
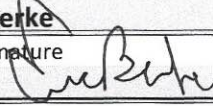


Appendix 1: Scattered Site Stand Alone Neighborhood Homes Cover Sheet Form

SOLICITATION, OFFER AND AWARD		3. DATE ISSUED	
1. PROJECT NAME	2. TYPE OF SOLICITATION		
Scattered Site Stand Alone Neighborhood Homes NHI	<input type="checkbox"/> Invitation for Bids <input checked="" type="checkbox"/> Negotiated (RFP)	March 9, 2020	
4. ISSUED BY: City of Boston, Department of Neighborhood Development 26 Court Street, 11 th Floor Boston, MA 02108		5. ADDRESS OFFER TO: (If other than item 4)	
SOLICITATION			
6. SEALED OFFERS (original and 3 copies) will be received at the place specified in item 4 until 4:00 p.m. (EST) April 13, 2020 CAUTION: Late submissions, Modifications, and Withdrawals: See Section 10. All offers are subject to all terms and conditions contained in this solicitation.			
7. For Information Contact:	7a. Name Neriliz Llenas	7b. Telephone (617)- 635-0101	7c. Fax (617) 635-0383
			7d. E-mail Neriliz.Llenas@boston.gov
OFFER			
8. In accordance with the terms of this RFP, the undersigned agrees, if this offer is accepted, to furnish any and all supporting documentation upon request by DND.			
OFFER PRICE:	\$500	This is \$100 per parcel for the affordable homes plus the land price calculated for the Market-Rate homes in Appendix 2	
9. SUBMISSION CHECKLIST			
<input checked="" type="checkbox"/> [Y]	Cover Sheet Form (Appendix 1)	<input checked="" type="checkbox"/> [Y]	Development Timetable (Appendix 4)
<input checked="" type="checkbox"/> [Y]	Financials: (Appendix 2)	<input checked="" type="checkbox"/> N	Developer's Qualifications Statement included
<input checked="" type="checkbox"/> [Y]	Key Construction Elements (Appendix 3)	<input checked="" type="checkbox"/> Y	Developers Qualification Statement included with a different NHI Package: NHI Callender, Floyd, Stratton, Jones
<input checked="" type="checkbox"/> [Y]	My signature below signifies that I have read the Terms & Conditions as specified in Appendix 6 and that I will abide by those requirements should I be selected as developer under this Request for Proposals		
10. ADDRESS OF OFFEROR Castle Rock Properties 77 Pond Ave., #1508 Brookline, MA 02445		11. Name and Title of Authorized Signatory (Print) Eric Berke	
		12. Signature 	
13. Phone Number 617-413-3348		14. Offer Date 5/22/20	

APPENDIX 3: DEVELOPMENT FINANCIALS FOR AFFORDABLE HOMES

Instructions: Complete all shaded boxes, all other boxes will self-calculate. Refer to Tab 1 For Market-Rate Financials

