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01

Introduction & Instructions

Purpose

The purpose of this Request for Proposals ("RFP") is to solicit proposals for the disposition and redevelopment of property owned by the Boston Redevelopment Authority d/b/a Boston Planning & Development Agency (the "BPDA"), consisting of approximately 12,325 square feet of vacant land located between Tremont Street and Warwick Street in the Roxbury neighborhood of Boston (the "Property"), within the South End Urban Renewal Area, Project No. Mass R-56.

The BPDA seeks to convey the Property to allow publicly accessible open space or residential development. Proposals will be subject to review and approval by the BPDA and the City of Boston, including applicable planning and zoning controls, and the development objectives and guidelines described herein. Proposals must meet all minimum submission requirements, complete the enclosed proposal form and price summary form, and include the requested documents.

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

Instructions

The RFP will be available for download beginning on **XXXXXX, XX, 2020** on the [BPDA Procurement Webpage](#). Proponents must register when downloading the RFP to ensure they receive any addenda. Requests for clarification or any questions about the RFP must be submitted in writing to:

Morgan McDaniel, Real Estate Development Officer
Boston Planning & Development Agency (BPDA)
One City Hall Square
Boston, MA 02210
Morgan.E.McDaniel@boston.gov

No requests or questions regarding the RFP will be accepted after **XXXX xx, 2020**. Proponents must include their name, address, telephone number and email address with any questions. An addendum with questions and answers will be emailed to all Proponents on record and posted on the BPDA website ten days prior to the RFP deadline.

Proponents may visit the Property with BPDA staff on **TBD, 2020** from 10:00am-11:00am. Staff will not be answering questions, but will take written questions to answer in an addendum, if necessary.

There is a fee of One Hundred Dollars (\$100.00) to submit the RFP, which check should be made payable to the Boston Redevelopment Authority.

Eight (8) sealed copies of the Development Submission and Disclosures (as defined in the Submission Requirements Section) are required. The Design Submission shall include: one (1) full set of reduced drawings in an 8 1/2" x 11" format; and one (1) set of the drawings at full scale; and one (1) set of drawings mounted on boards, no smaller than 30"x 40" in presentation form. The Development and Design Submissions must also be submitted on a flash drive.

Three (3) sealed copies and one (1) original of the Financial Submission must be provided separately from the Development Submission and Disclosures and Design Submission. The Financial submission must also be submitted on

a flash drive. Proposals must be submitted no later than **Monday, XXXX, 2020 at 12:00 pm (noon) to:**

Teresa Polhemus
Executive Director/Secretary
Boston Planning & Development Agency
Room 910
Boston City Hall
One City Hall Square
Boston, MA 02201

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

Draft for Discussion

02

Property Description

Site Description

The Property consists of approximately 12,325 square feet of vacant land, comprised of three parcels, known as Assessing parcels 0901930010, 0901925020, and 0901925010. The Property is abutted to the southwest by the Bessie Barnes Garden owned by The Trustees of Reservations, to the northwest by 1008-1012 Tremont St, and to the east by privately owned rowhouses.

Parcels 0901925010 and 0901925020 are portions of the discontinued Cabot Street. Parcel 0901925010 (the "Driveway Parcel") is paved with cobblestones. It is subject to an easement to allow parking access for the tenants of 1008-1012 Tremont Street. Parcel 0901925020 (the "Hammerhead Parcel") is paved and has a sixteen-foot passageway running through it that must be kept open to access by the public. It is not subject to any existing leases or licenses.

Parcel 0901930010 is known as the Frederick Douglass Peace Garden (the "Garden Parcel"). The South End Lower Roxbury Open Space Land Trust ("SELROSLT") made improvements on the site with the involvement of community residents and assistance from Urban Ecology. These improvements included perimeter fencing, unit paving, topsoil, a stone wall, a gazebo, and flower, tree, and shrub plantings. The fencing and gazebo have since been removed.

Address	Assessor's Parcel Number	Lot Size (approx. square feet)
Tremont St	0901930010	5,446

Tremont St	0901925020	3,052
Tremont St	0901925010	3,827
Total		12,325

Beginning in 1999, the Boston Redevelopment Authority (“BRA”) granted and extended final designation several times to SELROSLT for the Garden Parcel. Final designation expired without land conveyance in 2009. Following this, the BRA entered into a temporary license agreement with SELROSLT multiple times for the use and occupancy of the parcel. In 2012, SELROSLT merged with the Boston Natural Areas Network (“BNAN”), and in 2014, BNAN merged with the The Trustees of Reservations and now identify as one organization, “Trustees.” The last temporary license agreement with this organization expired in 2016.

The Garden Parcel was the original site considered for the Frederick Douglass monument that will now be sited at the corner of Tremont Street and Hammond Street. The Garden Parcel is currently open space and is unencumbered. In 2015, the gazebo that occupied the site was removed.

The Property is a short walk from the Ruggles Orange Lines station. In addition, proximity to major thoroughfares provides vehicular access to the Property. The Property abuts the Frederick Douglass Square Historic District.

