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01

Introduction & Instructions

Purpose

The purpose of this Request for Proposals ("RFP") is to solicit proposals for the redevelopment and sale of a parcel known as 104 Walter Street in the Roslindale Neighborhood of Boston (the "Property"). The parcel consists of approximately 10,511 sf of land owned by the Boston Redevelopment Authority doing business as the Boston Planning & Development Agency ("the BPDA").

The BPDA seeks to convey the Property for the development of affordable housing. Proposals will be subject to review and approval by an Evaluation Committee, composed of staff from the BPDA, the City of Boston Department of Neighborhood Development (DND), and the City of Boston Parks and Recreation Department. Review and approval will include applicable planning and zoning controls, and the development objectives and guidelines described herein.

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

Date	RFP is available for download on BPDA website
	Virtual Pre-Bid Conference
	Walkthrough
	Walkthrough
	Deadline for questions
	Proposal submission deadline

The RFP will be available for download beginning on [date] on the [BPDA Procurement Webpage](#). Proponents must register when downloading the RFP to ensure they receive any addendum.

Questions: Requests for clarification or any questions about the RFP must be submitted by email to:

Morgan McDaniel
Real Estate Development Officer
Boston Planning & Development Agency (BPDA)
morgan.e.mcdaniel@boston.gov

The BPDA will not respond to any requests for clarification or questions concerning the RFP received after [date]. 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: A pre-proposal conference will be held virtually over Zoom on **DATE, 2021 at TIME**. Attendance at the pre-proposal conference is optional, and a recording will be posted on the BPDA procurement webpage. All those planning to attend must register at [\[link\]](#).

Walkthroughs: Walkthroughs for prospective proponents will take place at 104 Walter Street on two dates:

- **Date 1**, 12:00-2:00 pm
- **Date 2**, 12:00-2:00 pm

In order to comply with COVID social distancing guidelines, registration in advance is required. On either day, attendees may register to arrive at 12 pm or 1 pm. Attendance will be capped at 8 people for each time. Social distancing and masks are mandatory. If an attendee has an elevated body temperature, cough, or any other COVID symptoms, the attendee shall not participate in the walk-through. Staff will not be answering questions, but, to the extent necessary, will accept written questions to answer in a subsequent addendum.

Proposal Submission: 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. This required Submission Fee will be applied to the purchase price for the selected proponent, and returned for all other proponents.

The Submission Requirements as stated in Section 4 should be submitted electronically on a flash drive. Design drawings should be PDF or JPEG files, at minimum 300 DPI.

Proposals must be submitted no later than **[week day]**, **[date]** at 12:00 pm (noon) to:

Teresa Polhemus
Executive Director/Secretary
Boston Planning & Development Agency
Municipal Protective Services Desk, First Floor
12 Channel Street
South Boston, MA 02210

The Municipal Protective Services Officer is on duty 24 hours a day, seven days a week and two-hour parking is available at the 12 Channel Street building for no charge. When dropping proposals off in person, proponents must comply with

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City of Boston COVID-19 guidance by practicing social distancing and wearing a face covering.

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: The opening of proposals received by the deadline will take place on [date] at 12:30 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, with no in-person viewing available, following current COVID-19 guidance.

Proponents can register for and access the live-streamed RFP opening at the following link: [link]. The video of the RFP opening will be posted on the BPDA website no later than 5 PM on [opening date].

Addenda: The BPDA will communicate any updates, corrections, clarifications, or extensions to this RFP through an addendum emailed to all prospective respondents posted to the BPDA website. It shall be the responsibility of proponents to check the BPDA website regularly for any addenda.

