

Mt. Bowdoin Mallon Package

RFP Issue Date: September 3, 2019 October 8, 2019 **Proposal Due Date:**

Preferred Developer

Community Meeting: Pending: Week of October 21, 2019

CITY OF BOSTON

Department of Neighborhood Development Martin J. Walsh, Mayor Sheila A. Dillon, Chief and Director

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Notice to Bidders Regarding Downloadable RFPs

If you have picked up this Request for Proposals from DND's Bid Counter, you should know that this RFP is also available for download at https://www.boston.gov/dnd/rfps.. The on-line version of the RFP is identical to the version available through the Bid Counter but it has extra features that make it easier for bidders to prepare a proposal. The on-line version of this RFP has downloadable forms that can be filled in, saved and printed from your computer. To access this function you will need the most recent edition of Adobe Reader installed on your computer. A link to the free download program is provided in the right hand column of the webpage listed above. DND will provide paper copies of the forms referenced in this RFP upon request. Remember to select "save as" on your computer before printing to ensure you retain an electronic copy of your filled-in forms. You will still need to submit paper copies of your

proposal to the Bid Counter in the form specified in this RFP – DND does not accept electronic submissions.

A. THE NEIGHBORHOOD HOMES INITIATIVE

The **Neighborhood Homes Initiative** (NHI) is a new initiative resulting from Mayor Walsh's Boston 2030 Housing Plan. It represents a significant commitment to promote mixed-income communities and expand affordable homeownership opportunities for first-time homebuyers priced out of today's housing market. To achieve this objective, the Department of Neighborhood Development (DND) is making packages of developable parcels available for developers to create new, well-designed homes.

For some of the homes, DND will be providing subsidy funds to bridge the difference between the developer's cost to build the home and an affordable price determined by DND. Some homes will be market rate homes for which no subsidy funds are provided. Land parcels will be grouped into packages of parcels in close proximity to one another and the number of parcels in each package will be varied to provide opportunities for smaller and larger developers.

For each site, DND has produced plans, elevations and a zoning analysis site plan. The design of each building, its appearance, style, general details and interior layout has been vetted with community residents during DND's community process. The Selected Developer will receive these drawings from DND in a CAD format and will be responsible for producing the technical drawings (structural, civil (including BWSC, DPW drawings), MEP, etc.) required to produce a complete permit set for construction.

B. HOW NHI MAKES IT EASIER FOR DEVELOPERS TO BUILD

The Neighborhood Homes Initiative has been designed with a number of features to make development easier and more cost-efficient for developers:

COMMUNITY PRE-APPROVAL. DND establishes clear agreements with the local community on the development objectives and building types *before* DND issues its Request for Proposals. This greatly lowers the developer's risk because community issues that could otherwise hold up development are worked out ahead of time.

LOW REAL ESTATE COSTS. DND's land price for affordable home sites is \$100 per parcel. The land price for the market-rate sites may also be discounted where needed for financial feasibility. This substantially reduces the need for developers to finance the land acquisition costs which should make their projects more bankable.

ZONING/PERMITTING ASSISTANCE. The Building Designs provided in the RFP have received a preliminary review by the Inspectional Services Department (ISD) and the Boston Planning and Development Agency (BPDA.) The goal of providing pre-screened designs is intended to reduce the time associated with the zoning process and facilitate a streamlined permitting process. Where zoning relief is necessary, DND and ISD will work to fast-track scheduling of Zoning Board of Appeals hearings.

LOWER MARKET RISK & MARKETING COSTS. DND's Boston Home Center will be responsible for the marketing of, and finding income eligible and qualified buyers for, the affordable homes. Marketing costs and market risk for the developer are limited to the market rate homes only.

SURVEYS AND ENVIRONMENTAL TESTING. Where DND has done site surveys and 21E test work, it will be made available to developers for reference in order to enhance site planning, estimate

costs and assist with understanding the predevelopment time. However the Preferred Developer will need to anticipate conducting his or her own site surveys and environmental testing associated with each site.

C. HOW NHI WORKS STEP-BY-STEP

An NHI development has six key stages:

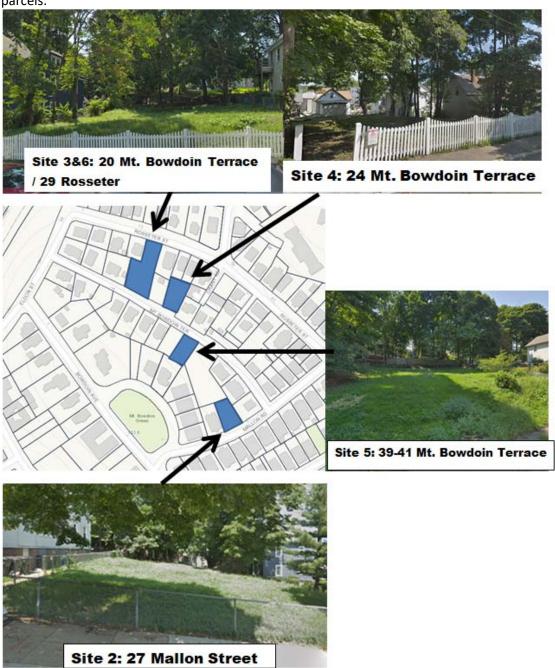
- 1. SITE & HOME SELECTION. Prior to offering any property, DND works with neighborhood residents to create a development plan for the selected sites. DND provides building designs and site plans for each site, and then works with area residents to determine preferred optional elements as well as siting and landscaping requirements. In this way, Developers know exactly what is expected before they prepare a submission.
- 2. DEVELOPER SELECTION. DND will select a Preferred Developer based on eight criteria: 1) the developer's experience and capacity, 2) how well the proposal achieves DND's design and construction objectives as approved by the community, 3) the financial feasibility of the market-rate homes, including reasonableness of projected sales prices, 4) the reasonableness of the costs for the affordable homes, 5) any surplus revenue to the City of Boston from the sale of market-rate units, 6) the developer's ability to secure the necessary financing and/or provide equity, 7) the ability to deliver the finished homes in a timely manner, and 8) the developer's ability to provide economic opportunities for Boston residents, veterans, persons of color, and women as permitted by law.
- **3. PREDEVELOPMENT.** Within two weeks after the RFP deadline, DND may recommend one of the Developers as the "Preferred Developer" of the package. Included in this RFP is a date and time for a community meeting at which the Preferred Developer's proposal will be introduced. Once the Preferred Developer's proposal has been introduced to the community, DND will formally select the developer through a Tentative Designation Vote of the Public Facilities Commission ("PFC"). At this time, the developer will be issued a license that enables them to enter the property to conduct site assessment activities. The developer will also begin the process of arranging financing and seeking building permits. When the developer has 1) completed their site assessments, 2) established an agreed-upon final sources and uses budget, and 3) demonstrated their ability to obtain financing and permits, DND shall seek a Conveyance Vote from PFC.
- 4. LAND SALE & FUNDING AGREEMENT. Once the developer has permits and financing in hand, DND will then proceed to closing where the developer will take possession of the properties and execute closing documents with all identified financing sources. Market rate units will be subject to an owner-occupancy requirement for a period of 15 years. Affordable units will be subject to resale and income restrictions for 50 years. DND and the developer will execute a Loan Agreement that specifies the terms of DND's funding, including the building-by-building construction schedules and other details related to the proposed development.
- 5. CONSTRUCTION/MARKETING. For affordable home sites where DND is providing subsidy funds, the developer may draw on DND's funds, while in some cases simultaneously drawing on the construction loan, throughout the construction period for costs associated with the affordable homes only, except for the developer's fee. For the market rate units, the developer will proceed with construction paid for out of their construction financing resources. DND will visit the construction site on a regular basis to ensure that the building as proposed is the building that is constructed. While the developer proceeds with construction, DND will commence with the outreach to income eligible buyers for the affordable homes. DND will seek to have completed the buyer