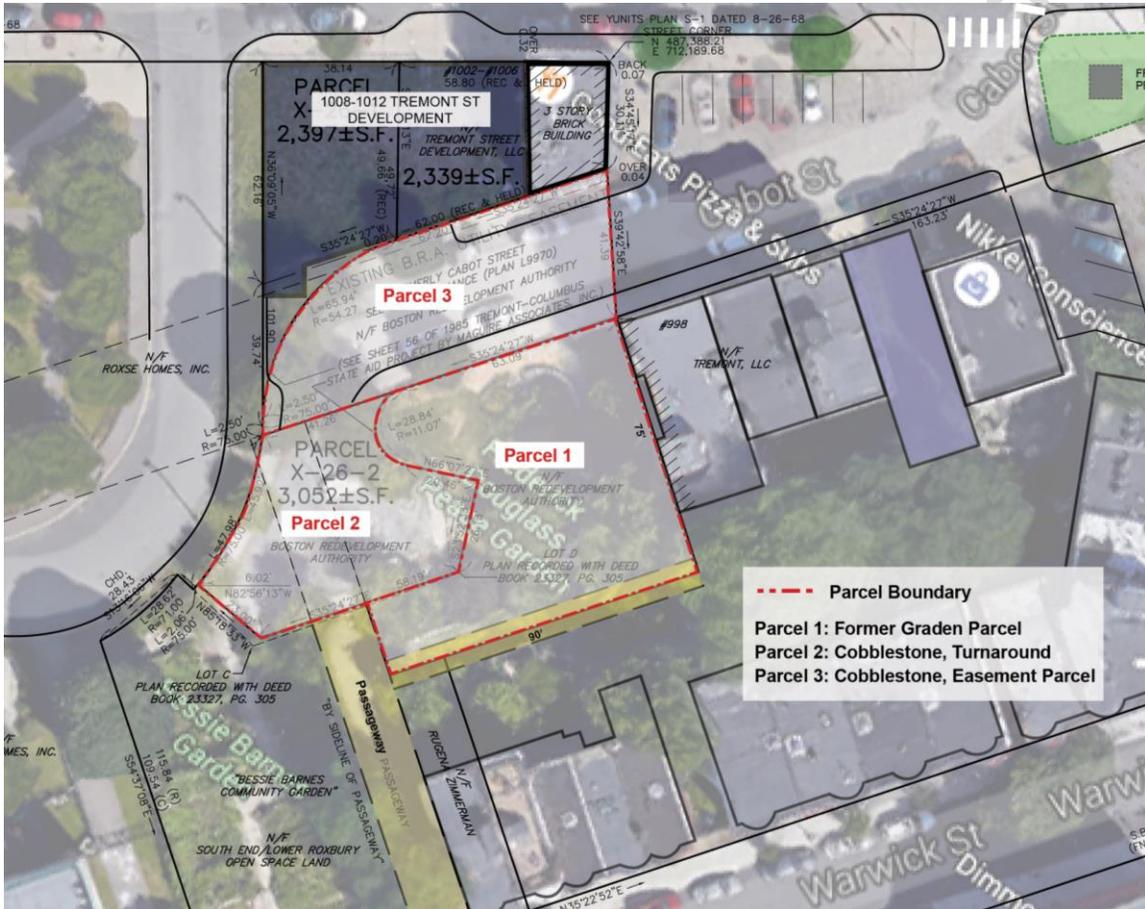
Planning and Zoning Context

The Property is part of the Roxbury District as shown on Map 6A-6C of the Boston Zoning Maps, and therefore is principally governed by the provisions of [Article 50 of the Boston Zoning Code](#) (“Code”).

- The Garden Parcel is located in a Row House Residential Sub-District.
- The Hammerhead Parcel is located in a Row House Residential Sub-District and Open Space: Garden-Sub District.
- The Driveway Parcel is located in a Row House Residential Sub-District, Open Space: Garden-Sub District, and Multi-Family Residential

The Property is located in a Neighborhood Design Review Overlay and Restricted Parking Overlay. Zoning relief may be required to achieve the requirements of this RFP.

The Property is located on Parcel X-26B in the South End Urban Renewal Area, Project No. Mass. R-56. The minor modification to the South End Urban Renewal Plan approved on May 21, 1998, permits open space uses.



The Property

Title

Proponents are fully responsible for conducting their own title examination to ensure that the title to the Property is clear. The BPDA, to the best of its knowledge, is the owner of the Property and the title is not encumbered. However, the BPDA makes no warranty 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 that could exist.

Draft for Discussion

03

Development Objectives and Guidelines

The BPDA seeks creative and innovative proposals that will address the climate and open space needs of the Lower Roxbury community and honor the history of the Frederick Douglass Peace Garden.

An open space or community garden use will be considered most highly advantageous. We will also consider creative proposals for affordable residential uses that address the community's desires for open space and climate resilience. All proposals must align with the key principles below:

- **Energy positive:** On-site renewable energy resources that generate more energy than needed by site occupants.
- **Environmentally positive:** Positively impact the environmental function and service of the site, and address climate resilience needs including storm water and heat island concerns.
- **Equity positive:** Contribute to the social and financial wellbeing of the community. Any development plan, for a garden or housing, should engage minority and women owned businesses and honor the history of the Frederick Douglass Peace Garden. Residential development should create affordable housing opportunities and be thoughtful about preventing displacement of current residents.

Open space uses are explicitly permitted in the South End Urban Renewal Plan. To the extent that residential uses are proposed, the BPDA will need to make a minor modification to the South End Urban Renewal Plan.

Open Space Use

The successful proponent for an open space use will provide a sustainable plan for long-term maintenance of the site.

The garden should honor the history of the original Frederick Douglass Peace Garden on the site, and should include trees, shrubs, perennials and garden-scaled furnishings, such as benches, trellises, fencing and gates. The design of the garden should be modified to encourage better site lines into the site and may incorporate better detailing for the long-term maintenance, as the existing design has proven difficult to maintain. Any design changes should be conducted with local community input through an appropriately advertised and documented process, to both gain input into the design and to engage the community in the future of the site. Some elements of the original garden remain on site (granite block, fruit trees) and should be considered for salvage and reincorporation into a new garden design.