I. DEVELOPMENT BUDGET

PROPERTY ADDRESS		29 Bradlee St	30 Clarkson St	38 Clarkson St	ALL
HOUSE MODEL		1-Family Type A2	2-Family Type C	2-Family Type C	This Page
GROSS SQUARE FOOTAGE		1,773	2,987	2,987	7,747
NET SQUARE FOOTAGE		1,230	1,982	1,982	5,194
1	LAND ACQUISITION	\$100	\$100	\$100	\$300
CONSTRUCTION					
2	Direct Construction Costs	\$487,600	\$658,000	\$658,000	\$1,803,600
3	Hard Cost Contingency	\$24,380	\$32,900	\$32,900	\$90,180
4	Allocation for potential soil remediation	\$10,970	\$17,360	\$17,360	\$45,690
5	Other Contingency				\$0
6	Subtotal: Construction Expense	\$522,950	\$708,260	\$708,260	\$1,939,470
GENERAL DEVELOPMENT COSTS					
7	Survey/Siting & Permits	\$12,500	\$12,500	\$12,500	\$37,500
8	Architect	\$18,000	\$18,000	\$18,000	\$54,000
9	Legal	\$11,250	\$11,250	\$11,250	\$33,750
10	Title & Recording	\$2,500	\$2,500	\$2,500	\$7,500
11	Appraisal	\$1,200	\$1,200	\$1,200	\$3,600
12	Real Estate Taxes	\$2,000	\$2,000	\$2,000	\$6,000
13	Insurance	\$3,000	\$3,000	\$3,000	\$9,000
14	Construction Loan Interest	\$6,000	\$6,000	\$6,000	\$18,000
15	Construction Inspection Fees	\$3,000	\$3,000	\$3,000	\$9,000
16	Utilities & Back Charges	\$6,500	\$6,500	\$6,500	\$19,500
17	Fees to Construction Lender	\$3,500	\$3,500	\$3,500	\$10,500
18	Other: Environmental/Testing	\$3,750	\$3,750	\$3,750	\$11,250
19	Other: Accounting	\$1,600	\$1,600	\$1,600	\$4,800
20	Other: Development Consultant	\$5,000	\$5,000	\$5,000	\$15,000
21	Other:	\$0	\$0	\$0	\$0
22	Soft Cost Contingency	\$11,970	\$11,970	\$11,970	\$35,910
23	Subtotal: General Development	\$91,770	\$91,770	\$91,770	\$275,310
24	DEVELOPER FEE & OVERHEAD	\$45,000	\$45,000	\$45,000	\$135,000
25	TOTAL COST TO BUILD AS SPECIFIED	\$659,820	\$845,130	\$845,130	\$2,350,080
RECOMMENDED COST SAVING REVISIONS TO SPECIFICATIONS ¹					
Describe		Savings	Savings	Savings	Savings
26	COVID-19 Costs if Applicable (costs not savings)	\$15,000	\$15,000	\$15,000	\$45,000
27					\$0
28					\$0
29					\$0

¹ DND may select some or all of these cost-saving measures to enhance financial feasibility. You are encouraged to more fully explain the advantages of your proposed changes on a separate sheet, clearly marked "Cost-Saving Recommendations"

II. CONSTRUCTION FINANCING PLAN

PROPERTY ADDRESS		29 Bradlee St	30 Clarkson St	38 Clarkson St	ALL
HOUSE MODEL		1-Family Type A2	2-Family Type C	2-Family Type C	This Page
30	TOTAL COST TO BUILD (Line 25)	\$659,820	\$845,130	\$845,130	\$2,350,080
31	Construction Loan ¹	\$614,820	\$800,130	\$800,130	\$2,215,080
32	Equity: Deferred Developer Fees/OH	\$45,000	\$45,000	\$45,000	\$135,000
33	Other Equity:				\$0
34	Other Equity:				\$0
35	TOTAL CONSTRUCTION FINANCING	\$659,820	\$845,130	\$845,130	\$2,350,080

¹ Part of this construction financing will come from advances of DND subsidy funds during the construction period. Amount of DND funding not yet determined.

APPENDIX 3: DEVELOPMENT FINANCIALS FOR AFFORDABLE HOMES

Instructions: Complete all shaded boxes, all other boxes will self-calculate. Refer to Tab 1 For Market-Rate Financials

I. DEVELOPMENT BUDGET					
PROPERTY ADDRESS		27-29 Browning Ave			ALL
HOUSE MODEL		2-Family Type C			This Page
GROSS SQUARE FOOTAGE		2,987			2,987
NET SQUARE FOOTAGE		1,982			1,982
1	LAND ACQUISITION	\$100	\$0	\$0	\$100
CONSTRUCTION					
2	Direct Construction Costs	\$658,000			\$658,000
3	Hard Cost Contingency	\$32,900			\$32,900
4	Allocation for potential soil remediation	\$17,360			\$17,360
5	Other Contingency				\$0
6	Subtotal: Construction Expense	\$708,260	\$0	\$0	\$708,260
GENERAL DEVELOPMENT COSTS					
7	Survey/Siting & Permits	\$12,500			\$12,500
8	Architect	\$18,000			\$18,000
9	Legal	\$11,250			\$11,250
10	Title & Recording	\$2,500			\$2,500
11	Appraisal	\$1,200			\$1,200
12	Real Estate Taxes	\$2,000			\$2,000
13	Insurance	\$3,000			\$3,000
14	Construction Loan Interest	\$6,000			\$6,000
15	Construction Inspection Fees	\$3,000			\$3,000
16	Utilities & Back Charges	\$6,500			\$6,500
17	Fees to Construction Lender	\$3,500			\$3,500
18	Other: Environmental/Testing	\$3,750			\$3,750
19	Other: Accounting	\$1,600			\$1,600
20	Other: Development Consultant	\$5,000			\$5,000
21	Other:	\$0			\$0
22	Soft Cost Contingency	\$11,970			\$11,970
23	Subtotal: General Development	\$91,770	\$0	\$0	\$91,770
24	DEVELOPER FEE & OVERHEAD	\$45,000			\$45,000
25	TOTAL COST TO BUILD AS SPECIFIED	\$845,130	\$0	\$0	\$845,130
RECOMMENDED COST SAVING REVISIONS TO SPECIFICATIONS ¹					
	Describe	Savings	Savings	Savings	Savings
26	COVID-19 Costs if Applicable (costs not savings)	\$15,000			\$15,000
27					\$0
28					\$0
29					\$0