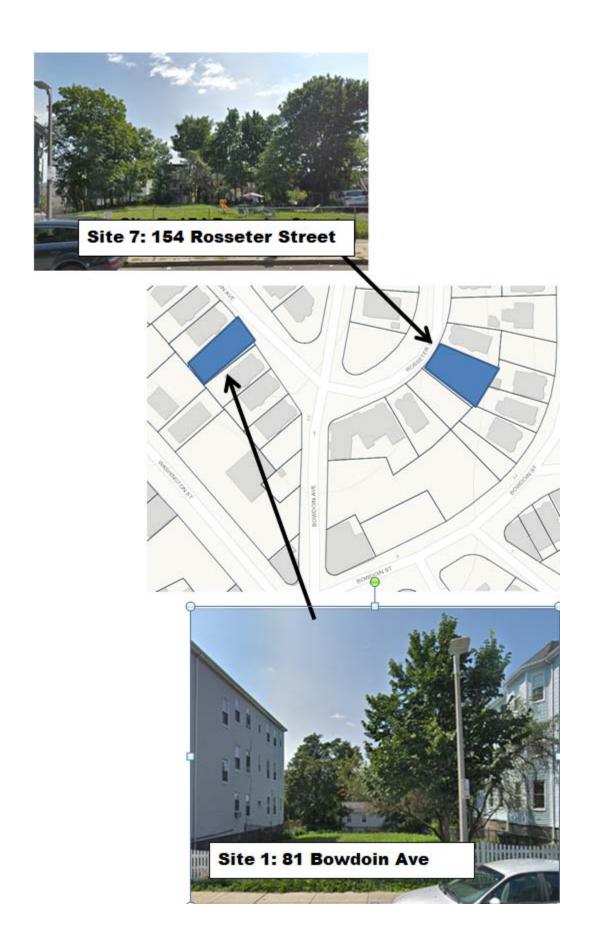
selection process on or before the scheduled completion date for each affordable home. Developers are responsible for the marketing and sale of the market rate homes.

6. SALES PHASE. For the affordable homes, DND will provide income-eligible and bank-approved buyers to the developer. The developer will cooperate with DND on scheduling open houses and arranging access to the property for DND and prospective buyers. The developer is solely responsible for finding buyers for the market rate homes.

D. AVAILABLE PARCELS and DEVELOPMENT PLANS

 Available Sites – Seven (7) parcels representing seven (7) development sites with a total of approximately 39,504 square feet of land are available. Proposals must plan to develop all parcels.





II. **Parcel Characteristics.** To facilitate developer efforts to create the most accurate development budgets possible, DND has assembled some preliminary additional information¹ about the parcels. All available environmental reports on these properties can be downloaded from the same location as this RFP.

SITE	Parcel Address(es)	Guaranteed Street	Other
1	81 Bowdoin Avenue	No	Curb cut needed
2	27 Mallon Road	Yes	Guaranteed roadway maintenance 08/26/2021
3	20 Mount Bowdoin Terrace	Yes	Guaranteed roadway overlay until 10/03/2019
4	24 Mount Bowdoin Terrace	Yes	Guaranteed roadway overlay until 10/03/2019
5	39-41 Mount Bowdoin Terrace	Yes	Guaranteed roadway overlay until 10/03/2019
6	29 Rosseter Street	No	Curb cut needed
7	154 Rosseter Street	No	Curb cut needed

¹ If additional information becomes available to DND during the RFP period, it will be made available on-line at the website where this RFP was made available under the name "Mt. Bowdoin Mallon NHI Supplementary Parcel Information"

III. Mt. Bowdoin Mallon Development Plan - Working with area residents, DND has arrived at the following development plan for the Mt. Bowdoin Mallon Package. There will be a total of 13 new units, including 3 two-family structures (owner and renter), 1 single-family home, and 3 side by side townhomes (6 fee simple ownership sales).

SITE	Street Address	Assessor Parcels	Land Sq. Feet	House Type	Buyer Affordability
1	81 Bowdoin Avenue	1401165000	4,808	Detached 2 Family Type B	Market/Market
2	27 Mallon Road	1401230000	5,334	Flat Roof Side by Side Townhouses Type CC	Affordable/Affordable
3	20 Mt. Bowdoin Terrace	1401285000	8,477	Side by Side Townhouses Type E	Affordable/Affordable
4	24 Mt. Bowdoin Terrace	1401283000	6,722	Detached Single Family Type A2	Affordable
5	39-41 Mt. Bowdoin Terrace	1401250000	4,946	Side by Side Townhouses Type E	Affordable/Affordable
6	29 Rosseter Street	1401261000	4,897	Detached 2 Family Type B	Market/Market
7	154 Rosseter Street	1401424000	4,320	Detached Flat Roof 2 Family Type C	Affordable/Affordable

When complete, there will be 8 homes for sale at an affordable price (plus 1 affordable rental unit) and 2 sold at a market-rate price (plus 2 market rental units). After a developer has been selected, DND reserves the right to negotiate revisions to the distribution of affordable and market rate homes across all the development parcels where DND determines that either 1) it is in the City's financial interest to do so by reducing subsidy requirements or increasing land sale revenue, or 2) such revisions are needed for the financial feasibility of the entire package (and/or packages).

E. LAND PRICE

Land Price. The land price is \$100 per parcel for the sites that are designated for affordable homes. The land price for the market-rate sites will be set at the amount necessary for financial feasibility for each site using a pricing formula described in *Appendix 2: Development Financials for Market Rate Homes*. Under no circumstances can the land price be below the floor price of \$100 per parcel.

Your land price proposal for the market rate homes in this RFP will be considered your *initial price proposal* and will be used in a comparative evaluation of the proposals. After a developer has been selected and additional site and market analysis has been completed, this new and more accurate analysis will be used to generate a final price determination using this same pricing formula as used in *Appendix 2: Development Financials for Market Rate Homes*. This may result in a higher or lower price than originally offered. This final pricing will be locked in at the time the final budget is established and will be included in the Loan Agreement between DND and the developer.

Payment Policy. Unless otherwise agreed to in writing between DND and the Selected Developer, DND requires payment in full by a treasurer's or cashier's check, for the full purchase price at the time that the property is conveyed. In addition, the Selected Developer will be responsible for making a pro forma tax payment, as well as paying all recording and registration fees including, but not limited to, the cost of recording the Deed and conveyance documents at the Suffolk County Registry of Deeds.

F. HOME DESIGNS & CONSTRUCTION ELEMENTS

An important feature of NHI is community approval on building designs *before* offering the properties for RFP. This provides much greater certainty to the developer about what the community will support. Inspectional Services Department (ISD) and the Boston Planning and Development Agency (BPDA) have conducted a preliminary review to facilitate a faster permitting review. DND provides elevations, floor plans, site plans as part of this RFP. Building sizes are shown in *Appendices*. DND will also provide the Selected Developer with the drawings attached to this RFP in CAD format, to be used by the developer's architect to form the basis of the final set of working drawings. Building Designs can be obtained for download at the same location as this RFP under the name:

Neighborhood Homes Floorplans & Elevations

Paper copies of these documents are also available by calling or e-mailing the Project Manager identified in Section K of this RFP.

Design Guidelines and Construction Preferences. DND Design Guidelines can be obtained for download at the same location as this RFP under the name: **Neighborhood Homes Design Guidelines**.

The following enumerates some key construction characteristics that DND seeks in all of its Neighborhood Homes developments. It also identifies elements that DND discourages or outright prohibits. Assume you will conform to all of these preferences when preparing your proposal and costing out your development budget.

Construction Element	Required, Preferred or Prohibited Elements
Energy Efficiency	Massachusetts Energy Stretch Code minimum. Developers are encouraged to build with a high level of air-tightness and improve the insulation and thermal characteristics of building elements to reduce the sizing of the mechanical systems and reduce operating costs.
Pre-fabricated Construction	Panelized construction is not prohibited.
Foundation	Each building's first floor elevation is to mirror the elevations of other homes (usually a minimum of 3 feet above the average grade level). Basements are not required. Unless an acceptable alternative foundation wall detail is proposed, it is expected that a foundation wall and first floor concrete slab will be used.
Soils, Ledge, Grading	DND understands that removing soils from the site is a large expense for the project. Developers are to anticipate in their proposals and costs methods of retaining soils on site included but not limited to placing soils below the first floor slab. Developers must review the existing site conditions. Where exposed ledge, steep slopes and grading require retaining walls or other regrading, these costs must be included in the proposal.
Floor Covering	Carpet inside individual apartments is prohibited to minimize asthma impacts. Wood flooring may be hardwood or engineered wood flooring with the durability and maintenance characteristics comparable to hardwood.
Exterior Siding	Vinyl siding is prohibited.
Paved Surfaces	Minimize the amount of surface area that is paved.
Fencing	Fencing is required at the perimeter of all sites and at the property line dividing 2 attached side by side townhouses. Existing fencing deemed of good quality may be used on a case by case basis. Developers are to review the site conditions to make this assessment and provide an allowance for additional fencing that may be required.
Exterior Storage	If no basement is provided, a locked area must be provided for storing equipment and materials used for landscaping and other home maintenance. Where it is possible to carve out a small area within the building footprint or attached to the main structure is preferred. A detached shed with a concrete slab floor must conform with zoning and must be a minimum of 40 sf.
Comparability	The homes cannot be distinguished in any way by the income of the buyer. Distinct differences in finishes, lighting, fixtures and cabinetry are to be avoided. Developers interested in providing an alternative package for countertops or appliances for example may provide an itemized budget of these elements. Minor modifications in the interior layout of the kitchen and bathroom layouts may be allowed with DND review and approval.