Proponents are encouraged to coordinate with the abutting Bessie Barnes Community Garden, which currently occasionally uses a portion of the Hammerhead Parcel for mulch and soil deliveries.

Proponents may wish to apply for grant funding from the Community Preservation Act fund or the Department of Neighborhood Development Grass Roots program for the garden reconstruction.

Affordable Housing

Any proposal for affordable housing uses must also include publicly-accessible open space on the property, and must provide a plan for its long-term maintenance. The garden must be no less than one-quarter of the total area of the Garden parcel. The garden space should follow the Garden guidelines above.

Residential units may be targeted to a range of incomes, with a maximum income at 100% of AMI and the average income not to exceed 80% of AMI. Units may be rental or homeownership.

Proposals that can reach deeper levels of affordability and/or a higher percentage of income-restricted housing are preferred. Preference will also be given to projects that include affordability at many income levels (e.g. 30%, 40%, 50%, 60%, 80%, 100% of AMI, etc.). In addition, while the AMI is defined by the U.S. Department of Housing and Urban Development for the Greater Boston region, developers are encouraged to present their affordable housing proposals using both AMI and the corresponding, qualifying income ranges.

DND and BPDA affordability requirements require owner occupancy of income restricted homeownership units and prohibit subleasing of income restricted rental units.

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:

- Proposers 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.

Sustainable, Resilient, and Healthy Development

Proposals should support and exemplify the community's and the City's goals for sustainable, resilient and healthy new construction including Mayor Walsh's Carbon Neutral Boston 2050 commitment.

Any new buildings should be designed as green, net-energy positive, all-electric structures that prioritize enhanced building envelope solutions and passive system strategies, and that are optimized for and include onsite solar renewable energy generation. As necessary projects should identify off site and procured renewable energy solutions sufficient for achieving net zero carbon emissions.

Proposals should include strategies that extend beyond the specific development site and enhance the sustainability, resiliency, and health of the surrounding community. The community has identified increased extreme heat conditions and stormwater flooding as a leading concerns.

Displacement Prevention

Proposals must describe measures they will take to avoid displacement of existing residents of the Roxbury neighborhood. As part of their submission, Proponents must include a narrative describing how their proposal supports the community's goal of displacement prevention.

Proponents must discuss how their proposed development will assist the current residents of Roxbury to afford to remain living in their community and to find pathways to economic opportunity. Such discussion should address the affordable housing production goals of the project and how the proposed rents and sale prices meet the needs of Boston and Roxbury residents. This discussion should also identify how the development's composition of unit sizes meets the needs of the community.

The Proponent should include details on its development team's track record of supporting projects and policies that promote displacement prevention and should discuss their experience with preventing eviction of tenants when acquiring, developing and operating property.

Community Benefits

Proponents must also describe specific contributions that will ensue as a result of their proposed redevelopment of the Property that are above and beyond the development objectives described above.

A Frederick Douglass art piece and landscape space is currently being designed to improve the enlarged sidewalk at the corner of Tremont Street and Hammond Street. Proposed community benefits that include a continuing contribution toward the landscape maintenance for this space will be highly advantageous. For the purposes of economy, the maintenance plan could be an extension of a similar plan for the garden to be created and maintained on the development site.

In order to achieve the development objectives of open space, housing affordability, sustainable development, and displacement prevention as set forth in this RFP, there may need to be a significant contribution of city resources. Therefore, proposals that rely heavily on government subsidies to achieve the development objectives may lack sufficient additional resources to commit to such community benefits. Regardless, all proposals must submit a community benefits narrative to discuss the overall community contribution that will ensue from their proposed development.

Development Guidelines for the Property

The development is subject to both [BPDA Development Review Guidelines](#) and [DND Development Review Guidelines](#), and to the following guidelines as set forth below:

Urban Design Guidelines

The urban design guidelines are set forth herein to ensure that development of the Property preserves and enhances the distinct physical character of the neighborhood and respects the general scale of the surrounding area.

1. Proposals must acknowledge and accommodate the extension of two existing pedestrian passageways. One exists between the development site and the east side of the neighboring Bessie Barnes Community Garden extending through the block from the 1008-1012

Tremont Street development driveway (Driveway Parcel) to Warwick Street to the southeast. A second exists along the rear edge of the development site along its south perimeter.

2. The selected proponent must respect the easement rights for 1008-1012 Tremont Street on the Driveway Parcel, and is expected to coordinate vehicle access from Tremont Street with the adjacent 1008-1012 Tremont Street development.
3. The proposed design should enhance the architectural characteristics of the neighborhood by carefully taking into consideration the existing building types, footprints, street frontages, height and architectural styles. Architectural detailing should be executed using materials of the highest quality and be compatible with existing buildings in the area. Design should be compatible with the distinct architectural character of the adjacent Frederick Douglass Square Historic District. The District, listed on the National Register of Historic Places, is the last surviving fragment of Panel Brick and Queen Anne row houses from the late 19th Century landfill of Lower Roxbury (See Appendix A.) Proposed architectural expression for any proposed building should take cues from the contextual historic architecture, but should not attempt to recreate the style.
4. New construction should be designed and programmed to activate the extended street frontage and reinforce the streetscape of the neighborhood. The building height should be compatible with existing building heights in the neighborhood.
5. Proponents should explore strategies to minimize or eliminate the need for parking by acknowledging the proximity of the MBTA Ruggles Station to the development site. Ruggles Station is a primary bus station and hub for the MBTA, as well as an Orange Line and Commuter Rail Station. Additionally, the Proponent should encourage use of car and ride sharing services and Blue Bike bicycle stations, to decrease or eliminate parking needs both for the development and

