, and to remain adaptable and economically viable over time.
- E. A description of community-based and minority participation on the development team, especially any supporting information not included in Section 0 (A).
- F. The estimated number of construction jobs that will be created and the basis for the estimate.
- G. The estimated number of new permanent full-time and part-time jobs that will be created and the basis for the estimate,
- H. The estimated occupational characteristics, skill levels, and wages of permanent jobs that will be created. Characteristics should be estimated according to a clearly documented methodology and based on readily available data sources.
- I. A description of possible and intended strategies for achieving the community goals related to employment in all phases of the project.
- J. A description of the development team's history of meeting hiring and training goals.
- K. A description of potential business partnerships and goods and services contracts available before, during, and after construction, including the estimated amount of such contracts.
- L. A description of possible and intended strategies for achieving the community goals related to business development and subcontracts.
- M. An explanation of other features of the development that will yield long-term opportunities and benefits for local businesses, e.g. an on-site incubator, capacity -

building assistance for potential contractors and suppliers, preferential treatment for local retail businesses operating within the development, assistance obtaining surety bonds, etc.

Urban Design

All materials should include a graphic scale. The respondent should provide materials in the following formats as indicated below or as appropriate:

- A. Presentation boards of 30" x 40" showing the site plan, key diagrams and illustrations, and other drawings deemed necessary.
- B. Architectural drawings at full scale (1" = 40' for the site plan and 1/16" = 1'-0" for plans, sections and elevations) and other drawings and illustrations at the appropriate scale.
- C. 11" x 17" hard copies of all graphic materials to be submitted as part of the Development and Design Submission, including all design submission materials listed below.
- D. 300 DPI JPEG versions of all design submission materials.
- E. Digital 3D model showing building massing with the context of the site. See Appendix IV: Digital 3D Model Submission Guidelines for more information.

The Development and Design Submission should include, at a minimum, the following items:

- A. A neighborhood plan showing the Project Site, building footprints, street names, and existing buildings on the neighboring sites.
- B. A site plan showing building footprints and location of all site improvements including open space, curbside uses, pedestrian and vehicular circulation, and the organization of functions and open spaces.
- C. Concept diagrams and illustrations depicting the proposed development and showing how the proposal captures the essence of the urban design guidelines and incorporates the urban design guidelines into the development plan.
- D. A written description of how the proposed development plan successfully interprets the urban design guidelines.
- E. Diagrams and illustrations of proposed improvements to existing pedestrian and bicycle connections to transit facilities, the local street network, and existing and planned pedestrian/bicycle trails.
- F. Circulation plan (at appropriate scale) showing vehicular circulation for passenger and service vehicles, as well as locations, types, and numbers of parking spaces.
- G. Building elevations showing façade, architectural details, massing, building height, and notations of proposed materials, demonstrating all sides of each building.
- H. Conceptual designs and schematic floor plans of all buildings, showing ground floor and typical upper floor(s).

- I. Street elevations (at appropriate scale) showing the relationships of the proposal to the massing and building height 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.
- J. Perspective drawings drawn at eye-level and bird's eye-level showing the project in the context of the surrounding area.
- K. Digital 3-D Model.

Implementation Plan

The respondent shall provide a description of how the development concept will be implemented. The description shall include:

- A. A detailed timeline, indicating all pre-development tasks from the date of Tentative Designation by the BRA through construction loan closing and construction commencement. The respondent should indicate start and end dates for each pre-development task.
- B. An outline of required regulatory approvals and projected timeline to obtain such approvals

6.8.5 Financial Submission: Market Study

A preliminary market study, using empirical market data, that demonstrates the feasibility of the proposed sale and/or lease rates of the project and the most likely uses and industries.

6.8.7 Financial Submission: Residential Management Plan

A management plan for the residential component of the project, if applicable.

6.8.8 Financial Submission: condominium Sales Pro Forma

If applicable, the condominium sales pro forma shall include, but not be limited to, the following information:

- A. A schedule of unit types showing the average net square feet ("NSF"), number of bedrooms, condominium fees, and price per unit and price per NSF for each unit type. Comparable data should also be provided for commercial and parking spaces that will be sold.
- B. Gross Sales Revenue.
- C. Sales cost, including brokerage, legal, and other conveyance costs.
- D. Net Sales Revenue.

F. Assumptions regarding pre-sales and projected sell-out period.

**Appendix I:
Additional Documentation and Materials**

The following documents are available for viewing and/or distribution at the BRA in the office of Harry R. Collings, Executive Director/Secretary, Room 910, Boston City Hall, One City Hall Square.

- A. Roxbury Strategic Master Plan
- B. Boston Zoning Code
- C. Profile of Development Impact Area
- D. LEED NC-2.1 Checklist (also available at the U.S. Green Building Council's website, www.usgbc.org)

7 REQUIREMENTS AFTER TENTATIVE DESIGNATION

*8/1/06 – Section **to be** revised to reflect Bartlett Yard site and MBTA sale of property*