Construction Line Item Budget. To facilitate review of construction costs, Developers are required to submit a <u>full construction cost line item budget</u>, including general conditions, overhead and profit, for each site. See Hard Cost Appendices.

Soil Removal Allowance. DND has done Phase 1 21E environmental testing of the site; the report will be provided to the Selected Developer. DND requires that all homes have surface soil conditions that are safe for children. For project planning, all areas of the parcel not covered by the footprint of the dwelling, driveway, or other impervious surface shall be finished with a minimum of one (1) foot of clean, imported loam. There is a soil removal allowance in the development budget (Line item #3: Allowance For Soil Removal) for developers to plan for the cost to remove soil from the site and properly dispose of it (include \$20,000 per affordable site). Prior to commitment on DND's funding, DND and the developer will agree on a final determination regarding the removal costs. These costs will be included in the final development budget used to establish DND's commitment of funding for the affordable units. If the full allowance is not required, any unspent funds will be retained by DND.

Modifications to Building Designs. The developer must review the drawings provided for any minor errors or conflicts. Code and other construction issues will be resolved in conjunction with DND when identified. Very minor alterations to the exterior design or interior layout may be proposed in order to resolve conditions prior to the development of the permit and construction set. Unless indicated in the drawings, all the Home Designs do not have basements and do not have any finished or insulated attic space (other than required by code.) Stairs to the attic are shown in all Home Designs. The door, ceilings and walls of the stair to attic must be insulated (i.e. within the heated space of the home.) The attic is not intended to be inhabited and expected to be used for storage. Developers must itemize the cost of any additional finished spaces proposed for spaces shown as unfinished or storage or any basement areas. If mechanical areas are not indicated in the CAD files provided, the selected developer may propose locations for heating and hot water mechanical systems as basements are not provided. The massing, roof shape, window shape, trim details and front porch design are intended to mirror similar homes directly surrounding the site and are subject to further modification due to context if requested by DND. All revisions must be reviewed and approved by DND. If appropriate, the developer may provide a narrative outlining suggested very minor alterations to the exterior design or interior layout for DND to consider after developer designation.

G. DEVELOPMENT PREFERENCES

In cooperation with community residents, DND has established the following development preferences. Proposals should seek to achieve as many of these development preferences as possible. The Preferred Developer will be required to make a presentation to the community showing how they plan to achieve these development objectives. If chosen as the Preferred Developer, the community presentation will be held on a **date and time to be determined during the week of October 21, 2019**.

SITE 1: 81 Bowdoin Avenue

Home Model: Detached Two Family Type B

Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate obvious site features, soil conditions, retaining walls and regrading in their pricing of this site.







SITE 2: 27 Mallon Road

Home Model: Side by Side Flat Roof Townhouses Type CC

Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate obvious site features, soil conditions, retaining walls and regrading in their pricing of this site.









SITE 3: 20 Mt. Bowdoin Terrace

Home Model: Side by Side Townhouses Type E

Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: Given the sloping site to the rear, a walkout basement (full or partial) may be considered. At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate retaining walls and regrading in their pricing of this site.









SITE 4: 24 Mt. Bowdoin Terrace

Home Model: Detached Single Family Type A2

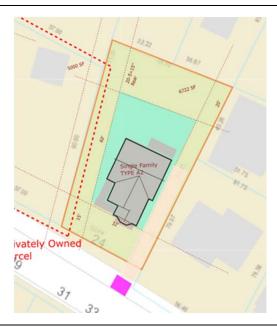
Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate obvious site features, soil conditions, retaining walls and regrading in their pricing of this site.









SITE 5: 39-41 Mt. Bowdoin Terrace

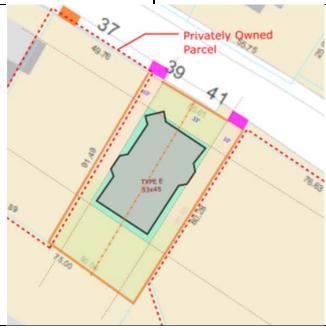
Home Model: Side by Side Townhouses Type E

Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate obvious site features, soil conditions, retaining walls and regrading in their pricing of this site.







SITE 6: 29 Rosseter Street

Home Model: Detached Two Family Type B

Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: Given the sloping site, the placement of the building must be setback to align with 23 Rosseter and the FFE set in order to provide the proper elevation above grade at the rear of the building. Front stairs and retaining walls at the street front may be necessary. At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate retaining walls and regrading in their pricing of this site.









SITE 7: 154 Rosseter Street

Home Model: Detached Two Family Flat Roof Type C

Building Design: The first floor elevation must be raised at least 3' above grade. The Developer must itemize any costs associated with additional finished spaces, bathrooms, basement areas, site work, etc.

Site Conditions: At minimum one off-street parking space is to be provided per unit. The driveway must extend to at least the rear of the building and allow enough space for two cars to be parked in tandem without being located in the front setback. The proposed location of the new curb cut is shown in purple. New fencing will be required around the property. Existing fencing must be replaced where it is unsuitable, in disrepair or is not present. Developers must anticipate obvious site features, soil conditions, retaining walls and regrading in their pricing of this site.







H. AFFORDABILITY REQUIREMENTS & SUBSIDY FUNDING

The Neighborhood Homes Initiative has been designed to promote mixed-income communities by creating housing that is affordable to a wide range of income levels. DND's objective is to create homebuying opportunities for a range of income levels. Some homes will be affordable to households with moderate incomes (up to 80% area median income, or about \$81,600 for a family of three). Some will be affordable to middle-income homebuyers (up to 100% of area median income, or about \$102,000). Some will be sold at market price.

The rental units in the 2-family homes receiving City funding will be priced at rents affordable to households with incomes as low as 80-100% of area median income, and at a minimum must match the area median income of the sales price. DND's pricing requirement for the affordable homes will reflect these rent limitations. The rental units in market-priced 2-family homes will not be restricted.

To achieve these affordability objectives, DND will provide a development subsidy to the developer to cover the difference between the delivered cost of the home and the DND-determined affordable price for the moderate- and middle-income homes. The amount of development subsidy for each of the affordable homes will be determined by DND once the final construction budget has been set and the target sales prices have been established. These subsidy funds can be drawn by the developer during the construction period to pay for approved development costs.

NOTE: the Developer will NOT be required to provide affordable sales prices at application. Application submittals will require the development budget and other required submittal information only.

DND has established \$100,000 per unit as a reasonable maximum average subsidy for the affordable units. Proposals **below** the \$100,000 average subsidy will be considered more competitive.

NOTE: Full budget costs established at application must be held- the application budget is the final budget- to meet the target schedule and closing in the RFP.

NOTE: Developer Fee and Overhead is capped at 12.5% of total project costs for the affordable homes. Applications will be more competitive, and DND review of applications will give preference to proposals that are below the 12.5% cap. The developer will be able to draw up to 50% of overhead at closing with the remaining overhead to be funded during the course of construction at a rate proportionate to percent complete. Developer fee will not be funded during construction and will be released after the final sale of the homes.

Subsidy funding is not available for the market rate homes.

DND's Commitment Letter for subsidy funding will require a Developer personal guarantee.

I. DESIGNATION TIMELINES

DND shall designate a developer for a six month period. By the conclusion of the six month period, DND shall either convey the parcel to the developer, extend the designation for an additional time period or withdraw the designation.

J. SUBMISSION INSTRUCTIONS

Developers MUST submit an original and three (3) copies of the proposal in a sealed envelope and labeled Mt. Bowdoin Mallon Package to the Department of Neighborhood Development, Bid Counter (either in person or by mail) by **October 8, 2019** at 4:00 p.m. The Bid Counter is located at:

26 Court Street, 10th Floor Boston, MA 02108 Bid Counter hours are Monday—Friday from 9:00 a.m. - 4:00 p.m.

Under law, any proposals received after the date and time specified in this RFP must be rejected as non-responsive, and not considered for evaluation. Please plan accordingly.