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Property Description

Site Description

The Property is a 10,511 sf parcel containing a two story single-family home built in 1890. The seven-room home includes three bedrooms and two bathrooms. It was renovated in the early 2000s with stainless steel appliances and hardwood flooring on the first floor. The building has two heat zones with central air conditioning. The third floor has a master suite with a full bath. An exterior inspection indicates that the property has some deferred maintenance, including chipped exterior paint. The site also contains a two story abandoned barn at the rear of the parcel, which is partially built on the adjacent 108 Walter Street parcel. The home has been rented to short term tenants since 2000. The Property borders a Boston Water and Sewer Commission ("BWSC") Easement over 108 Walter Street.

The Property is located in the northern end of the Roslindale neighborhood of the City of Boston. Roslindale is predominantly residential in nature, with single-, two-, three- and multi-family houses. The location is a mixed use area, with commercial uses located to the south and north, and residential uses and open space to the west. The Property is located less than half a mile from Roslindale Village, the commercial heart of the neighborhood and home to banks, law offices, restaurants, and retail shops.

The Property directly abuts the Roslindale Urban Wilds, a 9.5 acre open wetland area that is surrounded by the backyards of abutting residential properties. It serves primarily as a catch basin for the area's stormwater and is thus dominated by a forested wetland habitat. The site is also proximate to other significant areas

of open space. A block to the northeast is the Arnold Arboretum, a 281 acre park and botanical research institution operated by Harvard University. The Allendale Woods Urban Wilds area, measuring 86 acres, is located three blocks to the north in the Jamaica Plain neighborhood.

The Roslindale Village MBTA station 0.3 miles south of the Property provides public transport to Downtown Boston. Public transport in Roslindale includes the Needham Line, a trolley which is part of the MBTA's Passenger rail. Roslindale Village MBTA Station is also a bus terminal, with several routes running through it.

Planning and Zoning Context

For zoning purposes, the Property is situated within the two-family residential zoning sub-district as shown on Map 10A-10B of the Boston Zoning Maps in the Roslindale District, and therefore is principally governed by the provisions of Article 67 of the [Boston Zoning Code](#) ("Code"). The Property is also located in a Neighborhood Design Review Overlay District.

The Code and maps can be found at www.bostonplans.org/zoning. Zoning relief may be required to achieve the requirements of this RFP.

Title

Proponents are fully responsible for conducting their own title examination to ensure that the title to the Property is clear. To the best of the BPDA's knowledge, the BPDA is the owner of the Property and the title is not encumbered. However, the BPDA makes no representations or warranties 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.

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Development Objectives and Design Guidelines

Development Objectives

The BPDA seeks proposals to develop the property in a manner consistent with the following goals:

- Four homeownership units of varying sizes.
- All units must be affordable, with projected sales prices not to exceed an amount affordable to households earning 100% Area median Income (AMI), with a preference given to proposals that offer a mix of affordability.
- One parking space per unit, all parking and associated access from Walter Street must be provided on-site.
- No off-street parking for Wetlands visitors should be included.

The selected proponent will be expected to demolish the whole barn structure at the rear of the Property, both within the Property and on the adjacent parcel. Materials should be salvaged if possible. The selected proponent will work with the BPDA, the City of Boston Department of Neighborhood Development, and the City of Boston Conservation Commission to coordinate demolition of the barn.

NOTE: The City of Boston has provided \$775,129 to support the purchase of the subject property. Given the substantial investment by the city, no further city funds or subsidy will be provided to support the development.

Affirmative Marketing

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

Diversity and Inclusion

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

Development without Displacement

Proposals must describe measures they will take to avoid displacement of existing residents of the Roslindale neighborhood. As part of their submission, proponents must include a narrative describing how their proposal supports the community's goal of "development without displacement." More details on the requirements of the development without displacement narrative can be found below in Section 04 - Submission Requirements.

