

REQUEST FOR PROPOSALS

For Development in the Upham's Corner Arts & Innovation District -
555-559 Columbia Road

MARCH 2022



CITY of BOSTON

IMAGINE
BOSTON 2030



boston planning & development agency



Economic Opportunity and Inclusion



HOUSING



Mayor's Office of Arts and Culture

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PREFACE

This Request for Proposals (“RFP”) is the product of a robust and unique partnership between the members of the Upham’s Corner community, Dudley Street Neighborhood Initiative, Inc. (“DSNI”)/Dudley Neighbors Incorporated (“DNI”), Upham’s Corner Main Street, and an inter-departmental City of Boston planning team.¹ This document presents a landmark opportunity to participate in the implementation of the community’s vision for an Arts and Innovation District in Upham’s Corner along the Fairmont Indigo Corridor in Dorchester. This new district will combine performance spaces, a new branch public library, affordable commercial and entrepreneurial spaces, and housing to spur a neighborhood economic engine that develops talent, lifts residents out of poverty, maintains local control, and serves as a model for development without displacement. Strategic public investment in the creation of affordable housing, affordable commercial space, and cultural facilities along the Fairmount Indigo corridor is intended to preempt gentrification typified by private speculation attracted by public investment in transportation.

¹ The inter-departmental City of Boston planning team includes the Boston Public Library (“BPL”), Mayor’s Office of Arts and Culture (“MOAC”), Office of Economic Opportunity and Inclusion (“OEOI”), Office of Housing (“MOH”), Public Facilities Department (“PFD”), Boston Transportation Department (“BTD”), and the Boston Planning & Development Agency (“BPDA”).

01 INTRODUCTION & INSTRUCTIONS

PURPOSE

The Boston Redevelopment Authority, doing business as the Boston Planning & Development Agency (the “BPDA”) is issuing a Request for Proposals (“RFP”) for the redevelopment of 555 Columbia Road and 559 Columbia Road (hereinafter, “555-559 Columbia Road”). This RFP seeks qualified proponents to:

- Deliver affordable housing
- Deliver affordable commercial space
- Deliver core and shell for community space anticipated to be used for a branch library

This document is one of three (3) separate RFPs for three Development Sites seeking creative partnerships between one or several developers:

- Site 1: 555-559 Columbia Road, issued by the BPDA
- Site 2: Hamlet Street, issued by the Department of Neighborhood Development (“DND”), now known as the Mayors Office of Housing (“MOH”). This RFP was issued on October 4, 2021 and is currently undergoing the selection process.
- Site 3: 568-574 Columbia Road, issued by Dudley Neighbors Inc. This RFP was issued in December 2020 and a developer was selected in May 2021.

All three (3) RFPs share a common set of Development Objectives, Submission Requirements and Evaluation Criteria which were developed by a robust community process. It is expected that by offering the three (3) development sites together, proponents will be better positioned to strategically maximize opportunities across multiple sites, offering innovative solutions to challenges that may not be solved on a single development site. Proponents are invited to consider the three (3) RFPs together in any combination and are encouraged to seek out innovative partnerships to deliver on an ambitious neighborhood vision.

Eligible proponents intending to combine multiple sites and respond as a single development team may apply jointly to one or more RFPs. Similarly, eligible proponents intending to develop multiple sites independently may apply separately to one or more RFPs. Such proponents may achieve the development objectives of this RFP across multiple sites.

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

SUBMISSION INSTRUCTIONS

The RFP will be available for download beginning on **March 23, 2022** on the [BPDA Procurement Webpage](#).²

Proponents must register when downloading the RFP to ensure they receive any addendum. Requests for clarification or any questions about the RFP must be submitted by email to:

Reay Pannesi
Senior Real Estate Development Officer
Boston Planning & Development Agency
reay.l.pannesi@boston.gov

The BPDA will not respond to any requests for clarification or questions concerning the RFP received after June 1, 2022. With any request for clarification or question, proponents must include their name, address, telephone number and email address. An addendum with questions and answers will be emailed to all prospective responders on record and posted on the BPDA website no later than five business days prior to the RFP deadline.

Pre-Proposal Conference

The BPDA will host a virtual pre-proposal conference on **April 12, 2022 at 1 pm** where staff will take questions. Attendance at this event is optional. However, all proponents are strongly encouraged to attend. All those planning to attend must register at the following link: <https://bit.ly/3tFseFz>

Submissions

The Submission Requirements in Section 7 should be submitted electronically on a flash drive. The electronic submission should include the following files:

- PDF file containing Development Submission
- PDF file containing Design Submission
- PDF file containing Financial Submission (excluding the financial workbook)
- PDF file containing Disclosures
- PDF Submission checklist
- Excel file containing the Financial Submission Workbook

Proposals must be submitted no later than **June 15, 2022 at 12:00 pm (noon)** to:

Teresa Polhemus, Executive Director/Secretary
Boston Planning & Development Agency
22 Drydock Avenue, 2nd Floor
South Boston, MA 02210

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

Proposal Opening

² <http://www.bostonplans.org/work-with-us/procurement>

The opening of proposals received by the deadline will take place on June 15, 2022 at 12:00 pm (the "Proposal Opening Time"). Proposals will be stored in a secure location until the Proposal Opening Time. The BPDA will hold a virtual proposal opening by live-streaming and recording the event, in accordance with COVID-19 guidance. No in-person viewing will be available.

Proponents can access the live-streamed RFP opening by registering at <https://bit.ly/3iqtsOv>. The video of the RFP opening will be posted on the BPDA website no later than 5 PM on June 15, 2022 .

02 A UNIQUE OPPORTUNITY

This Request for Proposals (“RFP”) for Site 1 represents many years of hard work and collaboration. It is a compilation of the community and the City of Boston’s shared vision for an improved Upham’s Corner along an invigorated Fairmount transit corridor. This decades-in-the-making effort aims to ensure that the people who live in Upham’s Corner benefit from the generations of hard work while also welcoming new residents and patrons to participate in a renewed Arts & Innovation District anchored by a revitalized century-year old Strand Theatre and a brand new, purpose-built branch of the Boston Public Library. The community looks forward with excited anticipation to what the next 100 years of Upham’s Corner will look like.



Figure 01: A view from the surface lot located adjacent to 555 Columbia Road where the Imagine Boston 2030 launch was held.

THE VISION

A Different Kind of Neighborhood Arts District

The Upham’s Corner Arts and Innovation District is based on the belief that sustainable opportunities for local residents and businesses can be created by supporting and empowering the significant artistic and entrepreneurial talent that exists in the neighborhood. This vision is centered on the presence of the 100+ year old Strand Theatre, a historic neighborhood asset that has already catalyzed several decades of career development for performing artists and theatre technical professionals.



Figure 02: 1940's view of Strand Theatre.

The broader vision is to reignite Upham's Corner as a hub of creative activity that boasts physical assets in close proximity to each other linked by programmatic partnerships. The district will include the Strand Theatre, the Upham's Corner branch library, smaller performance venues, sites for connected small businesses, and affordable housing with a significant portion set aside for visual and performing artists. Small business development will be supported by the City, DSNI, and local agencies such as the Upham's Corner Main Street and Fairmount Innovation Lab. Together, the community envisions an Arts and Innovation District ("District") where:

- Economic development is anchored by cultural uses that can occupy new or renovated spaces and are enhanced and expanded to provide local residents, entrepreneurs, small businesses, and artists with the housing, venues, public amenities, and resources needed to collaborate and thrive;
- Investments, both public and private, are being made in buildings and programs in strategic response to the robust planning efforts that have led to the designation of this District, and support the cultural, ethnic, and economic diversity of the community; and

- Committed, collaborative partnerships with deep roots and proven effectiveness in planning retain a strong voice in this new phase of creative problem-solving for the future of their neighborhood.

Recognizing that entrepreneurship and innovation come in many forms, the Upham's Corner Arts and Innovation District will be designed as a hub of creativity to bolster collaboration among local residents, entrepreneurs, and business-owners participating in the greater Boston economy.

A New Boston Public Library Branch

One of the key civic anchor components of this neighborhood development and of the Arts and Innovation District is the creation of a new branch of the public library, replacing the current Upham's Corner branch in the first floor and basement of the Upham's Corner Health Center building at 500 Columbia Road. The modern branch library will bring together the best of core services – collections for all ages, robust programming and gathering spaces, places for library staff to deliver services – and envision new ways of simultaneously interacting with and being part of the community, and making real its function as part of the arts and culture district. The typical modern branch is 17,000-20,000 square feet, existing primarily on a single floor, and offers a welcoming presence to the urban streetscape.

The Upham's Corner Branch Library is an essential component of the community's public space and has thrived in the face of surprising odds. Public visioning for a new branch library was initiated in November 2017 when the City and its partners held a community meeting at the Salvation Army Ray and Joan Kroc Corps Community Center to discuss the Upham's Corner branch of the Boston Public Library. The event focused on identifying specific uses, programs, and amenities imagined for the area. The current and future relationship between the public library and Strand Theatre as anchors in the area was discussed, and that the two anchors should have a combined effect that is greater than the sum of their individual programs. The Library is an invaluable resource to the community at large and an important institutional landmark. Community members described the Library as not only a valued forum for the exchange of knowledge, but also a forum for the exchange of culture and community.

Home to Significant Historical Cultural Assets

Since 1804 when Amos Upham opened a dry goods store there, Upham's Corner has been a commercial district that serves as an urban center for several surrounding residential neighborhoods. The area's historic assets include the Dorchester North Burying Ground (1638), Pilgrim Church (1892), Masonic Hall (1895), and the Strand Theatre (1918), as well as several banks, apartment buildings, and single- and multi-story commercial buildings that date back to the turn of the twentieth century. The area previously hosted greater density than exists today. Upham's Corner is a hub of creative activity enabled, in part, by the physical assets that exist in close proximity to each other. Today, many of the great commercial buildings of earlier eras have been repurposed to meet modern needs including the Pierce Building (1905), the Comfort Station (1912), and the Municipal Building (1902).

A Vibrant and Diverse Community

Throughout history, the people who call Upham's Corner home have been its most important asset. Today, the neighborhood is characterized by both ethnic and economic diversity and is known for its welcoming inclusion of immigrant groups. Within the community are a variety of immigrant

populations, including those with roots in Cape Verde, Haiti, the Dominican Republic and Vietnam. Upham's Corner is anchored by its African American and Hispanic/Latino populations, which account for 39% and 26% of the area population respectively. The strength of neighborhood commercial activity in Upham's Corner lies in its position as a hub of ethnic culture serving these immigrant communities and native-born communities of color in Boston.



Figure 03: Aerial view of Upham's Corner in the foreground with Downtown Boston in the background

Guided by the Community

Upham's Corner has a long history of organizing and advocacy, which resulted in the rebuilding of deeply disinvested streets into a vibrant multicultural community, and it has ignited partnerships for arts, culture, and creative placemaking. Upham's Corner has been the subject of several planning initiatives focused on growth in the corridor. These plans and their associated community processes form the foundation of this document and have contributed substantially to its vision and guiding principles.

This document builds on earlier community-oriented planning processes and is a reflection of ideas and priorities expressed by the community members participating in a robust public outreach process, and was guided by a community-based advisory group. The Working Advisory Group ("WAG") is a City-appointed advisory group for this process and includes residents, business owners,

advocates and other community leaders who have been meeting regularly throughout the process to help shape the content of public meetings and review community feedback. Several members of the WAG participated in previous planning initiatives and offered continuity to the process, connecting planning with implementation. In recognition of this continuity, members of the WAG will also participate in the evaluation of proposals (See Section 08, "Evaluation of Proposals"). It is expected that some members of the WAG will also serve on the Impact Advisory Group ("IAG") assembled as a component of the public review process required by Article 80 of the Boston Zoning Code.

A Proud Legacy of Neighborhood Advocacy

Upham's Corner is located in Dorchester at the crossing of two major neighborhood corridors. Historically, Upham's Corner was a well-connected part of town, both socially and with regard to infrastructure. Passenger rail service along the Fairmount line began serving Upham's Corner in the mid-19th century followed a few decades later by streetcar service that ran down Columbia Road. Changes in preferred modes of transportation and commuting patterns in the mid-20th century contributed to a pattern of disinvestment in Upham's Corner and the termination of passenger rail service. A compounding pattern of vacancy, loss of resident population, crime and arson through the 1960s left Upham's as one of the most blighted districts in Boston.

