

REQUEST FOR PROPOSALS Development Submission

For Development of 21-29 Fernboro Street

March 11, 2024



ESCAZÚ DEVELOPMENT



21-29 Fernboro Proposal Submission



Dorchester Bay Economic Development Corporation
594 Columbia Road
Dorchester, MA 02125



Caribbean Integrate Community Development
820 Cummins Highway
Boston, MA 02126

ESCAZÚ DEVELOPMENT

Escazu Development
21-35 Batchelder Street
Roxbury, MA 02119

Letter of Interest

March 11, 2024

Teresa Polhemus
Executive Director/Secretary
Boston Planning & Development Agency
12 Channel Street, Suite 901
Boston, MA 02110

Re: DBEDC-Escazu-CICD Proposal Submission

Dear Ms. Polhemus,

Dorchester Bay Economic Development Corporation (DBEDC), Escazu Development (Escazu), and Caribbean Integration Community Development (CICD) are pleased to present our shared vision for the development of the five parcels located at 21-29 Fernboro Street.

DBEDC will be a co-developer of the site. DBEDC is a nonprofit, City of Boston-certified and Commonwealth of Massachusetts-certified MBE founded in 1979. With its home at the Pierce Building just one mile away from the 21-29 Fernboro Street site, DBEDC brings an understanding of the neighborhood to this project. DBEDC has developed over 1,000 affordable units within a two-mile radius of the BPDA-MOH site and over 160,000 square feet of commercial space with an economic development mission to help local businesses grow and to create jobs for local residents.

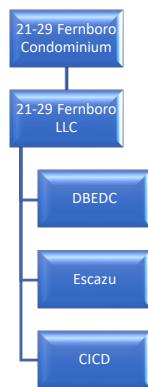
21-29 Fernboro Proposal Submission

Escazu Development will be a co-developer of the site. Escazu is a certified MBE and was formed in 2013 by My Lam, its acting principal. Escazu has a deep commitment to developing and investing in Dorchester where there is a need for economic growth and opportunity.

CICD will be a co-developer of the site. CICD is a 503(c) non-profit that leverages real estate development in struggling communities to build healthy neighborhoods and broadens access to economic opportunities. CICD develops affordable housing solutions and offers culturally sensitive support and resources through Programming for professional development, workforce training, and community engagement.

Vita Architects will be the architect of record for the project.

Nicoya Construction will be the contractor of record for this project.



Organization Structure for the Fernboro Joint Venture

Our development team is excited for the possibility to create 12 new homes that are beautiful, efficient, safe, and affordable for the local community that needs more quality housing. We are grateful to hear that the community input into the RFP also reflects the desire for more affordable housing.

Our goal is to leverage development at 21-29 Fernboro Street to prevent displacement and promote economic opportunity for local residents and the surrounding community. We will achieve this goal through the following development objectives:

- Create affordable condominium units that will bring many first-time homebuyers stable, affordable mortgage payments and the chance to build a limited amount of equity, providing future residents with an affordable alternative to the instability of renting in the community.
- Provide family-sized 2- & 3-bedroom housing units that is in line with the desires of the community as expressed in the RFP.
- Develop an energy-efficient building with 1:1 bike and vehicle parking spaces that sets a high standard for future development in the Grove Hall area.
- Create a modern, visually appealing building while complementing the historic architectural features from the surrounding neighborhood.

21-29 Fernboro Proposal Submission

Through project work and direct lived experience, our team has an intimate understanding of the Grove Hall history and culture. Some of us have lived in affordable housing in Dorchester. Others know what it means to start businesses as people of color with little intergenerational wealth. As members of this community, we understand what is at stake and what we stand to lose if we cannot create and preserve affordable spaces for our neighbors.

We will combine our deep community knowledge and lived experiences with the skill, experience, and sophistication necessary to deliver a successful project that will sustain the Grove Hall community for generations to come.

Thank You for your consideration. We look forward to continuing to work with you, community members, and local elected officials of the Grove Hall area to make this vision a reality.

Sincerely,

Kimberly R. Lyle




Chief Executive Officer
DBEDC
(617) 533-9562
klyle@dbedc.org

My Lam



Manager
Escazu
(617) 230-3263
My.lam@escazudev.com

Donald Alexis

DocuSigned by:

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President
CICD
(617) 942-3591
dalexis@alexisorg.com

Contents

Joint Venture Memorandum of Understanding.....	6
Development Submission	12
Introduction – Developer Qualifications, Experience, & References	12
DBEDC Qualifications	12
Escazu Qualifications	16
CICD Qualifications	18
Experience:	19
DBEDC	19
Escazu Experience:.....	25
CICD Experience:.....	27
References:	30
Resumes.....	31
Development Concept.....	38
Development Plan	39
Boston Residents Jobs Policy.....	41
Diversity and Inclusion Plan	42
Development without Displacement Plan	45

Joint Venture Memorandum of Understanding

**Memorandum of Understanding
for the Joint Venture between
Dorchester Bay Economic Development Corp (DBEDC)
and
Escazu Development (Escazu)
and
Caribbean Integration Community Development (CICD)**

The parties, if designated, will form a LLC for the development of 21-29 Fernboro Street, Boston, MA 02121. This agreement shall be succeeded by a more detailed LLC operating agreement.

Development Site:

21-29 Fernboro Street, Dorchester, Massachusetts

JV Interests:

DBEDC as 42.5% partner Escazu as 42.5% partner CICD as 15% partner

Opportunity:

The development of 12 units of condominium homeownership on 5 parcels of City of Boston-owned land totaling 14,914+/- square feet. Each condominium will be a member of the 21-29 Fernboro Condominium.

If designated as developer of 21-29 Fernboro by the City of Boston, the intent is that DBEDC/Escazu/CICD will jointly develop the site with the intent of selling the condominium units to 3rd parties.

All parties agree to the following mission elements: The program for the development of the Site will be consistent with that requested by the City's RFP and community feedback outlined in the RFP; the general contractor will be required, at a minimum, to meet the following hiring and subcontractor standards: for worker hours – 51% City of Boston residents, 51% minority workers, and 15% women, for subcontractors, 30% MBEs and 10% MBEs; DBEDC will act in accordance with its mission of serving low and moderate income residents of the neighborhood, the other parties hereby acknowledging that DBEDC is primarily motivated by its mission in this joint venture.

Roles & Responsibilities:

Financial responsibilities and benefits shall be allocated per the parties' respective percentage interest.

DBEDC will be co-lead on Project Management

Escazu will be co-lead on Project Management

CICD to take the lead on Community Engagement & Funding Advisement

Decision Making:

For the project overall, the parties will jointly make all major decisions through consensus. Approval of all parties will be required for the following major decisions: 1) the identity of the architect, general contractor and legal team, and the contracts signed with these entities; 2) program for the site (e.g. number of units, building

height and massing, parking, amenities); 3) major design/construction material and value engineering decisions, specifically any that result in a change of more than 0.5% of the cost of construction; 4) the identity of all major funders, lenders and/or investors and the legal agreements signed with these entities; 5) the mission elements described in this MOU; and 6) other financial decisions of the project. In any instance when it is not possible to reconcile the views of the parties hereto after good faith efforts to reach a consensus, the parties agree the tiebreaker goes to the party which has the majority guarantee with respect to the issue for which there is disagreement on the decision.

Monthly (or more frequent, as needed) partnership meetings will be held where past progress is reviewed and anticipated tasks for the next month will be reviewed by the Partners. Within this meeting, decisions requiring DBEDC and/or CICD Board approval will be identified with a plan to present. Non-DBEDC and non-CICD Board decisions will be confirmed and memorialized as part of the Monthly partnership meetings.

Compensation:

Developer Overhead & Fee will be split per the parties' respective percentage interest.

Compensation shall be proportionately adjusted should one or more of the parties be unable to contribute financially per its respective percentage interest.

Signatures:

In witness whereof, the parties to this MOU through their duly authorized representatives have executed this MOU on the days set out below, and certify that they have read, understood, and agreed to the terms and conditions of this MOU as set forth herein.

The effective date of this MOU is the date of the signature last affixed to this page.

Dorchester Bay Economic Development Corporation:

Kimberly R. Lyle, Chief Executive Officer

Date

Escazu Development:



My Lam, Manager

Date 3/10/2024

Caribbean Integration Community Development:

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UCD | Donald Alexis
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Donald Alexis, President

3/11/2024

Date

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Dorchester Bay Economic Development Corporation:

3/11/2024



Kimberly R. Lyle, Chief Executive Officer

Date

Escazu Development:

My Lam, Manager

Date

Caribbean Integration Community Development:

Donald Alexis, President

Date

Development Submission

Introduction – Developer Qualifications, Experience, & References

DBEDC Qualifications

Dorchester Bay EDC was founded in 1979 by local civic associations to address the problems of economic disinvestment, unemployment, crime, community tensions and the shortage of quality affordable housing undermining Boston's Dorchester neighborhoods.

Over the course of our 41-year history, DBEDC has been a leader in community revitalization. Here are just a few highlights:

- Built or preserved 1,114 affordable rentals & owner-occupied homes. We completed redeveloping/rehabbing 56 units of affordable housing in our portfolio, are in construction on 80 new units of affordable and workforce housing, and in the lease-up phase on 42 units of senior housing.
- Developed 164,260 SF of commercial space, which created over 325 jobs.
- Built the 36,000 SF Bornstein & Pearl Food Production Center on Quincy Street, which has created over 200 jobs.
- Provided over \$7.5M in small business & home improvement loans, which created 850 jobs.
- Helped initiate the nationally recognized Fairmount-Indigo CDC Collaborative, which, with the Fairmount Transit Coalition, helped catalyze investment of over \$200 million in public transit improvements & over 800 housing units.
- Developed an award-winning re-entry program to support ex-offenders, placing more than 350 individuals (a rate of almost 50%) in jobs while maintaining a recidivism rate of less than 7%.
- Supported more than 2,841 local youth & adults in a variety of camps, after school, technology, community organizing, and leadership development programs.