Design Guidelines

The urban design guidelines are set forth herein to ensure that development of the Property preserves and respects the general scale of the surrounding area. Proponents are encouraged to present exceptional designs and include quality

and creative contributions to the public realm. Residential components are required to comply with [DND's Residential Design Standards](#).¹

Key urban design guidelines are as follows:

1. **Treatment of existing building:** Applicants must thoughtfully consider the optimal approach to address the existing home, including rehabilitation or demolition and new construction, in order to meet the development objectives and resilient development, carbon neutral and green building goals of the RFP. Proposals must outline the environmental, development, sustainable design, cost merits (initial, life cycle, and operational costs for future homeowners) and the impact(s) of the proposal upon the wetlands and immediate direct abutters of the plan to address the existing home. The proposed plan to address the existing home will be in the Strength of Design Evaluation Criteria category.
2. **Unit size:** Community members have expressed a preference for larger unit types appropriate for families, i.e. two and three bedrooms.
3. **Parking:** Parking should provide enough space to turn around so that residents do not need to back out onto Walter Street.
4. **Architectural Design:** The proposed design should enhance and complement the architectural characteristics of the area 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.
5. **Height:** The building height should be compatible with existing building heights in the area.
6. **Landscaping:** Landscaping site improvements should include the use of loam and seed on all non-paved areas of the Property. Any exposed concrete foundation should be screened by landscaping treatment. New native trees, shrubs and other plantings are strongly encouraged at both

¹ <https://content.boston.gov/sites/default/files/file/2020/09/DND%20Design%20Standards.pdf>

the property lines and within the Property (see “Guidelines related to Urban Wild” below). Existing mature trees over eight (8) inch caliper should be pruned and protected. New native trees should be as mature as possible to achieve the goals of aesthetics and screening.

7. **Edge Treatment:** Abide by setbacks required by zoning for the border with 100 Walter Street and provide a visual barrier between the properties. See “Guidelines related to Urban Wild” for treatment of the border with 108 Walter Street.
8. **Repair of damage:** 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.

Guidelines related to Urban Wild

The landscaping site improvements should be cognizant of the proximity to the Roslindale Wetlands Urban Wild, which abuts the Property and contains wetlands under the jurisdiction of the state Wetlands Protection Act and the Boston Wetlands Ordinance, and under the management of the City’s Urban Wild Program. This Urban Wild is protected by Article 97 of the Amendments to the state Constitution, so any encroachment on this land is strictly prohibited.

Design of the Property needs to be aware of its relationship to this valued natural and community resource. The abutting 108 Walter Street parcel will be the major public access point to this Urban Wild; therefore, all design of the Property will avoid any feature that would falsely convey or imply that 108 Walter Street is land that is privately held.

Proponents should be aware that Wetland Protection Act and Boston Wetlands Ordinance permits, and approval by the Parks Commission per City ordinance, will likely be required. The 108 Walter Street parcel will be under the jurisdiction of the Conservation Commission by the time the selected proponent begins the Project. Therefore, the Parks Commission will require review of this project under City of Boston Code of Ordinances Section 7-4.11 (“Permission for Construction Near Parks or Parkways”). The selected proponent will also need to identify their limit of work on the 108 Walter Street parcel for both the demolition of the portion of the dilapidated barn structure and the subsequent landscape

restoration, so as to determine whether said work area will be within the buffer zone of the nearby delineated wetland resource area. See Appendix A for a plan demonstrating the nearby delineated wetland resource area. If said work area is within the buffer area of the delineated wetland resource area as defined under either or both the state Wetlands Protection Act or the City of Boston Wetlands Ordinance, the Project will require permit approval from the Conservation Commission.

Proponents should also be aware that as the major public access point for the Roslindale Wetlands Urban Wild, the City will treat the 108 Walter Street frontage to encourage the public to enter and use the Urban Wild. There will be one or more signs and other features, potentially including benches and a bike rack, to encourage public use. The selected proponent shall make potential tenants or owners aware of this condition, and even encourage viewing this condition as a beneficial and attractive feature of the Property.

Further, the proponents should be aware that the “neck” or “stem” portion of the 108 Walter Street parcel contains a 20 foot wide storm sewer easement held by the Boston Water and Sewer Commission. Therefore, woody plantings (trees, shrubs, vines) will not be allowed on this easement.