Fortunately, in the late 1970s, a grassroots effort led by neighborhood advocates and residents reversed the decline. Passenger rail service was restored along the Fairmount line in 1979. When the new Orange Line service set to launch in 1987, passenger service was once again scheduled to end and communities along the rail line, led by DSNI, successfully came together in opposition, and preserved passenger rail service.

From 1999 to 2004, transit equity advocacy continued among the corridor communities. The Fairmount Coalition of community leaders and advocates pushed for continued and expanded service on the rail corridor. Substantial action from the Commonwealth of Massachusetts occurred in 2005 when the state committed to four additional stations. In 2007, the station at Upham's Corner was rebuilt and upgraded. The MBTA responded further to neighborhood advocacy by decreasing the fare on the line to equal the cost of a subway ride in the City in 2020 and increasing the frequency of service.

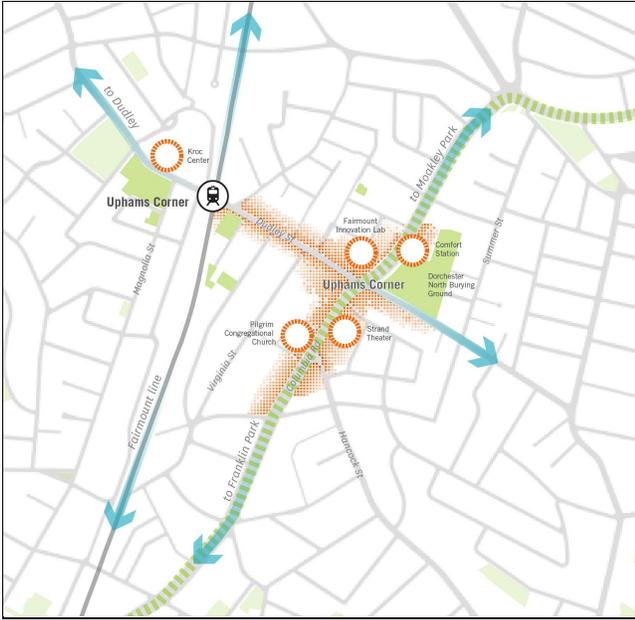


Figure 04: A neighborhood map from Imagine Boston 2030 highlighting key cultural buildings and major transit paths that connect Upham's Corner to greater Boston.

4 Upham's Center Parcels

Columbia Road and Cushing Avenue Corners

14,000+ SF
Active retail uses
40+ Housing units

5-story height
FAR of 2.6

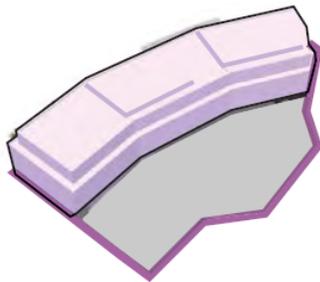


Figure 05: An illustration from the 2014 Fairmount Indigo Planning Initiative Upham's Corner Station Area plan showing the potential redevelopment at the corner of Columbia Road and Stoughton Street.

Fairmount Indigo Planning Initiative

[The Fairmount Indigo Planning Initiative \("FIPI"\)](http://www.bostonplans.org/planning/planning-initiatives/fairmount-indigo-planning-initiative)³ launched at the Strand Theatre in February 2012. The two-year community planning effort was led by the BPDA, along with several City departments, local partners, and community stakeholders. It evaluated opportunities to create new links between neighborhoods, revitalize commercial districts, and create a sense of place along the 9.2 mile long

³ <http://www.bostonplans.org/planning/planning-initiatives/fairmount-indigo-planning-initiative>

transit that extends from South Station to Readville. The FIPI presented a unique opportunity for the City to address the critical need for economic growth and physical improvement along the corridor. The resulting Fairmount Indigo Corridor Plan provided new opportunities to link culturally rich residential areas with mixed-use amenities in settings that are accessible and affordable for the benefit of existing residents and businesses. The Fairmount Indigo Corridor Plan also asserted the direct correlation between transit equity and displacement prevention and clearly stated that City-owned property provides an opportunity to leverage private investment.

Neighborhood Innovation District Committee (“NIDC”)

In September 2015, Mayor Martin J. Walsh released a report that explored the possibility of building on the successes and lessons learned from the Seaport Innovation District to create more Neighborhood Innovation Districts in Boston to empower the City's entrepreneurial talent. The report was created by the Neighborhood Innovation District Committee, a group of community members, entrepreneurs, thought leaders and public servants who were appointed by Mayor Walsh to hold public meetings and discuss the benefits and challenges found in the creation of more Neighborhood Innovation Districts. The report recommends the Dudley Square-Upham's Corner Corridor as a pilot location. The report and additional information can be accessed online [here](#).⁴

Imagine Boston 2030

In 2017 [Imagine Boston 2030 \(“IB2030”\)](#),⁵ Boston's first master plan in more than 50 years, was released with a citywide celebration that took place at the Strand Theatre. Upham's Corner took center stage during the unveiling and the prioritization of efforts within the plan. IB2030 set the course for the future, guiding the City's growth and building on our existing strengths to create a thriving city for all Bostonians. The plan identified key areas where we can take action to expand neighborhoods for new housing and jobs and improve access to opportunity in historically underserved neighborhoods.

Upham's Corner Implementation

Guided by a unique partnership between the City, the Dudley Street Neighborhood Initiative (“DSNI”), and the Upham's Corner community, the Upham's Corner Implementation Process began in June 2017 just as Imagine Boston 2030 was completed. The implementation has focused on putting IB2030 and the FIPI planning process into action by developing key parcels in the neighborhood. The next step is this RFP for Site 1. Combined with the RFP for Site 2, these RFPs are designed to seek partners in delivering affordable housing, affordable commercial space, and an iconic branch public library.

The community-led, City-catalyzed approach for public and private investment in Upham's Corner provides a template for how Boston can bring new mixed-use development to our neighborhoods. The two RFPs are a critical next step for delivering on the promise of the Fairmount Corridor. Together with the community and our partners, the City and the BPDA invite greater density, support increased housing and commercial affordability, and seek future development in Upham's Corner that fortifies community relationships and maximizes neighborhood economic development.

⁴ <https://www.boston.gov/news/report-explores-creation-more-neighborhood-innovation-districts>

⁵ www.boston.gov/sites/default/files/imce-uploads/2018-06/imagine20boston202030_pages2.pdf



Figure 06: This early 20th century image shows the intersection of Dudley Street and Columbia Road and captures the Pierce Building (1905- far right), the Columbia Square Masonic Hall (1895- in the center) and the former Winthrop Hall, a facility originally with rental spaces for events that was torn down in 1929 to construct the Art Moderne Dorchester Savings Bank, now empty and part of the project site.

Served by Multiple Modes of Public Transportation

IB2030 advocates for generating networks of opportunity along the Fairmount Corridor and identified both projects as priorities. The heart of the district is formed by the intersection of Columbia Road, the central artery of the bustling Upham's Corner Main Street district, and the Dudley Street/Stoughton Street corridor, extending into Roxbury to the north, and the Savin Hill neighborhood of Dorchester to the south. Currently, the neighborhood is served by the MBTA Fairmount Line and several bus routes making it an important location for transit-oriented development and a priority for strategic public investment. Upham's Corner includes the MBTA's 11th busiest bus route, Route 15, which connects Dorchester and Roxbury to Ruggles station and is slated to be improved as part of the MBTA's Key Bus Route Improvement Program. The area is also served by Routes 12, 16, 17, and 41. Additionally, there are plans to collaborate on their improvement by boosting service during off peak hours and connectivity to the rest of the transportation system. Planned improvements to regional transportation networks include continued study of upgrading service on the MBTA Fairmount Line from commuter rail to regular service, and the design of Columbia Road from Forest Hills to Joe Moakley Park.

03 PROPERTY DETAILS

DEVELOPMENT ACTIVITIES

Over the past two years, the City and the BPDA, in partnership with the Upham's Corner community, have worked to define the development activities set forth below as the cornerstone of a thriving, mixed-use Arts & Innovation District. The community envisions a distinctive branch library situated within a public realm brimming with activity from commercial, residential, and cultural spaces. These public spaces blend mixed-income affordable housing and small business opportunities for current residents and a vibrant, welcoming destination for visitors. This RFP seeks to:

- **Create Affordable Housing** – The plan needs to deliver permanently affordable housing (rental and/or homeownership units) that serves the Upham's Corner community; incorporates artists' spaces and housing; and promotes a mixed-use, mixed-income neighborhood that can accommodate a broad range of incomes and age groups and which at a minimum must be a third affordable, a third middle, and a third market rate.
- **Create Affordable Commercial Space** – The plan for commercial space needs to meaningfully demonstrate its coherence to the Neighborhood Arts & Innovation theme and incorporate potential business/entrepreneurship development, exhibit space, and smaller performance venues.
- **Support Arts and Cultural Uses** - Site 1 is adjacent to the Strand Theatre (the "Theatre"), an invaluable asset to the community and an anchor of the Upham's Corner Arts and Innovation District. As a public asset for decades, the community has a long history of stewardship of the theater and involvement in programming. Cultural assets paired with affordable housing and affordable commercial space creates the building blocks of this neighborhood arts and innovation district.
- **Provide Transit Oriented Development & Parking** – The plan should demonstrate a transit-oriented development strategy that is also pedestrian-oriented. The parking strategy for all Upham's Corner Development sites must accommodate the demand generated by the proposed development activities and may include shared parking across multiple development sites or shared by multiple development activities. Commercial and service access shall accommodate direct, onsite loading for the new branch library and the Strand Theatre. Innovative concepts around adaptable parking structures are encouraged.
- **Create Community Space for a Branch Library** - The City, the Boston Public Library, the BPDA, and community members favor including a permanent location for the Upham's Corner branch library in the development of the Property. At this time, it is anticipated that the community space delivered through this RFP will be built out by BPL and serve as the location for the Upham's Corner branch library.

General information about the development site is included in this section, followed by a high-level description of the development activities, and then general development objectives and guidelines followed by specific requirements unique to each use.