We are proud of the recognitions we have received for our work:

- 2019 DBEDC was awarded a JP Morgan Chase planning grant for our work on a plan for equitable development in Upham's Corner in partnership with BlueHub Capital, CEDAC, Boston Medical Center, and the Corporation for Supportive Housing
- 2015 Boston Public Health Commission chose Dorchester Bay EDC as their North Dorchester Partner for their Partnerships to Improve Community Health (PICH) Initiative to promote Healthy Food and Beverage, Smoke Free Housing, and Opportunities through Active Transportation (Walking and Biking) Initiatives and other activities to promote systemic change. Through our Healthy Foods partnership with Fair Foods, we were able to hire 12 of our volunteers to work as Healthy Community Champions (HCC's), and to expand the Fair Foods \$2 a bag sites to our properties. Since launching

the sites, we have distributed an average of 1,920lbs of fresh fruits and veggies each month – a total of 15,360lbs of fresh food distributed in 2015.

- 2014 Brownfield Renewal Award: Bornstein & Pearl Food Production Center - Gold Standard, Social Impact
- 2014 Received the Met-Life Foundation Community-Police Partnership national award for Hendry Street Public Safety.
- In 2013, Boston's Quincy Corridor was the first Choice Neighborhoods grantee to begin construction, and in December of 2014, the first-Choice project in the country to reach completion. Construction was completed on time and on budget with over 65% minority workers, over 55% Boston resident workers, and over 40% minority owned subcontractors.
- HUD Choice Neighborhoods Awards – In 2011, the Quincy Corridor was one of the first five projects nationally to be awarded a HUD Choice Neighborhoods Grant, providing \$12.3M for 129 distressed housing units, \$500K awarded to develop the Pearl food production center, and \$3M to support resident services.
- 2011 Fairmount Indigo Corridor chosen as one of five *U.S. Sustainable Communities Pilots* by the EPA, HUD and U.S. Department of Transportation.

DBEDC has been developing and preserving affordable housing in North Dorchester since its founding in 1979 and has had its home at the Pierce Building in Upham's Corner since 1985. We have built or preserved over 1,114 units of affordable housing in the surrounding area and have 80 new units of affordable and mixed income in construction, with a further 42 units of affordable senior housing in predevelopment. The organization has financial strength sufficient to provide all required financial guarantees of construction and operations as required by affordable housing lenders and has ready access to predevelopment funding through existing lines of credit. Much of our work has been in tandem with the efforts of DSNI to revitalize the neighborhood after disinvestment and arson for profit left properties vacant and major buildings in Upham's Corner abandoned. Our acquisition and rehab of the Pierce Building in 1985 brought the abandoned building at the major Upham's Corner intersection at Columbia Road and Dudley/Stoughton Streets back to life with the installation of the Rix Drug Store and DBEDC as office tenants. We have been responsible for or played a leading role in redeveloping large swathes of Dudley Street, from Columbia Road up to East Cottage Street:

- In the 1990s we redeveloped the CVS and Brother's Market building.
- In the early 2000s, we were instrumental in redeveloping the Amado Insurance and Paraiso Restaurant building, assisting with financing for its rehab.
- In the early 2000s, we rehabilitated an affordable apartment building on Dudley Street at Dudley Terrace and are landlords to the Jackson Food Market. We have recently completed a renovation of the 56-unit scattered site Dudley Terrace property, upgrading windows and addressing life safety systems.

- In the 1990s we acquired and rehabbed the affordable Cottage Brook apartments, preserving their affordability for 30 years. In 2016 we completed a significant rehab of the apartments again, bringing them up to code and modernizing them for our tenants.
- Between 2001 and 2010 we developed or rehabbed 58 units in the area for various forms of homeownership, ranging from two-family homes for fee simple ownership to cooperative ownership models that have allowed residents to have an equity stake in their homes.
- On Magnolia Street, in 2001 we redeveloped a burned-out former school building into 25 new units of affordable housing at Sister Clara Muhammad Apartments.
- In 2008 we completed construction on Dudley Village, adding 50 units of affordable housing, ground floor commercial space, and a playground to a property on the Dudley Neighbors, Inc. land trust.

We continue to invest in the properties we acquired decades ago to keep our housing in top condition for our tenants. The majority of DBEDC's tenants are long-term residents, many with tenures upward of 30 years. We are a community anchor that has been investing in the Upham's Corner community for 41 years, and we continue to invest in the area through our ongoing renovation of our affordable housing properties to keep the housing we own in high-quality condition for our residents.

We look toward the future of the neighborhood by continuing to build new affordable housing that helps keep residents in this community despite the gentrification pressures hemming Upham's Corner in on all sides. Our commercial work began in the mid-2000s with the redevelopment of the Spire Manufacturing Plant in Savin Hill where on the site of a burned-out old brick factory we built to suit a 60,000 SF modern manufacturing facility for the Spire Printing Company, creating 150 jobs. We were inspired by our success there to broaden our neighborhood development strategy to combine jobs with affordable housing to thoroughly revitalize places within our services area. At the Bornstein & Pearl Food Production Center on Quincy Street in Dorchester, we used New Market Tax Credits and a myriad of public and private financing sources to redevelop a vacant 36,000 SF former meat packing facility into a multi-tenant food production facility that has succeeded in creating over 200 jobs accessible to local residents.

At the same time, we were the recipients of a CHOICE Neighborhoods award in partnership with the City of Boston to transform 129 units of decrepit affordable housing into brand new, beautifully designed rental housing that since 2014 has completely changed the landscape of Quincy Street. The two projects together have created a desirable neighborhood with access to economic opportunity and high-quality housing for Grove Hall residents. Our work has not ended there. We are currently in construction on the Indigo Block project at 65 East Cottage Street, known locally as the old Maxwell Box site, where we are building 80 new units of mixed-

income, 100% income-restricted housing, 9 condominium units for homeownership, and a 20,000 SF light industrial/commercial facility. Through the Pearl and Indigo Block projects, we have created a series of commercial spaces of varying sizes for small and growing businesses to locate where we offer flexible lease terms, assistance with tenant build outs, and a local landlord who understands the needs of small businesses and is willing to work with them to make sure they are able to stay local.

Escazu Qualifications

Escazú Development, formed in 2013, adopts an entrepreneurial approach to real estate development, construction management and owner's project manager, creating value for its public, private, and local community partners. A growing real estate development company, Escazú Development is involved in the creation of a range of housing and commercial development ventures in greater Boston's neighborhoods.

The firm takes a collaborative approach to development that involves stakeholders in government, private capital partners, nonprofits, and community neighborhood groups. Our firm and its leadership have an unwavering commitment to developing and investing in urban areas where there is a need for economic growth and opportunity. As a minority-owned enterprise, Escazú has a deep commitment to excellence, growth and collaboration with local municipalities and their leadership.

Nicoya Construction Qualifications

In 2015, My Lam founded Nicoya Construction building affordable residential housing in the Greater Boston area. Over the years we have established a strong team of Concrete, HVAC, Electrical, and Plumbing contractors.

My Lam is the founder/principal manager of Escazú Development. My's chief responsibility involves the creation of value for investors, sourcing projects, and overseeing all aspects of real estate acquisition, development, construction, and disposition. His skill set includes land acquisition and planning, structuring, and securing public and private financing, investment analysis, permitting and community process, market research, project design, and marketing lease up and sales. In 2006, My started his real estate career with a developer of affordable housing. He oversaw projects focused on urban infill, transit-oriented development in the City of Boston. My studied City Planning and Real Estate at the Massachusetts Institute of Technology and is a graduate of Bowdoin College.

My was appointed by the City of Boston Mayor Marty Walsh to serve as Co-Chair of the Committee for Basic Services & Housing for the Mayor's first term. My led a committee that examined the delivery of City services, including easing the path to permitting for homeowners, businesses, and development projects. He co-authored the transition report that has led to improvements in the permitting system in the City of Boston.

My also served on Mayor Martin Walsh's Housing Task Force to address the need for affordable housing across all incomes, especially those at the middle-income level. The Mayor continues to use the report as a blueprint for the expansion of affordable housing.

Escazú Development Experience & Key Projects

City of Boston Neighborhood Homes Initiatives (2014-Current)

Indigo Block Development at 65 East Cottage Street (2019-2022)

- \$30M, 80 units of affordable and workforce housing

- \$3M, 9 market rate condominiums
- \$9M, 20,000 sf commercial industrial space
- New Pedestrian Connection to the MBTA station

CICD Qualifications

Donald Alexis established Caribbean Integration Community Development (CICD) in 2011 to promote the wellbeing and advancement of the residents of Mattapan-a low income, working class and predominantly black neighborhood in the greater Boston area that is home to a large population of Haitian and Caribbean immigrants.

Mission Statement: CICD is dedicated to working with and for Afro-Caribbean diaspora communities in greater Boston to build more vibrant and economically resilient neighborhoods. CICD fosters community development by creating affordable housing and implementing programs that revitalize distressed neighborhoods, preserve ethnic, cultural, and racial diversity, and advance the economic and social well-being of Boston residents.

Experience:

DBEDC



PROJECT TYPE Mixed-Use Residential & Commercial

SIZE Rental Residential: 80 Units Homeownership: 9 units

Commercial: 20,000 SF

COST \$45 Million

CONSTRUCTION START December 2019

COMPLETION DATE 2021

STATUS Completed

In May 2015, Dorchester Bay and its partners Boston Capital, Escazú Development, and Newmarket Community Partners were jointly awarded tentative designation by the City of Boston as developer of a 2.75-acre parcel at 65 East Cottage Street in Dorchester. This vacant site is located directly adjacent to the Uphams Corner station platform on the Fairmount / Indigo Line, making it an ideal spot for a mixed-use, transit- oriented development. The development team redeveloped the site into three uses: 80 mixed-income units of residential apartments; 20,000 SF of light industrial manufacturing/commercial space; and nine condo units for ownership.

One of the great benefits for both residents and the surrounding community is a direct pedestrian connection to the Uphams Corner station platform from the Indigo Block site, which allows residents and neighbors to get downtown within 10 minutes. The project assembled a combination of public and private financing sources, including NMTC.