WITHDRAWAL OF PROPOSALS. Proposals may be withdrawn either personally, by written request or by electronic request at any time prior to the scheduled closing time of receipt of proposals.

K. MORE INFORMATION/DEVELOPER'S WORKSHOP

Developer Conference. An Developer Conference will be held at DND's offices at **26 Central Avenue**, **Hyde Park on September 19, 2019 at 3:00 pm.** Staff from DND will be there to answer any questions you may have about this Request For Proposals. If you are unable to attend the Workshop, formal questions may be submitted by mail or e-mail.

The last day for receiving formal questions is **October 2, 2019** at 5 p.m. All formal questions should be received in writing by either e-mail or U.S. mail and addressed as shown below.

E-mail: jonathan.spillane@boston.gov

U.S. Mail: Department of Neighborhood Development

Attn: Jonathan Spillane 26 Court Street, 8th Floor Boston, MA 02108

You may also contact the project manager, Jonathan Spillane, by phone (617-635-0248) with simple questions of clarification. However, verbal responses are not included in the public record and cannot be considered an official statement by DND regarding your proposal.

Disclaimer: DND will attempt to communicate any changes/addenda to this RFP; however, it is the Developer's responsibility to check the DND's website regularly for any updates, corrections or information about deadline extensions.

L. REQUIRED PROPOSAL SUBMISSION DOCUMENTS

The following documents are required for all submissions:

- Statement of Developer Qualifications This is available at the same website as this RFP and is submitted separately. Only one <u>Developer Qualification Statement</u> is required regardless of how many packages of sites the Developer is seeking to develop.
- Proposal Forms included in this RFP that provide the required project-related data necessary for DND to comparatively evaluate competing proposals. As outlined in Section F, Developers must

also submit a full construction cost line item budget, including general conditions, overhead and profit.

PROPOSAL FORMS

The following is a list of standard forms necessary for a complete proposal. Submitting these documents in the order listed below will facilitate the City's ability to determine if your application is complete and eligible for further review. Incomplete proposals will be rejected.

Appendix 1: Cover Sheet Form

Appendix 2: Development Financials for Market Rate Homes
Appendix 3: Development Financials for Affordable Homes

Appendix 4: Hard Costs

Appendix 5: Development Timetable
Appendix 6: General Project Requirements

Appendix 7: Terms and Conditions

Appendix 8: Developer Qualification Forms

M. PROPOSAL EVALUATION PROCESS

Proposals will be reviewed and selected using a 3-part process.

- 1. First, proposals must meet the City's **Minimum Eligibility Criteria** as described below.
- 2. Proposals that meet the Minimum Eligibility Criteria will then be comparatively reviewed based on the **General Evaluation Criteria** described below. Rule of Award: the most advantageous proposal, taking into consideration all evaluation criteria, will be selected as the "Preferred Developer".
- **3.** Finally, prior to designation by the Public Facilities Commission, the Preferred Developer will be subject to the **Statutory Compliance Requirements** as described in Section 1 of *Appendix 6* to determine compliance with various City regulations, ordinances and policies.

MINIMUM ELIGIBILITY CRITERIA:

- **1. Proposal Received by Deadline**. Only proposals that are received by the date, time, and at the location indicated in Section J of this RFP will be accepted.
- 2. Complete Proposal Submission. Proposals must contain all necessary forms and documents and signatures as required in Section L of this RFP. Proposal submissions must be of sufficient detail and completeness that DND can fairly evaluate the proposal using the General Evaluation Criteria specified below. Proposals that fail to provide sufficient information for this review will be rejected.

GENERAL EVALUATION CRITERIA:

There are eight General Evaluation Criteria:

1. Developer Experience and Capacity. This will be evaluated based on the amount of experience that the development team has in residential development of the type and scale that they are proposing to undertake as described in Section 1 of the <u>Developer's</u>

<u>Qualifications Statement</u>. Developers without significant experience are encouraged to engage an entity with relevant experience as part of their development team.

- **2. Design and Construction Outcomes.** This will be evaluated based on how well the proposal achieves the overall design and construction objectives as specified by DND and approved by the local community as compared to other Developers. Information provided in <u>Sections F</u> and G will be the primary basis of this evaluation.
- **3. Development Financials: Market Rate Homes.** This will be evaluated based on the overall financial feasibility of the proposed development including the reasonableness of the proposed costs and prices as specified in <u>Appendix 2: Development Financials for Market-Rate Homes</u>. Developers are advised that in order to facilitate evaluation of this criteria, DND may require additional information on specific costs and cost-reduction proposals for specific buildings to better understand the Development Financials. Developers should include cost pricing estimates for one year out from the issuance of the RFP.
- **4. Development Financials: Affordable Homes.** This will be evaluated based on the reasonableness of the proposed costs listed in the Development Budget as specified in *Appendix 3: Development Financials for Affordable Homes.* Developers are advised that in order to facilitate evaluation of this criteria, DND may require additional information on specific costs and cost-reduction proposals for specific buildings to better understand the Development Financials. Developers should include cost pricing estimates for one year out from the issuance of the RFP.
- **5. Revenue to the City of Boston**. This will be evaluated based on the amount of revenue that the City of Boston is expected to receive as specified in <u>Appendix 2: Development Financials</u> for Market-Rate Homes.
- **6. Financial Capacity.** This will be evaluated based on 1) the feasibility of the developer's Construction Financing Plan as specified in Appendices 2 and 3, and 2) the developer's demonstrated capacity to secure the necessary financing as described in Section 2 of their *Developer's Qualifications Statement*.
- **7. Development Schedule.** This will be evaluated based on the amount of time between developer designation and construction completion for each site, relative to other proposals for the same sites as specified in <u>Appendix 5: Development Timetable.</u> The developer should include their timelines for permits, an estimated pre-ZBA date, if chosen as the preferred developer, and an in-ground construction start date, which should be within six months of receiving DND designation.
- 8. Boston Resident, Minority, and Female Economic Opportunity. This will be evaluated based on both the *Construction Employment Plan* (Section 3 of the <u>Developer's Qualifications Statement</u>) and the <u>Business Opportunity Plan</u> (Section 4 of the Developer's Qualifications Statement) as permitted by law.

To facilitate the City's evaluation of some criteria, the City may require that the Preferred Developer present their development plan to the community. In making such presentations, developers may provide additional information, but only to clarify the project *as proposed*. Providing supplementary information that changes the project is not permitted under the laws that govern public property disposition.

Multi-Package Developer Selection Process. Where DND is offering a number of development packages concurrently, DND will use a sequential process for reviewing the Financial Capacity and Development Schedule criteria. DND realizes that once a developer has been selected for one package, its capacity to undertake additional packages in a timely manner is diminished. To account for this reality, DND will implement a sequential selection process, starting with the largest package and ending with the smallest. Once a developer has been selected for the largest package, its scoring on Financial Capacity and Development Schedule will be adjusted to reflect its reduced capacity before proceeding with the evaluation for the next-largest package. This process will be repeated until developers have been selected for all packages.

For Developers That Have Already Been Selected for a Previous NHI Package. Where a developer has already been selected for an earlier NHI package, DND will take into account its experience with the developer regarding those earlier packages when scoring a developer's Experience & Capacity and Financial Capacity.

N. ADJUSTMENTS TO DEVELOPMENT PLAN

DND reserves the right to make changes to the development plan where such changes further DND's development and affordability objectives as stated in this RFP. These changes include, but are not limited to:

Additional Unforeseeable Costs. For the market rate homes, where additional development costs are revealed where, 1) the costs could not be reasonably anticipated by the developer at the time of proposal submission, 2) such costs are in excess of the developer's construction cost contingency, and 3) the costs make the development financially infeasible, DND reserves the right to allow modifications to the development plan. These modifications include, but are not limited to: 1) allow an increase in the sales price if supported by the market and/or 2) convert a market-rate site into an affordable site so that it may apply public resources to address the unanticipated development costs. In that event, DND also reserves the right convert an affordable site into a market rate site to maintain the income mix of the NHI development package.

For affordable homes, if substantial development costs that could not be reasonably anticipated are revealed after DND has entered into the Loan Agreement with the developer, and these costs exceed the developer's construction cost contingency, DND reserves the right to negotiate an amended Loan Agreement with the developer in order to ensure financial feasibility. DND also reserves the right to cancel the development of a site where it determines the additional financial expense is excessive.