Site 1 – 555-559 Columbia Road

Site One Parcels

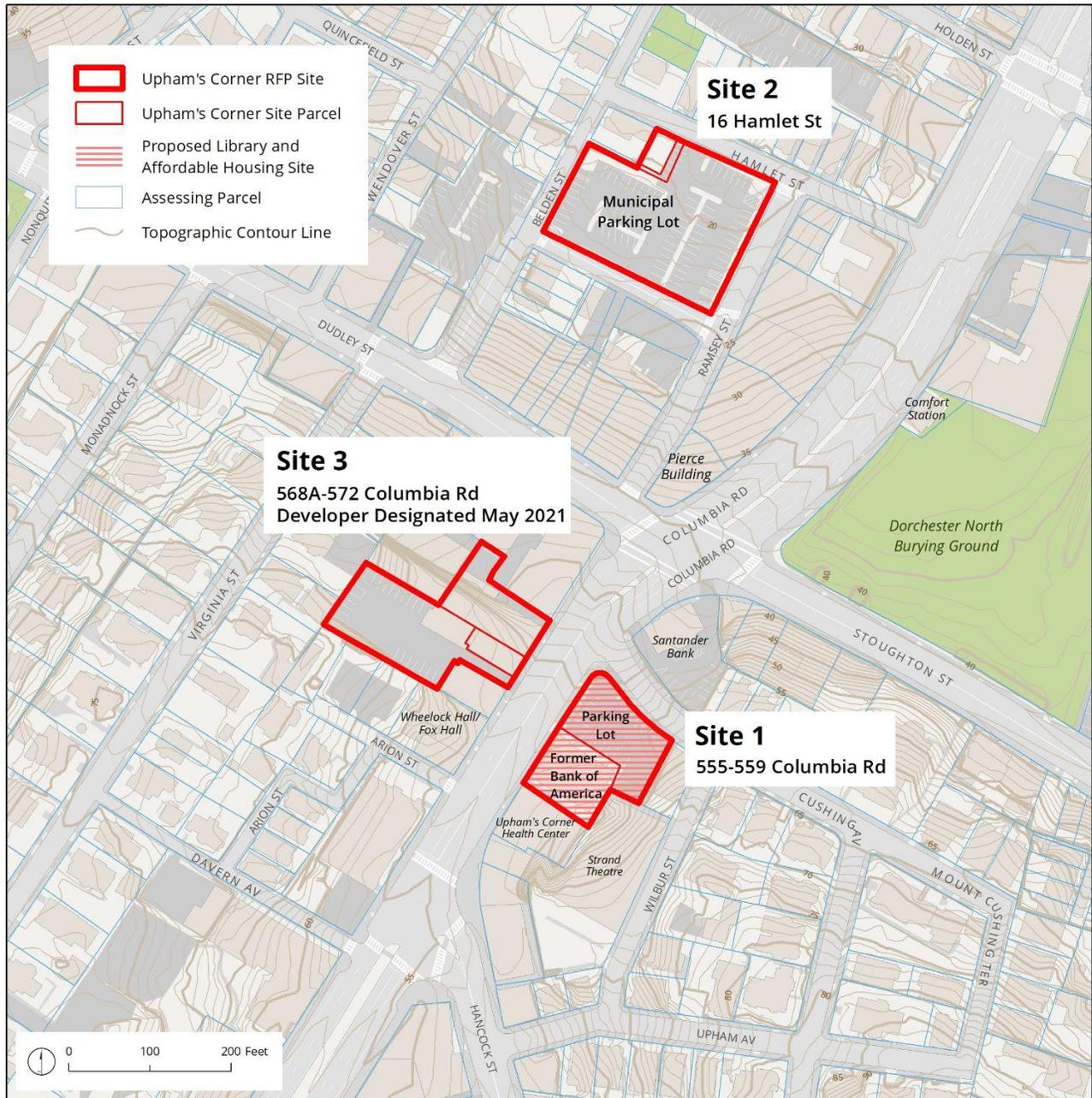


Figure 07: Illustrative Site Plan of the three clusters of parcels in the Upham's Corner neighborhood.

Address	Description	Parcel ID	Lot Area (SQ FT)
555 COLUMBIA RD	Former Bank of America Building	1301743000	8,251
559 COLUMBIA RD	Surface parking lot	1301735000	10,550
			18,801 (approx.)

Property Descriptions

555 Columbia Road: The 3-story masonry building was built in 1915 for the Dorchester Trust Company. The structure contains approximately 5,159 square feet on the first floor and sits on an approximately 8,251 square foot lot. Bank of America vacated the building in March 2014. The BPDA acquired the property in 2017. The property is listed on the MassDEP hazardous waste sites database under Release Tracking Number 3-25205 (Response Action Outcome Status). See Appendix A for more detailed information regarding environmental contamination.



Figure 08: View of the former Bank of America building located at 555 Columbia Road.

559 Columbia Road: The surface parking lot contains approximately 17 parking spaces on 10,550 square feet and has vehicular access via Cushing Avenue. The BPDA acquired the property in 2021.

The lot is the original location of the Baker Memorial Methodist Church (1891). The church was demolished in the late 1940's. From 1952 to 1979 a Gulf Gas Station occupied this site. The service station building was demolished and the property became a surface parking lot. The property is listed on the MassDEP hazardous waste sites database under Release Tracking Numbers 3-0003846 (Response Action Outcome Status) and 3-0026276 (Downgradient Property Status). See Appendix A for more detailed information regarding environmental contamination. This parcel accommodates loading access to the Strand Theatre and is expected to continue to do so throughout any development plans. See Appendix A for current Strand Theatre loading arrangements.

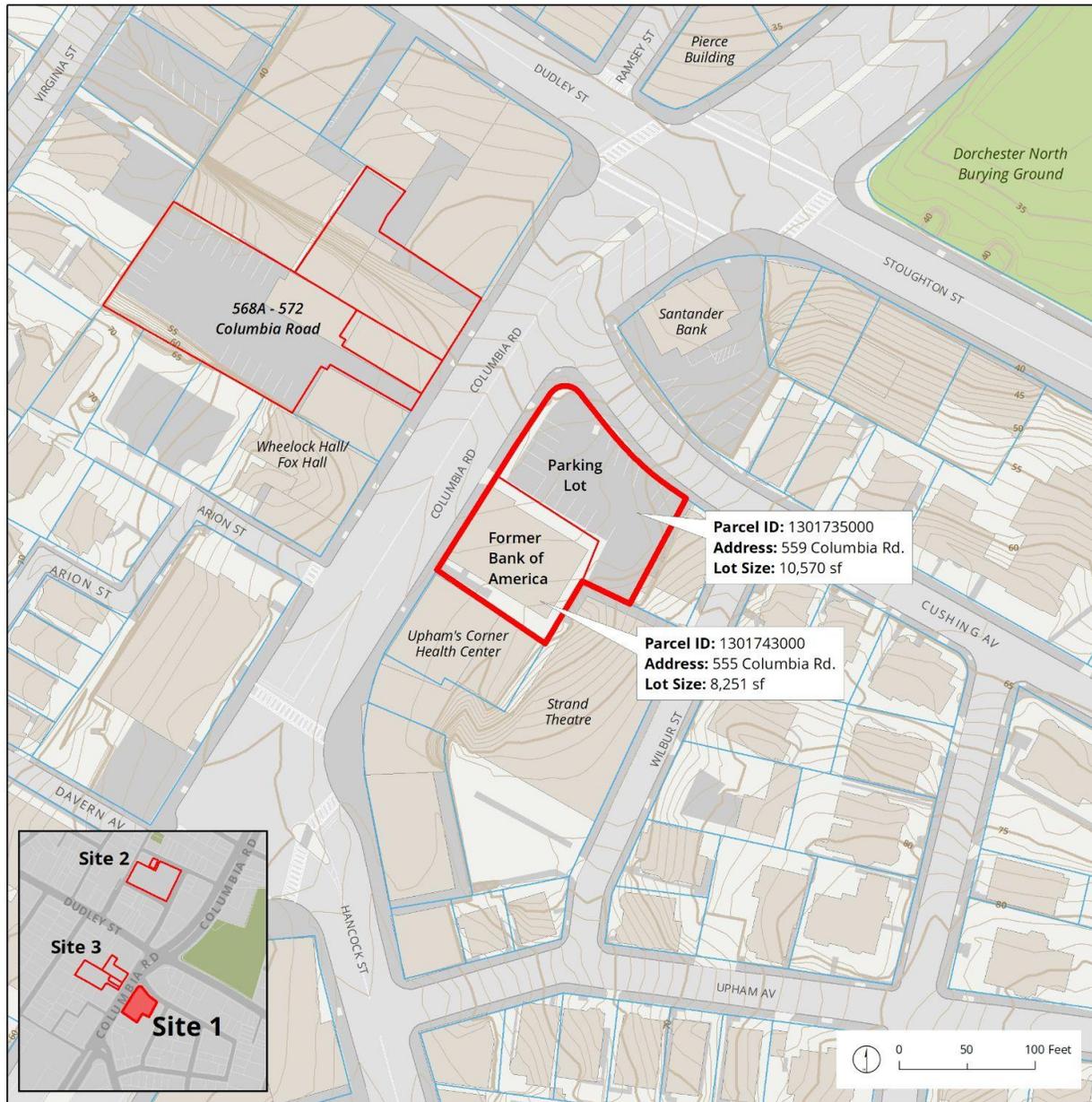


Figure 09: Illustrative plan of the Site 1 cluster of parcels.



Figure 10: 2017 aerial view of 555 Columbia Road and 559 Columbia Road.

Planning and Zoning Context

For zoning purposes, the Development Sites are part of the Neighborhood Shopping sub-district as shown on Map 5A/5B of the Boston Zoning Maps in the Dorchester District, and therefore are principally governed by the provisions of Article 65 of the Boston Zoning Code ("Code").

The Development Sites are also part of the Upham's Corner Neighborhood Design Overlay District. It is expected that the Development Sites will be redeveloped, and as such all changes proposed for the Development Sites should propose a zoning strategy for consideration. The Development Sites are not located in an Urban Renewal Area. The Code and maps can be found at www.bostonplans.org/zoning.

Proposals will be subject to review and approval by the City and the BPDA, including applicable planning and zoning controls and the development objectives and guidelines described herein.

Title

Proponents are fully responsible for conducting their own title examination to ensure that the title to the 555-559 Columbia Road is clear. The BPDA, to the best of its knowledge, is the owner of 555-559 Columbia Road, and the title is not encumbered. However, the BPDA makes no warranty or

representation as to the accuracy of any title examinations it may have conducted and recommends that proponents conduct their own title examinations. The BPDA further recommends that proponents commission their own boundary surveys to determine the existence of any encroachments.

04 DEVELOPMENT OBJECTIVES & GUIDELINES

Development Objectives

Overview

The community's vision for a neighborhood Arts & Innovation District defined the development objectives outlined in this section. Development objectives were crafted from feedback collected in-person at community meetings and from comments received online and via email. The BPDA, in partnership with the City, DSNi and DNI, is committed to catalyzing investment in the neighborhood in a way that supports and affirms community priorities.

The successful proponent must address each of the following considerations in their submission and must agree to work closely with the community to resolve any future issues that may arise as the development project moves forward.

Consistency with the Area Planning History

Proponents must incorporate the combined visions of the planning documents, while capturing and addressing the current needs of the community for affordable housing, affordable commercial space, economic development, and arts and innovation uses.

As articulated in the previous Fairmount Indigo Planning documents, mindfulness regarding the rich cultural history of this neighborhood is paramount. Proponents should use development as a catalyst to promote the arts, culture, education, as well as commercial and retail enterprises in the area. Neighborhood cultural amenities and assets such as art galleries, bookstores, entertainment venues, performance spaces and artist live-work spaces are strongly favored. Amenities and programming associated with the Development Sites should encourage residents to "stay local" to support Upham's Corner businesses for their entertainment, shopping and dining experiences to activate the area in the evening. Preference will be given to projects that include uses that support neighborhood control, whether it be through homeownership, the creation of a cooperative and/or control by a community land trust.

Diversity and Inclusion

In the areas of job creation and training, business development and the procurement of goods, services and construction services in association with construction projects, special emphasis should be made to ensure that maximum opportunities are afforded to small, local, and disadvantaged businesses, as well as those owned by people of color, women and veterans.

Transit-Oriented Development and Parking

The district is within a quarter mile, or an approximately 5-minute walk, from the Upham's Corner Station on the Fairmount Indigo Line. Transit-oriented development ("TOD") is the

preferred development style for the district because the district is well suited to exemplify the principles which encourage compact, walkable, pedestrian-oriented, mixed-use development, and discourage dependency on vehicles.

Parking Ratio

- Parking strategy must accommodate demand generated by proposed uses. Demand generated by housing and commercial uses should consider best practices for transit-oriented development.
- For residential uses, most residents were supportive of parking ratios lower than one car per unit.

Location

- Parking may be shared across multiple sites and can be shared by several facilities
- Service access strategy must accommodate direct, on-site loading

Proponents should also describe the extent to which they are able to provide public parking within the new development(s) which meet the needs of the adjoining retail beyond meeting the parking needs of the proposed development on the site.

Development without Displacement

Proponents must discuss how their proposed development will assist the current residents of Upham's Corner to afford to remain living in their community and to find pathways to economic opportunity. As part of their submission, proponents must include a narrative describing how their proposal supports the community's goal of "development without displacement."

Sustainable, Resilient, & Healthy Development

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

Proposals should include strategies that extend beyond the specific development site and enhance the sustainability, resilience, and health of the surrounding community.

Community Space Requirement

In order to support community organizations and community-oriented uses within Upham's Corner, proponents must include a community space from 17,000 to 20,000 usable square feet on a combination of the first and second floors of the development, which shall be provided at cost to a community-oriented user approved by the BPDA for the term of the ground lease. The final square footage of this space shall be determined after Tentative Designation based on the specific community-oriented user identified for the space.

The City, the Boston Public Library (“BPL”), the BPDA, and community members favor including a permanent location for the Upham's Corner branch library in the development of the Property. At this time, it is anticipated that the community space delivered through this RFP will be built out by BPL and serve as the location for the Upham's Corner branch library.