¹ DND may select some or all of these cost-saving measures to enhance financial feasibility. You are encouraged to more fully explain the advantages of your proposed changes on a separate sheet, clearly marked "Cost-Saving Recommendations"

II. CONSTRUCTION FINANCING PLAN					
PROPERTY ADDRESS		27-29 Browning Ave			ALL
HOUSE MODEL		2-Family Type C			This Page
30	TOTAL COST TO BUILD (Line 25)	\$845,130	\$0	\$0	\$845,130
31	Construction Loan ¹	\$800,130	\$0	\$0	\$800,130
32	Equity: Deferred Developer Fees/OH	\$45,000	\$0	\$0	\$45,000
33	Other Equity:				\$0
34	Other Equity:				\$0
35	TOTAL CONSTRUCTION FINANCING	\$845,130	\$0	\$0	\$845,130

¹ Part of this construction financing will come from advances of DND subsidy funds during the construction period. Amount of DND funding not yet determined.

APPENDIX 3: DEVELOPMENT FINANCIALS FOR AFFORDABLE HOMES

Instructions: No data needed - all boxes will self-calculate

I. COMBINED DEVELOPMENT BUDGET

		ALL AFFORDABLE
	GROSS SQUARE FOOTAGE	10,734
	NET SQUARE FOOTAGE	7,176
1	LAND ACQUISITION	\$400
	CONSTRUCTION	
2	Direct Construction Costs	\$2,461,600
3	Hard Cost Contingency	\$123,080
4	Allocation for potential soil remediation	\$63,050
5	Other Contingency	\$0
6	Subtotal: Construction Expense	\$2,647,730
	GENERAL DEVELOPMENT COSTS	
7	Survey/Siting & Permits	\$50,000
8	Architect	\$72,000
9	Legal	\$45,000
10	Title & Recording	\$10,000
11	Appraisal	\$4,800
12	Real Estate Taxes	\$8,000
13	Insurance	\$12,000
14	Construction Loan Interest	\$24,000
15	Construction Inspection Fees	\$12,000
16	Utilities & Back Charges	\$26,000
17	Fees to Construction Lender	\$14,000
18	Other:	\$15,000
19	Other:	\$6,400
20	Other:	\$20,000
21	Other:	\$0
22	Soft Cost Contingency	\$47,880
23	Subtotal: General Development	\$367,080
24	DEVELOPER FEE & OVERHEAD	\$180,000
25	TOTAL COST TO BUILD AS SPECIFIED	\$3,195,210
	RECOMMENDED COST SAVING REVISIONS TO SPECIFICATIONS ¹	
	Describe	Savings
26		\$60,000
27		\$0
28		\$0
29		\$0

¹ DND may select some or all of these cost-saving measures to enhance financial feasibility. You are encouraged to more fully explain the advantages of your proposed changes on a separate sheet, clearly marked "Cost-Saving Recommendations"

II. CONSTRUCTION FINANCING PLAN

		ALL AFFORDABLE
30	TOTAL COST TO BUILD (Line 25)	\$3,195,210
31	Construction Loan ¹	\$3,015,210
32	Equity: Deferred Developer Fees/OH	\$180,000
33	Other Equity:	\$0
34	Other Equity:	\$0
35	TOTAL CONSTRUCTION FINANCING	\$3,195,210

¹ Part of this construction financing will come from advances of DND subsidy funds during the construction period. Amount of DND funding not yet determined.