Accessibility Adaptations and Window Guards Allowance. While the developer is not required to make allowances in their proposed budget for the additional costs for accessibility adaptations for persons with disabilities, or for window guard installations for families with children under 6 years of age, DND will include a reserve for these costs in its subsidy budget and will fully fund these costs for the affordable homes should they be needed at the time of closing with the buyer. DND will outline specific site and unit work necessary to address the accessibility requirement with the selected developer so that work can be incorporated into building plans prior to closing. DND will require modifications on the market rate homes when buyer requests such accessibility or disability adaptations. The budget line item #4 "Other Contingency" provides a place for developers to establish a reserve for these costs in the market rate homes. If the full allowance is not required, any unspent funds will be retained by DND.

Sales Prices for Market Rate Homes. DND acknowledges that home values may change between the time that a developer submits their proposal and the time that the homes go on the market. Where the market values for the market-rate homes are substantively higher or lower than the amounts specified by the Developer in their proposal, developers may adjust their prices to market values subject to DND review and approval and will be finalized at land conveyance closing. DND also retains the right to negotiate a higher or lower land acquisition cost as a result of the price adjustment.

O. STATUTORY REQUIREMENTS & TERMS AND CONDITIONS OF SALE

All property disposed of through DND is subject to a number of Federal, State and City statutory requirements. In addition, DND has its own policy requirements regarding its property sales. All of these requirements are enumerated in *Appendix 6: General Project Requirements*. *Note: Section 1 of Appendix 6 lists the Statutory Compliance Requirements that must be met before DND can proceed with a developer designation vote of the Public Facilities Commission*. In addition to the statutory requirements, DND also has standard terms and conditions for properties sold through the Neighborhood Homes Initiative enumerated in *Appendix 7*.

Developers that have decided that they wish to submit a proposal are strongly advised to review Appendix 6 and Appendix 7 to be sure that they fully understand their obligations should they be selected as developer.

END OF Mt. Bowdon Mallon NHI REQUEST FOR PROPOSALS. DND THANKS YOU FOR YOUR INTEREST

The following appendices provide the forms necessary to prepare a complete proposal submission for these sites. **REMEMBER:** You will also need to complete and submit a Developer's Qualification Statement that can be obtained at the same on-line location as this Request for Proposals

Appendix 1: Cover Sheet Form

SOLICITATION, OFFER AND AWARD					BOSTONIA.			
	1. PROJECT	NAME	2. TYPE OF SOI	2. TYPE OF SOLICITATION			CONDITA AD.	
V	lt. Bowdoir NHI	n Mallon	Invitation Negotiate			September 3, 2	2019	
4. ISS	UED BY:		- Negotiate	u (IIII)		5. ADDRESS OF	FER TO:	
26 Cc	of Boston, Depa Burt Street, 11 th Bon, MA 02108	rtment of Neighl Floor	borhood Develo	pment		(If other than item	4)	
			SC	DLICITA	TION			
6. SEALED OFFERS (original and 3 copies) will be received at the place specified in item 4 until 4:00 p.m. (EST October 8, 2019 CAUTION: Late submissions, Modifications, and Withdrawals: See Section 10. All offers are subject to all terms and conditions contained in this solicitation.							subject to all terms and	
7. Fo	r Information	7a. Name	7b. Telep	hone	7c. Fax		7d. E-mail	
	ntact:	Jonathan Spillane	(617) 635	-0248	(617) 635-038	Jonathan.	spillane@boston.gov	
				OFFE				
		h the terms of t tation upon req					ed, to furnish any and all	
OFF	ER PRICE:	\$					able homes plus the land omes in Appendix 2	
			9. SUBI	MISSION	CHECKLIST			
[]	Cover Sheet F	orm (Appendix 1	L)	[]	Developme	velopment Timetable (Appendix 5)		
[]	Financials: Ma	arket Rate Home	s (Appendix 2)	Y/N	Developer's	Qualifications S	Statement included	
[]	Financials: Aff	ordable Homes	(Appendix 3)	Y/N	Developers different NI		atement included with a	
[]	Key Construct	ion Elements (A _l	opendix 4)					
[]		below signifies t e requirements s				-	Appendix 7 and that I will Proposals	
10. A	DDRESS OF OFF	EROR			11. Name and T	itle of Authorize	d Signatory (Print)	
					12. Signature			
13. Pl	none Number				L4. Of	fer Date		

Instructions for Completing Appendices 2 and 3:

Development Financials

For Developers that have access to Microsoft Excel: if you have access to Exec 97 or later, you can download the Development Financial Forms in Excel format — this version has much greater functionality, self-calculating many more elements as well as ensuring that your budget balances. It is available for download from the same on-line location as this RFP was downloaded under the name "Mt. Bowdoin Mallon RFP Appendix2+3Excel".

You should prepare an initial construction budget that meets all of the objectives as specified in the elevations and floorplans contained in this RFP and meets at least the minimum requirements of the Construction Guidance as described in *Section F: Home Designs & Construction Elements*.

Your cost estimates should be for one year out from the date of the RFP issuance.

The Gross and Net Square footage for each building is provided on the forms to facilitate your cost estimations, and are summarized here for consistency across all proposals:

House Type		ached Single nily	71	ached Two nily	, ,,	ached Two Flat Roof	• • •	ide by Side es Flat Roof		de by Side louses
Gross/Net	GROSS	NET	GROSS	NET	GROSS	NET	GROSS	NET	GROSS	NET
Basement*	0	0	0	0	0	0	0	0	0	0
First Floor	768	647	960	852	857	679	936	804	1162	993
First Floor Porches	224	0	307	0	196	0	194	0	197	0
Second Floor	768	647	979	869	791	612	936	804	1162	999
Second Floor Porches	0	0	230	0	200	0	68	0	0	0
Third Floor /Unfinished Attic**	499**	422**	499**	411**	791	691	936	804	630	580
Third Floor Porches	0	0	0	0	61	0	68	0	0	0
TOTAL	1,760	1,294	2,476	1,721	2,896	1,982	3,138	2,412	3,151	2,572

^{**}Attic is unfinished and uninsulated; minimum lighting; stairs provided for additional storage access. Mechanical Areas are to be inside the heated building envelope.

Net Square Footage does not include exterior walls, party walls, stairs or unfinished areas.

^{*} Basements are not required. Foundation walls must be raised 3 feet min. above the average ground level to mirror the neighborhood context.

Appendix 2: Development Financials for Mt. Bowdoin Mallon - Market-Rate Homes

Instructions: Complete all shaded boxes, all other boxes will self-calculate

Instructions: Complete all shaded b			TOTAL
PROPERTY ADDRESS HOUSE MODEL	81 Bowdoin Two-Family Type B	29 Rosseter Two-Family Type B	TOTAL All Market Rate
GROSS SQUARE FOOTAGE	2,476	2,476	4,952
NET SQUARE FOOTAGE	1,721	1,721	3,442
CONSTRUCTION			
1 Direct Construction Costs			
2 Hard Cost Contingency			
3 Allocation for potential soil removal			
 Other contingencies: a) Allocation for potential soil removal b) Allocation for other site conditions (i.e., retaining walls) 			
5 Subtotal: Construction Expense			
GENERAL DEVELOPMENT COSTS			
6 Survey/Siting & Permits			
7 Architect			
8 Legal			
9 Title & Recording			
10 Appraisal			
11 Real Estate Taxes			
12 Insurance			
13 Construction Loan Interest			
14 Construction Inspection Fees			
15 Utilities & Back Charges			
16 Fees to Construction Lender			
17 Other:			
18 Other:			
19 Other:			
20 Other:			
21 Soft Cost Contingency			
22 Subtotal: General Development			
23 DEVELOPER FEE & OVERHEAD			