Features Relevant to Fernboro Site:

- Affordable to families earning 60% AMI or less.
- Article 80
- City Funding
- Public owned land disposition (through the Boston Housing Authority) and long-term lease
- Energy efficiency-focused design

PROJECT TEAM

Sponsors	Dorchester Bay EDC, Boston Capital, Escazu Development and Newmarket Community Partners
General Contractor	NEI General Contracting, Inc
Architect	Davis Square Architects
Owner's Rep	Nathaniel Hailey, CS2CNE
Residential Project Funders	LISC Equitable Transit Oriented Development Fund, The Life Initiative Residential: Eastern Bank; Boston Private; MassHousing; Boston Capital; Department of Housing and Community Development; & The City of Boston
Commercial Project Funders	Commercial: The Life Initiative; Property and Casualty Initiative; Local Initiatives Support Corporation; Massachusetts Housing Investment Corporation; The Northern Trust Company; & the Department of Housing and Community Development

RESIDENTIAL UNIT MIX

	30% AMI	50% AMI	60% AMI	70% AMI	80-120% AMI	Totals
1-Bedroom	3	3	4	5	7	22
2-Bedroom	2	4	23	6	13	48
3-Bedroom	3	1	1	2	3	10
Totals	8	8	28	13	23	80

COMMERCIAL DETAILS

Floor	Commercial Type	Square Feet
1	Light Industrial	10,300 SF
2	Office	10,000 SF
Total		20,300 SF

SOURCES & USES

Uses		Sources	
Acquisition	\$100	Federal LIHTC Equity	\$7,670,000
Construction	\$34,500,000	MA State LIHTC Equity	\$5,703,000
Other Development Costs	\$10,610,000	New Market Tax Credits	\$4,753,000
		MA State Funding	\$5,809,000
		City of Boston Funding	\$4,045,000
		Mass Housing Workforce	\$3,600,000
		Private Debt	\$12,311,000
		Develop Contribution	\$965,100
Total Development Cost	\$45,110,100	Total Sources	\$45,110,100

DUDLEY TERRACE APARTMENTS

Dorchester, MA



Project Type Moderate Rehab, Mixed-Use Residential & Commercial
Size Rental Residential: 56 Units
 Commercial: 800 SF
Cost \$18.4 Million
Construction Start Summer 2020
Completion Date Summer 2021
Status Completed

PROJECT TEAM

Sponsor	Dorchester Bay EDC
Predevelopment Funders	LISC and CEDAC
General Contractor	Landmark Structures Corporation
Owner's Rep.	Andrea Vilanova
Property Manager	United Housing Management
Development Consultant	Maura Camosse Tsongas
Architect	Baker Wohl Architects
Project Funders	Massachusetts Housing Partnership; Boston Private Bank and Trust; Massachusetts Housing Investment Corporation; Dorfman Capital; Department of Housing and Community Development; Department of Housing and Community Development

Dudley Terrace

Dudley Terrace Apartments (DTA) is a scattered site rental multifamily development located in the Uphams Corner and Savin Hill neighborhoods of Boston. DTA is currently 96% affordable and restricted for families earning 60% of the Area Median Income (AMI) or below. The refinance will add more restricted affordable units so that 100% will be affordable. More than half of the 56 units at DTA serve households earning less than 30% of the AMI through mobile and project-based Section 8 vouchers.

While DBEDC has preserved this valuable affordable housing asset in neighborhoods experiencing rapidly rising housing costs for decades, a recent capital needs assessment warns that the buildings have reached the point in their life cycle when they need pressing life safety, structural, envelope and system upgrades. The physical conditions of the buildings have already

started to impact the quality of life of the residents. Without a financial restructuring, the growing capital needs of the project will grow, and place added financial strain on the project. DBEDC is requesting modest financing support from the City of Boston and the Commonwealth of Massachusetts to address these needs and stabilize the project. The support would be in the form of a small infusion of capital funding from the Facilities Consolidation Fund and The Boston Neighborhood Housing Trust, as well as 8 additional MRVP vouchers, three 811 vouchers and the assumption of existing debt. With this support, the project will expand its mission of serving extremely low-income households by designating additional units for individuals with physical and mental disabilities.

RESIDENTIAL UNIT MIX

EXISTING:

	30% AMI	50% AMI	60% AMI	Market	Totals
1 Bedroom	10	0	0	0	10
2 Bedroom	13	2	19	2	34
3 Bedroom	5	1	4	0	12
Totals	28	3	23	2	56

PROPOSED:

	30% AMI	50% AMI	60% AMI	Totals
	10			10
	13	2	19	34
	5	1	6	12
Totals	28	3	25	56

SOURCES & USES:

Uses		Sources	
Acquisition	\$7,340,000	4% LITHC	\$4,723,163
Construction	\$5,805,447	Seller Note	\$4,503,790
Other Development Costs	\$5,267,687	Developer Contribution	\$522,194
		State Historic Tax Credit	\$200,000
		DHCD Home (assumed debt)	\$500,000
		DND Home (assumed debt)	\$1,050,270
		DND NHT	\$402,000
		DHCD FCF	\$406,500
		DHCD AHTF	\$805,016
		MHP Permanent Loan	\$5,300,000
Total Development Cost	\$18,413,134	Total Sources	\$18,413,134



Project Type: Residential, Senior Housing
Size: Rental Residential, 43 Units
Cost: \$22.1 Million
Construction Start: January 2022
Completion Date: January 2024
Status: Leasing up units

PROJECT TEAM

Sponsor	Dorchester Bay EDC
General Contractor	Kaplan Construction
PreDevelopment Funders	LISC, CEDAC, & The Life Initiative
Architect	Davis Square Architects
Property Manager	Hebrew SeniorLife, Inc.
Project Funders	City of Boston's Mayor's Office of Housing, Department of Housing And Community Development, Massachusetts Housing Investment Corporation, MassDevelopment, Eastern Bank & Rockland Trust, Massachusetts Housing Partnership

Leyland St

5-13 Leyland Street is a 17,200 square foot site that has been vacant for over thirty years and has been the subject of growing health and safety concerns for the neighborhood. DBEDC has worked closely with the community and through this process has proposed the development of 43 units of affordable senior housing in an approximately 48,000 square foot midrise building and parking and accessible drop-off areas for caretakers and visitors. The City of Boston is experiencing a shortage of housing for seniors, who represent a growing portion of Boston's population, are one of the most rent burdened groups in Boston and are vulnerable to

displacement resulting from gentrification and rising housing costs. DBEDC addressed this housing shortage for seniors by developing 43 units of housing 100% affordable to seniors earning below 60% of the Area Median Income.

Through passive house certification, green design, and universal design we created a 21st century building to house some of our most vulnerable community members. Due to the contribution that isolation has on health outcomes for seniors, the building design creates intentional spaces for socialization and community building throughout the spaces. Design and amenity features in both common areas and unit interiors will be created with the goal of facilitating accessibility, mobility, and community building.

Features Relevant to Fernboro Site:

- Similar affordability – 60% AMI and below
- Emphasis on 30-50% AMI households
- Transformation of a vacant site
- Passive House certification

RESIDENTIAL UNIT MIX

	30% AMI	50% AMI	60% AMI	Total
1 Bedroom	11	13	17	41
2 Bedroom	0	0	2	2
Totals	11	13	2	43

SOURCES & USES

Uses		Sources	
Acquisition	\$1,420,000	DHCD FCF/DMH/AHTF/HSF/HIF	\$2,963,307
Construction	\$15,352,358	City of Boston - HB & NHT 2030	\$2,582,102
Other Development Cost	\$5,424,255	State LIHTC	\$3,228,225
		9% LIHTC	\$9,099,090
		MassDevelopment	\$215,372
		Brownfields Fund	
		Seller Loan	\$280,000
		Deferred Developer Fee	\$33,517
		Permanent Loan (MHP)	\$3,795,000
Total Development Costs	\$22,196,613	Total Sources	\$22,196,613

Escazu Experience:

Hillsboro Street, Dorchester Market Rate Condominiums



19 Dumas Street, Dorchester, Two-Family, 2019



19-21 Mt Pleasant Avenue, Roxbury, 2 Attached Single Families, 2019



CICD Experience:

Cote Village Townhomes, (completed in 2021)



- Cote Village townhomes is a new construction development comprising 24 units and situated in the Mattapan area of Boston.
- The project with a total development cost of around \$12 Million, was funded through various sources including a 9% LIHTC, a permanent loan from MHFA, funds from the City of Boston and DHCD, as well as financing from Bank of America.
- The main objective of the development is to cater to households with incomes equal to or lower than 60% of the Area Median Income.

Cote Village Apartments, (Completed 2022)



- Cote Village Apartments is a newly constructed transit-oriented development situated in Mattapan, MA.
- It is a mixed-use, multi-family project aimed at providing affordable housing options for households with incomes at or below 60% of the Area Median Income.
- This workforce housing initiative includes 52 Units, along with commercial retail space measuring 1,200 sq.ft. and office space of 1,000 sq.ft., which also houses CICD's offices.
- The project is a result of a collaboration between CICD and the Boston Planning Office for the Urban Affairs, chosen by the City of Boston, Department of Neighborhood Development to revitalize the 2.5 acres city owned lot previously known as the Cote Ford Site.

Morton Station Village, (Completed 2023)



CICD, alongside the Boston Planning Office for Urban Affairs, successfully secured a contract with the City of Boston, Department of Neighborhood Development for the acquisition and development of two parcels of land: 872 Morton Street and Hopkins Street.

These parcels, measuring approximately 47,769 GSF, have been vacant since the demolition of the Boston Police Department's Precinct 3 building in 2013.

The development enjoys a convenient location opposite the Morton Street Commuter Rail Station (Fairmont Line).

The project is comprised of 40 residential units, including 12 deed-restricted units, along with 28 rental units catering to a range of income levels from 30% to 100% of the Area Median Income.

In addition, there will be 8,000 sq.ft. of open space allocated for the Steven P. Odom Serenity Garden, and a 1,500 sq. ft. Community Room available for use by both residents and members of the community.