APPENDIX 2: DEVELOPMENT FINANCIALS FOR MARKET-RATE HOMES

Instructions: Complete all shaded boxes, all other boxes will self-calculate. Refer to Tab 2 for Affordable Home Financials

I. DEVELOPMENT BUDGET

PROPERTY				42 Georgia St	TOTAL
HOUSE MODEL				Detached Townhomes Type E	All Market Rate
GROSS SQUARE FOOTAGE				2,595	2,595
NET SQUARE FOOTAGE				1,992	1,992
1	Direct Construction Costs				
2	Hard Cost Contingency			\$599,100	\$599,100
3	Allocation for potential soil remediation			\$29,955	\$29,955
4	Other Contingency			\$19,010	\$19,010
CONSTRUCTION					\$0
5	Subtotal: Construction Expense	\$0	\$0	\$648,065	\$648,065
GENERAL DEVELOPMENT COSTS					
6	Survey/Siting & Permits			\$12,500	\$12,500
7	Architect			\$18,000	\$18,000
8	Legal			\$11,250	\$11,250
9	Title & Recording			\$2,500	\$2,500
10	Appraisal			\$1,200	\$1,200
11	Real Estate Taxes			\$2,000	\$2,000
12	Insurance			\$3,000	\$3,000
13	Construction Loan Interest			\$6,000	\$6,000
14	Construction Inspection Fees			\$3,000	\$3,000
15	Utilities & Back Charges			\$6,500	\$6,500
16	Fees to Construction Lender			\$3,500	\$3,500
17	Other: Environmental/Testing			\$3,750	\$3,750
18	Other: Accounting			\$1,600	\$1,600
19	Other: Development Consultant			\$5,000	\$5,000
20	Other:			\$0	\$0
21	Soft Cost Contingency			\$6,035	\$6,035
22	Subtotal: General Development	\$0	\$0	\$85,835	\$85,835
23	DEVELOPER FEE & OVERHEAD			\$45,000	\$45,000
24	TOTAL COST TO BUILD AS SPECIFIED	\$0	\$0	\$778,900	\$778,900
RECOMMENDED COST-SAVING REVISIONS TO SPECIFICATIONS¹					
Describe					
25	COVID-19 Costs if Applicable (costs not savings)			\$15,000	\$15,000
26					\$0
27					\$0
28					\$0

¹ You are encouraged to more fully explain the advantages of your proposed changes on a separate sheet, clearly marked "Cost-Saving Recommendations"

II. SALES, LAND PRICING AND FINANCING PLAN

PROPERTY				42 Georgia St	TOTAL
HOUSE MODEL				Detached Townhomes Type E	All Market Rate
SALES					
29	Market Price			\$820,000	\$820,000
30	Sales Expenses (Brokerage, Marketing etc)			\$41,000	\$41,000
31	Net Proceeds From Sale	\$0	\$0	\$779,000	\$779,000
LAND PRICE CALCULATION					
32	Net Proceeds From Sale (Line 31)	\$0	\$0	\$779,000	\$779,000
33	Cost To Build As Specified (Line 24)	\$0	\$0	\$778,900	\$778,900
34	Land Price <small>Land Price is difference between Net Proceeds From Sale (Line 35) and Cost To Build (Line 32), or \$100, whichever is greater</small>	\$100	\$100	\$100	\$300
CONSTRUCTION FINANCING					
35	Total Development Cost Including Land	\$100	\$100	\$779,000	\$779,200
36	Construction Loan	\$100	\$100	\$734,000	\$734,200
37	DND Land Financing <small>Land acquisition cost, if above \$100</small>	\$0	\$0	\$0	\$0
38	Equity: Developer Fees/OH	\$0	\$0	\$45,000	\$45,000
39	Other Equity:				\$0
40	Other Equity:				\$0
41	Total Sources - Construction	\$100	\$100	\$779,000	\$779,200

Appendix 3: Scattered Site Stand Alone Hard Costs- Affordable Homes

PROPERTY ADDRESS	29 Bradlee	30 Clarkson	38 Clarkson	27-29 Browning
HOUSE MODEL	Single Family Type A2	Two Family Type C	Two Family Type C	2-Family Type C
GROSS SQUARE FOOTAGE	1,773	2,987	2,987	2,987
NET SQUARE FOOTAGE	1,230	1,982	1,982	1,982