Guidelines for the boundary between 104 Walter Street and 108 Walter Street:

- Fencing must be installed along the entirety of those two boundaries with 108 Walter, within the 104 Walter St parcel, as monumented through the lot line revision process;
- The area inward from this fence line will be an edge treatment area that will serve as a landscaped buffer with no building or pavement.
- As mentioned above, the fencing and landscaped buffer, and all site landscaping, will be subject to review by the Parks and Recreation Commission, and all plantings will be native plantings per the request of the Conservation Commission, the adjacent landowner.

- Site plan should focus intensity of uses away from abutters and the Wetlands.

Resilient Development, Carbon Neutral 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. Proponents are to review the Zero Emissions Building (ZEB) requirements outlined in the DND Design Standards, in conjunction with the 2020 DND guidebook for Zero Emissions Buildings.

Proponents should be aware of the City's climate change preparedness and citywide resilience initiatives which guide the City of Boston's efforts to address climate change, available here: [Climate Ready Boston 2016](#). Based upon this study, the City of Boston 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 2050 goals by striving for zero carbon or positive energy performance. New buildings should be designed as low-energy structures with an enhanced envelope and efficient systems, includes on-site renewable energy and identifies off-site renewable assets, credits or certificates sufficient for achieving zero carbon emissions. 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. Strategies should include the use of higher albedo building and paving materials and increased shade areas through landscaping, expanded tree canopy and shade structures. Consider the inclusion of Green Roofs with plantings, especially for smaller sites that may include less 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 and infiltrate stormwater.

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 the appropriate BPDA Sea Level Rise – Design Flood Elevations (“SLR-DFE”). Proposed projects should utilize wet flood proofing strategies and materials for any spaces below the SLR-DFE 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 support a comprehensive approach to addressing the adverse impacts of the built environment and to promoting human health and the wellbeing of our communities. 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.

1. **Green Buildings:** Achieve and surpass the United States Green Building Council’s (“USGBC”) requirements for LEED Platinum Certification with a minimum requirement of LEED Silver Certification. Projects should be registered upon tentative designation and certified by the USGBC within one year of construction completion.
2. **Integrated Project Planning:** 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.

4. **Connectivity:** Promote and support non-personal vehicle means of travel including walking and 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 ground water recharging; and drought resistant planting and non-potable water irrigation.
6. **Energy Efficiency:** Minimize all energy uses with a priority on passive building strategies. Small residential buildings should target a HERS Index of 40 (based on a current Commonwealth of Massachusetts Stretch Code of 55). Large residential/commercial buildings should target modeled performance 25% below the current Commonwealth of Massachusetts Stretch Code.
 - a. Passive building strategies should include 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 appliances and 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.

7. **Renewable, Clean Energy Sources and Storage:** Include and maximize the potential for onsite solar PV. Additionally, clean energy (e.g. combined heat and power), electric battery, and thermal energy storage systems should be considered.
8. **Energy Efficiency Incentives:** Fully utilize any available federal, state, and utility energy efficiency and renewable energy programs.
9. **Indoor Environmental Quality:** Provide high quality healthy indoor environments by utilizing strategies that include extended roof overhangs, proper ground surface drainage and non-paper gypsum board in moist areas; passive and active fresh air systems and active ventilation at moisture and combustion sources; 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; and easily cleaned and maintained finishes.
10. **Materials Selection:** Include sustainably harvested and responsibly processed materials. Strategies should include 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.

04

Minimum 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. Omission of any of the required information may lead to a determination that the proposal is non-responsive.

Development Submission

The following information shall be submitted in the written Development Submission. This is an opportunity for the proponent to convey how the proposed development will be a highly beneficial use of the Property 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:

1. **Introduction/Development Team:**
 - a. Provide 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.
 - b. Include all contact information for team principals, including full address, phone numbers and e-mail addresses.