The total development costs for the project amount to \$19 Million and was financed through various sources, including 9% LIHTC, MHFA Perm, City of Boston Funds, CPA, and DHCD.

References:

DBEDC References

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The Life Initiative

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Valeska Daley, Executive Director

Upham's Corner Main Streets

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Sue Sullivan, Executive Director

Newmarket Business Association

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Escazu References

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Christine Tran

Invictus Lending

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Larry Corbeil

Corbeil Associates

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CICD References

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Will Morgan, Senior Project Manager for Supportive Housing

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wmorgan@cedac.org

Mary Thompson, Community Development Banking

Bank of America

(774) 454-0104

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Resumes

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[LinkedIn](#)

Executive Summary

As the Chief Executive Officer at Dorchester Bay Economic Development Corporation (DBEDC) in Boston, Massachusetts, Kimberly oversees a portfolio of total assets of approximately \$229 million, including 1000+ units of rental housing, 40,000 sq ft of commercial space, a \$4 million loan fund, and operating revenue of \$11 million (exclusive of rental property operations). Kimberly leads organizational culture, sets programming focus, and leads public policy advocacy for DBEDC.

Skills

Strategy

Problem-solving

People and culture

Revenue generation

Fiscal accountability

Financial management

Change leadership

Strategic partnerships

Championing vision

Professional Experience

Chief Executive Officer | July 2022 – Present

Dorchester Bay Economic Development Corporation (DBEDC)

- Oversees a portfolio of total assets of approximately \$229 million, net assets of \$29.7 million, including 1000+ units of rental housing, 40,000 sq ft commercial space, a \$4 million loan fund, and operating revenue of \$11 million.
- Recruited, leads, and motivates a high-performing senior leadership team to exceed goals and create a collaborative and empowering work culture
- Adopts ambitious strategies and implements plans to develop and preserve affordable housing, deploy capital to small businesses, and deliver impactful programming within DBEDC's service area
- Implements process and infrastructure improvements enabling the organization to navigate significant growth and scale effectively
- Elevates DBEDC's profile and contributes to policy advocacy for housing development and small business capital sectors through coalition-building, speaking engagements, press engagements, and board service

May 2016 – June 2022

Director of Strategy and Development

Director of Marketing and Communications

- Collaborated with the CEO to align community engagement, small business lending, and fundraising activities with DBEDC's strategic priorities; led Dorchester Bay's strategic

Kimberly Renée Lyle

initiatives, the implementation of plans, and led special projects; served as an internal consultant to the senior leadership team

- Represented the organization in coalitions, advisory boards, and policy advocacy efforts
- Oversaw fundraising, marketing, and communications; articulated the impact of DBEDC's work to funders, community partners, and other stakeholders; cultivated partnerships

Mass Mutual Insurance Group / Society of Grownups

Business Consultant | September 2014 – October 2015

Northeastern University School of Law

Associate Director of Data and Operations, Co-op Program | January 2013 – September 2014

Harvard University | February 2009–December 2010

Manager, Faculty Services

Program Associate

Capital Group – The American Funds

Senior Associate | December 2005 – January 2009

Education & Certification

Tufts University

Master of Public Policy

Rutgers University

Bachelor of Arts, Philosophy

Collaborative Institutional Training Initiative

Social & Behavioral Research - Stage 1 Basic Course Certificate - Valid May 1, 2021 - April 30, 2025

Language Ability

English Language: Native and expert proficiency (verbal and written)

Spanish Language: Limited working proficiency (verbal and written)

Board Service

Cooperative Fund of New England (CFNE)

President, Board of Trustees | December 2023–Present

Member, Board of Trustees | September 2020–Present

Massachusetts Association of Community Development Corporations (MACDC)

Vice President, Board of Directors | November 2023–Present

Member, Board of Directors | November 2019–Present

LEADERSHIP



DONALD ALEXIS

Donald Alexis is the Founder and President of Caribbean Integration Community Development, Inc. Since emigrating from Haiti over 15 years ago, Donald has been an advocate for tenant rights, youth development, and affordable housing options for immigrant families. Under his leadership, CICD has become the preeminent development organization serving Boston's Afro-Caribbean diaspora community and a major developer in Mattapan and surrounding neighborhoods with over \$100 million in real estate projects.

Donald manages the due diligence phase, financial modeling, market analysis, and design phase of each project as well as the negotiations of public financing agreements. Donald's philosophy is community-centric. He works to actively engage individuals and businesses in the economic and social conversations that spur real estate investment, community development, and growth. He encourages the disenfranchised to become more involved and to hold a real stake in their communities.

Donald's work and CICD's organizational success have earned him these recent recognitions:

- In 2022, he was recognized as one of nine Boston leaders solving racial household inequality by Boston Business Journal
- He was named one of 2020's "40 under 40" by the Boston Business Journal
- In 2018, he was named a Boston Changemaker by HUB-Week, founded by the Boston Globe, Harvard University, Massachusetts General Hospital, and MIT
- He was a recipient of the 2017 U.S. Haitian Chamber of Commerce's "Haitian-American Young Professionals Award."

Donald earned a BS in Computer Science from the UMASS Dartmouth and a Master's Degree in Urban Planning and Policy from Northeastern University.

ESCAZÚ DEVELOPMENT

Escazú Development is a growing real estate company involved in the creation of a range of housing and commercial development ventures in Boston's unique neighborhoods. The firm takes a collaborative approach to development that involve stakeholders in government, private capital partners, nonprofits, and community neighborhood groups. Our partners and staff have an unwavering commitment to excellence and collaboration in each of its development projects. Working closely with different stakeholders, the firm is involved in public private partnerships to create housing development that address the City of Boston's growing workforce. Escazú Development's goal is to bring value to each development project for the community, government entities, and private equity partners. We aim to deliver projects with the highest standards in design, construction, and placemaking.

My Lam, Founder

My Lam is the founder/manager of Escazú Development. My's chief responsibility involves the creation of value for investors, sourcing projects, and oversees all aspects of real estate investment, acquisition, development, construction and disposition. His skill set includes land acquisition and planning, structuring and securing public and private financing, investment analysis, permitting and community process, market research, project design, and marketing lease up and sales. In 2006, My started his real estate career with a developer of affordable housing. He oversaw projects focused on urban infill, transit-oriented development in the City of Boston. My is a graduate of Bowdoin College.

My served as a co-Chair for Mayor Martin Walsh on the Committee for Basic Services for the Mayor's first term. He led a committee that examined the delivery of City services, including easing the path to permitting for homeowners, businesses, and development projects. He co-authored the transition report that has led to improvements in the permitting system in the City of Boston.

My also served on Mayor Martin Walsh's Housing Task Force to address the need for affordable housing across all incomes, especially those at the middle income level.

Projects

Indigo Block Development at 65 East Cottage Street, Dorchester (2019)

- \$30M, 80 units of affordable and workforce housing
- \$3M, 9 market rate condominiums
- \$9M, 20,000 sf commercial industrial space
- New Pedestrian Connection to the MBTA station

Designated by the City of Boston after a competitive RFP process, Escazú Development, in conjunction with Boston Capital and a local nonprofit, Dorchester Bay Economic Development Corporation, is developing this mixed-use, mixed income low income housing tax credit and workforce housing development in the Uphams Corner section of Dorchester. The project involves financial commitments from the City of

Boston Department of Neighborhood Development, the State Department of Housing and Community Development, Masshousing, New Market Tax Credits, and tax credit syndication. Escazú Development led the project through the entitlement process, including community and the Boston Planning and Development Agency Large Project Article 80 Review and the MBTA construction approval, conceptual and construction design, oversight of construction, and full compliance with City and State housing agencies. This project includes a complex financial structure of combining City and State subsidies, low income housing and new market tax credits, and private construction lending. It is the first project in the City of Boston to use this financial structure to address Boston's affordable housing needs.

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City of Boston Neighborhood Homes Initiatives (2014-Current)

88 Milton Street, Dorchester, Single Family, 2013
16-18 Lauriat Street, Dorchester, Two-Family, 2016
54 Callender Street, Dorchester, Two-Family, 2016
139 Stoughton Street, Dorchester, Two Family, 2016
23 Dumas Street, Dorchester, Two-Family, 2017
58 Mascot Street, Dorchester, One Family, 2018
47 Forest Street, Roxbury, Single Family, 2018
43-45 Forest Street, Roxbury, Two-Family, 2018
70 -72 Mt Pleasant Avenue, Roxbury, 2 Attached Single Families, 2018
19-21 Mt Pleasant Avenue, Roxbury, 2 Attached Single Families, 2019
19 Dumas Street, Dorchester, Two-Family, 2019

Escazú Development was actively involved in the development of this new City of Boston program to build new construction homes for 1st time homebuyers. Escazú worked collaboratively City of Boston DND staff to provide feedback on costs, design, and permitting process.

Condo Conversions

1192 Morton Street, Dorchester (permitting and construction), 2020
16 Pasadena Road, Dorchester (construction), 2019
91 Glenroad Rd, Jamaica Plain (construction management), 2020

Public Space Construction and Project Management

36 Wade Street, Chestnut Hill
87-89 Callender Street, Dorchester
103 Ellington Street, Dorchester
3 Akron Street, Roxbury
25-27 Folsom Street, Dorchester
26 Magnolia Street, Dorchester
1 Centre Street, Dorchester

These projects include the design, permitting, and construction of new utilities for community garden space for community use. The construction and design contract is with the City of Boston Dept for Neighborhood Development.

Third Party relationship to Joint Venture

Nicoya Construction is certified MBE and will be the general contractor. Nicoya Construction founded in 205 by My Lam offers integrated project development, construction services, and subcontractor management services Nicoya Construction has supported minority subcontractors in the concrete, hvac, plumbing, and electrical trades by offering project management, estimating, bidding, quality control, financing, and technical assistance in winning competitive bids in the affordable housing market. Nicoya Construction’s mission is to grow and enhance these subcontractors' capacity, who primarily work and live in Boston.

Listing/Description of Lawsuits

There have been no lawsuits brought against Escazu or CICD nor against any of their principals, within the United States within the past five years.