DIVISION 2: SITEWORK

1	Earthwork – Excavation & Backfill	7,300.00	11,000.00	11,000.00	11,000.00
2	Utilities – Water, Gas, Electric, Phone, Cable	14,700.00	31,900.00	31,900.00	31,900.00
3	Paving	12,200.00	14,600.00	14,600.00	14,600.00
4	Road and Walks	700.00	1,400.00	1,400.00	1,400.00
5	Site Improvements	22,200.00	39,600.00	39,600.00	39,600.00
6	Geotechnical Conditions	0.00	0.00	0.00	0.00
7	Landscaping	8,700.00	10,200.00	10,200.00	10,200.00
8	Environmental Remediation	0.00	0.00	0.00	0.00
9	Demolition	0.00	0.00	0.00	0.00
10	Other On-Site Improvements	13,400.00	11,400.00	11,400.00	11,400.00
11	Subtotal: Sitework	79,200.00	120,100.00	120,100.00	120,100.00

DIVISION 3: CONCRETE

12	Subtotal: Concrete	41,300.00	44,200.00	44,200.00	44,200.00
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DIVISION 4: MASONRY

13	Subtotal: Masonry	0.00	0.00	0.00	0.00
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DIVISION 5: METALS

14	Subtotal: Metals	0.00	0.00	0.00	0.00
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DIVISION 6: CARPENTRY

15	Rough Carpentry	95,800.00	119,200.00	119,200.00	119,200.00
16	Finish Carpentry & Millwork	22,100.00	31,300.00	31,300.00	31,300.00
17	Cabinets	11,500.00	18,900.00	18,900.00	18,900.00
18	Subtotal: Carpentry	129,400.00	169,400.00	169,400.00	169,400.00

DIVISION 7: THERMAL & MOISTURE PROTECTION

19	Dampproofing & Waterproofing	3,400.00	3,200.00	3,200.00	3,200.00
20	Building Insulation	15,700.00	23,900.00	23,900.00	23,900.00
21	Roofing	9,000.00	19,000.00	19,000.00	19,000.00
22	Sheet Metal & Flashing	4,000.00	3,800.00	3,800.00	3,800.00
23	Exterior Siding	52,900.00	59,700.00	59,700.00	59,700.00
24	Subtotal: Thermal & Moisture Protection	85,000.00	109,600.00	109,600.00	109,600.00

DIVISION 8: DOORS & WINDOWS

25	Doors, Frames & Hardware	8,400.00	12,500.00	12,500.00	12,500.00
26	Windows	16,500.00	17,700.00	17,700.00	17,700.00
27	Glazing	0.00	0.00	0.00	0.00
28	Subtotal: Doors & Windows	24,900.00	30,200.00	30,200.00	30,200.00

DIVISION 9: FINISHES

29	Gypsum Wall Board & Plaster	19,900.00	31,900.00	31,900.00	31,900.00
30	Tile	9,800.00	10,000.00	10,000.00	10,000.00

Appendix 3: Scattered Site Stand Alone Hard Costs- Affordable Homes

PROPERTY ADDRESS		29 Bradlee	30 Clarkson	38 Clarkson	27-29 Browning
HOUSE MODEL		Single Family Type A2	Two Family Type C	Two Family Type C	2-Family Type C
GROSS SQUARE FOOTAGE		1,773	2,987	2,987	2,987
NET SQUARE FOOTAGE		1,230	1,982	1,982	1,982
31	Wood Flooring	13,000.00	22,200.00	22,200.00	22,200.00
32	Painting	15,700.00	21,600.00	21,600.00	21,600.00
33	Subtotal: Finishes	58,400.00	85,700.00	85,700.00	85,700.00
DIVISION 10: SPECIALTIES					
34	Subtotal: Finishes	1,200.00	1,200.00	1,200.00	1,200.00
DIVISION 11: EQUIPMENT					
35	Appliances	4,700.00	8,900.00	8,900.00	8,900.00
36	Special Equipment	0.00	0.00	0.00	0.00
37	Subtotal: Equipment	4,700.00	8,900.00	8,900.00	8,900.00
DIVISION 12: FURNISHING					
38	Window Treatments	1,600.00	1,400.00	1,400.00	1,400.00
39	Other Furnishings	0.00	0.00	0.00	0.00
40	Subtotal: Furnishing	1,600.00	1,400.00	1,400.00	1,400.00
DIVISION 13: SPECIAL CONSTRUCTION					
41	Subtotal: Special Construction	0.00	0.00	0.00	0.00
DIVISION 14: CONVEYING SYSTEMS					
42	Subtotal: Conveying Systems				
DIVISION 15: MECHANICAL					
43	HVAC	14,000.00	16,600.00	16,600.00	16,600.00
44	Plumbing & Hot Water	22,600.00	43,000.00	43,000.00	43,000.00
45	Fire Protection	0.00	0.00	0.00	0.00
46	Subtotal: Mechanical	36,600.00	59,600.00	59,600.00	59,600.00
DIVISION 16: ELECTRICAL					
47	Subtotal: Electrical	25,300.00	27,700.00	27,700.00	27,700.00
48	TOTAL COST TO BUILD AS SPECIFIED	487,600.00	658,000.00	658,000.00	658,000.00