- the neighborhood. Parking, service access and loading activity should be accommodated via the existing Tremont Street extension.
6. Site improvements should include an extension of the public sidewalk to the front door of any new construction, as well as to the proposed garden. New trees, shrubs and other plantings should be proposed within the garden and to make improvements to the immediate neighborhood in creating comfortable, legible pedestrian connections to neighboring community gardens and parks. Exposed concrete foundations should be screened by a landscaping treatment, where possible, or an architectural treatment where space does not allow.
 7. To the extent possible, existing mature trees over eight (8) inch caliper should be pruned and protected. New trees should be at least three and one-half inch (3½) caliper and nursery pruned to a height that allows pedestrian passage below
 8. Fencing type and height should be designed and selected in order to reflect location and function. The proponent should be aware of the existing gardens and parks in the neighborhood for cues on fence type and scale.
 9. Disposal areas, accessory storage areas, and dumpsters should be either incorporated in the building with easy access by residents, or placed at the rear of the property and appropriately screened from view, using the preserved pedestrian passageway as convenient access to those areas.
 10. The selected proponent must repair and/or replace, as appropriate, any alteration or damage of existing sidewalks, paving, lights and street trees that occurs during construction.

Resilient Development and Green Building Design Guidelines

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

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

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

- 1. Greenhouse Gas Reduction:** Proposed projects should exemplify Mayor Walsh's Carbon Free Boston 2050 goals by striving for zero carbon emission or energy positive performance. New buildings should be designed as green low-energy all-electric structures that prioritize enhanced building envelope solutions and passive system strategies and that are optimized for and include onsite solar renewable energy generation. As necessary projects should identify off site and procured renewable energy solutions sufficient for achieving net zero carbon emissions. Proposals should include a preliminary energy model with a Zero Carbon Building Assessment. Projects should assess these strategies in a first and life cycle cost analysis.
- 2. Higher Temperatures & Heat Events:** Proposed projects should reduce heat exposure and heat retention in and around the building(s) and surrounding district. Strategies should include the use of 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 limited access to open space.
- 3. More Intense Precipitation:** Proposed projects should integrate strategies to both mitigate the impact of storm water flooding to the site and reduce the Property's contribution to storm water flooding in the neighborhood. Strategies should focus on pervious site materials,

enhanced landscaping and Low Impact Development measures to capture, retain, and infiltrate storm water.

4. **Rising Sea Levels:** Proposed projects should reduce risks of coastal and inland flooding through elevating the base floor, critical utilities, mechanical systems and infrastructure above anticipated flood levels. Proposed projects should utilize flood proof materials below any future flood level and relocate vulnerable uses to higher floors.
5. **Sheltering in Place:** Proposed projects should provide for a cool/warm community room and essential systems to allow for extended sheltering in place and accommodation of local residents during an extreme weather event or an extended disruption of utility services.

Green buildings provide a comprehensive approach to reducing the adverse impacts of the built environment and to promoting human health and the wellbeing of our communities. **Proposed projects should exemplify leading green building and sustainable development practices and target zero energy or zero carbon emission performance.**

1. **Green Buildings:** Achieve and surpass the United States Green Building Council's ("USGBC") requirements for LEED Platinum and LEED Zero with a minimum requirement of achieving LEED Gold utilizing the most appropriate LEED rating system. Projects should seek USGBC certification and should be registered upon tentative designation and certified by the USGBC within one year of construction completion.
2. **Integrated Project Planning:** Projects should fulfill the Integrated Process requirements and include a LEED Accredited Professional(s) with the appropriate specialty(s) and, for residential uses, a LEED Homes Rater. Proposals should describe the team's approach to integrated project planning, including the use of preliminary and whole building energy modeling.

3. **Site Development:** Employ strategies to eliminate construction phase environmental impacts including off-site tracking of soils and construction debris. Site designs should include strategies to reduce heat island and storm water runoff impacts, and promote area natural habitats. Projects should include storm water systems and strategies for retaining and infiltrating the first 1.25" of rain water.
4. **Connectivity:** Promote and support non-personal vehicle means of travel including walking, bicycling, public transit, and reduced personal vehicle travel. Strategies should include easily accessible, secure and enclosed bicycle storage space (see [Boston Bicycle Parking Guidelines](#)), shared parking, transit pass programs, and car and bike share programs. Other elements that promote connectivity include open space courtyards with landscaping and seating, desire-line footpaths, public viewing areas, and communal gardening spaces.
5. **Water Efficiency:** Minimize water use and reuse storm and wastewater. Strategies should include low flow plumbing fixtures; rainwater harvesting for gardens and building systems; and drought resistant planting and non-potable water irrigation.
6. **Energy Efficiency:** Buildings should be designed as low-energy, all-electric structures that prioritize enhanced building envelope solutions and passive system strategies. Small residential buildings should target a HERS Index of 40 or lower (based on a current Commonwealth of Massachusetts Stretch Code of 55). Large residential / commercial buildings should target modeled performance at least 25% below the current Commonwealth of Massachusetts Stretch Code. Projects seeking DND funding for affordable housing should adhere to DND's Zero Emission Buildings guidelines.
 - a. Passive building strategies should include optimized building orientation and massing; high performance building envelopes that are airtight, well insulated, have appropriate window to wall ratios, and include high efficiency windows and doors; and natural ventilation and daylighting.