To establish a branch library at this location, the BPL would require a combination of ground and second floor space of approximately 17,000 to 20,000 of usable, programmable square feet of core and shell space, which the BPL would then fit out for library use at its own expense after acquiring the space. This size is consistent with test fit studies (Appendix A) examining the requirements for an Upham's Corner branch library, while also providing ample space to accommodate cultural, community and arts programming, as well as performance uses desired by the community as part of the branch. It is expected that ground level community space most likely could not exceed 11,000 to 14,000 square feet and the remaining community space square footage would have to be located on the second floor.

Proponents must include in their development program a shell and core space containing sufficient square footage on some combination of the ground and second floors that is configured and built according to the specifications set forth in Appendix A, as able to accommodate the required community space. The BPDA anticipates that, subject to appropriation in the City's budget and availability of funds, the City, or the BPDA, would acquire the shell and core at cost from the developer at a time to be agreed upon in advance of the start of construction.

For the BPL to successfully locate the Upham's Corner branch at the Property, it would be necessary to comply with real estate acquisition laws under M.G.L. Chapter 30B in the acquisition of the core and shell, as well as public bidding procurement as set forth in Chapter 149 for the build out of the space. Therefore, the City plans to seek legislative relief from any and all Commonwealth of Massachusetts general or special laws relating to the procurement and award of contracts for the construction, reconstruction, installation, demolition, maintenance or repair of the buildings to be constructed on the property in conjunction with the proposed redevelopment. It is anticipated that these exemptions would only be applicable to the construction of the core and shell of the BPL space by the developer, and that the City will not seek any exemptions applicable to the fit out of space for library uses by the City. It is further anticipated that the City would not seek any exemption from laws requiring the payment of prevailing wages on the project during construction of the core and shell. The City cannot proceed with seeking this legislative relief until a developer has been selected for tentative designation because the details of the specific development must be known in order to file such legislation.

General Development Guidelines

This development site is subject to both [BPDA Development Review Guidelines](#)⁶ and [DND Development Review Guidelines](#)⁷ as well as the guidelines set forth below.

⁶ <http://www.bostonplans.org/projects/development-review>

⁷ boston.gov/departments/neighborhood-development/neighborhood-development-housing-policies

Use: Arts and Cultural - Supporting the Arts and Innovation District

Cultural assets paired with affordable housing and affordable commercial space creates the building blocks of this neighborhood arts and innovation district. These uses are intentionally combined in this document to solicit innovative mixed-use facilities. The vision for the Upham's Corner Arts and Innovation District builds directly on two public assets, the Strand Theatre and the Upham's Corner Branch Boston Public Library.

Affordability

- A challenge across the City has been the production and maintenance of cultural assets that are accessible to the local community. For these Development Sites, this RFP seeks the creation of spaces that can be enjoyed by members of the current community and visitors alike.

Size and Connectivity

- Hybridized spaces, whether physically connected or connected by shared programs, are strongly encouraged. Throughout the community process, institutional stakeholders and the community at large demonstrated an interest in flexible spaces to host accessory arts and cultural uses that would support the Upham's Corner Arts and Innovation District.

Quality of Built Environment

- The quality of design should connect and reflect the goals and objectives of the neighborhood Arts and Innovation District.
- The 2020 Upham's Corner Branch Library Study's programmatic requirements should be incorporated.

Accessory Uses

- Spaces to support diverse arts uses including visual, literary, performing and multidisciplinary practices are encouraged.
- Spaces including arts education, makerspaces, classrooms, practice rooms, recording studios and rehearsal spaces are encouraged.
- As defined in the [Report of the Boston Performing Arts Facility Assessment](#), there is a clear need for rehearsal and performance space throughout the City and specifically in support of the Strand Theatre and the Upham's Corner community. While the whole report is applicable, sections 8-10 should be consulted for additional context regarding performing arts facilities.

Use: Residential - Creating Affordable Housing

The creation of affordable housing is foundational to the concept of development without displacement. A successful response must deliver permanently affordable housing that serves the Upham's Corner community and promotes a mixed-income neighborhood. Site 1 is envisioned as a primary location for housing.

Affordability

While Area Median Income ("AMI") is defined by the U.S. Department of Housing and Urban Development for the Greater Boston region (\$107,100 for a household of 3), it is important to acknowledge that the median income defined by Boston city-limits is

lower (\$66,355 unadjusted by household size), and the median income in Dorchester is lower still (\$52,866 unadjusted by household size). Proposals which achieve deeper levels of affordability and/or a higher percentage of income-restricted housing are preferred. Preference will be given to projects that include affordability at many income levels (e.g. 30%, 40%, 50%, 60%, 70%, 80% of AMI, et cetera).

Rental:

- One-third of all rental units must be provided for middle income households. These units should target a range of affordability options. The average AMI for these units is not to exceed 100% AMI.
- One-third of all rental units must be provided for low-income households. These units should not exceed 60% of AMI.
- The City requires projects they fund to provide a minimum of 10% of the overall units as homeless set-aside units accessible to household incomes of 30% AMI or less.

Homeownership:

- One-third of all rental and/or ownership units must be provided for middle income households. These units should target a range of affordability options. The average AMI for these units is not to exceed 100% AMI.
- One-third of all ownership units must be provided for low-income units not to exceed 80% of AMI.
- Ownership projects are required to provide an affordability period of 30 years with the BPDA's right to extend for another 20 years.

Artist Set-Aside:

- 20% of all units must be set-aside as Artist Housing. For rental units, these units must be affordable in perpetuity. Homeownership units must meet the affordability period specified above.
- Artist Housing should be offered at a range of affordability targets but cannot exceed 70% of AMI for rental housing and 100% AMI for ownership units.
- Artist Housing Unit Mix should be reflective of the unit mix proposed for other rental housing.
- A traditional artist studio space consists of 1,000 square feet of live-work space. A more compact artist live-work space may be proposed, provided the layout of the unit maximizes open space and includes at least 150 SQ FT of workspace.
- Artist Housing units, including those that are income-restricted, should be clustered within the building(s).
- Tenants or homeowners for the artist-restricted units must have received Artist Housing Certification from the City of Boston. More information on the certification process can be found on the website:
<https://www.boston.gov/departments/arts-and-culture/artist-certification>

Tenure:

- While the community is open to rental and ownership, there is a preference for expanded rental options.

Unit mix and size:

- Unit mixes should include studios, 1-bed, 2-bed and 3-bedroom units.
- Unit sizes should adhere to typical unit sizes as described in DND's Design Requirements & Guidelines.
- The City requires that at least 10% of the units be fully accessible. Proponents are encouraged to provide even greater accessibility. DND is moving towards Universal Design in all residential units since all people are likely to need accessible features at some point in their lives due to disability, aging, or injury. Proposals that propose full Universal Design will be viewed favorably.

DND and BPDA affordability requirements require owner occupancy of income restricted homeownership units and prohibit subleasing of income restricted rental units. DND and BPDA will also require that market rate rental units have rental periods of at least one year. Market rate rental units will also be subject to sub-leasing restrictions, prohibiting either short-term rentals or rental services.

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

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

Use: Affordable Commercial Space

The creation of affordable commercial space is foundational to the concept of development without displacement. If the proposal includes commercial space, the space should meaningfully demonstrate how it contributes to the Arts and Innovation District. Selected proponents will be expected to work with the BPDA, the City, DSNI and Upham's Corner Main Streets to help identify commercial tenants that are highly desired by the neighborhood..

Affordability

- While affordability in the commercial market is not formally regulated, strategies may include local business set-asides, arts/creative business set-asides, subsidized rents or funding subsidies for tenant fit-out or other technical assistance.

Size

- Commercial spaces should be appropriately sized to accommodate the needs of existing businesses or attract new businesses participating in the Arts and Innovation district. Most businesses currently operating in Upham's Corner operate out of spaces 1,500 square feet or smaller.

Tenanting

Strongly discouraged uses:

- Uses such as liquor stores, bars, medical and recreational marijuana clinics, national chain restaurants, check cashing, pawn shops, dollar stores, hair and nail salons or passive uses such as warehousing or self-storage

Strongly encouraged uses:

- Mission-aligned tenants that add value to the neighborhood, such as businesses that participate directly in the concept of an Arts and Innovation District, and especially those committed to supporting and showcasing local artists. The uses below were suggested directly by the community during the public process.

Arts & Culture

Businesses and other spaces that curate creative and artistic products and experiences such as:

- Art galleries
- Fashion design labs
- Incubators for cultivating emerging talent (in the creative phase)
- Indoor/outdoor performance space
- Markets for local artists, crafts makers, and designers
- Recording studios or music school for youth
- Performing arts space for live music, dance, theater, spoken word, etc.

Dining/Spaces for Community Members to Socialize such as:

- Coffee shops with comfortable seating
- Places for dinner and drinks
- Cafés with healthy eating options
- “Fast casual” dining options
- Restaurants with ethnic varied in cuisines

Entertainment and Wellness

Spaces that encourage physical and mental wellness and social gathering such as:

- Space for independent mental health and wellness practitioners
- A wellness center with services such as massage and spa
- A fitness studio with classes such as yoga, barre, etc.
- An arcade
- A karaoke bar
- A function hall for celebrations, business events, and social gatherings

Merchandise Retailers

Retailers that fill gaps for the everyday needs of local consumers, and retailers that offer discretionary goods and services such as:

- A resale/thrift store
- An office supply store
- A hardware store with an on-call handyperson or a building trade co-operative.
- A formalwear store
- Jewelry stores
- Sporting goods and hobby stores

Work Space

Affordable collaborative work space for small businesses such as:

- Workforce training programs for local parents
- Priority workspace for Fairmount Innovation Lab patrons.

05 DESIGN GUIDELINES

General Design Guidelines

All proposals must emphasize the importance of Columbia Road as a major thoroughfare running through a vibrant community. Buildings should strive to be iconic yet complement the neighborhood in terms of height, massing, and visual appearance. Buildings should be constructed of high quality materials and incorporate character-defining architectural features both inside and out. There are many buildings in the immediate context that are of historic and architectural importance. For the benefit of the neighborhood, any new development must relate to the existing context and maintain a high level of design and durability. All proposals for Site 1 shall also adhere to the following general guidelines:



Figure 13: Postcard from the 1920's showing 577-587 Columbia Road on the left (present location of Santander Bank) and Winthrop Hall (present location of DNICB building/former Citizens Bank) in the center.

Ground floor and Public Realm

Redevelopment of Site 1 must contribute to creating a new, high quality public realm in the center of Upham's Corner that is engaging, community focused and supports continuous pedestrian activity along the Columbia Road corridor.

- The incorporation of public art, lighting features, murals, relief elements, historic pieces of structures, etc. are strongly encouraged.
- Ground floor uses must be active, publicly accessible, and as porous as possible with generous visual connection to the public realm.

- Sidewalk and street edge conditions must promote accessibility and produce a safe and engaging public realm. Street trees, sidewalk furniture and exterior lighting are important features of the proposal.

Contextual Architectural Design

Buildings should reinforce the identity and character of Upham's Corner by recognizing its rich cultural and architectural history through careful consideration of appropriate, high quality building materials and facade expression. In this vein, proponents should thoughtfully consider the historical and social context of Upham's Corner in order to design exterior facades that will transcend time. Proposals for Site 1 must emphasize the importance of Columbia Road as a major thoroughfare running through a vibrant community. Buildings should be constructed of high quality materials and incorporate character-defining architectural features both inside and out

Open Space and Landscaping

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

- Open spaces that contribute to a public realm strategy should be included.
- Proposals must provide high quality landscaping that includes drought resistant and native plants.
- Proposals must include screening for all mechanical equipment and ventilation openings. Natural options are preferred.

Height and Massing

The Development Sites are located in Dorchester's Neighborhood Shopping sub-district and, as such, are permitted 1.0 FAR and 40' height as-of-right. Contextually relevant building heights along Columbia Road include the Strand Theatre, the Pierce Building, and Fox Hall. Building(s) design should create and reinforce a continuous street wall along Columbia Road. Buildings should strive to be iconic yet complement the neighborhood in terms of height, massing, and visual appearance.