TOTAL COST TO BUILD AS SPECIFIED

SALES, LAND PRICING AND FINANCING PLAN

PERTY		81 Bowdoin	29 Rosseter	TOTAL
SALES				
Market Price				
Sales Expenses (Brok	erage, Marketing, etc.)			
Net Proceeds From S	ale			
LAND PRICE CALCULA	TION			
Net Proceeds From S	ale (Line 31)			
Cost To Build As Spec	ified (Line 24)			
Land Price				
Land Price is difference be	tween Sales Proceeds (Line 31) and Cost To Build	d (Line 24), or \$100, which	hever is greater	
CONSTRUCTION FINA	NCING			
Total Development (Cost Including Land (line 24 + Line 34)			
Construction Loan				
DND Land Financing	¹ (Line 34)			
Equity: Developer Fe	es/OH (Line 23)			
Other Equity:				
Other Equity:				
	Sales Expenses (Broke Net Proceeds From S LAND PRICE CALCULA Net Proceeds From S Cost To Build As Spectand Price Land Price is difference bette CONSTRUCTION FINAL Total Development C Construction Loan DND Land Financing Equity: Developer Feetother Equity:	SALES Market Price Sales Expenses (Brokerage, Marketing, etc.) Net Proceeds From Sale LAND PRICE CALCULATION Net Proceeds From Sale (Line 31) Cost To Build As Specified (Line 24) Land Price Land Price Land Price is difference between Sales Proceeds (Line 31) and Cost To Build CONSTRUCTION FINANCING Total Development Cost Including Land (line 24 + Line 34) Construction Loan DND Land Financing¹ (Line 34) Equity: Developer Fees/OH (Line 23) Other Equity:	SALES Market Price Sales Expenses (Brokerage, Marketing, etc.) Net Proceeds From Sale LAND PRICE CALCULATION Net Proceeds From Sale (Line 31) Cost To Build As Specified (Line 24) Land Price Land Price Land Price is difference between Sales Proceeds (Line 31) and Cost To Build (Line 24), or \$100, which CONSTRUCTION FINANCING Total Development Cost Including Land (line 24 + Line 34) Construction Loan DND Land Financing¹ (Line 34) Equity: Developer Fees/OH (Line 23) Other Equity:	SALES Market Price Sales Expenses (Brokerage, Marketing, etc.) Net Proceeds From Sale LAND PRICE CALCULATION Net Proceeds From Sale (Line 31) Cost To Build As Specified (Line 24) Land Price Land Price Land Price is difference between Sales Proceeds (Line 31) and Cost To Build (Line 24), or \$100, whichever is greater CONSTRUCTION FINANCING Total Development Cost Including Land (line 24 + Line 34) Construction Loan DND Land Financing¹ (Line 34) Equity: Developer Fees/OH (Line 23) Other Equity:

¹This line should equal Line 35 (Total Development Cost Including Land) for your budget to be in balance

Appendix 3: Development Financials for Mt. Bowdoin Mallon - Affordable Homes

Instructions: Complete all shaded boxes, all other boxes will self-calculate

PRO	OPERTY ADI	DRESS	27 Mallon	20 Mt. Bowdoin	24 Mt. Bowdoin	39-41 Bowdoin
	USE MODEL		Side by Side Townhouses Type CC	Side by Side Townhouses Type E	Single Family Type A2	Side by Side Townhouses Type E
	,	E FOOTAGE	3,138	3,151	1,760	3,151
NE	Γ SQUARE F	OOTAGE	2,412	2,572	1,294	2,572
1	LAND ACC	QUISITION	100	100	100	100
	CONSTRU	ICTION				
2	Direct Co	onstruction Costs				
3	Hard Co	st Contingency				
4		ontingencies: ition for potential soil removal				
	•	ition for other site conditions aining walls)				
5	Other Co	ontingency				
6	Subtoto	ıl: Construction Expense				
	GENERAL	DEVELOPMENT COSTS				
7	Survey/S	Siting & Permits				
8	Architec	t				
9	Legal					
10	Title & R	ecording				
11	Appraisa	al				
12	Real Esta	ate Taxes				
13	Insuranc	e				
14	Construc	ction Loan Interest				
15	Construc	ction Inspection Fees				
16	Utilities	& Back Charges				
17	Fees to 0	Construction Lender				
18	Other:					
19	Other:					
20	Other:					
21	Other:					
22	Soft Cos	t Contingency				
23	Subto	tal: General Development				
24	DEVELOP	ER FEE & OVERHEAD				
25	COST TO	BUILD AS SPECIFIED				

Appendix 3: continued- Development Financials for Mt. Bowdoin Mallon - Affordable Homes

PRO	OPERTY ADDRESS	27 Mallon	20 Mt. Bowdoin	24 Mt. Bowdoin	39-41 Bowdoin
30	COST TO BUILD AS SPECIFIED (Line 25)				
31	Construction Financing ¹				
32	Equity: Deferred Developer Fees/OH (Line 24)				
33	Other Equity:				
34	Other Equity:				
35	TOTAL CONSTRUCTION FINANCING ²				

Appendix 3: Development Financials for Mt. Bowdoin Mallon - Affordable Homes

HO	DPERTY ADDRESS USE MODEL DSS SQUARE FOOTAGE SQUARE FOOTAGE	154 Rosseter Two-Family Type C 2,896 1,982		TOTAL All Affordable 14,096 10,832
1	LAND ACQUISITION	100		500
	CONSTRUCTION		<u> </u>	
2	Direct Construction Costs			
3	Hard Cost Contingency			
4	Other contingencies: a) Allocation for potential soil removal			
	b) Allocation for other site conditions (i.e., retaining walls)			
5	Other Contingency			
6	Subtotal: Construction Expense			
_	GENERAL DEVELOPMENT COSTS			
7	Survey/Siting & Permits			
8	Architect			
9	Legal			
10	Title & Recording			
11 12	Appraisal Real Estate Taxes			
13	Insurance			
14	Construction Loan Interest			
15	Construction Inspection Fees			
16	Utilities & Back Charges			
17	Fees to Construction Lender			
18	Other:			
19	Other:			
20	Other:			
21	Other:			
22	Soft Cost Contingency			
23	Subtotal: General Development			
24	DEVELOPER FEE & OVERHEAD			
25	COST TO BUILD AS SPECIFIED			

Appendix 3: continued- Development Financials for PACKAGE Mt. Bowdoin Mallon - Affordable

PROPERTY ADDRESS			154 Rosseter		TOTAL
30	COST TO BUI				
31	Construction Fir				
32	Equity: Deferred	l Developer Fees/OH (Line 24)			
33	Other Equity:				
34	Other Equity:				
35	TOTAL CONS				

Appendix 4: Mt. Bowdoin Mallon Hard Costs - Market Rate Homes

PROPERTY ADDRESS		81 Bowdoin	29 Rosseter	TOTAL
HOUSE MODEL		Two-Family Type B	Two-Family Type B	All Market Rate
GROSS SQUARE FOOTAGE		2,476	2,476	4,952
NET SQUARE FOOTAGE		1,721	1,721	3,442
	DIVISION 2: SITEWORK			
1	Earthwork – Excavation & Backfill			
2	Utilities – Water, Gas, Electric, Phone,			
	Cable			
3	Paving			
4	Road and Walks			
5	Site Improvements			
6	Geotechnical Conditions			
7	Landscaping			
8	Environmental Remediation			
9	Demolition			
10	Other On-Site Improvements			
11	Subtotal: Sitework			
	DIVISION 3: CONCRETE			
12	Subtotal: Concrete			
	DIVISION 4: MASONRY			
13	Subtotal: Masonry			
	DIVISION 5: METALS			
14	Subtotal: Metals			
	DIVISION 6: CARPENTRY			
15	Rough Carpentry			
16	Finish Carpentry & Millwork			
17	Cabinets			
18	Subtotal: Carpentry			
	DIVISION 7: THERMAL & MOISTURE PROTECTION			
19	Dampproofing & Waterproofing			
20	Building Insulation			
21	Roofing			
22	Sheet Metal & Flashing			
23	Exterior Siding			
24	Subtotal: Thermal & Moisture			
	Protection			
	DIVISION 8: DOORS & WINDOWS			
25	Doors, Frames & Hardware			
26	Windows			
27	Glazing			
28	Subtotal: Doors & Windows			

	DIVISION 9: FINISHES		
29	Gypsum Wall Board & Plaster		
30	Tile		
31	Wood Flooring		
32	Painting		
33	Subtotal: Finishes		
	DIVISION 10: SPECIALTIES		
34	Subtotal: Finishes		
	DIVISION 11: EQUIPMENT		
35	Appliances		
36	Special Equipment		
37	Subtotal: Equipment		
	DIVISION 12: FURNISHING		
38	Window Treatments		
39	Other Furnishings		
40	Subtotal: Furnishing		
	DIVISION 13: SPECIAL CONSTRUCTION		
41	Subtotal: Special Construction		
	DIVISION 14: CONVEYING SYSTEMS		
42	Subtotal: Conveying Systems		
	DIVISION 15: MECHANICAL		
43	HVAC		
44	Plumbing & Hot Water		
45	Fire Protection		
46	Subtotal: Mechanical		
	DIVISION 16: ELECTRICAL		
47	Subtotal: Electrical		
48	TOTAL COST TO BUILD AS SPECIFIED		