- b. Active building strategies should include Energy Star high efficiency equipment, dedicated outside air systems with energy recovery ventilation, air and ground source heat pump systems for building thermal conditioning and hot water systems, and high efficiency LED lighting fixtures and advanced lighting control systems and technologies. Residential appliances should be Energy Star rated and all electric.
7. **Renewable Energy Generation and Storage:** Buildings should be designed to maximize the potential for onsite renewable energy generation and include installed solar photo voltaic (PV) systems. Building roof tops and vehicular parking areas should be designed to maximize the solar PV system performance. Additionally, electric battery and thermal energy storage systems should be considered.
 8. **Energy Efficiency Assistance and Incentives:** Fully utilize any available federal, state, and utility energy efficiency and renewable energy programs, funding, and assistance. Proposals should identify potential assistance and funding resources.
 9. **Indoor Environmental Quality:** Provide high quality healthy indoor environments by utilizing strategies including: extended roof overhangs, proper ground surface drainage and non-paper gypsum board in moist areas to reduce mold risks; passive and active dedicated outdoor (fresh and filtered) air systems; active ventilation at moisture and no indoor combustion; building products and construction materials that are free of VOC's, toxins, hazardous chemicals, pollutants and other contaminants; entryway walk-off mats and smooth floors that reduce the presence of asthma triggers, allergens and respiratory irritants; easily cleaned and maintained finishes; and green cleaning and maintenance practices.
 10. **Materials Selection:** Include sustainably harvested and responsibly processed materials. Strategies should include low embodied carbon products made with recycled and reclaimed materials; materials and

products from responsibly harvested and rapidly renewable sources; and locally sourced products and materials (within 500 miles).

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

Draft for Discussion

04

Submission Requirements

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.

Development Submission

In addition to the required forms listed in the submission checklist, the following information shall be submitted in the written Proposal Summary. Omission of any of the required information may lead to a determination that the proposal is non-responsive. Please provide the following items as listed:

Introduction/Development Team: A letter of interest signed by the principal(s) of the Proponent. This letter should introduce the development team and organization structure, including the developer, attorney, architect, contractor, marketing agent/broker, management company, and any other consultants for the proposed development. For joint ventures, the Proponent shall provide a copy of the Partnership Agreement detailing the authority and participation of all parties. A chief contact person for each specialty must be listed. The proponent shall provide a listing/description of any lawsuits brought against the Proponent or any principals of the Proponents in courts situated within the United States within the past five years should also be included.

Development Plan. A description that demonstrates that the Proponent understands the development plan to be performed. The Proponent must indicate and fully explain their plan for development and how it coincides

with BPDA's stated scope for PLAN: Dudley Square and the project requirements. Additionally, the Proponent must provide a credible scheme for accomplishing its stated goals and/or objectives, a proposed time schedule to accomplish the tasks listed in the development timetable, a project scope and an articulation of the goals and objectives unique to the submitted proposal.

Operational Plan. A summary of the plan for the operation of the Proposed Development upon development completion. Include the anticipated annual costs, as well as the planned sources of funding.

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

Diversity and Inclusion Plan. Proponents must include a narrative setting forth a plan (hereinafter, a "Diversity and Inclusion Plan") for establishing and overseeing a minority outreach program aimed at creating increased opportunities for people of color, women, and Commonwealth of Massachusetts-certified Minority and Women-Owned Business Enterprises ("M/WBEs") to participate in the development of the Proposed Property Site. Proposals should reflect the extent to which the proponent plans to include meaningful participation by people of color, women, and M/WBEs in the following professional fields:

- Construction;
- Design;
- Development;
- Financing;
- Operations; and
- Ownership.

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

A Woman Business Enterprise or "WBE" is a firm that is owned, operated, and controlled by one or more women who has or have at least 51% ownership of the firm.

Proposals will be considered and rated based on the comprehensiveness of the Proponent's Diversity and Inclusion Plan for creating increased opportunities for people of color, women and M/WBEs to participate in the development of the Proposed Property Site, including specific strategies to achieve maximum participation by people of color, women, and M/WBEs in the fields of construction, design, development, financing, operations, and/or ownership. The Diversity and Inclusion Plan should be realistic and executable.

Developer Qualifications, Experience and References. A narrative supported by relevant data regarding qualifications and past experience with similar projects. Proponents must provide detailed descriptions of previous relevant work completed and the results or outcome of that work. Proponents shall also furnish three (3) current references including: names, addresses, e-mail addresses, phone numbers, and principal contacts in which the Proponent has provided comparable services.

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

Subcontractors or Partnerships. If applicable, explain the relationship(s) between the Proponent and any third-party developers, subcontractors, or community partners that might influence the Proponent's development plan.

Displacement Prevention Plan. Proponents must include a narrative explaining how their proposal supports the community's goal of displacement prevention. Specifically, this narrative should address how the

proposed development will assist the current residents of Roxbury to remain in their community in the future, afford housing, and find pathways to economic opportunity. At a minimum this narrative should include the affordable housing production goals of the project and articulate how the proposed rents meet the needs of Roxbury residents, as well as other local residents. This discussion should also identify how proposed sizes of units meet the needs of community members, taking into consideration that community members have suggested that larger unit sizes of two, three and four bedrooms are needed for local families, while smaller unit sizes may be appropriate for seniors.

The development team's track record for supporting projects and policies which prevent displacement should also be included. If applicable, the development team should include their experience preventing eviction of tenants when acquiring, developing and operating property. Proponents must disclose if the proposed development of the Proposed Property Site will result in the direct eviction of any current tenants living in property owned or acquired by the development team. (Note that while the property being disposed of by the BPDA in this RFP is vacant, proponents including any abutting or nearby properties in their proposals should disclose if any direct evictions are contemplated on these properties).