DBEDC owns a real estate portfolio of approximately 1,000 residential and commercial units through various subsidiary entities and from time-to-time lawsuits may be brought against those entities for personal injury or property damage. In 2023, UHM Properties LLC brought a declaratory action case against DBEDC and Quincy-Geneva Housing Corporation to formally dissolve a business agreement; the case was resolved by a final judgment on February 2, 2024.

Development Concept

Our proposal for 21-29 Fernboro Street is a 14,324 SF development with 12 family-sized homeownership units – ten 2-bedrooms and two 3-bedrooms – providing homes sized for the many households with children in the neighborhood. A ground level garage will provide each unit with a covered parking space (12 spaces – 3,933 SF), and the building includes 2,322 SF of amenity space with a community room/shelter-in-place area, an exercise room, resident storage, and a bicycle parking room. With modern energy efficient systems and sustainable design features, the building will have 978 SF of service rooms- trash/recycling, water, and electrical- and 2,850 SF of circulation space. The existing trees on the property boundary will be professionally assessed for preservation. If trees must be removed because of disease, health reasons, or impracticality of preservation, the development team will explore suitable locations and species with appropriate size for replacement of same.. The massing of the project will create green spaces accessible from either Fernboro or Intervale Streets. The design drawings form complements the residential design features of the surrounding neighborhood.

Community Benefits of the Fernboro Development

Our proposal will create (construction/post-construction) jobs, provide stable and affordable homeownership, opportunities for new homeowners to engage with the Grove Hall community through the nearby school and parks, and create an attractive development that honors the buildings in the surrounding neighborhood with architectural elements that reflect the history of the community.

Two thirds of the units will be less than market rate, with two units being priced to be affordable for those earning less than 80% of AMI and six units priced to be affordable to those earning 80%-100% of AMI. This mixed-income approach reflects the city as a whole and promotes fair housing goals by creating market rate, middle-income, and affordable homeownership opportunities in a neighborhood with few new mixed-income ownership developments.

Residential Unit MIX

	<80% AMI	80% AMI	100% AMI	Market Rate	Total
2 Bedroom	2	2	4	2	10
3 Bedroom				2	2
TOTALS	2	2	4	4	12

The Fernboro development will restore homes to parcels that have been vacant for decades. At a scale and with a façade that reflects the existing streetscape, the new Fernboro development will fit in with the surrounding neighborhood. 12 parking spaces means the building will provide for new parking demand from new owner households, while the indoor bike parking room will promote active transportation and connection with nearby parks and greenspaces. The project is also a 5–15-minute walk from public transit options, including the Four Corners/Geneva stop on the Fairmont/Indigo Commuter Rail as well as buses 16, 19, 23, & 28, which connect to the MBTA Red and Orange lines.

During construction it is estimated that the project will generate construction jobs for 25-30 people with another 8-10 jobs for the various consultants that will be necessary to complete this project.

The development will help to support investment in the surrounding Grove Hall community, a neighborhood which has experienced disinvestment over many decades. Much of the real estate investment in the neighborhood in recent years has been extractive, with many speculators evicting tenants, and converting rental units into condominiums priced above what most local residents can afford. Our proposal showcases a different model of real estate development, built by the community, and affordable to the community, that will be a model for future investment and development in the neighborhood. Through this proposal we aim to promote the broader regional goals of creating new housing stock priced at levels affordable to working class families.

We also know from prior engagement with the Dorchester community that there is a widespread desire for more affordable homeownership opportunities in the neighborhood to allow more residents to benefit from the stability of homeownership, the opportunity to build equity, and the independence of owning one's own home. The 12 units developed at Fernboro will help to satisfy this demand, and they will be priced at levels affordable to many local residents who would otherwise be forced out of Boston to find similar prices.

The building will also be energy efficient and sustainably designed, supporting the City's Resilient Development, Green Building, and Net-Zero Goals. The preservation of greenery and open space contribute to the City's sustainability goals and have various other benefits for the surrounding community, including conservation of the natural resources that among other things can help contribute to better air quality and reduction in heat island effect.

Development Plan

Proposed timeline for submission and approvals

Proposal Submission	March 11, 2024
Notice of Tentative Designation	April 30, 2024
Submission of Rejection Set to MOH	July 1, 2024
Pre-File Meeting with MOH	July 15, 2024
Rejection Set Submission to ISD	August 1, 2024
Zoning Board of Appeal	October 2024
MOH 95% CD Approval	December 2024
Secure Financing Proposals	January 2025
Final Financial Commitments	February 2025
Construction Bidding/Contractor Selection/Cost Finalization	8 weeks after MOH 95% CD Approval
Financing Secured	3 weeks after MOH Contractor Approval

Construction Loan Closing
Construction Begins

10 weeks after formal PFC Vote
At Construction Loan Closing

Operational Plan

The development team will develop the condo units and coordinate with MOH to establish a marketing plan for the condo units. Since the units are for-sale, the development team will manage the construction and for sale process. The development team will also work with the owners and be an advisor to the condo association for a period of 1 year.

Acquisition Price

The proposed acquisition price of \$500.00 will enable the project to be financially feasible to first time homebuyers at the targeted area median income levels.

Ownership Structure

The units will be for sale to first-time homeowners and managed in accordance with a condominium association. The development team will sit on the board of the condo association for a minimum of two years to offer guidance and will coordinate with MOH to ensure that the inaugural association participates in training for new owners.

In particular, the development team will offer guidance on best practices of living in an energy efficient building in order to ensure the residents can reap the maximum benefits of energy efficiency, as well as guidance on the shared management of the basement and outdoor spaces.

Condo Structure

The condo units will be managed under a professional condo association. Potential buyers will be notified in advance marketing of the condo association's requirements. Educational materials will be provided to highlight the requirements, responsibilities, and legal structure of the condo association. Each buyer will receive a condo association package as part of their marketing and closing documents. In addition, a training session will be provided for buyers.

- The development team will coordinate with MOH to ensure the inaugural association participates in training for new owners.
- The development team will fund an initial capital reserve account for at least three months. This cost is part of the development soft costs.
- The development team will stay on as an advisor to the condo association for a period of 1 year.
- A detailed condo budget is attached as Exhibit 1 below.

EXHIBIT 1

21-29 Fernboro St DRAFT Condo Budget

	<u>ANNUALLY</u>	<u>PER UNIT</u>	<u>MONTHLY PER UNIT</u>
REAL ESTATE TAX	\$ 15,000.00	\$ 1,250.00	\$ 104.17
INSURANCE	\$ 7,000.00	\$ 583.33	\$ 48.61
REPAIR Reserve	\$ 3,000.00	\$ 250.00	\$ 20.83
WATER	\$ 8,000.00	\$ 666.67	\$ 55.56
ELECTRIC	\$ 2,000.00	\$ 166.67	\$ 13.89
CLEAN UP/SNOW	\$ 3,000.00	\$ 250.00	\$ 20.83
MISC.	\$ 500.00	\$ 41.67	\$ 3.47
LEGAL	\$ 2,500.00	\$ 208.33	\$ 17.36
ACCOUNTANT	\$ 1,200.00	\$ 100.00	\$ 8.33
TOTAL	\$ 42,200.00	3,516.67	\$ 293.06

Note: Draft condo budget is proposed for discussion purposes only

Boston Residents Jobs Policy

We are committed to exceeding the Boston Residents Jobs Policy goals of at least 51% of total work hours by Boston residents; at least 51% of total work hours by people of color; and at least 15% of the total work hours by women.

Share of Construction Work Hours

Development Partner	Development Name	POC	Boston Resident	Women
DBEDC	9 Leyland	78%	29%	4%
DBEDC	Pierce	76%	36%	14%
DBEDC, Escazu	Indigo Block	63%	31%	4%
DBEDC	Dudley Terrace	89%	47%	3%
Escazu	Hillsboro Condominium	90%	90%	0%
Escazu	19 Dumas St, 2 Family	90%	90%	0%
Escazu	19-21 Mt. Pleasant St, 2 Family	90%	90%	0%

We will develop an outreach timetable for recommendations for subcontractors. Once we have a reasonable timeline, we will address the Boston Residents Job Policy goals through:

- Outreach to the Massachusetts Supplier Diversity Office and the Greater New England Supplier Development Council to alert their member subcontractors to the specific opportunity.
- Outreach to the Massachusetts Minority Contractors Association.
- Outreach to the Builders of Color Coalition.
- Outreach to the Office of Veteran Services.
- Outreach to the National Association of Women in Construction, Boston Chapter.
- Development of a jobs referral program for community residents, stakeholders, and professionals to make recommendations on subcontractors.

As part of the requisition process, subcontractors will be required to provide proof of payment to qualified journey or apprentice persons. The project team will provide a monthly report on initial commitments, current contracts, and payments to date to verify that the subcontractors follow through with contractual commitments.

Diversity and Inclusion Plan

Diversity and Inclusion stands as a foundational principle upheld by the City of Boston and the Mayor's Office of Housing (MOH) in the redevelopment of 21-29 Fernboro Street, a principle endorsed and embraced by our proposed development team. The following Diversity and Inclusion Plan will act as a roadmap guiding our strategy to achieve significant involvement in the development, construction, and operations of the Project by minority and women-owned businesses, as well as local enterprises and residents.

Diversity and Inclusion on the Development Team

CICD is a non-profit organization based in Boston, founded by President Donald Alexis, who is a minority and Haitian immigrant himself. While not officially MBE certified, CICD is led and staffed by 100% BIPOC individuals. CICD will be a 15% co-member of the development that will take the lead for engaging with the community and provide financing advise. Escazu is a certified MBE based in Roxbury. Escazu is a 42.5% co-member of the development and will be co-lead for project management. DBEDC has been a part of the Dorchester community for over 40 years. DBEDC is a non-profit organization and a certified MBE that is staffed by 60+% people of color and 68% women. DBEDC will lead the community engagement as a 42.5% co-member of the development and a co-lead in project management. If designated, our goal as the development team is to get as close to 100% MBE and WBE participation as possible.