- c. 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.
- d. 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.
- e. 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.
- f. A list of relevant business permits/licenses including expiration dates.

2. Development Concept:

- a. 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.
- b. Estimate the number of construction and permanent jobs that will be generated by the proposed development.

3. Development Plan:

- a. 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.

- b. 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 Property 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.
4. **Boston Residents Jobs Policy.** Proposals must describe the planned approach to meeting the goals outlined in the Boston Residents Jobs Policy (Appendix A)
5. **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 the Property.

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 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 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.

6. **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 development will assist the current residents of Roslindale 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 Roslindale 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 promote development without 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 Property will result in the direct eviction of any current tenants living in property owned or acquired by the development team.

Design Submission

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

Design Narrative

1. A written and graphic description explaining how the proposed design will meet the Development Objectives and Design Guidelines of this RFP. *The narrative should clearly note the approach to address the existing home, including rehabilitation or demolition and new construction.* These documents must describe and illustrate all program elements and the organization of these spaces within the building.
2. A preliminary zoning analysis
3. A written and graphic description of how the proposed development will satisfy the Resilient Development, Carbon Neutral, and Green Building guidelines of this RFP that includes:
 - a. The team's approach to integrated project design and delivery;

- b. Zero Carbon Building Assessment including performance targets for energy use and carbon emissions (or Home Energy Rating System (“HERS”) index score);
- c. Preliminary LEED Checklist;
- d. Preliminary Boston Climate Resiliency Checklist reflecting proposed outcomes;
- e. Key resilient development; and
- f. Green building strategies

Design Drawings

1. 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 neighborhood. The purpose of the neighborhood plan is to illustrate how the project meets the 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.
2. 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.

3. Building Elevations (1/8" = 1'-0" scale) showing all sides of the proposed building, architectural details, building height and notations of proposed materials.
4. 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.
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 not be 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. Financing commitments or project specific letters of interest from recognized funding sources.

2. **One-Stop:** A One-Stop Application can be downloaded from www.mhic.com (see tab "One Stop Center," then "Downloads," then "OneStop2000.") 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 proponent 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.

3. 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.

In addition to the foregoing, the Proposal must provide the following:

- g. **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
- h. **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.

- 4. Price Proposal:** The appraised value of the parcel is \$760,000. Offered price is one of the many factors used in determining the most highly advantageous proposal. Proposers are encouraged to make competitive offers. For more information on comparative evaluation criteria, please refer to Section 05.

NOTE: A Proposer may offer less than the appraised value, but they must credibly demonstrate that their development concept maximizes the public benefit and foregoes 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 Proposer from maximizing development revenues and/or operating income.² In order to offer less than the asking price the Proposer 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 per parcel.**

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

² If a Proposer 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.

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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).

05

Evaluation of Proposals

Description of Evaluation Process

All proposals meeting the Minimum Threshold Requirements will be reviewed by the Evaluation Committee. The Evaluation Committee will be made up of staff from the BPDA, DND, and Parks and Recreation Department, as well as two neighborhood representatives, including a representative focused on the impact on the Urban Wild. Tentative Developer Designation will be recommended for the responsive and responsible proponent who submits the most advantageous proposal, taking into consideration the financial offer and all other comparative evaluation criteria set forth in this RFP. If this RFP results in Tentative Designation, the BPDA will award Tentative Designation status to only one developer.

The Evaluation Committee reserves the right to seek clarifying information from proponents in writing. If requested, clarifying information will be used only to further the Evaluation Committee's understanding of the original proposal submitted. **Proponents will NOT be allowed to change the content of their submission after the submission deadline; proposals, including the price offer, must be best and final at the time of submission.**

Proponents will NOT be allowed to change the content of their submission after the submission deadline or, to the extent applicable, during the interview process.

All applicants meeting Minimum Threshold Requirements will be required to present their proposals at a virtual community meeting. The community input received from these presentations will be taken into account by the Evaluation Committee.