Community members have expressed enthusiasm for innovative strategies that support community stability such as cooperative ownership, land trust participation, and rent-to-own strategies. The inclusion of these or similar elements and/or other innovative strategies to prevent displacement will increase the advantageousness of the proposal.

Community Benefits Plan. As described in the Development Objectives, proposals must include a narrative of the community benefits supported by the development, including any benefits to the local community that are above those generated by the development itself.

Additional Data. Any other relevant information the Proponent believes is essential to the evaluation of the proposal (i.e., aesthetic designs, environmental sustainability goals, property management plans, ideas for

selection of subcontractors, methods of obtaining community engagement, etc.).

Development Concept:

1. Describe the proposed property uses and the total square footage of each use, along with a description of how the proposed uses and design will satisfy the Development Objectives and Development Guidelines of this RFP.
2. Describe how the proposed property will benefit the surrounding community.
3. Estimate the number of construction and permanent jobs that will be generated by the proposed property.
4. Provide an outline of all required regulatory approvals and a projected timeline to obtain these approvals. The proponent should note the currently applicable zoning districts, overlays and provisions that govern development of the Proposed Property Site and discuss the type of zoning amendments or variances that are required for the proposed development, or indicate if the proposed development can be constructed "as-of-right" under existing zoning.

Design Submission

All drawings must be submitted in both hard copy and digital format (PDF or JPEG, at minimum 300 DPI). The design submission should include, but not be limited to, the following materials:

1. A written and graphic description explaining how the proposed design will meet the Development Objectives & Design Guidelines of this RFP. These descriptions must describe and illustrate all program elements and the organization of these spaces within the building.
2. A neighborhood plan (at appropriate scale, e.g. 1"=40') as well as a site plan (1" = 20') showing how the proposed design will fit within the immediate context of existing buildings and within the larger context

of the Dudley Square neighborhood. The purpose of the neighborhood plan is to illustrate how the project meets the Urban Design Guidelines set forth in this RFP. Therefore, the proposed building(s), existing building footprints, lot lines, streets, street names and any other relevant contextual information should be included in the neighborhood plan. The purpose of the site plan is to illustrate the building footprint and its placement on the site, the general building organization, open space, landscape elements, driveways, curb cuts, fencing, walkways and streetscape improvements. The neighborhood plan and site plan should coordinate through the inclusion of renderings, perspective drawings and aerial views of the project.

3. Schematic floor plans (1/8" = 1'-0" scale) showing the basement, ground floor, upper floor(s), and roof, including room dimensions, square footage of rooms, overall building dimensions, and the gross square footage of the building.
4. Building Elevations (1/8" = 1'-0" scale) showing all sides of the proposed building, architectural details, building height and notations of proposed materials.
5. Street elevations (at appropriate scale, e.g. 1/8"=1'-0") showing the relationships of the proposed building to the massing, building height and architectural style of adjacent buildings. This street context drawing may combine drawings with photographs in any manner that clearly depicts the relationship of the new building to existing buildings.
6. Perspective drawings drawn at eye-level and aerial views that show the project in the context of the surrounding area.
7. A description and illustration of the bicycle parking, automobile parking and transportation and circulation plan for the proposed development based on the Urban Design Guidelines set forth in this RFP.

8. A preliminary zoning analysis
9. A written and graphic Sustainability Narrative describing how the proposed project will satisfy the Resilient Development and Green Building Guidelines that includes:
 - a. The team's approach to integrated project design and delivery;
 - b. Preliminary energy modeling including a Carbon Neutral Building Assessment and describing strategies for achieving zero energy or zero carbon performance and targets;
 - c. Preliminary LEED Checklist and narrative describing key green building strategies;
 - d. Preliminary Boston Climate Resiliency Checklist reflecting proposed outcomes and describing key resiliency strategies.
10. A conceptual drawing of the required public park and all improvements.

Financial Submission

The Financial Submission should include, but not be limited to the information listed below. The financial submission should be provided in both hard copy and flash drive form in Microsoft Excel. **The Financial Submission must be submitted in a separate, sealed envelope and include a formal price offer on the Price Proposal form included in Appendix B.**

1. Formation Documents:
 - a. Articles of Incorporation;
 - b. Certificate of Status/Good Standing;
 - c. Certificate of Incorporation;
 - d. By-laws;

- e. Certificate of Organization (LLC 1, or LLP 1 in some states, if applicable);
- f. Borrowing Resolution;
- g. Operating/Partnership Agreement (if LLC or LLP); and
- h. Certificate of Registration as a Foreign Entity (if applicable).

2. Financial Documents:

- a. Financial Statements or Annual Reports for the three most recent fiscal years;
- b. Interim Financial Statements for Proponent (if applicable, most recent month ending within thirty days);
- c. Personal Financial Statement of principal owners of Proponent (upon request);
- d. Financial Statements of any tenants, lessees and occupants intended to occupy the premises (if applicable); and financing commitments or project specific letters of interest from recognized funding sources.