Diversity and Inclusion During Construction

We know from experience in Boston and nationally that to be successful in meeting the subcontracting goals of 30% MBE 15% WBE, and the workforce goals of 51% minority, 51% Boston residents, and 15% women, a general contractor must both be committed to meeting the goals and willing to devote their staff time to local outreach efforts and consistent monitoring of the subcontractors; and must have or be working on developing connections to MBE and WBE subcontractors who will be likely to bid on the job and be responsive to compliance engagement during construction. A key criterion in selecting a subcontractor will be their track record with hiring MBE/WBE and on meeting the worker hour

requirements on Boston projects. We ask for their hiring plan up front, and we make hiring goals a part of the subcontractor selection process, valuing it as a priority. We also know from experience that subcontractors with no experience working in Boston are less likely to put in the effort or have the local connections needed to meet the compliance requirements. We will therefore review the list of subcontractors the general contractor proposes to bid the job to and will reject any subcontractor who we determine does not have an appropriate workforce compliance track record on Boston construction jobs. Finally, all of this will be backed up by strong construction contract language holding the general contractor, and by extension all their subcontractors to the compliance requirements with penalties for failing to meet the requirements. The development team has developed standard language that we have found to be successful in motivating subcontractors to meet our diversity and inclusion goals.

Furthermore, we work to hold our selected subcontractors accountable for the goals we set (which are often above the standards set by the City of Boston). Once construction begins, we hold regular (typically bi-weekly) meetings with the general contractor to monitor progress towards participation goals. We will encourage the general contractor to have job fairs and be active participants in the workforce hiring processes.

Diversity Contracting in Recent Projects

Partner	Project	Spent	MBE		WBE	
			Cost Share	Percent	Cost Share	Percent
DBEDC, Escazu	Indigo Block	\$32,992,742.51	\$11,462,070.00	35%	\$1,629,103.00	5%
DBEDC	Pierce	\$2,531,061.47	\$527, 222.03	21%	\$374,135.18	15%
DBEDC	Dudley Terrace	\$7,401,290.22	\$1,613,628.04	22%	\$529,137.19	7%
DBEDC	9 Leyland	\$12,507,879.00	\$3,911,694.00	26%	\$1,125,709.11	9%
Escazu	Hillsboro Condominium	\$4,821,000.00	\$3,865,800.00	80%	\$0	0%
Escazu	19 Dumas St	\$639,000.00	\$511,200.00	80%	\$0	0%
Escazu	19-21 Mt Pleasant St	\$765,290.00	\$612,232.00	80%	\$0	0%

Our process to maximize MBE/WBE subcontracting awards, as well as resident, minority, and worker hours during construction, will include the following:

Maximize construction opportunities

The development plan includes a broad array of interior and exterior scopes that require both general and highly specialized construction trades. DBEDC will work with the general contractor to find opportunities to break up scopes and bid packages into smaller scopes to the extent feasible, and encourage mentor- protégé relationships, joint ventures, and other similar partnership structures between majority/prime subcontractors and MBE/WBE/DBE firms. We will also work to ensure that

purchase of materials that are procured because of the construction of the project is extended to M/WBE material suppliers.

Outreach and engagement

We will employ multiple tools to inform MBE/WBE/DBE subcontractors of opportunities on the development project well in advance of work beginning. The general contractor will maintain an updated database of MBE/WBE/DBE contractors and suppliers and directly contact each one through emails and phone calls. Bid notices will be posted via social media outlets, notices in local newspapers with majority minority neighborhoods (*Dorchester Reporter*, *Bay State Banner*, in addition to the *Boston Globe* and *Boston Herald*) and through advocacy groups, such as the Massachusetts Minority Contractors Association (MMCA). Bid notices will include the stated MBE/WBE participation goals along with key information on the project. We will hold at least two contractor engagement events at or near the site to inform contractors of construction scopes to be bid. Additional outreach will occur in advance of bid deadlines to encourage responses. Contractors will be encouraged to partner with MBE/WBE/DBE contractors in their bid responses. Construction documents will be made available at no cost in virtual and physical plan rooms.

Resources to MBE/WBE/DBE contractors during construction

Our team will identify resources to help MBE/WBE/DBE subcontractors be successful, including joint payments to suppliers, accelerated payment agreements to meet cash flow demands, and training and technical assistance. Tracking and reporting: our team is accustomed to documenting outreach, engagement, and participation results from the inception of a project through transition to operations. MBE/ WBE participation is a topic at each weekly Owner-Architect-Contractor (OAC) meeting to ensure the project is on track to meet or exceed participation goals and to address any challenges proactively and collaboratively. Through Escazu Diversity and Inclusion team and its Workforce Opportunity Resource Center (WORC2), ESCAZU not only aims to engage locally based businesses and workers in its construction projects, particularly in underserved communities but also provides training, technical support, and connects potential workers to various resources within the industry. Further details on Escazu Development can be found in the materials provided at the conclusion of this plan.

Diversity and Inclusion During Operations

Our commitment to MBE/WBE firms goes beyond construction of the new Fernboro condominium. We are committed to meeting the workforce goals throughout the life of the project. Operating a condominium requires regular maintenance services including landscaping, painting, HVAC repairs, etc., which are all opportunities for MBE/WBE/DBE participation.

The development team either has on-staff job counselors or uses consultants to work with job seekers from the community and connects them with jobs that are available and are a good fit for each person's skills and experience level, assisting with resume development and setting up interviews, and referring people to programs as needed to enhance skills. The counselor/consultant will proactively connect job seekers with commercial tenants who have open positions. DBEDC has specific experience

through its commercial properties with annual (and more frequent) monitoring using tracking systems that have been developed over the past eight years of commercial economic development projects.

Strong Track Record of M/WBE Subcontracting and Resident, Minority, and Female Worker Hiring

The development team brings to the community our organizations with deep experience in meeting and exceeding the Boston Residents Jobs Policy goals of subcontract awards to 40% MBE and 15% WBE subcontractors. Our organizations have a similarly strong record of maximizing resident, minority, and female worker hours on construction projects over the past decade.

DBEDC has been a leader among Boston community development corporations in this regard and has been a catalyst for CDCs to increase their efforts as well as an example to developers across Boston on how to achieve diversity and inclusion goals. In 2013 DBEDC committed to the hiring standards that had been developed as part of the Roxbury Strategic Master Plan process. On our Quincy Heights affordable housing project, which we completed in late 2014, we exceeded even those goals. DSNI staff wrote a detailed case study outlining our success on the project in 2015. We have since then continued our leadership by meeting and exceeding the 51% resident, 51% minority, and 15% female worker hours on recent projects. In 2018 the Boston Globe reported that DBEDC had the best hiring numbers in the City of Boston, focusing on local resident and minority hiring numbers. We remain focused on meeting our high standards, as demonstrated by our recent construction projects, all located within a mile radius of the Fernboro site.

DBEDC's success in achieving high compliance numbers is a result of dedicated staff time to push contractors to meet and exceed the contractual subcontracting and worker hour goals, which is bolstered by contract language that we have used in every construction contract on projects since 2013. We are also careful to select subcontractors based on their prior track record with M/WBE subcontracting and local, minority, and female hiring record. We have the experience to know what needs to happen to set up a construction project for success and are committed to devoting the staff time to vigilantly monitor and push the contractors to be successful.

Development without Displacement Plan

Our over-arching goal for the Fernboro project is to provide housing that is needed by and affordable to the existing residents of the Dorchester community. Development without displacement is a guiding theme for DBEDC in its affordable housing and economic development work. If we are selected as the developer, we will be fully committed to equitably developing the site for the benefit of existing residents. As developer, we envision this project as a beacon for the rest of the Dorchester community, sending the signal that new housing developments must prioritize housing affordability and economic opportunity for existing residents, not reshape the community into a playground for the wealthy. DBEDC is an organization whose existence was born from collective concern regarding displacement and recognition of the central role housing plays in maintaining communities and creating economic

opportunity for the disadvantaged. Our work over the decades is a testament to our commitment to housing equity and combatting displacement.

Affordable Housing Production Goals Preventing Displacement

We have sought to design appropriate housing for the people living in the Grove Hall Area, and we intend for the Fernboro development to be reflective of the greater Grove Hall community surrounding it. Our project goals, and their relationship to the common goal of preventing displacement, are discussed below.

Local Preference for Dorchester

As an income-restricted development, Fernboro buyer selection is required to be conducted via lottery. However, subject to City of Boston's approval, the development team is committed to including a local preference in the Affirmative Fair Housing Marketing Plan, allowing us to give preference in selecting buyers to residents of this neighborhood. DBEDC has employed local preference in housing lotteries successfully – this strategy helps to ensure that locals at risk of displacement are given preference for new units. We would similarly use local preference at Fernboro as one of our tools to combat displacement.

Units for Fernboro

In developing a homeownership program that addresses local needs and discourages displacement, we devised a mix of unit sizes that appropriately responds to the community's existing composition. All units will be 2 or 3 bedrooms with 2 bathrooms per unit.

63% of households in Grove Hall are families and 43% are households with children. To address this need, all 12 units will be sized for families.

Affordability for Grove Hall

Affordability is fundamental to our anti-displacement strategy. However, the term "affordable" can vary according to the audience. Most of the major funding programs for affordable housing permit home sale limits that are as much as 80% of AMI, a statistic published by HUD that incorporates a large segment of the surrounding population. Residents of Grove Hall and Dorchester more broadly, tend to have household incomes that are less than many of the other communities included in HUD's data set for this area's median income.

Through DBEDC's firsthand research of the economic makeup of Grove Hall, we know that most 4-person households (62%) earn an amount less than 40% of AMI. 13% earn less than 50% of AMI, 7% earn 70% of AMI, 17% earn over 70% of AMI. Therefore, many households in Grove Hall would be burdened in a condominium designated "affordable" at 80% of AMI.