- Increased height and density beyond what is currently allowed by zoning are considered appropriate and advisable given both current and historic context of the site.
- Strong proposals will utilize grade changes along the site on Columbia Road from Stoughton Street to Hancock Street to lessen the impact of massing and height changes.



Figure 14: 1911 Postcard view showing Winthrop Hall on left (572-574 Columbia Road) and on right Baker Memorial Methodist Church (559 Columbia Road). The Pierce Building is in the distance behind the streetcar.

Access, Circulation, Connectivity, and Loading

Proposals that combine adjoining parcels to increase economic feasibility, create jobs, and improve vehicular and pedestrian access are encouraged. If the proposed design makes use of adjacent parcels, the proponent must demonstrate site control of such other parcels by including a copy of a fully executed, and currently dated, Purchase and Sale Agreement or a signed, and currently dated, Option Agreement.

- Building configuration should maintain grade-level access to Cushing Avenue Street to Columbia Road, and allow for loading access to the Strand.
- Safety, views, and ease of navigation must be considered in the site design. In particular, night safety is a concern of some neighborhood residents. Therefore, structures must be designed with clear sight lines and exterior lighting design must create well-lit open spaces and streetscapes without dark pockets at night.
- Drop-off areas must be conveniently located.
- Service access must accommodate direct loading for both the Branch Public Library and the Theatre. Please refer to Figure 12 and the Theatre loading study in Appendix A for further detail of loading requirements for the Theatre. The Theatre's loading dock is currently accessed from Cushing Avenue. Typically, productions require loading capacity for a WB 50 tractor trailer in tandem with another loading truck or tour bus. Vehicles should be able to load-in concurrently.

Loading access for the Theatre must remain operational during construction of the proposed development. The selected developer will be expected to coordinate loading schedule arrangements between the Strand and the proposed development.

- The redevelopment must reasonably limit noise and traffic impacts in order to minimize any adverse effects on the quality of life of the immediate abutters.
- Applicants are to creatively design a parking plan/strategy that reflects the needs of its occupants, proximity to public transit, and makes use of the site's topography.
 - Any structured parking must be well-designed and buffered visually to limit the visibility of the garage use from the public ways.
 - Parking should not be located at the ground floor or exposed to the public realm along Columbia Road.
 - Buildings should not contain garage doors or parking entrances on the building frontage where possible.
 - Surface parking (if proposed):
 - Should be located at the side or rear of the building(s) and screened from street views and residences with landscaping and fencing.
 - Should employ low impact strategies that reduce stormwater runoff and remove pollutants including permeable pavement, bio-swales, rain gardens and storm water retention/reuse systems.
 - Hardscaped and paved surfaces should be shaded and/or have a low Solar Reflectance Index rating, minimum SRI 29.

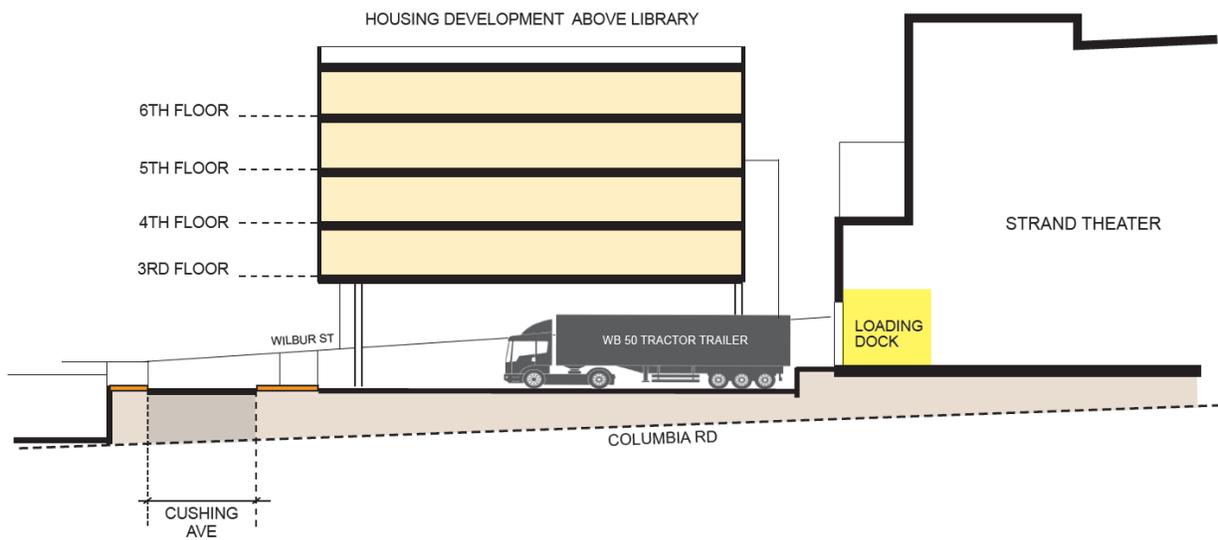
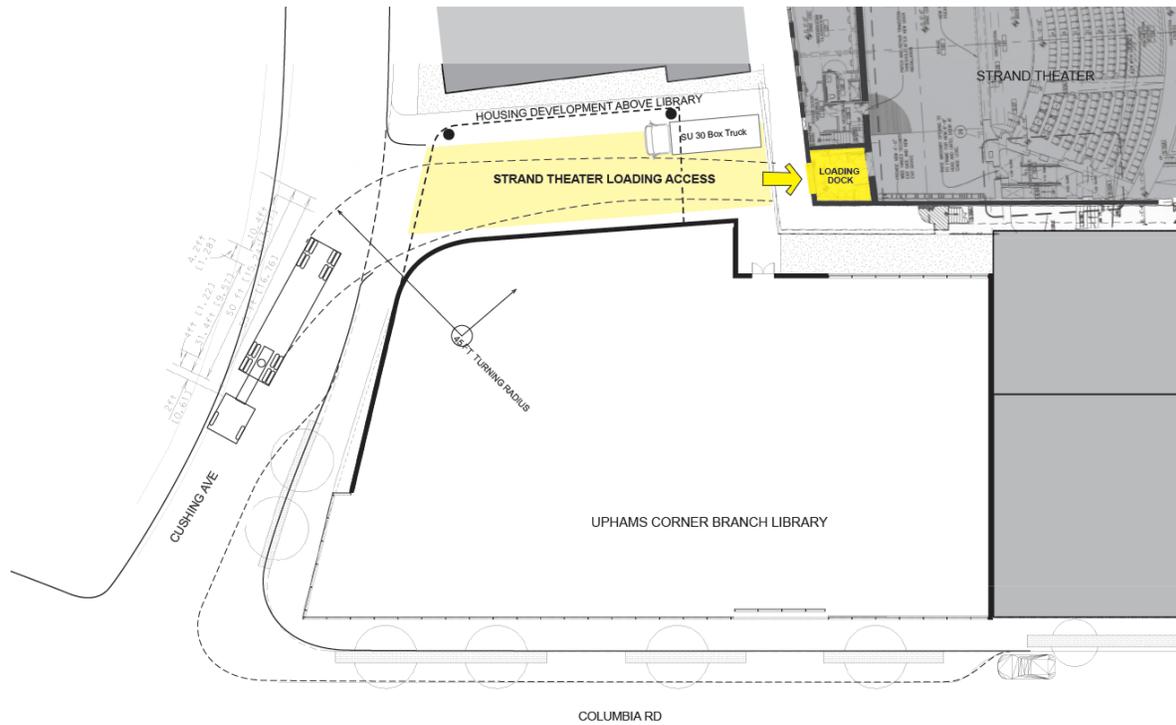


Figure 12: Loading diagrams for the Strand Theatre that must be accommodated on this site

Bicycle Storage

Provide at least one secured or covered bicycle parking space per residential unit located in an easily accessed storage area or adjacent/attached garage or shed.

Resilient Development and Green Building Design Guidelines

Proposed projects should support the community’s and City’s Carbon Free, Climate Resilient, and Healthy Community goals including the 2019 Carbon Free Boston report and DND’s Zero

Emission Buildings guidebook for affordable housing projects. See [Article 37 Green Building and Climate Resiliency Guidelines](#)⁸ for additional information.

Based upon [Climate Ready Boston 2016](#)⁹, the City's comprehensive climate vulnerability and preparedness study, the Upham's Square area is subject to multiple climate change related hazards. Proposed projects should include resilient building and site strategies to eliminate, reduce, and mitigate potential impacts, as follows:

Greenhouse Gas Reduction

Proposed projects should exemplify the City's Carbon Free Boston 2050 goals by striving for zero carbon emission or energy positive performance. New buildings should be designed as green low-energy all-electric structures that prioritize enhanced building envelope solutions and passive system strategies and that are optimized for and include onsite solar renewable energy generation. As necessary projects should identify off site and procured renewable energy solutions sufficient for achieving net zero carbon emissions. Proposals should include a preliminary energy model with a Zero Carbon Building Assessment. Projects should assess these strategies in a first and life cycle cost analysis.

Higher Temperatures & Heat Events

Proposed projects should reduce heat exposure and heat retention in and around the building(s) and surrounding district. Strategies should include the use of building and paving materials with high Solar Reflectance and Solar Reflectance Index values and increased shade areas through landscaping, expanded tree canopy and shade structures. At a minimum projects should achieve the LEED Sustainable Sites, Heat Island Reduction credit. Consider the inclusion of Green Roofs with plantings, especially for accessible roof spaces and sites with limited access to open space.

More Intense Precipitation

Proposed projects should integrate strategies to both mitigate the impact of storm water flooding to the site and reduce the Development Sites' contribution to storm water flooding in the neighborhood. Strategies should focus on pervious site materials, enhanced landscaping and Low Impact Development measures to capture, retain, and infiltrate stormwater.

Rising Sea Levels

Proposed projects should reduce risks of coastal and inland flooding through elevating the base floor, critical utilities, mechanical systems and infrastructure above anticipated flood levels. Proposed projects should utilize flood proof materials below any future flood level and relocate vulnerable uses to higher floors.

Sheltering in Place

Proposed projects should provide for a cool/warm community room and essential systems to allow for extended sheltering in place and accommodation of local

⁸ www.bostonplans.org/planning/planning-initiatives/article-37-green-building-guidelines

⁹ <https://www.boston.gov/departments/environment/preparing-climate-change>

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

Green buildings provide a comprehensive approach to reducing the adverse impacts of the built environment and to promoting human health and the wellbeing of our communities. Proposed projects should exemplify leading green building and sustainable development practices and target zero energy or zero carbon emission performance. Accordingly, proposed projects are strongly encouraged to include the following items. Proponents should describe in their design narratives how each consideration will be incorporated into their proposed project.

Green Building

Achieve and surpass the United States Green Building Council's ("USGBC") requirements for LEED Platinum and LEED Zero with a minimum requirement of achieving LEED Gold utilizing the most appropriate LEED rating system. Projects should seek USGBC certification and should be registered upon tentative designation and certified by the USGBC within one year of construction completion.

Integrated Project Planning

Projects should fulfill the Integrated Process requirements and include a LEED Accredited Professional(s) with the appropriate specialty(s) and, for residential uses, a LEED Homes Rater. Proposals should describe the team's approach to integrated project planning, including the use of preliminary and whole building energy modeling.

Site Development

Employ strategies to eliminate construction phase environmental impacts including off-site tracking of soils and construction debris. Site designs should include strategies to reduce heat island and storm water runoff impacts, and promote area natural habitats. Projects should include stormwater systems and strategies for retaining and infiltrating the first 1.25" of rain water.

Connectivity

Promote and support non-personal vehicle means of travel including walking, bicycling, public transit, and reduced personal vehicle travel. Strategies should include easily accessible, secure and enclosed bicycle storage space (see Boston Bicycle Parking Guidelines), shared parking, transit pass programs, and car and bike share programs. Other elements that promote connectivity include open space courtyards with landscaping and seating, desire-line footpaths, public viewing areas, and communal gardening spaces.

Water Efficiency

Minimize water use and reuse storm and wastewater. Strategies should include low flow plumbing fixtures; rainwater harvesting for gardens and building systems; and drought resistant planting and non-potable water irrigation.