3. Financial Submission Workbook: Using the template provided in Appendix B and here, provide the following information: with separate sources and uses for each project component (e.g. commercial, housing, parking, etc.) or phase, if applicable, as well as a combined budget for the entire project:

- 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-Forma

- 4. One-Stop:** If the sources of funds for the Proposed Project include City or State subsidies for affordable housing, the financial submission must include a One-Stop Application that can be downloaded from www.mhic.com (see tab “One Stop Center,” then “Downloads,” then “OneStop2000.”) The One Stop should only include financial information for the affordable housing portion of the Proposed Project. Sources must equal uses. If applicable, land costs for privately owned parcels that would be included in the proposed development must be identified in the “Acquisition” line. At the time of application to BPDA, the applicant must have an accepted offer to purchase, an executed purchase and sale agreement or a deed and the price must be supported by an as-is appraisal for that property.
- 5. Financial Narrative:** In addition to the pro forma spreadsheets, the Proposal must include a narrative which describes the following:
- a. An implementation plan for the proposed development, including a development schedule with key milestone dates and a projected occupancy date. The development schedule should outline the required regulatory approvals for the proposed development and the anticipated timing for obtaining such approvals;
 - b. All contingencies, specifying whether for hard costs, soft costs or total costs, design or construction, financing or other critical components of the total project costs;
 - c. Sources of debt and equity for the total project cost;
 - d. All assumptions regarding financing terms on acquisitions, pre-development, construction, and permanent loans;
 - e. Any other project related expense not included in the above categories; and

f. Calculation of total project costs.

6. Ground Lease Price Proposal: Using the price proposal form included in Appendix B, as described in Section 6, 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.

7. Preliminary market study, using empirical market data, that demonstrates the feasibility of the proposed sale and/or lease rates of the project.

8. Financing

- a. Developer Equity: The Proponent must demonstrate the availability of financial resources to fund working capital and equity requirements for the proposed project. Acceptable documentation includes current bank statements, brokerage statements, and/or audited financial statements; and
- b. Financing Commitments: Letters of interest and/or commitment from debt and equity sources for construction and permanent financing. Letters should include a term sheet that provides the Loan-To-Value ("LTV") and Debt Service Coverage ("DSC") requirements, fees, term, amortization, etc.

9. Good Standing:

- a. The proposal shall also certify that the proponent, its principals and affiliated stakeholders are all in good corporate and fiscal standing with the City of Boston and are current with respect to any and all taxes, charges and assessments levied by the City of Boston (i.e. real estate tax, excise tax, rents, fees, water and sewer charges, motor vehicle moving violations, etc.). The proponent and all affiliates must also document that they have no outstanding sanitary code violations documented by the Inspectional Services Department on properties owned by the

proponent and no record of conviction for arson, as certified in the BPDA and City of Boston Disclosure Statement (Appendix B). Failure to correct such violations in a timely manner may cause the proponent's proposal to be deemed non-responsive and failure to meet any certification as requested in any of the Appendices attached herewith will cause a proposal to be deemed non-responsive.

- b. The proponent must not have any violations pending before any federal, state or local instrumentality as certified in the Certificate of Tax, Employment Security and Contract Compliance (Appendix B).
- c. The proponent must affirm that they are in compliance with applicable statutes governing conflict of interest as certified in the BPDA and City of Boston Disclosure Form (Appendix B).

Submission Checklist

1. Submission Fee of \$100.00
2. Development Submission
3. Design Submission
4. Financial Submission
5. Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility
6. Disclosure Statement Concerning Beneficial Interest
7. BPDA and City of Boston Disclosure Statement
8. Certificate of Tax, Employment Security, and Contract Compliance
9. Price Proposal Form
10. Submission Checklist

Items 5-8 on the Submission Checklist are referred to as the “Disclosures.”
Items 4-10 are included in Appendix B.

Draft for Discussion

05

Evaluation of Proposals

Description of Evaluation Process

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

To facilitate final evaluation of the Comparative Evaluation Criteria, proponents that meet threshold criteria will be required to present their plans of development to the community. The selection committee will then factor community input received at this presentation into the final overall rating.

Rule for Award

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

Minimum Threshold Requirements

All proposals must meet the following minimum threshold criteria:

1. Only proposals that are received by the date, time, and at the location indicated in Section 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. Proponents shall comply with the Conflict of Interest Law.

Comparative Evaluation Criteria

The BPDA will use the following Comparative Evaluation Criteria to compare the merits of all qualifying proposals. For each evaluation criterion set forth below, the BPDA's selection committee will assign a rating of Highly Advantageous, Advantageous or Not Advantageous. The selection committee will then assign a composite rating of Highly Advantageous, Advantageous or Not Advantageous for each proposal it evaluates.

To facilitate evaluation of these criteria, the BPDA will take into account community input received as a result of developers' presentations.

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 and experience completing projects similar to the one proposed. The criterion is also designed to evaluate the proponent's ability to adhere to the proposed delivery schedule, and the accuracy of development and operating costs for the construction and operation of the development as proposed. ***To facilitate its evaluation of this criterion, the selection committee 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 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 for the Proposed Project Site; b) consistent with applicable zoning and regulatory restrictions; c) contributes to the public realm; d) provides quality, creative, innovative and contextual designs that achieve all of the BPDA's Development Objectives and Guidelines; and e) includes the use of high quality, durable materials. ***To facilitate its evaluation of this criterion, the selection committee 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. Financial Capacity

This Criterion evaluates the relative strength of the proponent's financing plan relative to other proposals. Proposals that provide evidence of confirmed financing offers to generate sufficient capital to fund most or all of

their development budget will be considered to be more advantageous. Proposals that do not provide evidence of confirmed financing sources or only partially confirmed financing will be considered less advantageous.

Proposals that provide a 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 fundraising or financing to fully satisfy the development budget as presented; and demonstrate experience in previously successfully financing a similar development will 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 will 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, will 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 Proposed Project Site, including specific strategies to achieve maximum participation by people of color, women, and M/WBEs in the fields of construction, design, development, financing, operations, and/or ownership. The Diversity and Inclusion Plan should be detailed, realistic and executable. ***To facilitate its evaluation of this criterion, the selection committee will seek community input in the form of a developer's presentation with opportunity for public comment.***

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. Displacement Prevention

This is an evaluation of the relative strength of the proposal for achieving the objective of displacement prevention as articulated by the community.