Appendix 3: Scattered Site Stand Alone Hard Costs- Affordable Homes

PROPERTY ADDRESS	42 Georgia	
HOUSE MODEL	Side by Side Townhouses Type E	
GROSS SQUARE FOOTAGE	2,595	
NET SQUARE FOOTAGE	1,992	

DIVISION 2: SITEWORK

1	Earthwork – Excavation & Backfill	10,600.00			
2	Utilities – Water, Gas, Electric, Phone, Cable	39,700.00			
3	Paving	17,100.00			
4	Road and Walks	2,000.00			
5	Site Improvements	27,700.00			
6	Geotechnical Conditions	0.00			
7	Landscaping	8,900.00			
8	Environmental Remediation	0.00			
9	Demolition	0.00			
10	Other On-Site Improvements	12,800.00			
11	Subtotal: Sitework	118,800.00	0.00	0.00	0.00

DIVISION 3: CONCRETE

12	Subtotal: Concrete	41,700.00			
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DIVISION 4: MASONRY

13	Subtotal: Masonry	0.00			
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DIVISION 5: METALS

14	Subtotal: Metals	0.00			
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DIVISION 6: CARPENTRY

15	Rough Carpentry	104,800.00			
16	Finish Carpentry & Millwork	27,400.00			
17	Cabinets	14,300.00			
18	Subtotal: Carpentry	146,500.00	0.00	0.00	0.00

DIVISION 7: THERMAL & MOISTURE PROTECTION

19	Dampproofing & Waterproofing	5,300.00			
20	Building Insulation	21,000.00			
21	Roofing	13,000.00			
22	Sheet Metal & Flashing	2,800.00			
23	Exterior Siding	50,300.00			
24	Subtotal: Thermal & Moisture Protection	92,400.00	0.00	0.00	0.00

DIVISION 8: DOORS & WINDOWS

25	Doors, Frames & Hardware	10,500.00			
26	Windows	18,400.00			
27	Glazing	0.00			
28	Subtotal: Doors & Windows	28,900.00	0.00	0.00	0.00

DIVISION 9: FINISHES

29	Gypsum Wall Board & Plaster	28,400.00			
30	Tile	11,000.00			

Appendix 3: Scattered Site Stand Alone Hard Costs- Affordable Homes

PROPERTY ADDRESS		42 Georgia			
HOUSE MODEL		Side by Side Townhouses Type E			
GROSS SQUARE FOOTAGE		2,595			
NET SQUARE FOOTAGE		1,992			
31	Wood Flooring	16,800.00			
32	Painting	21,300.00			
33	Subtotal: Finishes	77,500.00	0.00	0.00	0.00
DIVISION 10: SPECIALTIES					
34	Subtotal: Finishes	1,100.00			
DIVISION 11: EQUIPMENT					
35	Appliances	7,800.00			
36	Special Equipment	0.00			
37	Subtotal: Equipment	7,800.00	0.00	0.00	0.00
DIVISION 12: FURNISHING					
38	Window Treatments	1,800.00			
39	Other Furnishings	0.00			
40	Subtotal: Furnishing	1,800.00	0.00	0.00	0.00
DIVISION 13: SPECIAL CONSTRUCTION					
41	Subtotal: Special Construction	0.00			
DIVISION 14: CONVEYING SYSTEMS					
42	Subtotal: Conveying Systems				
DIVISION 15: MECHANICAL					
43	HVAC	14,500.00			
44	Plumbing & Hot Water	37,700.00			
45	Fire Protection	0.00			
46	Subtotal: Mechanical	52,200.00	0.00	0.00	0.00
DIVISION 16: ELECTRICAL					
47	Subtotal: Electrical	30,400.00			
48	TOTAL COST TO BUILD AS SPECIFIED	599,100.00	0.00	0.00	0.00