Appendix 4: Mt. Bowdoin Mallon Hard Costs - Affordable Homes

PROPERTY ADDRESS		27 Mallon	20 Mt. Bowdoin	24 Mt. Bowdoin
HOUSE MODEL		Side by Side Townhouses Type CC	Side by Side Townhouses Type E	Single Family Type A2
GROSS SQUARE FOOTAGE		3,138	3,151	1,760
NET SQUARE FOOTAGE		2,412	2,572	1,294
	DIVISION 2: SITEWORK			
1	Earthwork – Excavation & Backfill			
2	Utilities – Water, Gas, Electric, Phone,			
	Cable			
3	Paving			
4	Road and Walks			
5	Site Improvements			
6	Geotechnical Conditions			
7	Landscaping			
8	Environmental Remediation			
9	Demolition			
10	Other On-Site Improvements			
11	Subtotal: Sitework			
	DIVISION 3: CONCRETE			
12	Subtotal: Concrete			
	DIVISION 4: MASONRY			
13	Subtotal: Masonry			
	DIVISION 5: METALS			
14	Subtotal: Metals			
	DIVISION 6: CARPENTRY			
15	Rough Carpentry			
16	Finish Carpentry & Millwork			
17	Cabinets			
18	Subtotal: Carpentry			
	DIVISION 7: THERMAL & MOISTURE PROTECTION			
19	Dampproofing & Waterproofing			
20	Building Insulation			
21	Roofing			
22	Sheet Metal & Flashing			
23	Exterior Siding			
24	Subtotal: Thermal & Moisture			
	Protection			
	DIVISION 8: DOORS & WINDOWS			
25	Doors, Frames & Hardware			
26	Windows			
27	Glazing			

28

Subtotal: Doors & Windows

	DIVISION 9: FINISHES		
29	Gypsum Wall Board & Plaster		
30	Tile		
31	Wood Flooring		
32	Painting		
33	Subtotal: Finishes		
	DIVISION 10: SPECIALTIES		
34	Subtotal: Finishes		
	DIVISION 11: EQUIPMENT		
35	Appliances		
36	Special Equipment		
37	Subtotal: Equipment		
	DIVISION 12: FURNISHING		
38	Window Treatments		
39	Other Furnishings		
40	Subtotal: Furnishing		
	DIVISION 13: SPECIAL CONSTRUCTION		
41	Subtotal: Special Construction		
	DIVISION 14: CONVEYING SYSTEMS		
42	Subtotal: Conveying Systems		
	DIVISION 15: MECHANICAL		
43	HVAC		
44	Plumbing & Hot Water		
45	Fire Protection		
46	Subtotal: Mechanical		
	DIVISION 16: ELECTRICAL		
47	Subtotal: Electrical		
48	TOTAL COST TO BUILD AS SPECIFIED		

Appendix 4: Mt. Bowdoin Mallon Hard Costs - Affordable Homes

PRO	OPERTY ADDRESS	39-41 Mt. Bowdoin	154 Rosseter	TOTAL
но	USE MODEL	Side by Side	Two-Family	All
		Townhouses	Type C	Affordable
CD	OSC COLLARE FOOTACE	Type E 3,151	2,896	14,096
	OSS SQUARE FOOTAGE			-
NE	T SQUARE FOOTAGE	2,572	1,982	10,832
	DIVISION 2: SITEWORK			
1	Earthwork – Excavation & Backfill			
2	Utilities – Water, Gas, Electric, Phone, Cable			
3	Paving			
4	Road and Walks			
5	Site Improvements			
6	Geotechnical Conditions			
7	Landscaping			
8	Environmental Remediation			
9	Demolition			
10	Other On-Site Improvements			
11	Subtotal: Sitework			
	DIVISION 3: CONCRETE			
12	Subtotal: Concrete			
	DIVISION 4: MASONRY			
13	Subtotal: Masonry			
	DIVISION 5: METALS			
14	Subtotal: Metals			
	DIVISION 6: CARPENTRY			
15	Rough Carpentry			
16	Finish Carpentry & Millwork			
17	Cabinets			
18	Subtotal: Carpentry			
	DIVISION 7: THERMAL & MOISTURE PROTECTION			
19	Dampproofing & Waterproofing			
20	Building Insulation			
21	Roofing			
22	Sheet Metal & Flashing			
23	Exterior Siding			
24	Subtotal: Thermal & Moisture			
	Protection			
	DIVISION 8: DOORS & WINDOWS			
25	Doors, Frames & Hardware			
26	Windows			
27	Glazing			

28

Subtotal: Doors & Windows

	DIVISION 9: FINISHES		
29	Gypsum Wall Board & Plaster		
30	Tile		
31	Wood Flooring		
32	Painting		
33	Subtotal: Finishes		
	DIVISION 10: SPECIALTIES		
34	Subtotal: Finishes		
	DIVISION 11: EQUIPMENT		
35	Appliances		
36	Special Equipment		
37	Subtotal: Equipment		
	DIVISION 12: FURNISHING		
38	Window Treatments		
39	Other Furnishings		
40	Subtotal: Furnishing		
	DIVISION 13: SPECIAL CONSTRUCTION		
41	Subtotal: Special Construction		
	DIVISION 14: CONVEYING SYSTEMS		
42	Subtotal: Conveying Systems		
	DIVISION 15: MECHANICAL		
43	HVAC		
44	Plumbing & Hot Water		
45	Fire Protection		
46	Subtotal: Mechanical		
	DIVISION 16: ELECTRICAL		
47	Subtotal: Electrical		
48	TOTAL COST TO BUILD AS SPECIFIED		

Appendix 5: Development Timetable

With an increasing need for additional new affordable homeownership housing in Boston, there is an urgency to start construction on NHI developments. DND will make available any existing surveys and environmental testing, site plans, zoning information, and CAD files of home designs (which have been reviewed by the community) in an effort to accelerate the predevelopment period. DND will also assist the designated developer with the community process and zoning board of appeals (if required) in order to streamline the permitting process. Therefore, DND has established a development schedule for the project that must be adhered to:

Presentation by Preferred Developer at Community Meeting	2 weeks from Application Due Date
Submission to PFC by DND for Developer Designation.	2 months from Application Due Date
Application to Inspectional Services Department:	1 month from Developer Designation
If ZBA:	3 months from ISD App.
Permits:	2 months from ZBA approval
Bank Commitment:	3 months from Developer Designation Date
DND and Bank Project Closing:	5 months from Developer Designation Date
Start Construction:	6 months from Developer Designation Date

Appendix 6: General Project Requirements

The following nine General Project Requirements are required of all Neighborhood Homes developments.

1. STATUTORY COMPLIANCE REQUREMENTS:

All purchasers of real estate from DND must be in compliance with the following statutory requirements:

Tax Delinquency Review. The City of Boston Collector-Treasurer's Office will conduct a review of the selected Developer's property tax history. The selected Developer cannot be delinquent in the payment of taxes on any property owned within the City of Boston. The selected Developer must cure any such delinquency prior to the conveyance of the Property. If the selected Developer has been foreclosed upon by the City of Boston for failure to pay property taxes, then said Developer will be deemed ineligible for conveyance of the Property offered pursuant to this RFP, unless such Developer promptly causes the decree(s) or judgment(s) of foreclosure to be vacated by the Land Court and the City made whole. DND, in its sole discretion, shall determine the timeliness of the selected Developer's corrective action in this regard and will disqualify the Developer if vacating the tax-title foreclosure is not prosecuted expeditiously and in good faith, so as to avoid undue delay.

Water and Sewer Review. The City of Boston Water and Sewer Commission will conduct a review of the selected Developer's water and sewer account(s). The selected Developer cannot be delinquent in the payment of water and sewer charges on any property owned within the City of Boston and, if found to be delinquent, must cure such delinquency prior to a vote request to the Public Facilities Commission for conveyance of the Property.

Property Portfolio Review. The City will review the selected Developer's portfolio of property owned to ascertain whether there has/have been abandonment, Inspectional Services Department (ISD) code violations or substantial disrepair. If unacceptable conditions exist in the selected Developer's property portfolio, DND may deem the selected Developer ineligible for conveyance of the Property.

Prior Participation Review. The City will review the Developer's prior participation in any City of Boston programs, including DND programs, to ascertain Developer's previous performance. Developers found to have not fulfilled their duties or obligations under previous agreement with the City may be deemed to be ineligible for conveyance of the Property.