Proposals will be considered and rated based on the comprehensiveness of the Proponent's planned approach to assisting the current residents of Roxbury to remain in their community in the future, afford housing, and find pathways to economic opportunity. ***To facilitate its evaluation of this criterion, the selection committee will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that provide a comprehensive, highly reasonable, and achievable displacement prevention strategy for a project of the type proposed that is clearly superior to that of all other proposals shall be ranked **Highly Advantageous**.

Proposals that provide a reasonable and justifiable displacement prevention strategy for a project of the type proposed that is similar or equal to all other submitted proposals shall be ranked **Advantageous**.

Proposals that do not provide a credible or detailed displacement prevention strategy for a project of the type proposed, and/or propose a displacement

prevention strategy that is substantively inferior to all other submitted proposals shall be ranked **Not Advantageous**.

6. Sustainable Development

This criterion is an evaluation of the extent to which the proponent addresses the Resilient Development and Green Building Design Guidelines as specified in section 03. Proposals that better fulfill these objectives relative to other proposals will be considered to be more advantageous. Proposals that do not fully address the Resilient Development and Green Building Design Guidelines will be considered less advantageous. ***To facilitate its evaluation of this Criterion, the selection committee will seek community input in the form of a developer's presentation with opportunity for public comment.***

Proposals that provide a detailed plan that addresses all subsections, exceeds LEED Gold certifiability, and exceeds the other requirements outlined in the Resilient Development and Green Building Design Guidelines, will be ranked as **Highly Advantageous**.

Proposals that address most subsections, provide a feasible plan for LEED Gold certifiability, and meet Resilient Development and Green Building Design Guidelines will be ranked as **Advantageous**.

Proposals that address few subsections, do not provide a plan for LEED Gold certifiability, and do not meet minimum Resilient Development and Green Building Design Guidelines will be ranked as **Not Advantageous**.

06

Contract Terms and Conditions

Ground Lease Price Proposal

The selected proponent will enter into a 70 year ground lease with the BRA. The full and fair market value of the Property, as determined through a valuation done by a professional appraiser(s) licensed by the Commonwealth of Massachusetts, was determined to be \$2.25 per square foot of proposed garden use per year and \$2.00 per square foot for housing use per year. For the purpose of preparing a development and operating pro forma, proponents should use these amounts.

While the BPDA expects a ground lease price offer of at least \$2.25 per square foot of proposed garden use per year and \$2.00 per square foot for housing use per year, a lower price proposal will not be automatically rejected. A proponent offering less than \$2.25 per square foot of proposed garden use per year and \$2.00 per square foot for housing use per year, shall provide with their price proposal a compelling and quantifiable narrative as to the merits and strengths of their proposal while also setting forth the reasons as to why the proposal cannot meet the \$2.25 (garden) / \$2.00 (affordable housing) per square foot of floor area price threshold.

Proponent Designation and Conveyance

Upon a satisfactory review of all proposals submitted to the BPDA pursuant to this RFP, as well as the completion of any subsequent applicable reviews resulting therefrom and relating thereto, BPDA staff will request Board approval to award a single proponent Tentative Designation status. The Tentative Designation status shall be for a nine-month period. Pending

sufficient progress during the Tentative Designation period, BPDA staff will then request that the BPDA Board award Final Designation status to the selected proponent, prior to the expiration of the Tentative Designation period. During the Tentative Designation period, the selected proponent shall accomplish, among other things, the following in order to be considered for Final Designation status:

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

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

Additional Terms and Conditions

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

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

For more information on how to achieve compliance with the Boston Residents Jobs Policy, please see City of Boston Code, Ordinances, Section 8-9, and Appendix A.

Development Costs. The preparation and submission of all proposals by any person, group or organization is at the sole expense of such person, group or organization. Proponents shall be responsible for any and all costs incurred in connection with the planning and development of the Property. The BPDA and the City of Boston shall not be liable for any such costs nor shall the BPDA or the City of Boston be required to reimburse the applicants for such costs.

Site improvements. All site improvements, including sidewalks, street lights and street trees, shall be paid for by the selected proponent, and the estimated costs for such improvements must be documented in the development pro forma. The selected proponent will pay for the cost of any utility relocation not paid by a utility company. The selected proponent will assume any and all liability for any environmental clean-up pursuant to Chapter 21E of the Massachusetts General Laws. The selected proponent may be responsible for having the Property surveyed, with plans that are suitable for recording, at the expense of the proponent.

Policies and Regulations. Development of the Property shall comply with the City of Boston's zoning and building regulations, procedures and any

other applicable City and/or State code(s). The project will be assessed and taxed by the City of Boston pursuant to M.G.L. Chapter 59.

Signage During Construction. During construction at the Property, 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 Property 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 City of Boston Eviction Prevention Efforts. Data collected from Boston Housing Court in 2015 indicates that at least 67% of evicted tenants were evicted from subsidized units. Because tenants that are evicted are often unable to secure alternate housing and also may be disqualified from future affordable housing opportunities, the City of Boston and BPDA are implementing eviction prevention strategies. Selected proponents developing affordable housing financed with public resources will be required to submit data on the number of evictions and terminated tenancies that exist in their portfolio of property during the previous twelve month period. They may also be asked to submit an eviction prevention plan. If the information received from selected proponents receiving City of Boston funding indicates a significant presence of evictions or terminated tenancies, the award of these funds may be suspended