REQUEST FOR PROPOSALS

Design Submission

For Development of 21-29 Fernboro Street

March 11, 2024



ESCAZÚ DEVELOPMENT



Contents

Design Submission	3
Design Narrative.....	3
Design Drawings.....	10

Design Submission

Design Narrative

Site Description

The 21-29 Fernboro Street parcels (collectively the “site”) are located at the intersection of Fernboro Street and Intervale Street in the Dorchester neighborhood. Located in the Grove Hall neighborhood, between Blue Hill Avenue and Columbia Road, the site has access to local businesses and public transportation. The Site is across the street from the Brunswick King Play area and playground on Intervale Street, two blocks from Ceylon Park on Columbia Road and a block from two schools – the King K-8 and the Lilla G. Fredrick Middle School.



The terrain of the Site is slightly sloped from north to South and steeply sloped from West to East. The Site is currently not occupied by any buildings and is fully fenced. The Site is bounded by mature trees at the northwest and northeast perimeter and lots 27-29 have several existing trees.

Site Layout

The proposed project considers the existing shape and orientation of the Site, maximizing the programmable open space by proposing a single building positioned close to the Fernboro-Intervale intersection. Lots 27-29 are left largely for passive recreational open space, taking advantage of the existing trees on those lots.

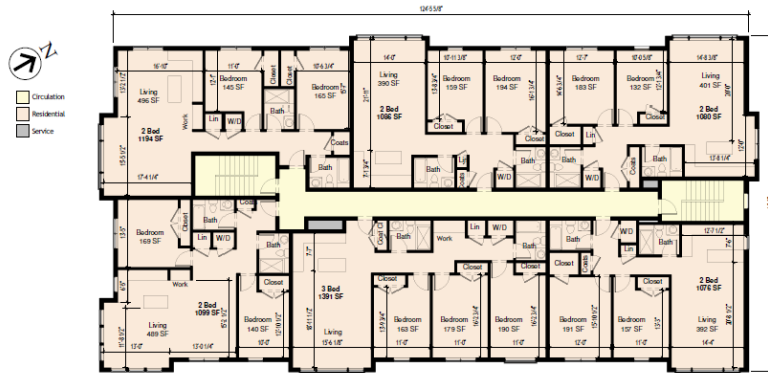
The main residential entrance is located at the intersection, visible from both streets. The garage entrance is located on Fernboro Street, away from the intersection. The bike storage room and shelter-in-place rooms have accessible secondary entrance/exits directly from the exterior.

The building is set back 5ft from both streets, allowing for a vegetation strip that helps to interface with the sidewalk and provide natural screening of the proposed ground floor garage and common areas.



Program

The development program consists of 12 residential home ownership units, 12 parking spaces, Shelter-in-place area, bike storage, resident storage and various amenities and service areas. The units are a mix of 2-bedroom and 3-bedroom dwellings, suitable for families. The program fully satisfies the objectives targeted in the RFP guidelines.



Vehicle Parking and Bike Storage

The parking spaces will be on the first floor under the structure. The garage entrance is located on Fernboro Street away from the intersection and accessed directly from the street. The side entrance is advantageous because it creates a short driveway and maintains more usable open space on the rest of the site. The parking spaces and drive aisle meet and exceed the City of Boston’s dimensional requirements. The garage will be naturally ventilated and lighted during the day by large, screened openings on the exterior walls.

The bike storage room will comply with the City of Boston’s guidelines by having a combination of rack types for stacking and storing at ground level, allowing for different bike sizes and having a separate accessible entrance directly from the exterior.

Exterior Elevations

The exterior elevations use façade materials that are common in the immediate neighborhood and throughout Dorchester. The massing and proportions of the building relate, in height and horizontal projections, to the existing structures around the site. Several elements of the façade, including the balcony guardrails, window proportions, vertical split of the materials between the first level and the levels above, mimic the traditional features of the neighboring buildings but, updated to modern standards.



The proposed articulation of the exterior reflects the tendencies and preferences of the homeownership market in the recent years. The main residential entrance is highlighted via a

Preliminary Zoning Analysis

21-29 Fernboro St, Dorchester, MA 02121	Article 50	Proposed
Use	3F-4000	Multifamily
Lot Area, Minimum for Dwelling Unit(s) Specified (Sq.Ft.)	4,000 for 1 or 2 Units	14914 Sq.Ft. for 12 Units
Lot Width Minimum (feet)	45	177
Lot Frontage Minimum (feet)	45	177
Floor Area Ratio Maximum	0.8	19,244 Sq.Ft. (GSF zoning definition) 1.3
Building Height Maximum	3 Stories & 35 Feet	3 Stories & 36 Feet
Usable open Space Minimum Sq.Ft. Per Dwelling Unit	650	4,700 Sq.Ft. for 12 Units, 391 Sq.Ft. per Unit
Front Yard Minimum Depth (Feet)	20 Except alignment w/existing buildings	5
Side Yard Minimum Width (Feet)	10	45
Rear Yard Minimum Depth (Feet)	30	10
Rear Yard Maximum Occupancy by Accessory Buidlings (Percent)	25	0
Off-Street Parking Requirements	1.0/Unit, 0.7/Affordable	12 space or 1/Unit

Sustainable Design, Resiliency and Energy Efficiency Strategies

The development team is committed to maximizing the incorporation of sustainable design, resiliency, and energy efficiency elements into this project, with the goal of attaining net zero energy usage and a Passive House certifiable standards for the 21-29 Fernboro Street project.

Passive House multifamily properties are healthy, comfortable, and resilient homes, and building to Passive House sustainability standards provides a clear path toward our net zero goal, a central component of the Carbon Neutral Boston 2050 commitment. While the cost of constructing a community to these high standards of sustainability must be weighed against our occasionally countervailing goals of deep housing affordability, we are committed to exploring all possible avenues to achieve the goal of net zero energy and will implement as many sustainability measures as are financially feasible as we move through pricing iterations with a contractor as we advance the project toward construction. At a minimum, we are confident in our ability to achieve LEED-NC v4 Gold certifiable.

The 21-29 Fernboro Street project will be an all-electric building with a high-performance envelope design. A significant portion of the upper roof area will be dedicated to an on-site photovoltaic installation, although more may be required as design progresses in order to achieve as much as possible a net zero energy usage.

Mechanical systems will be balanced with the load demands and initial energy assessment of the building mass, but must also take into consideration the building orientation, opportunity for daylighting and views as well as passive thermal load/loss. An integrated project delivery approach will

also invite a multi-disciplinary approach to passive design. We will evaluate opportunities to manipulate factors such as massing, form, glazing, and orientation early in the design process to passively reduce energy consumption before applying energy conservation measures to systems. This combined approach holistically addresses issues of carbon emissions reduction, energy efficiency, and climate-ready design.

In an effort to meet the Boston Water and Sewer Commission requirement regarding stormwater recharge on site, the team will work with its MEP engineers to keep water on site to the greatest extent possible given the site conditions. However, if there is a prevalence of ledge on site, alternative solutions may be necessary.

Below we provide detail on the resiliency, energy efficiency, sustainable design, and construction approaches and measures we are actively evaluating and planning to implement for this project. Although our stated objective for 21-29 Fernboro Street is a building that meets the Passive House, net zero standard, we have organized the narrative below according to the framework of the LEED-NC v4 Gold certifiable, which we are confident we can achieve as a baseline for the development.

Integrative Process

An integrative process will facilitate the design and development team's achievement of green objectives throughout the project life cycle. The project team will include LEED Accredited Professionals and LEED Green Raters, and Passive House Consultants to ensure a complete, integrated approach to design, construction, operations, and maintenance. Sustainable design focused meetings will be held during schematic design and the team will review and confirm the sustainable design and energy efficiency goals. A preliminary energy use assessment will be conducted using whole building energy modeling. As the project develops, regular design meetings will be held to ensure the entire team is engaged throughout the design and construction process. As the project moves into construction, onsite trainings, inspections, and testing will ensure the project is built according to these requirements.

Among the parking spaces, we will work to provide the maximum number of electric vehicle charging stations that are financially feasible.

Site Sustainability

Low-impact development and green infrastructure practices have been incorporated into the site design. The site will include more than 90% of the total area's landscaping with plants that are native or adapted to the region. An erosion and sedimentation control plan will be implemented to meet LEED prerequisites of construction activity pollution prevention. The project will investigate stormwater infiltration opportunities to maximize the building's roof drains directed to an on-site storm water system. The team will develop a construction and demolition waste management plan that establishes waste diversion goals.

Water Efficiency

The water consumption goals will be achieved by installing low-flow indoor water fixtures. The project will use WaterSense labeled fixtures. The faucets will have an average rated flow volume of 1 gallon per minute or less, the showerhead fixtures will have an average rated flow volume of 1.5 gallons per minute or less, and the toilet fixtures will have an average rated flow volume of 1.1 gallons per flush or less. All water using appliances will be high efficiency and low water use. The landscape planned will introduce only native and adapted plant species, reducing the need for irrigation.

Energy Efficiency

The project will be designed to exceed the LEED prerequisite Energy Simulation target. It will also exceed energy code by demonstrating a 27% improvement over the baseline building performance rating using ASHRAE 90.1 2016. ERVs will be used to reduce the energy required to ventilate the building. The project team will implement a robust building envelope and airtight construction with low air change rates and high-performance windows and doors to manage energy use and minimize leakage. Emphasis on Passive House design will be placed during the integrative process to identify key design decisions. Fundamental Commissioning will be pursued to verify and ensure that building elements and systems are designed, installed, and calibrated to operate as intended. The project will work with utility companies and Mass Save to determine what programs and incentives are available for the project. The building will seek to be solar ready, and the team will evaluate both photovoltaic and solar thermal installations depending on availability of funding.

Low Energy (Low Carbon) Buildings—the building will prioritize enhanced building envelope and passive system strategies to reduce energy loads before using high efficiency systems for space conditioning, equipment, and lighting. Below are the specific targets for building elements and assemblies and goals:

Roof insulation: >R-50 plus with CI to eliminate thermal bridging

Wall insulation: >R-36 with CI to eliminate thermal bridging.