Appendix 4: 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	3 weeks from Application Due Date
Submission to PFC by DND for Developer Designation.	2 months from Application Due Date
Application to Inspectional Services Department:	2 months from Developer Designation
If ZBA:	3 months from ISD App.
Permits:	2 months from ZBA approval
Bank Commitment:	4 months (or 8 months if ZBA) from Developer Designation Date
DND and Bank Project Closing:	6 months (or 10 months if ZBA) from Developer Designation Date
Start Construction:	6 months (or 10 months if ZBA) from Developer Designation Date

If designated, Castle Rock Properties will meet or exceed the project schedule outlined above. As the house designs for this project are similar to other houses that we have designed recently, we anticipate being able to start the permitting process immediately upon designation, and complete the process expeditiously.

Appendix 5: General Project Requirements

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

1. STATUTORY COMPLIANCE REQUIREMENTS:

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 Applicant's property tax history. The selected Applicant cannot be delinquent in the payment of taxes on any property owned within the City of Boston. The selected Applicant must cure any such delinquency prior to the conveyance of the Property. If the selected Applicant has been foreclosed upon by the City of Boston for failure to pay property taxes, then said Applicant will be deemed ineligible for conveyance of the Property offered pursuant to this RFP, unless such Applicant 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 Applicant's corrective action in this regard and will disqualify the Applicant 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 Applicant's water and sewer account(s). The selected Applicant 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 Applicant'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 Applicant's property portfolio, DND may deem the selected Applicant ineligible for conveyance of the Property.

Prior Participation Review. The City will review the Applicant's prior participation in any City of Boston programs, including DND programs, to ascertain Applicant's previous performance. Applicants 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 Applicant, nor any of the Applicant'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 Applicant 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 Applicants. Any Applicant 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 Applicants 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.

Applicants 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 Applicant will confirm all scheduled project milestones with DND prior to initiating work.

7. APPLICANT'S DESIGNATED REPRESENTATIVE.

The Successful Applicant 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 Applicant 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 Applicant 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 Applicant 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 6: 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 Roxbury 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 Applicants, 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 Applicant(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 Applicants in responding to this Request for Proposals. Applicants 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 Applicant 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 Applicant/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 Applicant.

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 Applicant 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 Applicant 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 Applicant 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 Applicants are not prejudiced.

Appendix 7: 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](#)

[Chapter 803 Disclosure Statement \(Arson Disclosure\)](#)

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

[Living Wage Division: Notice to Beneficiaries](#)

[Living Wage Division: Certified Referral Agencies and Boston One Stop Career Centers](#)

If you require hard copies of the forms please contact Anne Conway at (617) 635-0182 or at [**anne.conway@boston.gov**](mailto:anne.conway@boston.gov)



CITY OF BOSTON JOBS AND LIVING WAGE ORDINANCE

THE LIVING WAGE DIVISION • (617) 918-5236

BENEFICIARY AFFIDAVIT

Any for-profit Beneficiary who employs at least 25 full-time equivalents (FTEs) or any not-for-profit Beneficiary who employs at least 100 FTEs who has been awarded assistance of \$100,000 or more from the City of Boston must comply with the **First Source Hiring Agreement** provisions of the Boston Jobs and Living Wage Ordinance.

If you are submitting a request for proposal, request for qualification, or invitation for bid, or negotiating a loan, grant, or other financial assistance that meets the above criteria, you must submit this affidavit along with your proposal. If you believe that you are exempt from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance, complete Part 4: Exemption From First Source Hiring Agreement Provisions, or if you are requesting a general waiver, please complete Part 5: General Waiver Reason(s).

IMPORTANT: Please print in ink or type all required information. Assistance in completing this form may be obtained by calling the Living Wage Administrator in the Living Wage Division of the Office of Workforce Development, telephone: (617) 918-5236.