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 Evaluation Team will use the following Comparative Evaluation Criteria to compare the merits of all qualifying proposals. For each evaluation criterion set forth below, the Evaluation Team will assign a rating of Highly Advantageous, Advantageous or Not Advantageous. The Evaluation Team will 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. Developer Experience and Capacity:

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.

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. Strength of Development Plan:

This Criterion is an evaluation of the Proposer's development plan relative to the Development Guidelines & Objectives set out in the RFP. Proposals that better fulfill the Development Guidelines relative to other proposals will be considered to be more advantageous. Proposals that do not meet the objectives specified in the Development Guidelines will be considered less advantageous.

Proposals that demonstrate a development plan that is highly compatible with the Development Guidelines and Objectives and meets more of the identified objectives than competing proposals will be ranked **Highly Advantageous**.

Proposals that demonstrate a development plan that is compatible with most, but not all Development Guidelines and Objectives, meeting fewer of the identified objectives than competing proposals, will be ranked **Advantageous**

Proposals that demonstrate a development plan that is not compatible with many of the Development Guidelines and Objectives will be ranked **Not Advantageous**.

3. Strength of Design Plan

This criterion is an evaluation of the Proposer's development plan relative to the Design Guidelines. Proposals that better fulfill the Design Guidelines relative to other proposals will be considered to be more advantageous, with specific attention to a) the treatment of the existing home and the plan for rehabilitation or demolition and new construction, b) landscaping, and c) the design guidelines

relation to the Urban Wild. Proposals that do not meet the objectives specified in the Design Guidelines will be considered less advantageous.

Proposals that are highly compatible with the Design Guidelines, including a strong plan for the treatment of the existing home, and meets more of the identified design objectives than competing proposals will be ranked as **Highly Advantageous**.

Proposals that are compatible with most, but not all Design Guidelines, including a reasonable plan for the treatment of the existing home, meeting fewer of the identified objectives than competing proposals will be ranked **Advantageous**.

Proposals that are not compatible with many of the Design Guidelines, including a poor plan for the treatment of the existing home, meeting considerably fewer of the identified objectives than competing proposals will be ranked **Not Advantageous**.

4. Resilient Development, Carbon Neutral and Green Building Design

This criterion is an evaluation of the extent to which the Proponent addresses the Resilient Development, Carbon neutral and Green Building Guidelines specified in Section 4. Proposals that better fulfill these objectives relative to other proposals will be considered to be more advantageous. Proposals that do not meet these objectives will be considered less advantageous.

Proposals that provide a detailed plan that addresses all subsections, exceeds LEED Platinum certifiability, exceeds Zero Carbon Building performance, 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**.

5. Developer's Financial Capacity and Price Proposal

This Criterion evaluates the relative strength of the Proposer's financing plan and proposed price offer relative to other proposals. 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. Proposals that do not have confirmed financing sources or have confirmed financing for only part of the Development Budget will be considered less advantageous.

Proposals that are able to provide documentation of necessary cash on hand, a bank commitment letter or strong letter of interest to finance, lines of credit or other liquid equity to fully satisfy the Preliminary Development Budget as presented will be ranked **Highly Advantageous**.

Proposals that are able to provide evidence of a credible fund raising program or capital campaign program underway to raise sufficient funds in a reasonable time frame in order to fully satisfy their Preliminary Development Budget, and who can demonstrate experience in successfully raising funds in this manner for another significant project, will be ranked **Advantageous**.

Proposals that do not provide evidence of or documentation for any financing, funding sources or equity to satisfy the development budget; or the documentation or evidence is insufficient or outdated will be ranked **Not Advantageous**.

6. Development Cost Feasibility

This Criterion evaluates the relative strength and completeness of the Proposer's Development Budget relative to other proposals. Proposals that most completely specify all anticipated costs and contingencies and are in line with current industry standards will be considered to be more advantageous. Proposals that have incomplete development budgets or have costs that are not consistent with industry standards will be considered less advantageous.

