Boston Inclusionary Development Policy (IDP): Project Review Process, Projects Requiring Zoning Relief*

When does this process apply?

10+ Units & Requires Zoning Relief**

Development Review Stages

Developer meets with BPDA Development Review; IDP explained

Pre-Filing Meetings

Letter of Intent Filed; Followed by Project Notification Form (PNF) OR Application for Zoning Relief Filed

Under Review

- · Developer notifies BPDA staff as to whether project is homeownership, rental, or a combination.
- BPDA staff assesses whether IDP applies, and applicable Zone; BPDA Housing Policy Manager (HPM) confirms
- Developer Indicates preference for on-site units, off-site units, or contribution to the IDP Fund
- BPDA staff and HPM estimate units required and/or contribution amount
- · Community input taken into account in finalizing option
- Developer, in consultation with BPDA Development Review, HPM, BPDA Legal, BPDA Director's Office, and where appropriate, Department of Neighborhood Development (DND) staff, finalizes option

On-Site Development

- BPDA staff calculates # of units
- BPDA staff confirms on-site
 locations

BPDA Approval Required for:

- Deviation from "comparable" for unit finishes and appliances
- Allowing incomes of up to 100% AMI in Zone C in rental developments

Off-Site Development

- BPDA staff calculates # of units; BPDA Housing Policy Manger confirms
- DND Director provides guidance on potential opportunities.

BPDA Approval Required for:

- Units more than 1/2 mile from project
- Units resulting from rehabilitation/ designation of existing units
- Allowing 15% of proposed units offsite for projects in Zone C

Contribution to IDP Fund

• Ownership, Zone A: BPDA Finance confirms amount

BPDA Approval Required for:

- Rental (all zones): BPDA Finance confirms amount
- Ownership, Zones B & C: BPDA Finance confirms necessity and amount
- All Owner Types: Developer may request targeting of IDP contribution in 1/2 mile of proposed project, with DND approval

BPDA Board Approval

Zoning Approval

*This document is intended to provide guidance only, and may be changed. For official guidance, please review the BPDA Inclusionary Development Policy. **Exceptions are made for projects that meet certain affordability requirements. Documentation will be required, such as a confirmation from DND.

Boston Inclusionary Development Program: After BPDA & Zoning Approval

On-Site Development

- BPDA Legal staff completes housing agreement
- Developer creates Fair Housing Marketing Agreement; BPDA and Office of Fair Housing & Equity (OFHE) approve
- BPDA Design reviews architectural plans

Off-Site Development

- BPDA staff approves location
- Legal staff completes housing agreement
- Developer creates Fair Housing Marketing Agreement; BPDA and Office of Fair Housing & Equity (OFHE) approve
- BPDA Design reviews architectural plans
- If rehab, BPDA approves required relocation documentation

Contribution to IDP Fund

 BPDA Legal staff completes Affordable Housing Contribution Agreement

Inspectional Services Department Issues Building Permit			
BPDA Design staff inspect completed units	 BPDA Design and DND staff inspect completed units If rehab, BPDA monitors relocation process 	 Treasury invoices initial payment Developer decides whether payment is up-front; BPDA Finance verifies present value calculation 	
Inspectional Services Department Issues Certificate of Occupancy			
 Developer implements marketing plan and lottery; OFHE assists with lottery* Developer manages income and asset certifications; BPDA Compliance approves certifications 	 Developer implements marketing plan and lottery; OFHE assists with lottery* Developer manages income and asset certifications; BPDA Compliance approves certifications 	Ownership Projects: Treasury invoices for second payment	

BPDA Approves Certificate of Completion

Ongoing Compliance

Inclusionary Development Units

- Marketing, income certifications, leasing up, and sales continue on units; BPDA Compliance and OFHE monitors/assists
- BPDA Compliance monitors ongoing affordability

Contribution to IDP Fund

- For rental, annual payments continue; Treasury invoices
- For ownership, BPDA Finance determines final contribution; Treasury invoices
- BPDA Compliance and DND monitor payments
- DND disburses funds to qualified affordable housing developments