Curtain Wall Opaque & Spandrel Assembly: <U-0.05

Curtain Wall Vision Glazing Assembly: <U-0.22 / SHGC <0.25

Window to Wall Ratio: residential <30%

Airtight Envelope: ACH50 = < 0.06

Heating / Cooling Systems: high efficiency, use-optimized

Dedicated Outdoor Air Supply with ERV systems: > 80% efficiency and MERV 8 filter

Domestic Hot Water: high efficiency systems with minimal pipe runs; residential – in unit ASHP
DHW

Lighting: LED fixtures with occupancy sensors and advanced controls

Appliances: all Energy Star, residential Induction Cooktops / Ovens

The building will be all Electric Building Systems.

Materials and Resources

Careful material selection will be performed for the project. All wood in the building will be non-tropical to comply with the LEED requirement of environmentally responsible forest management. Where possible, we hope to integrate products that are recycled and reclaimed. The project will use locally sourced materials, such as aggregate located within 100 miles of the site to promote the local economy and avoid the effects of long-distance transport. Durability risks will be assessed early in the project, and appropriate design, materials, and construction practices will be followed.

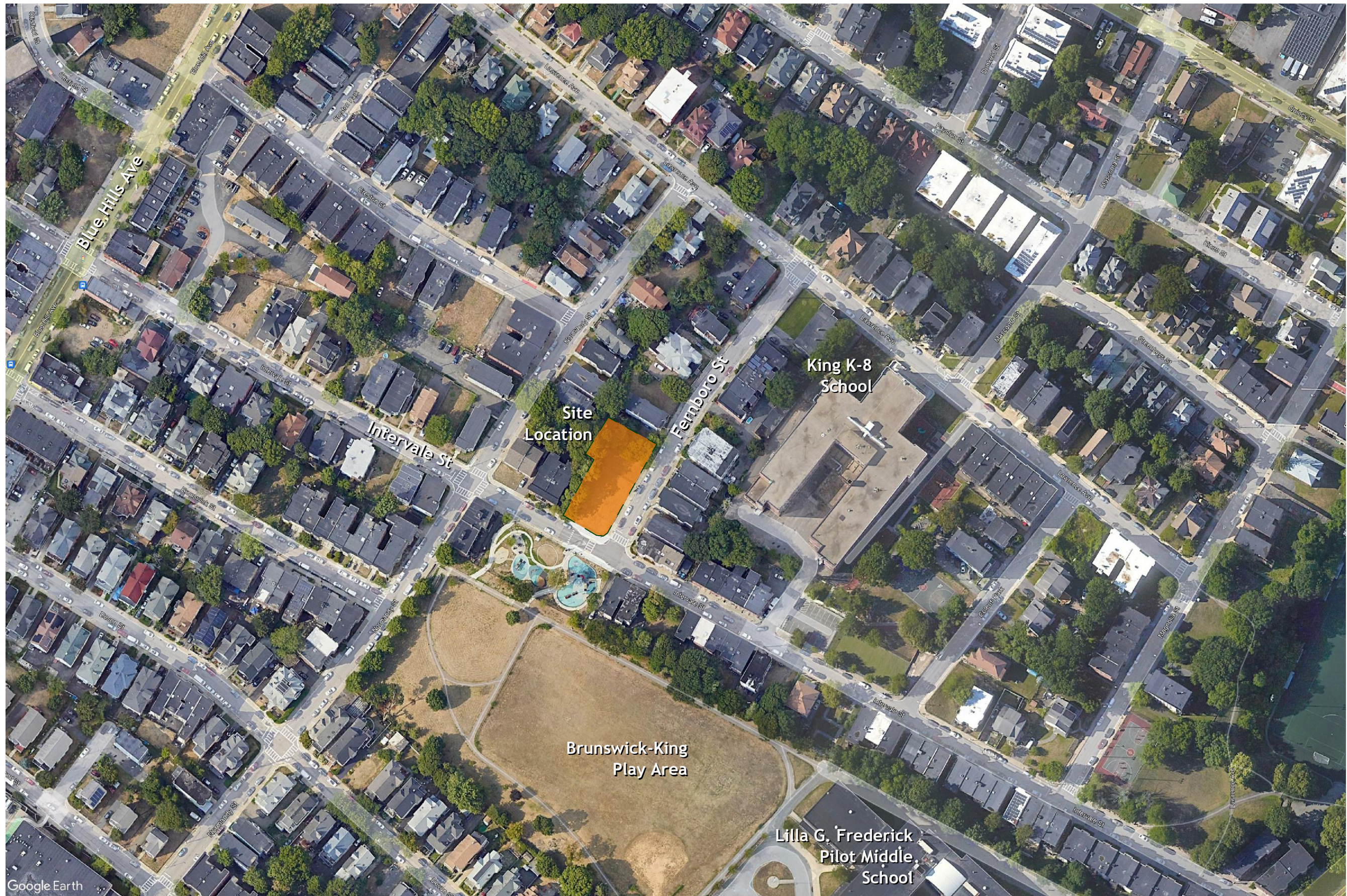
Indoor Environmental Quality

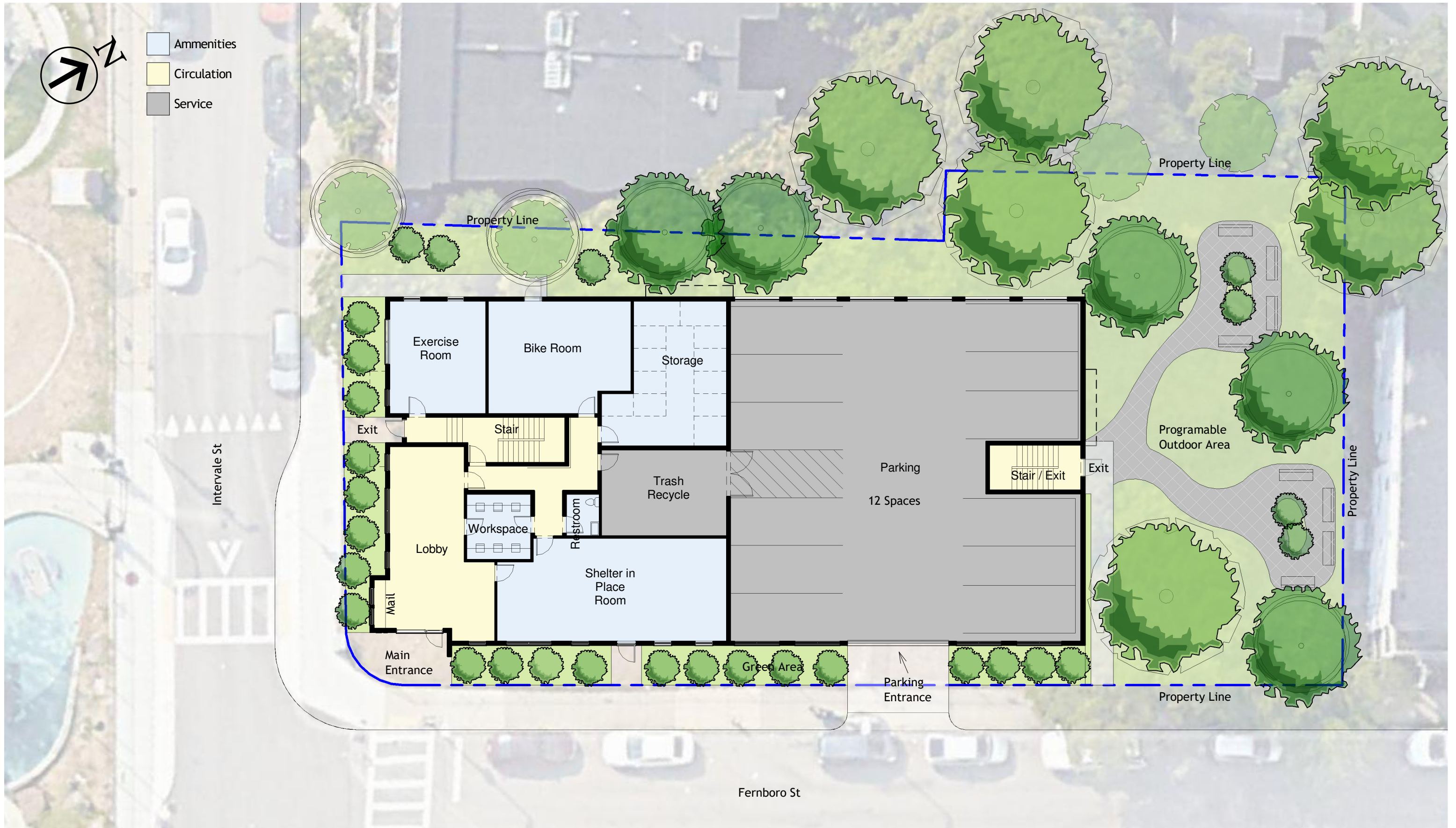
A major focus of the design and choice of building materials will be on the durability of the building, which is key to resident comfort and health. The building will have a healthy interior environment generated through the use of low-VOC containing interior construction and finish materials and maintained through an efficient ventilation system in compliance with ASHRAE 62.1-2010. In accordance with LEED, the buildings will be non-smoking, and no smoking will be allowed within 25 feet of the building. The construction management team will develop and implement a compliant Indoor Air Quality Management Plan for the construction and pre-occupancy phases of the project. The use of ERVs will result in more balanced air flow and filtration within the units. Air and odors from the individual units will be contained through compartmentalizing of the units. All interior paints, adhesives, and insulation will meet low-emitting materials and all composite wood materials will meet low or no-added formaldehyde requirements.

Green Building Strategies

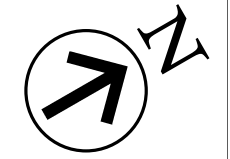
The development team will implement an integrated approach to put forth the best green building practices that achieve the ultimate goal of passive house standard. We will maximize the efficiency with which the building and the site use resources with regards to energy, water, and materials, while minimizing building impacts on human health and the environment throughout the complete building life cycle. These include siting, design and construction to operation and renovation.

Design Drawings







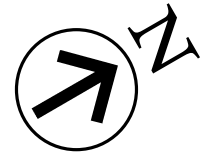


- Ammenities
- Circulation
- Service

Intervale St

Fernboro St

124-5 5/8"



- Circulation
- Residential
- Service



66'-0"

