

MOH Design Review Checklists

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Project Name: _____
Project Architect: _____
MOH Design Reviewer: _____ (leave blank if not known)
Date: _____
Notes: _____

*****INTERNAL USE ONLY***:**

- ☐ MOH Design Reviewer has reviewed the submission with the Planning Department review team and incorporated any feedback into this document.
- ☐ Once this box is checked, the project may progress to Design Development. Any remaining MOH comments must be addressed in the next submission.

Funding Application & Schematic Design Checklist

MOH Design pursues design excellence with a focus on improving life for the people of the city of Boston, particularly those with the greatest need. Our role is to partner with development teams to: 1. create affordable, equitable, and sustainable housing for residents and newcomers using design principles that contribute to a high quality of life; 2. preserve and enhance the urban fabric of the neighborhoods by building and supporting thriving communities; and 3. ensure that public resources are used to help as many people as possible.

At this stage in the design process, it is important to clearly explain the project's vision, design concept, and challenges, so that MOH Design can review the submission with those in mind and provide feedback to support the goals and navigate the challenges.

Complete and include this checklist and any previous MOH design checklists for this project with your design submission indicating that all requirements are met, all content is included, all project-specific items (if any) have been addressed, and all "Submission items" listed below are included in the submission to MOH. Where there is a Location ("Loc") field to the right of a checklist item, indicate where the checklist item can be found in the drawings, specifications, or other documents. Sign and date this document as indicated at the end of the checklist.

Submission items:

- ☐ A digital copy of the drawings
- ☐ A digital copy of the outline specifications
- ☐ A digital copy of this completed checklist and any previous checklists for this project

Renovations:

For many moderate renovation projects, this section and the following "Codes & Guidelines" section are the only ones that will need to be completed. Other renovation projects that involve gutting the interior, adaptive reuse, additions, or facade changes will need to complete additional sections as applicable.

- ☐ Capital Needs Assessment conducted within 2 years prior to submission
 - ☐ 20-year capital needs report
 - ☐ Sustainability analysis
 - ☐ Rehabilitation strategy



- ☐ Interior and exterior photographs of existing conditions Loc:_____
- ☐ All unique existing and proposed floor plans and elevations Loc:_____
- ☐ Existing and proposed Gross Floor Area Loc:_____

Codes & Guidelines:

- ☐ Preliminary zoning code review describing required and proposed zoning Loc:_____
- ☐ Preliminary review to determine if the project is in a Coast Flood Resilience Overlay District (CFROD) Loc:_____
- ☐ Preliminary building code review Loc:_____
- ☐ Preliminary review of stormwater requirements Loc:_____
- ☐ Preliminary MAAB review Loc:_____
- ☐ Preliminary review of MOH's Design Standards
- ☐ Preliminary review of the Mayor's Office of Arts & Culture's Artist Housing Guidelines if the project is considering incorporating art-related program
(<https://www.boston.gov/arts-and-culture/artist-housing-guidelines>) Loc:_____

Design Principles & Renderings:

- ☐ Concept diagrams illustrating the project's design principles Loc:_____
- ☐ Perspectival views showing the proposal's relationship to the context, abutting buildings, and existing grading Loc:_____

Site Context & Strategy:

- ☐ Site plan Loc:_____
- ☐ Preliminary landscape design Loc:_____
- ☐ Property lines, streets, and adjacent buildings Loc:_____
- ☐ Any site challenges (Developer, Architect, and Surveyor have visited the site and identified any obstructions, encroachments, etc. in person) Loc:_____
- ☐ Proposed usable open space Loc:_____
- ☐ Tree survey indicating tree size, location, and species of all trees on site measuring 3" or greater at 4.5' above the ground per Boston's Public Tree Protection Ordinance Loc:_____
- ☐ Trees to be preserved and trees to be removed Loc:_____
- ☐ Parking (if included) is hidden from the primary street(s) and buffered from abutting neighbors Loc:_____

Building Design:

- ☐ Proposed Gross Floor Area Loc:_____
- ☐ All unique floor plans Loc:_____
 - ☐ Laundry locations Loc:_____
- ☐ Typical building sections Loc:_____

- ☐ Building elevations Loc: _____
 - ☐ No blank areas on the exterior elevations
 - ☐ Windows evenly spaced and coordinated with the floor plans
 - ☐ Unless otherwise approved by MOH, Top of Foundation 3'-0" above grade or at minimum match the typical first floor elevation of surrounding buildings and provide protection against water/snow
 - ☐ Proposed exterior finish materials labeled (no vinyl exterior finish materials e.g. siding, trim, and windows)
- ☐ Enlarged typical exterior wall section Loc: _____
- ☐ Window plan and section details with depth to create shadow lines at the openings Loc: _____

Residential Units:

- ☐ Unit schedule indicating number of bedrooms, number of bathrooms, floor area, and accessibility Loc: _____
 - ☐ Unit sizes reasonably close to MOH's target sizes (+/- approximately 100sf): 500sf for studios, 600sf for 1BR units, 750sf for 2BR units, 1,000sf for 3BR units, and 1,100 for 4BR units
 - ☐ Number of bathrooms in each unit: no more or less than one full bathroom in studios, 1BR, and 2BR units; one full and one half bathroom (neither en suite) or two full bathrooms (if cost effective) in 3BR units; and two full bathrooms (neither en suite) in 4BR units
 - ☐ Unit sizes, amenities, and finishes are comparable between all units, regardless of income level
 - ☐ The number of group 2 accessible units is 10% of the total residential units in the project, rounded up
 - ☐ The number of sensory units is 2% of the total residential units in the project as applicable by code
- ☐ Enlarged unit plans for each unit type labeled with the number of bedrooms, unit floor area, and accessibility (group 1, group 2, or sensory) Loc: _____
 - ☐ Dimensional requirements below labeled on the unit plans
 - ☐ 12' x 10' clear, without obstructions such as columns, mechanical spaces, and closets, in primary bedrooms
 - ☐ 10' x 10' clear, without obstructions such as columns, mechanical spaces, and closets, in secondary bedrooms
 - ☐ 4' x 2' bedroom closets
 - ☐ 3' x 2' coat closets
 - ☐ 2' x 2' linen storage, which could be located inside another closet
 - ☐ 12' x 12' clear but at least 150 sf without obstructions such as columns, mechanical spaces, and closets in living rooms
 - ☐ 10' x 10' clear, without obstructions such as columns, mechanical spaces, and closets, in dining areas
 - ☐ 18" linear counter space, measured along the front edge, on both sides of kitchen sinks and ranges

- ☐ Unit interior layouts with enough detail to show the requirements below
 - ☐ Any project-generated programmatic requirements (e.g. spatial requirements for medical equipment for anticipated residents, space for a shelf at the entrance for residents to place a bag, larger or smaller spaces for occupancy higher/lower than is typical, etc.)
 - ☐ Units located in exterior building corners have living/dining spaces located at the exterior corners
 - ☐ Units with more bedrooms have living/dining areas and kitchens that are at least as large as those in units with fewer bedrooms
 - ☐ For privacy, bedroom and bathroom doors are located off of hallways or in recesses rather than directly off of living/dining areas
 - ☐ Functional furniture layouts maintaining circulation paths are shown for living/dining areas
 - ☐ Living/dining areas have direct access to natural light
 - ☐ General unit circulation is not forced through the kitchen work area (with an exception for studios)
 - ☐ Dishwashers (required in units with at least three bedrooms) are located so that someone can stand at the sink while they load dishes into the dishwasher
 - ☐ Bathroom storage is provided

Loc: _____

Sustainability:

- ☐ LEED Silver “certifiable” at minimum
- ☐ Preliminary description of the Net Zero Emissions and Energy strategy
- ☐ Preliminary description of the Article 37 strategy, if applicable

Loc: _____

Loc: _____

Loc: _____

Systems:

- ☐ Preliminary description of MEP and FP systems

Loc: _____

Finishes & Products:

- ☐ Outline specifications and pricing reflect the MOH finish and product requirements described on the Design Development Checklist and the standalone mock-up described on the Construction Documents & Bid Package Checklist

Bidding:

- ☐ The project will be competitively bid per MOH's bidding policy

Project-specific items:

- ☐ [applicable as indicated in any design conversations prior to submitting for this review phase]

Development Team Signatures

Developer/Owner: _____
Signature Date

Project Architect: _____
Signature Date



Project Name: _____
Project Architect: _____
MOH Design Reviewer: _____ (leave blank if not known)
Date: _____
Notes: _____

*****INTERNAL USE ONLY***:**

- ☐ MOH Design Reviewer has reviewed the submission with the Planning Department review team and incorporated any feedback into this document.
- ☐ Once this box is checked, the project may progress to Construction Documents. Any remaining MOH comments must be addressed in the next submission.

Design Development Checklist

This stage in the design process is focused on systems and technical coordination. It will be important to pay attention to the details of MOH's design requirements as more information is compiled and decisions are made. MOH Design will perform a progress review to ensure a smooth review at the next submission prior to bidding.

Complete and include this checklist and all previous MOH design checklists for this project with your design submission indicating that all baseline requirements are met, all content is included, all project-specific items have been addressed, and all "Submission items" listed below are included in the submission to MOH. Where there is a Location ("Loc") field to the right of a checklist item, indicate where the checklist item can be found in the drawings, specifications, or other documents. Sign and date this document as indicated at the end of the checklist.