Employee Review. Neither the Developer, nor any of the Developer's immediate family, nor those with whom s/he has business ties may be currently, or have been within the last twelve (12) months, an employee, agent, consultant, officer, or an elected official of the City of Boston, including DND. An "immediate family member" shall include parents, spouse, siblings or children, irrespective of their place of residence. Any Developer who fails to satisfy this requirement may be deemed to be ineligible for conveyance of the Property.

Equal Opportunity Housing. The City administers its programs in accordance with federal, state and local equal opportunity and fair housing laws, regulations and requirements. This includes affirmatively advertising and providing equal access to information regarding housing and development opportunities. The Boston Fair Housing Commission will screen all Developers. Any Developer who fails to satisfy this requirement may be deemed to be ineligible for conveyance of the Property.

2. OFFER PRICE.

The minimum acceptable offer price for the property is \$100 per parcel. Religious Organizations – In accordance with Massachusetts Constitution religious organizations must pay 100% of the appraised value of the any public property as established by a qualified appraiser.

3. TITLE.

While DND has conducted title examinations of the properties, DND makes no warranty or representations as to the accuracy of such reports and recommends that Developers conduct their own title examinations.

4. SURVEYS.

When available, DND will provide complete predevelopment site surveys to the selected developer including property line, utility and topographical information. The surveyor will be authorized to reissue the complete survey to the selected developer.

5. MISCELLANEOUS FEES.

Developers are responsible for budgeting for all miscellaneous fees, including fees at the Department of Public Works, Boston Water and Sewer Commission, Inspectional Services Department, as appropriate. These fees should be included in the budgets for the affordable and market rate homes.

6. PROJECT MANAGEMENT

Performance under this Request for Proposals will be closely coordinated with the Project Manager and any other staff member designated by DND. Questions pertaining to requests for technical guidance and direction should be directed to the assigned Project Manager, or other designated DND representative. However, such DND representative(s) will only provide necessary background information and guidance; they will under no circumstances change the terms and conditions of this engagement. The Successful Developer will confirm all scheduled project milestones with DND prior to initiating work.

7. DEVELOPER'S DESIGNATED REPRESENTATIVE.

The Successful Developer shall designate qualified representatives as point of contact to assist DND as needed throughout the engagement. Names, phone numbers, and e-mail addresses of proposed representatives are to be listed in the proposal.

8. TIMELY DEVELOPMENT.

The Successful Developer will produce an appropriate plan of development that satisfies the City's needs within specified time frames. If the Property has not been developed according to the proposal specifications and sold to a homebuyer within two (2) years, DND may choose to grant additional time for performance or to rescind the contract, at its discretion. The determination of whether services were performed satisfactorily is at the sole discretion of DND.

9. PROPERTY MANAGEMENT.

The Successful Developer will be ultimately responsible for the condition of the property. They must take any steps necessary to keep the property free of trash, debris, and snow.

10. FAIR HOUSING.

DND administers its development programs in accordance with federal, state and local equal opportunity and fair housing laws, regulations and requirements. This includes affirmatively furthering fair housing and providing equal access to information about development opportunities. Pursuant to this policy, all NHI homes will be affirmatively marketed in accordance with the NHI Blanket Affirmative Marketing Plan.

11. BOSTON JOBS & LIVING WAGE ORDINANCE.

If the Successful Developer is a for-profit firm with 25 or more full time employees, or a non-profit firm with 100 or more employees, you will be required to make best efforts to adhere to the Boston Jobs and Living Wage Ordinance, and the provisions of the Promulgated Regulations, including the "First Source Hiring Agreement" provisions of said Ordinance.

Appendix 7: Terms & Conditions

The City, acting by and through its Public Facilities Commission by the Director of DND, is soliciting proposals for the acquisition of, and funding for, the properties located in the Mt. Bowdoin Mallon Package area. The City will award a contract to the highest-rated, most advantageous proposal based on the above-listed criteria.

DND will review and evaluate proposals promptly after the submission deadline specified on the Proposal Cover Page.

DND reserves the right to award contracts to multiple Developers, to reject any or all proposals, to waive any informality in the proposal process, or to cancel in whole, or in part, this solicitation if it is in the best interest of the City to do so. A proposal may be rejected if it is incomplete, illegible, or conditional. An acceptable offer will not include conditional requirements, such as:

- Altering the square footage of the Property;
- Proposing a use for the Property beyond mixed-income housing; or
- Proposing a use for the Property that does not benefit the residents of Boston.

DND reserves the right to obtain opinion of Counsel regarding the legality and sufficiency of proposals. The contract will be awarded, if at all, to the responsive, responsible Developer(s) that receive the highest overall composite rating in the evaluation process.

Assumption of Risk. The City accepts NO financial responsibility for costs incurred by Developers in responding to this Request for Proposals. Developers are responsible for any and all risks and costs incurred in order to provide the City with the required submission.

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

Terms of Sale. After a final proposal has been selected, the Successful Developer will be contacted by DND to finalize the terms of the sale. The terms of the sale will and MUST be consistent with this Request for Proposals, including the advertised purchase price and Project Requirements.

"As Is" Conveyance. DND will convey the property in "AS IS CONDITION" without warranty or representation as to the status or quality of title. The Successful Developer/Buyer shall, to the fullest extent permitted by law, assume any and all liability for environmental remediation and removal of soils pursuant to Chapter 21E of the Massachusetts General Laws. Finally, any and all site improvements, such as utility connections and/or street repairs, are the responsibility of the Successful Developer.

Negotiations. DND reserves the right to negotiate for changes to the selected proposal. These negotiations may encompass values described in the Request for Proposal, as well as values and items identified during the Request for Proposal and negotiation process. On the basis of these negotiations, DND may decline to sell the property even after the selection process is complete and negotiations have begun.

Closing. The Successful Developer must execute a Purchase and Sales Agreement and then close on the sale within ninety (90) days of the date of execution, unless otherwise agreed upon (in writing) by DND. Failure to comply with the obligations of closing may result in the rescission of any prior agreement(s) with DND regarding the Property.

Restrictions on Transfer. All properties sold under the Neighborhood Home Initiative will have a deed restriction requiring owner-occupancy. Homes that are designated as "affordable" will also have a 50-year deed rider and mortgage on the end homebuyer that requires owner-occupancy, prohibits condominium conversion, and limits

future resale prices. The Successful Developer will only be permitted to transfer the property to a homebuyer under terms specified by DND. Any other transfer or failure to fulfill the development requirements specified by DND will trigger a reversionary clause in the deed, automatically transferring title of the Property back to DND.

Payment. Unless otherwise agreed in writing between DND and the Selected Developer, DND requires payment in full by a treasurer's or cashier's check, for the full purchase price at the time that the property is conveyed. In addition, the Selected Developer will be responsible for making a pro forma tax payment, as well as paying all recording and registration fees including, but not limited to, the cost of recording the Deed and conveyance documents at the Suffolk County Registry of Deeds.

Reservation of Rights. DND reserves the right to postpone or withdraw this RFP; to accept or reject any and all proposals; to modify or amend the terms of this RFP through an addendum; to waive any informality, and to interview, question and/or hold discussions regarding the terms of any proposal received in response to this RFP. DND reserves the right to cancel a sale for any reason. DND reserves the right to select the next highest ranked proposal, if the initially Successful Developer is unable to proceed in a timely manner or otherwise fails to satisfactorily perform. DND reserves the right to waive any requirement or restriction set forth in this RFP or conveyance documents, if such waiver is deemed appropriate by DND, in its sole discretion.

Changes to Program. DND reserves the right to change aspects of the development program outlined in this RFP, using its best judgment as to the needs of the program and the furtherance of its mission, provided that the rights of the Developers are not prejudiced.

Appendix 8: Developer Qualification Forms

DEVELOPER QUALIFICATION FORMS. Download and complete these forms that are required by City and/or State law or regulation:

Affidavit of Eligibility

Developer's Disclosure of Property Owned

Conflict of Interest Affidavit

Living Wage Division: Beneficiary Affidavit

<u>Chapter 803 Disclosure Statement (Arson Disclosure)</u>

Below are two additional notifications and resources that all proposers should read:

Living Wage Division: Notice to Beneficiaries

<u>Living Wage Division: Certified Referral Agencies and Boston One Stop Career Centers</u>

If you require hard copies of the forms please contact the project manager listed on the Cover Sheet of the NHI Package for which you're a making a submission.