PART 1: BENEFICIARY OF ASSISTANCE INFORMATION:

Name of Beneficiary: _____

Contact person: _____

Address: _____
Street City Zip

Telephone #: _____ E-Mail: _____

PART 2: ASSISTANCE INFORMATION:

Name of the program or project under which the assistance is being awarded:

City of Boston awarding department: _____

Bid or proposal amount: \$ _____

Date assistance documents executed: _____ Award end date: _____

Duration of award: ☐ 1 year ☐ 2 years ☐ 3 years ☐ Other: _____ (years)

PART 3: ADDITIONAL INFORMATION

Please answer the following questions regarding your company or organization:

1. Your company or organization is: *check one*:

☐ For Profit ☐ Not For Profit

2. Total number of employees whom you employ: _____

3. Total number of employees who will be assigned to work on the above-stated award: _____

4. Do you anticipate hiring any additional employees?

☐ Yes ☐ No

If yes, how many additional FTEs do you plan to hire? _____

PART 4: EXEMPTION FROM FIRST SOURCE HIRING AGREEMENT PROVISIONS OF THE BOSTON JOBS AND LIVING WAGE ORDINANCE

Any Beneficiary who qualifies may request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance by completing the following:

I hereby request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance for the following reason(s): Attach any pertinent documents to this application to prove that you are exempt. Please check the appropriate box(es) below:

- ☐ The construction contract awarded by the City of Boston is subject to the state prevailing wage law; or
- ☐ Assistance awarded to youth programs, provided that the award is for stipends to youth in the program. "Youth Program" means any city, state, or federally funded program which employs youth, as defined by city, state, or federal guidelines, during the summer, or as part of a school to work program, or in other related seasonal or part-time program; or
- ☐ Assistance awarded to work-study or cooperative educational programs, provided that the assistance is for stipends to students in the programs; or
- ☐ Assistance awarded to vendors who provide services to the City and are awarded to vendors who provide trainees a stipend or wage as part of a job training program and provides the trainees with additional services, which may include but are not limited to room and board, case management, and job readiness services, and provided further that the trainees do not replace current City-funded positions.

Please give a full statement describing in detail the reasons you are exempt from the First Source Hiring Agreement provisions the Boston Jobs and Living Wage Ordinance (attach additional sheets if necessary):

PART 5. GENERAL WAIVER REASON(S)

I hereby request a general waiver from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance. The application of the First Source Hiring Agreement to my assistance violates the following state or federal statutory, regulatory or constitutional provision(s).

State the specific state or federal statutory, regulatory or constitutional provision(s), which makes compliance with the First Source Hiring Agreement unlawful:

GENERAL WAIVER ATTACHMENTS:

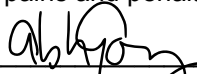
Please attach a copy of the conflicting statutory, regulatory or constitutional provision(s) that makes compliance with this ordinance unlawful.

Please give a full statement describing in detail the reasons the specific state or federal statutory, regulatory or constitutional provision(s) makes compliance with the First Source Hiring Agreement unlawful (attach additional sheets if necessary):

PART 6: BENEFICIARY OF ASSISTANCE AFFIDAVIT:

I, (print or type) _____, the Beneficiary, certify and swear/affirm that the information provided on this **Beneficiary Affidavit** is true and within my own personal knowledge and belief.

Signed under the pains and penalties of perjury.

SIGNATURE:  DATE: _____

TITLE: _____

Appendix 8: Description of Key Construction Elements

To fairly evaluate different proposals, DND is seeking more specificity on what it considers the most important construction elements that benefit the end buyers. Describe with as much specificity as you can your construction specifications/standards for the key construction elements listed below. If you prefer, you can provide this information on separate sheet(s), clearly labeled with your name and the title "Description of Key Construction Elements". *Be sure to address all of the items listed here.*

CONSTRUCTION ELEMENT	DESCRIPTION
Insulation	Indicate Type and Rating
Foundation Exterior Wall Roof & Attic Sound	
Exterior Materials	Describe materials; describe warranties
Roofing Siding Exterior Trim Window	
Floor Finish	Describe materials
Kitchen Bathroom Living & Sleeping Areas	
Appliances	Type, Size and Performance
Kitchen Laundry	

CONSTRUCTION ELEMENT	DESCRIPTION
Cabinetry & Countertops	Describe materials
Kitchen Bathrooms	
Heating System	Describe materials, energy rating and warranties
Heat Hot Water	
Plumbing	Describe materials
Plumbing fixtures, faucets and accessories	
Bath Lavatory, Faucet and Tub	Describe materials
Electrical	Describe materials
Lighting	