Proposals that demonstrate the development budget is complete, thorough and appears accurate for the proposed project, includes appropriate contingency expense and development cost appears to be highly feasible will be ranked **Highly Advantageous**.

Proposals that demonstrate the development budget is complete and thorough, but deviates from projects similar to the one proposed, and some expenses in the budget appear inaccurate or atypical and there is no further justification or explanation for this apparent deviation, and the development cost appears to be reasonably feasible will be ranked **Advantageous**.

Proposals that include incomplete development budgets that lack detail and/or appear very inaccurate for the proposed project, and the development cost appears to have a low likelihood of feasibility or to be infeasible will be ranked **Not Advantageous**.

7. 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. This criterion shall comprise 25% of the Evaluation Team's 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**.

8. Development Without Displacement Plan

This is an evaluation of the relative strength of the proposal for achieving the objective of development without displacement 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 Roslindale to remain in their community in the future, afford housing, and find pathways to economic opportunity. BPDA will seek community input in the form of developer(s)' presentation(s) with opportunity for public comment.

Proposals that provide a comprehensive, highly reasonable, and achievable development without displacement 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 development without displacement 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 development without displacement strategy for a project of the type proposed, and/or propose a development without displacement strategy that is substantively inferior to all other submitted proposals shall be ranked **Not Advantageous**.

06

Contract Terms and Conditions

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 will recommend Tentative Designation for the proponent whose proposal best meets the objectives set forth herein. BPDA staff will request BPDA Board approval to award a proponent Tentative Designation status. The Tentative Designation status of such proponent (the "selected proponent") shall be for a twelve-month 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;
- Obtain 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, if applicable;
- Issuance of all required building permits; and
- Negotiated terms and conditions of conveyance.

The selected proponent will be required to present to the community at key stages during the designation period to ensure community feedback. Meetings will be coordinating with BPDA/DND.

Final designation will be granted upon the satisfactory completion of 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.

Terms and Conditions

Condition of Premises. The selected proponent acknowledges that it is familiar with the Property 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 the Property.

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 Resident Jobs Policy. Construction on this redevelopment 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 totally at the 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 be required to reimburse the applicants for such costs.

Policies and Regulations. Development of the Property shall comply with the City of Boston's zoning and building regulations and procedures and any other applicable City and/or State code(s). The project will be assessed and taxed by the City of Boston under normal real estate taxation procedures pursuant to M.G.L. Chapter 59.

Signage During Construction. During the construction of the Property, the 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 proponent should also provide signage that describes the project, including the number of affordable units, if applicable.

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.

Non-Binding. This RFP and all proposals accepted as a result are deemed non-binding in nature. The BPDA makes no representations or guarantees with respect to the redevelopment project selection process or awarding of development rights. The BPDA reserves all rights including its right to cancel the RFP, cancel the selection process or cancel subsequent lease negotiations at any time, with or without cause and at the BPDA's sole discretion. In such an event, the BPDA shall not be liable for costs or expenses incurred by Proponents or other interested parties relating to this RFP or any responses prepared in conjunction therewith.

Appendix A: Information Resources

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

- Plan of Land ([link tbd](#))
- Phase 1 Environmental Site Assessment ([link](#))
- Existing Conditions, Roslindale Urban Wilds Park ([link](#))
- Article 67 of the Boston Zoning Code ([link](#))
- BPDA Development Review Information, including Article 80 and Article 37 ([link](#))
- Boston Residents Jobs Policy ([link](#))
- Resources for M/WBE Outreach
 - Builders of Color Coalition ([link](#))
 - Black Economic Council of Massachusetts ([link](#))
 - Massachusetts Minority Contractors Association ([link](#))
 - City of Boston Certified Business Directory ([link](#))
 - Commonwealth of Massachusetts Certified Business Directory ([link](#))

Appendix B: Required Forms

- Price Proposal Form (tbd)
- 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 (tbd)