Energy Efficiency

Buildings should be designed as low-energy, all- electric structures that prioritize enhanced building envelope solutions and passive system strategies. Small residential buildings should target a HERS Index of 40 or lower (based on a current Commonwealth of Massachusetts Stretch Code of 55). Large residential / commercial buildings should target modeled performance at least 25% below the current Commonwealth of Massachusetts Stretch Code. Projects seeking DND funding for affordable housing should adhere to DND's Zero Emission Buildings guidelines.

- Passive building strategies should include optimized building orientation and massing; high performance building envelopes that are airtight, well insulated, have appropriate window to wall ratios, and include high efficiency windows and doors; and natural ventilation and daylighting.
- Active building strategies should include Energy Star high efficiency equipment, dedicated outside air systems with energy recovery ventilation, air and ground source heat pump systems for building thermal conditioning and hot water systems, and high efficiency LED lighting fixtures and advanced lighting control systems and technologies. Residential appliances should be Energy Star rated and all electric.

Renewable Energy Generation and Storage

Buildings should be designed to maximize the potential for onsite renewable energy generation and include installed solar photovoltaic (PV) systems. Building rooftops and vehicular parking areas should be designed to maximize the solar PV system performance. Additionally, electric battery and thermal energy storage systems should be considered.

Energy Efficiency Assistance and Incentives

Fully utilize any available federal, state, and utility energy efficiency and renewable energy programs, funding, and assistance. Proposals should identify potential assistance and funding resources.

Indoor Environmental Quality

Provide high quality healthy indoor environments by utilizing strategies including: extended roof overhangs, proper ground surface drainage and non-paper gypsum board in moist areas to reduce mold risks; passive and active dedicated outdoor (fresh and filtered) air systems; active ventilation at moisture and no indoor combustion; building products and construction materials that are be free of VOC's, toxins, hazardous chemicals, pollutants and other contaminants; entryway walk-off mats and smooth floors that reduce the presence of asthma triggers, allergens and respiratory irritants; easily cleaned and maintained finishes; and green cleaning and maintenance practices.

Materials Selection

Include sustainably harvested and responsibly processed materials. Strategies should include low embodied carbon products made with recycled and reclaimed materials; materials and products from responsibly harvested and rapidly renewable sources; and locally sourced products and materials (within 500 miles).

Innovation

Utilize both "off-the-shelf" products and practices as well as innovative strategies and "cutting edge" products to increase the sustainability and performance of the building.

Productive Landscape

Productive landscape is a concept that joins principles and best practices of place-making, sustainability, public space and aesthetics. Productivity is defined as installations, plantings, activities and utilizations that involve people interacting with the landscape. This includes environmental remediation strategies, and incorporates features such as green roofs, brown roofs, reflective roofs, vertical living walls/structures, urban orchards, community gardens, rooftop farms, and solar canopies.

- Steps should be taken to make the site an enjoyable aesthetic, including fashioning exterior features and elements in an engaging manner and utilizing materials and greenery inventively.

06 FINANCIAL SUPPORT

COMMERCIAL DEVELOPMENT

The City's discretionary incentive tools and loan programs can be used to encourage job retention and creation. Tax Increment Financing ("TIF") and Special Tax Assessment ("STA") are property tax incentives administered by the City that may be available to businesses. In return for substantial job creation, TIF agreements provide businesses with tax relief on the incremental growth in their property's value for up to 20 years, and give businesses tax relief by providing a phased-in assessment of the total value of the property from 5 to 20 years. All TIF and STA plans must be approved by a City Council vote.

RESIDENTIAL DEVELOPMENT

Proposals that include funding requests will be considered, subject to availability of funds, and the successful proponent must apply to DND for funding in DND's annual funding Request for Proposals. This may include Neighborhood Housing Trust and Community Preservation Act funding. DND will analyze and evaluate the need for subsidy funding to support the construction and long-term affordability of eligible units as part of a successful proposal.

The successful proponent may be expected to seek support from other agencies such as the Department of Housing and Community Development ("DHCD") under separate Request(s) for Proposals or Notices of Funding Availability for additional resources. The successful proponent is highly encouraged to explore grants, private funding and/or private partnerships to assist in financing the shared artist workspace and/or artist housing units.

The City may provide tax incentive programs to advance its economic development and housing goals, including TIF and 121A agreements that allow project owners to make alternative tax payments each year. Requests for tax incentives will be considered as part of a comprehensive evaluation of the financial structure of the development proposal.

Please contact Christine O'Keefe, Acting Assistant Director for Development & Finance at christine.okeefe@boston.gov for questions regarding potential City funding.

07 SUBMISSION INFORMATION & REQUIREMENTS

GENERAL SUBMISSION INFORMATION

Proposals must include the Submission Requirements set forth in this section. These Submission Requirements must also be submitted in accordance with the instructions set forth in Section 01 of this RFP. Omission of any of the required information may lead to a determination that the proposal is non-responsive.

If the proposed design makes use of adjacent parcels, the proponent must demonstrate site control of such other parcels by way of a fully executed, and currently dated, Purchase and Sale Agreement or a signed, and currently dated, Option Agreement.

Proponents will be required to present at a community meeting organized by the BPDA in conjunction with the City of Boston.

DEVELOPMENT SUBMISSION

The following information shall be submitted in the written Proposal Summary. This is an opportunity for the proponent to convey how the Proposal will be a highly-beneficial use of Site 1 that will be cost-effective, completed in a timely fashion, and provide options superior to those currently available to the community.

Please provide the following items as listed:

Introduction/Development Team

- A letter of interest signed by the principal(s) of the proponent's organization (s). This letter should introduce the development team and organization structure, including the developer, attorney, architect, contractor, marketing agent/broker, management company, and any other consultants for the proposed development. For joint ventures, the proponent shall provide a copy of the Partnership Agreement detailing the authority and participation of all parties.
- Include all contact information for team principals, including full address, phone numbers and e-mail addresses.
- Developer Qualifications, Experience and References: A narrative supported by relevant data regarding qualifications and past experience with similar projects. Proponents must provide detailed descriptions of previous relevant work completed and the results or outcome of that work. Proponents shall also furnish three (3) current references including: names, addresses, e-mail addresses, phone numbers, and principal contacts in which the proponent has provided comparable services. Include resumes for key personnel of the development team, including lead designers. Please emphasize past experience with mixed use facilities and the team's design portfolio examples.

- If applicable, explain the relationship(s) between the proponent and any third-party developers, subcontractors, or community partners that might influence the proponent's development plan.
- The proponent shall provide a listing/description of any lawsuits brought against the proponent or any principals of the proponent in courts situated within the United States within the past five years.

Development Concept:

- Describe the proposed development's uses and the total square footage of each use, along with a description of how the proposed uses and design will satisfy the Development Objectives of this RFP.
- Describe how the proposed development will benefit the surrounding community.
- Estimate the number of construction and permanent jobs that will be generated by the proposed development.
- Proposals must include a narrative of the community benefits supported by the development, including any benefits to the local community that are above those generated by the development itself.

Development Plan:

- Describe how the development concept will be implemented. The description should include a detailed timeline that lists all pre-development tasks from the date of Tentative Designation by the BPDA through loan closing and construction commencement. It should also indicate the start and end dates for each pre-development task.
- Provide a summary of the plan for the operation of the proposed development upon development completion. Include the anticipated annual costs, as well as the planned sources of funding.
- Provide an outline of all required regulatory approvals and a projected timeline to obtain these approvals. The proponent should note the currently applicable zoning districts, overlays and provisions that govern development of Site 1 and discuss the type of zoning amendments or variances that are required for the proposed development, or indicate if the proposed development can be constructed "as-of-right" under existing zoning.

Boston Residents Jobs Policy. Proposals must describe the planned approach to meeting the goals outlined in the Boston Residents Jobs Policy (Appendix A)

Good Jobs Strategy Plan - Proponents must include a narrative explaining how their proposal supports the community's expressed priorities regarding the creation and sustainment of good permanent jobs in all phases of the development and in particular, end user jobs that will be located in the development. This includes engaging in fair hiring practices which will foster and encourage the participation of the people of Roxbury and the

immediate neighborhood. The narrative should include the proponent's commitments towards achieving the seven (7) "Good Jobs Standards criteria" ("GJS") listed below. Proponents will be required to make their commitments public and these commitments will be evaluated and enforced on a long-term basis after construction is complete. While the Boston Residents Jobs Policy is focused primarily on construction hiring, GJS are not only more expansive, but focus more on the people employed at Site 1 after construction is complete.

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

The seven (7) priority "good job standards" are:

1. At least 51% of the total employees working on the parcel shall be bona fide Boston Residents. Please note that the community has expressed a preference for developers to select tenants for retail spaces who are committed to hiring Roxbury residents specifically. Proponents are expected to work with community partners as an element of their employee recruitment.
2. At least 51% of the total employees working on the parcel shall be people of color.
3. At least 51% of the total employees working on the parcel shall be women.
4. All employees shall be paid a "good wage", defined as a salary or hourly wage equal to or greater than the Boston Living Wage, which shall be defined as \$17.62 on January 1, 2019 and thereafter increasing annually by the rate of inflation.
5. At least 75% of all employees working on Site 1, and at least 75% of all employees of each lessee, sub-lessee, or tenant working on Site 1, shall be full-time employees. "Full time" shall mean at least 30 hours per week.
6. All employees shall work "stable shifts," which include a predictable schedule that is appropriate for the particular field of work. Such a work schedule allows employees to reasonably schedule other family care, educational, and work obligations. A schedule that does not include "on-call" time and has a set weekly pattern that does not change more than two times per year shall be presumed to be stable.
7. All full-time employees shall be offered benefits, defined as the opportunity to opt into a company sponsored health insurance plan with coverage that meets Massachusetts Minimum Creditable Coverage ("MCC").

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

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

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

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

Diversity and Inclusion Plan - The City of Boston and the BPDA are strongly committed to ensuring that the disposition of BPDA properties provide opportunities for wealth-creation and workforce participation for businesses and individuals who have historically been underrepresented in real estate development.

Proponents must include a narrative setting forth a plan (hereinafter, a "Diversity and Inclusion Plan") for establishing and overseeing a minority outreach program aimed at creating increased opportunities for people of color, women, and Commonwealth of Massachusetts-certified Minority and Women-Owned Business Enterprises ("M/WBEs") to participate in the development of Site 1.

The Diversity and Inclusion Plan should reflect the extent to which the proponent plans to include significant economic participation and management roles by people of color, women, and M/WBEs in as many aspects of the project as possible, including but not limited to:

- pre-development (ex. development entity, ownership, equity and debt investment, design, engineering, legal, other consultants);
- construction (ex. general contractor, sub-contractor, trades, workers performing construction); and
- ongoing operations (ex. building tenants, facilities management, contracted services).

Within the Diversity and Inclusion Plan, proponents shall specify the M/WBE-owned firms participating in the development, the nature of their participation in the particular phase(s) of the development, and the extent to which such M/WBE involvement is committed as of the date of proposal submission. The strategy set forth in the Diversity and Inclusion Plan shall also set forth a plan for M/WBE outreach as the development progresses.

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

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

Proposals will be considered and rated based on the comprehensiveness of the proponent’s Diversity and Inclusion Plan for creating increased opportunities for people of color, women and M/WBEs to participate in the development of Site 1, including specific strategies to achieve maximum participation by people of color, women, and M/WBEs in pre-development, construction, and operations. The Diversity and Inclusion Plan should discuss why it is realistic, and executable. Proposals that include specific partnerships and/or specific outreach plans for promoting M/WBE participation during each aspect of the project will be considered more advantageous.

The Diversity and Inclusion Plan evaluation criterion shall comprise 25% of the BPDA’s comparative evaluation of each proposal submitted.

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

Residential Services Plan - The City and the BPDA are aware of an increasing number of tenant evictions from projects that serve affordable households. While it is recognized that a Resident Services Plan may be preliminary at the initial funding application stage, applicants are encouraged to assess the general needs of all residents in addition to those with special needs. The goal of the City and the BPDA is to minimize evictions through owner/ manager/ service provider interventions. Developing housing affordable to low income households does not only involve the bricks and mortar. Providing a properly managed facility that provides a safe and stable living environment is critical to the success of the project. Resident Services are supports designed to help low-income households maintain a stable living environment and to access services that foster positive outcomes for the household. To that end, DND is establishing minimum standards for affordable rental housing developments assisted through their programs. Depending upon the programming proposed for the different housing developments, the minimum standards required will vary. For example, a higher level of service enrichment will be expected from developments where a large percentage of the units to be built will be targeted to special needs, homeless or extremely low-income populations. A less intensive plan will be acceptable for more mainstream affordable developments. All affordable housing developments will be expected to adopt and implement a Resident Services Plan that identifies the following, as contained within Exhibit 14 of the One Stop:

- Who will manage the property
- Prior experience managing similar properties and services
- Similar properties and services list
- Staffing plan
- On-site resident services coordination

- Management responsibilities as pertains to tenancy stabilization, including:
 - An early warning system to identify issues that could lead to eviction (late payments, chronic utility shut offs, persistent arrearages, etc.)
 - A referral system to financial assistance and economic development services (Rent & utility assistance programs, employment and training programs, money management, budgeting, etc.)
 - Information and access to social services, (domestic violence programs, substance abuse counseling services, etc.)
- Special service needs, which may require specialized training for resident services staff
- Use of outside vendors and identification of potential vendors, community partners, and other public service agencies who might provide on-site or off-site services
- Specific service coordination responsibilities, including data tracking on service use and resident outcomes, as well as benefits access and enrollment support
- Physical plan of building(s) to enable provision of services; for instance, wellness centers, community rooms, computer stations, etc.
- Types of Services to be introduced (proposed)
- Other possible interventions, including tenant education, childcare, basic skills training, career development, and tenant participation in leadership and civic activities

Affordable Commercial Plan - Proponents must prepare a plan for commercial space that meaningfully demonstrates its coherence to the Neighborhood Arts & Innovation theme and incorporates potential business/entrepreneurship development, exhibit space, and smaller performance venues and a strategy for achieving meaningful affordability.

Community Focused Development without Displacement Plan - Proponents must include a narrative explaining how their proposal supports the community's goal of development without displacement. Specifically, this narrative should address how the proposed developments will assist the current residents of Upham's Corner to remain in their community in the future, afford housing, find pathways to economic opportunity, as well as mitigate displacement of existing residents in Upham's Corner that may be impacted by the development while incorporating the input of the surrounding community during the development, construction, and ongoing operations of the new building(s).

- At a minimum, this narrative should include the affordable housing production goals of the project and how the proposed rents meet the needs of Boston and neighborhood residents. This discussion should also identify how proposed sizes of units meet the needs of community members, taking into consideration that community members have suggested that larger unit sizes (two, three and four bedroom units) are needed for local families, while smaller unit sizes may be appropriate for seniors.

- The proponent should include details on its development team's track record of supporting projects and policies that promote development without displacement and should discuss their experience with preventing eviction of tenants when acquiring, developing and operating property. The proponent must disclose if the proposed development will result in the direct eviction of any current tenants, being aware that such a situation will detract from the advantageousness of its proposal.
- The narrative must also include the processes that the developer will use to obtain community input throughout the life of the project. In order to reach existing residents of the neighborhood and to design responses that reflect the race, gender, income and other diversity of the area, proposals should include community groups and sectors that the developer will engage, accompanied with a description of their interests and communities that such groups represent. The community has expressed a strong interest in tools to maximize long-term neighborhood decision making through the creation of limited equity cooperatives, control by community land trusts, rent-to-own strategies, or other structures. Proponents are encouraged to include these and any other innovative strategies to prevent displacement.

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

DESIGN SUBMISSION

The Design Submission should include, but is not limited to, the following materials:

Design Narrative:

1. A written and graphic description explaining how the proposed design will meet the Development Objectives & Design Guidelines of this RFP. These documents must describe and illustrate all the program elements and the organization of these spaces within the building(s).
2. A description and illustration of the bicycle parking, automobile parking and transportation plan for the proposed development based on the Urban Design Guidelines established for this site in the RFP.
3. A preliminary zoning analysis.
4. A written and graphic description of how the proposed project(s) will satisfy the Resilient Development and Green Building guidelines of this RFP that includes:
 - The team's approach to integrated project design and delivery
 - Performance targets for energy use and carbon emissions (or HERS score);

- Preliminary LEED Checklist and narrative describing key green building strategies;
- Preliminary Boston Climate Resiliency Checklist reflecting proposed outcomes

Design Drawings:

1. A Neighborhood Plan (at appropriate scale, e.g. 1"=40') and Site Plan (1"= 20' scale) showing how the proposed design will fit within the immediate context of existing buildings and within the larger context of the Upham's Corner neighborhood. The neighborhood plan is to illustrate how the project meets the Urban Design Guidelines established for this site in the RFP.
 - The proposed building(s), existing building footprints, lot lines, streets, street names and any other relevant contextual information is to be included in the plan.
 - The site plan is to illustrate the building footprint(s) & placement on the site, the general building organization, open space, landscape elements, driveways, curb cuts, fencing, walkways, streetscape improvements. The neighborhood and site plan should coordinate with renderings, perspective drawing and aerial views of the project.
2. Schematic floor plans (1/8" = 1'-0" scale) showing the basement, ground floor, upper floor(s), and roof including approximate room dimensions, overall building dimensions, and the gross square footage of the building, and square footages of various uses including BPL and housing.
3. Building Elevations (1/8" = 1'-0" scale) showing all sides of the proposed building(s), architectural details, building height and notations of proposed materials. Provide floor to floor heights and exterior materials.
4. Street elevations (at appropriate scale, e.g. 1/8"=1'-0") showing the relationships of the proposed building(s) to the massing, building height and architectural style of adjacent buildings. This street context drawing may combine drawings with photographs in any manner that clearly depicts the relationship of the new building(s) to existing buildings.
5. Perspective drawings drawn at eye-level and aerial views that show the project in the context of the surrounding area.

FINANCIAL SUBMISSION

The financial submission should include, but is not limited to the information listed below.

1. Financial Documents

- a. Financial Statements or Annual Reports for the three most recent fiscal years;
- b. Interim Financial Statements for proponent (if applicable, most recent month ending within thirty days);
- c. Personal Financial Statement of principal owners of proponent (upon request);

- d. Financial Statements of any tenants, lessees and occupants intended to occupy the premises (if applicable); and financing commitments or project specific letters of interest from recognized funding sources.
2. **Financial Submission Workbook:** Using the template provided in Appendix B, provide the following information:
 - a. **Sheet 1:** Development Program
 - b. **Sheet 2: Development Cost Pro Forma.** All costs identified must be supported by realistic funding sources and uses must equal sources.
 - c. **Sheet 3:** Stabilized Operating Pro Forma.
 - d. **Sheet 4:** Fifteen Year Operating Pro-Form.
 3. **One-Stop** - If the sources of funds for the Proposed Project include City or State subsidies for affordable housing, the financial submission must include a One-Stop Application that can be downloaded from www.mhlc.com (see tab "One Stop Center," then "Downloads," then "OneStop2000.") If the proposal includes a combination of unit types for different income categories, the applicant will be required to submit a separate budget that illustrates that the costs associated with the development of the different income levels are covered by eligible sources. The One Stop should only include financial information for the affordable housing portion of the Proposed Project(s). Sources must equal uses. If applicable, land costs for privately owned parcels that would be included in the proposed development must be identified in the "Acquisition" line. At the time of application, the applicant must have an accepted offer to purchase, an executed purchase and sale agreement or a deed and the price must be supported by an as-is appraisal for that property.
 4. **Financial Narrative** - In addition to the pro forma spreadsheets, the Proposal must include a narrative which describes the following:
 - a. An implementation plan for the proposed development, including a development schedule with key milestone dates and a projected occupancy date. The development schedule should outline the required regulatory approvals for the proposed development and the anticipated timing for obtaining such approvals;
 - b. All contingencies, specifying whether for hard costs, soft costs or total costs, design or construction, financing or other critical components of the total project costs;
 - c. Sources of debt and equity for the total project cost;
 - d. All assumptions regarding financing terms on acquisitions, pre-development, construction, and permanent loans;
 - e. Any other project related expense not included in the above categories; and
 - f. Calculation of total project costs.
 5. **Ground Lease Price Proposal:**

The selected proponent will enter into a 99 year ground lease with the BPDA for the parcels located at 555-559 Columbia Road. The full and fair market value of 555-559 Columbia Road, as determined through a valuation done by a professional appraiser

licensed by the Commonwealth of Massachusetts, was determined to be \$3.00 per square foot of gross floor area per year.

Offered price is one of the many factors used in determining the most highly advantageous proposal. Proponents are encouraged to make competitive offers. For more information on comparative evaluation criteria, please refer to Section 05.

A proponent may offer less than the appraised value, but they must credibly demonstrate that their development concept maximizes the public benefit and forgoes more lucrative opportunities in order to be consistent with community preferences, resulting in a concept not financially feasible at the asking price. Reasons may include, but are not limited to specific community benefits (such as affordable housing, community programming space, etc.) that the development will provide that will prohibit the proponent from maximizing development revenues and/or operating income.¹⁰ In order to offer less than the asking price, a proponent must include a detailed written explanation of why their offer price is reduced and provide development budgets and proformas that support the lower offer price. The minimum price that can be accepted is \$100.

If the successful proponent is applying for federal grant funding from either the City or State in connection with this project, their purchase price may be adjusted downward to comply with federal subsidy layering rules.

Using the price proposal form included in Appendix B, clearly outline the financial offer to the BPDA by indicating the amount of your offer per gross square foot of the development constructed. This form must be signed by the authorized principal.

6. **Preliminary market study** - Using empirical market data, include a preliminary market study that demonstrates the feasibility of the proposed sale and/or lease rates of the project.
7. **Financing**
 - a. **Developer Equity:** The proponent must demonstrate the availability of financial resources to fund working capital and equity requirements for the proposed project. Acceptable documentation includes current bank statements, brokerage statements, and/or audited financial statements.
 - b. **Financing Commitments:** Letters of interest and/or commitment from debt and equity sources for construction and permanent financing. Letters should include a term sheet that provides the Loan-To-Value ("LTV") and Debt Service Coverage ("DSC") requirements, fees, term, amortization, etc.
8. Applicants may be required to provide formation documents at the BPDA's request, such as: Articles of Incorporation; Certificate of Status/Good Standing; Certificate of Incorporation; By-laws; Certificate of Organization (LLC 1, or LLP 1 in some states, if

¹⁰ If a proponent is a church or religious entity, in compliance with the Commonwealth of Massachusetts Declaration of Rights, he/she/they must offer 100% of the appraised value. Failure to make such an offer will be grounds for disqualification of the proposal.

applicable); Borrowing Resolution; Operating/Partnership Agreement (if LLC or LLP); and Certificate of Registration as a Foreign Entity (if applicable).

DISCLOSURES

Proponents must submit the following forms, which are referred to as the “Disclosures” (Appendix B):

1. Disclosure Statement for Transaction with a Public Agency Concerning Real Property
2. BPDA & City of Boston Disclosure Statement
3. Certificate of Tax, Employment Security and Contract Compliance
4. HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility

SUBMISSION CHECKLIST

Proponents must submit the Submission Checklist (Appendix B).

08 EVALUATION OF PROPOSALS

DESCRIPTION OF EVALUATION PROCESS

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

To facilitate final evaluation of Comparative Evaluation Criteria, proponents that meet the Minimum Threshold Requirements will be required to present their plans of development to the community. The Selection Committee will then factor community input received at this presentation, as well as input from the WAG, into the final overall rating.

Rule for Award

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

Minimum Threshold Requirements

All proposals must meet the following minimum threshold criteria:

1. Only proposals that are received by the date, time, and at the location indicated in Section 1 of this RFP will be accepted.
2. Proposals must include all documentation specified under Submission Requirements.
3. The proponent shall have the necessary finances in place to pursue this project.
4. The proponent must demonstrate that it has adequate insurance.
5. The proponent shall comply with the Conflict of Interest Law.

COMPARATIVE EVALUATION CRITERIA

The BPDA will use the following Comparative Evaluation Criteria to compare the merits of all qualifying proposals. For each evaluation criterion set forth below, the selection committee shall assign a rating of Highly Advantageous, Advantageous or Not Advantageous. The selection committee shall then assign a composite rating of Highly Advantageous, Advantageous or Not Advantageous for each proposal it evaluates. The composite rating will weight the Diversity and Inclusion evaluation criterion at 25%. The other evaluation criteria comprising the remaining 75% will be weighted equally.

1. Demonstration of the Ability to Execute the Project as Presented

The purpose of this criterion is to assess the extent to which proposals are able to demonstrate organization and qualifications of the development team to deliver a quality project that is able to be developed as presented, based upon the team's professional credentials, experience completing projects similar to the one proposed, ability to adhere to the proposed delivery schedule, the relative strength and completeness of the proponent's development budget, and the relative strength of the Operating Plan relative to other proposals.

Proposals that most thoroughly and most effectively address all of the above requirements compared with other proposals submitted will be ranked as Highly Advantageous.

Proposals that address the above requirements, but do not address these requirements as effectively and thoroughly as other submitted proposals, will be ranked as Advantageous.

Proposals that do not offer sufficient detail or do not address all of the above requirements, and/or do not demonstrate experience with other projects similar to the one they propose, will be ranked as Not Advantageous.

2. Exceptional Design, Development Program and Public Realm Contribution

This criterion assesses the extent to which the proposed project's development program, vision and aspirations as presented: a) is detailed and realistic in addressing the RFP's Development Objectives, including the principles articulated for the Arts and Innovation District, commercial space affordability, and housing affordability; b) consistent with applicable zoning and regulatory restrictions; c) contributes to the economy and public realm; d) provides quality, creative, innovative and contextual designs that achieve all of the BPDA's Design Guidelines; and e) includes the use of high quality, durable materials. To facilitate its evaluation of this criterion, the City and the BPDA will seek community input in the form of a developer's presentation with opportunity for public comment.

Proposals that most thoroughly and most effectively address the above requirements by presenting a more compelling vision for a well-developed project compared with other proposals submitted, will be ranked as Highly Advantageous.

Proposals that address the above requirements, but are not as effective and thorough in covering all aspects of the considerations above as other submitted proposals, will be ranked as Advantageous.

Proposals that do not offer sufficient detail or do not address all of the above requirements, will be ranked as Not Advantageous.

3. Developer Financial Capacity

This criterion evaluates the relative strength of the proponent's equity, debt and capital sources and the overall viability of the plan to finance the project. Proposals that can show that they have confirmed financing offers to generate enough capital to fund most or all of

their Development Budget will be considered to be more advantageous. The proponent's experience in financing projects of a similar complexity will also be taken into consideration.

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

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

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

4. Diversity and Inclusion Plan

This criterion evaluates the comprehensiveness of the proponent's Diversity and Inclusion Plan for creating increased opportunities for people of color, women, and M/WBEs to participate in the development of the Property, including specific strategies to achieve maximum participation by people of color, women, and M/WBEs in pre-development, construction, and operations. The Diversity and Inclusion Plan should be specific, realistic and executable. To facilitate its evaluation of this criterion, the City and the BPDA will seek community input in the form of a developer's presentation with opportunity for public comment.

This criterion shall comprise 25% of the comparative evaluation of each proposal submitted.

Proposals that provide a Diversity and Inclusion Plan for a project of the type proposed that includes all of the elements described above and is clearly superior to that of all other proposals will be ranked as Highly Advantageous.

Proposals that provide a Diversity and Inclusion Plan for a project of the type proposed that includes all of the elements described above and is similar or equal to other submitted proposals will be ranked as Advantageous.

Proposals that do not provide a detailed Diversity and Inclusion Plan for a project of the type proposed, and/or it does not include the elements described above or propose a Diversity and Inclusion Plan that is inferior to other submitted proposals will be ranked as Not Advantageous.

5. Community Focused Development Without Displacement Plan

This criterion evaluates the relative strength and completeness of the proponent's Community Focused Development and Development without Displacement plan relative to

other proposals. Proposals that do the most to limit displacement of current Upham's Corner residents and maximize neighborhood-led decision making during development and ongoing operations of the site will be considered more advantageous. To facilitate its evaluation of this criterion, the City and the BPDA will seek community input in the form of a developer's presentation with opportunity for public comment.

Proposals that provide a comprehensive, ambitious, and achievable Development Without Displacement strategy as well a comprehensive plan that maximizes neighborhood decision-making, for projects of the type proposed that is clearly superior to that of all other proposals shall be ranked as Highly Advantageous.

Proposals that provide a reasonable and justifiable Community Focused Development and Development without Displacement Plan that is similar or equal to all other submitted proposals shall be ranked as Advantageous.

Proposals that do not provide a credible or sufficiently detailed Community Focused Development and Development without Displacement Plan and/or propose a strategy and plan that is substantively inferior to all other submitted proposals shall be ranked as Not Advantageous.

09 CONTRACT TERMS AND CONDITIONS

555-559 COLUMBIA ROAD PROPONENT DESIGNATION AND CONVEYANCE

Upon a satisfactory review of all proposals submitted pursuant to this RFP, as well as the completion of any subsequent applicable reviews resulting therefrom and relating thereto, BPDA staff will request Board approval to award the Selected Proponent(s) Tentative Designation status for the redevelopment of 555-559 Columbia Road. The Tentative Designation status shall be for a nine-month period. Pending sufficient progress during the Tentative Designation period, BPDA staff will then request that the BPDA Board award Final Designation status to the selected proponent, prior to the expiration of the Tentative Designation period. The BPDA may choose to grant additional time for performance or to rescind the designation, at its discretion. During the Tentative Designation period, the selected proponent shall accomplish, among other things, the following in order to be considered for Final Designation status:

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

Final designation will be granted upon satisfactorily completing all required terms and conditions. The proposal will be subject to subsequent stages of BPDA development and design review, including Article 80 if required. The final designation will be automatically rescinded without prejudice and without any further authorization or approvals by the BPDA's Board, if Site 1 has not been conveyed by a designated time frame established by the BPDA Board.

555-559 COLUMBIA ROAD GROUND LEASE TERMS AND CONDITIONS

The ground lease will require the selected proponent to be responsible for paying applicable taxes and fees as well as the fixed rent. All other material terms and conditions of the ground lease will be negotiated following Tentative Designation of a selected proponent within the time period specified in the Tentative Designation Board Vote.

The following are additional terms of the lease:

Condition of Premises. The selected proponent acknowledges that it is familiar with Site 1 and agrees to accept it in "as-is" condition.

The selected proponent will be solely responsible to obtain all permits and approvals necessary to obtain a Certificate of Occupancy for the building. The selected proponent acknowledges that required upgrades include, but may not be limited to utilities and other essential base-building needs, such as electricity, sewer, sprinkler and heating systems. Estimated costs for such improvements must be documented in the development pro forma. The selected proponent will pay for the cost of any utility relocation not paid by a utility company.

The selected proponent will assume any and all liability for any environmental clean-up pursuant to Chapter 21E of the Massachusetts General Laws.

Footprint: Any proposed redevelopment plan must assume that any new construction must occur entirely within the footprint of 555-559 Columbia Road.

Utilities. The selected proponent shall make arrangements with the utility providers to separately meter and pay utility provider(s) directly, for required needs on site, such as, but not limited to electricity, gas and water and sewer usage in 555-559 Columbia Road.

Taxes. Upon the lease commencement date, the selected proponent shall be responsible to pay all real property taxes, personal property taxes and/or PILOT payments assessed or otherwise imposed upon 555-559 Columbia Road by the City in accordance with Chapter 59 of the Massachusetts General Laws.

Other Terms of Lease. The BPDA reserves the right to negotiate any other terms of the lease.

Brokerage. If the selected proponent is represented by a real estate broker, currently licensed in the Commonwealth of Massachusetts, the selected proponent is fully responsible for any brokerage commission. The BPDA will not pay a broker's fee to any individual or concern.

ADDITIONAL TERMS AND CONDITIONS

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

- At least 51 percent of the total work hours of journey people and fifty-one percent of the total work hours of apprentices in each trade must go to Boston residents;
- At least 40 percent of the total work hours of journey people and forty percent of the total work hours of apprentices in each trade must go to people of color, and
- At least 12 percent of the total work hours of journey people and twelve percent of the total work hours of apprentices in each trade must go to women.

For more information on how to achieve compliance with the Boston Residents Jobs Policy, [please see City of Boston Code, Ordinances, Section 8- 9.](#)

Development Costs - The preparation and submission of all proposals by any person, group or organization is at the sole expense of such person, group or organization. Proponents shall be responsible for any and all costs incurred in connection with the planning and

development of the Property. The BPDA and the City shall not be liable for any such costs nor shall the BPDA or the City be required to reimburse the applicants for such costs.

Public Records - Proposals submitted to the BPDA will become property of the BPDA. After opening, all proposals become public records and are subject to the requirements of the Massachusetts Public Records Law (M.G.L. c. 4, § 7(26)).

Stable Occupancy - For all housing proposals, the successful proponent(s) will be required to enter into a development or land disposition agreement, and possible non-monetary mortgage, which shall be recorded with the Suffolk County Registry of Deeds, to ensure owner occupancy, stable tenancies and active on-site management. Applicants must clearly outline the approach to be taken to meet the above occupancy requirements. The BPDA reserves the right to change the number of affordable units and other aspects of the development program outlined in this RFP depending on the needs of the development, provided that the rights of the successful proponent and other applicants are not prejudiced.

Policies and Regulations - Development of Site 1 shall comply with the City of Boston's zoning and building regulations, procedures and any other applicable City and/or State code(s). The designated proponent will be solely responsible to obtain all permits and approvals necessary to obtain a Certificate of Occupancy for the building. The project will be assessed and taxed by the City pursuant to M.G.L. Chapter 59.

Signage during Construction - During construction at 555-559 Columbia Road, the selected proponent shall provide and display, at their expense, appropriate signage as required by the BPDA. Such signage must be approved by the BPDA prior to installation. The selected proponent should also provide signage that describes the project, including the number of affordable units, if applicable.

In addition, the selected proponent agrees to use a construction wrap for the 555-559 Columbia Road approved by BPDA design staff in its reasonable discretion. The selected proponent shall be responsible for any and all costs associated with designing, printing and installing the construction wrap.

Compliance with DND Eviction Prevention Efforts - Data collected from Boston Housing Court in 2015 indicates that at least 67% of evicted tenants were evicted from subsidized units. Because tenants that are evicted often find themselves with no place to go and may be disqualified from future affordable housing opportunities, the City is implementing eviction prevention efforts. The City's expectation is that any developer who develops affordable housing using City resources is doing whatever possible to prevent evictions. Proponents that receive an award of funds from the City will be required to submit information on the number of evictions and terminated tenancies in their portfolio of developments during the previous twelve month period and may be asked to submit an eviction prevention plan. If the information submitted indicates a substantial issue, the award of funds may be suspended.

Appendix A: Information Resources

Proponents should consult the following web links for information to assist in proposal preparation.

Site Plans and Environmental Reports:

- 555 Columbia Road Plan ([link](#))
- 559 Columbia Road Plan ([link](#))
- Environmental Reports ([link](#))

Upham's Corner Branch of the Boston Public Library:

- Programming Study for the Upham's Corner Branch of the Boston Public Library ([link](#))
- Test Fit Study for the Upham's Corner Branch of the Boston Public Library ([link](#))

Planning, Zoning, and Development Review Documents:

- Fairmount Indigo Planning Initiative ([link](#))
- 2016 Boston Creates Plan ([link](#))
- 2014 Fairmount Cultural Corridor: Upham's Corner Pilot ([link](#))
- Zoning Map: 5A/5B Dorchester Neighborhood District ([link](#))
- BPDA Development Review Information, including Article 80 and Article 37 ([link](#))
- Boston Residents Jobs Policy ([link](#))

Appendix B: Required Forms

- Price Proposal Form ([here](#))
- Financial Submission Workbook ([link](#))
- HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility ([link](#))
- Disclosure Statement for Transaction with a Public Agency Concerning Real Property ([link](#))
- BPDA & City of Boston Disclosure Statement ([link](#))
- Certificate of Tax, Employment Security, and Contract Compliance ([link](#))
- Submission Checklist ([link](#))