Submission items:

- ☐ A digital copy of the drawings
- ☐ A digital copy of the specifications
- ☐ A digital copy of this completed checklist and all previous checklists for this project
- ☐ A request to schedule a meeting to walk MOH Design through the DD documents, using this checklist as an agenda

Content to be included:

- ☐ All content and requirements described on the Schematic Design Checklist
- ☐ Architectural drawings and specifications
 - ☐ Accessible mobility and sensory units are indicated and do not overlap Loc: _____
 - ☐ Garage, if included, has garage doors (no open entrances) Loc: _____
 - ☐ Vent locations on exterior walls are limited, organized, and eliminated from street-facing elevations where possible Loc: _____
 - ☐ Wall assembly and waterproofing details are air and water tight Loc: _____

- ☐ Windows Loc:_____
 - ☐ Flanged windows are specified Loc:_____
 - ☐ Operable window hardware is easy to reach and operate (e.g. not too high or low) Loc:_____
 - ☐ Window guards are included or limiters if they cannot be easily removed or broken off Loc:_____
 - ☐ No security bars Loc:_____
- ☐ Finish schedule Loc:_____
 - ☐ Flooring noted to extend under any built-in cabinets Loc:_____
 - ☐ For homeownership units, wood flooring throughout except at bathrooms and kitchens Loc:_____
 - ☐ Ceramic tile or a sheet product for bathroom flooring Loc:_____
 - ☐ Cabinets that comply with ANSI/KCMA A161.1. and MOH Design Standards Loc:_____
 - ☐ Cabinet finish that is not Thermofoil Loc:_____
 - ☐ Low- or no-VOC paints Loc:_____
 - ☐ Cord-free, child-safe window treatments Loc:_____
- ☐ Plumbing fixture schedule Loc:_____
 - ☐ Residential kitchen sink size maximized within a 30" cabinet Loc:_____
 - ☐ Bathroom tub material and construction meet MOH Design Standards Loc:_____
- ☐ Bathroom accessories schedule and drawings Loc:_____
 - ☐ Two 24" towel bars in all full and half bathrooms spaced/located such that each bar can accommodate bath towels; if wall space is limited, at minimum one can accommodate a bath towel and the other a typically-sized hand towel Loc:_____
 - ☐ One robe hook in each full and half bathroom Loc:_____
 - ☐ Side splashes are included where sinks are adjacent to side walls Loc:_____
- ☐ Appliance schedule Loc:_____
 - ☐ Refrigerators of at least 18 cubic feet Loc:_____
- ☐ Civil drawings with scope finalized that are progressing towards Construction Documents
 - ☐ Proposed utility connection locations Loc:_____
 - ☐ Any existing curb ramps have been confirmed to be accessible per the city's ADA Curb Ramp Inspection Manual, or if not, they are shown to be updated to be accessible Loc:_____
 - ☐ Any missing curb ramps to be added per the city's ADA Curb Ramp Inspection Manual Loc:_____

- Project-specific items:**

- ### Development Team Signatures

Project Architect: _____

Signature *Date*

Project Name: _____

Project Architect: _____

MOH Design Reviewer: _____ (leave blank if not known)

Date: _____

Notes: _____

*****INTERNAL USE ONLY***:**

- ☐ MOH Design Reviewer has reviewed the submission with the Planning Department review team and incorporated any feedback into this document.
- ☐ Once this box is checked, the project has received Conditional Design Approval and may proceed with bidding. Any remaining MOH comments must be addressed in the next submission.

MOH Staff Architect: _____

Signature

Date

Construction Documents & Bid Package Checklist

At this stage in the design process, the submission consists of a nearly-complete set of drawings and specifications and a set of bid package documents explaining the project and bidding process to a set of prospective contractors. MOH Design will be looking to see that the construction documents are complete enough and coordinated enough to be accurately priced, and that the bid package content is all included.

Complete and include this checklist and all previous MOH design checklists for this project with your design submission indicating that all requirements are met, all content is included, all project-specific items have been addressed, and all "Submission items" listed below are included in the submission to MOH. Where there is a Location ("Loc") field to the right of a checklist item, indicate where the checklist item can be found in the drawings, specifications, or other documents. Sign and date this document as indicated at the end of the checklist.

Submission items:

- ☐ A digital copy of the drawings
- ☐ A digital copy of the specifications
- ☐ A digital copy of the bid package content
- ☐ A list of qualified contractors to receive the bid package
- ☐ A digital copy of this completed checklist and all previous checklists for this project

Bid package content that must be included:

- ☐ 95% coordinated architectural, civil, landscape, structural, mechanical, plumbing, electrical, and fire protection drawings and specifications
 - ☐ All requirements described on the Schematic Design and Design Development Checklists



☐ Mock-up drawing that includes all exterior materials, shows all typical conditions, and includes actual building installation details so that installation can be tested as part of the mock-up

Loc: _____

☐ Any alternates, with references to where the detailed drawing or specification content can be found

Loc: _____

☐ Invitation to bid

☐ Instructions to bidders

☐ Contractor selection criteria

☐ Bid forms

☐ A copy of the most current Boston Residents Jobs Policy Pre-Construction Packet

☐ If Section 3 is applicable, a copy of the Section 3 package found on the Mayor's Office of Housing Policies website: <https://www.boston.gov/departments/housing/policies>

☐ Davis Bacon Wage Rates, if applicable

☐ Form of construction contract (typically AIA A101 and AIA A201, plus any known exhibits; should not be a Guaranteed Maximum Price); note that MOH will review the draft construction contract when submitted for Contract Review

☐ A copy of MOH's Contract Proviso

☐ Any other referenced attachments

Project-specific items:

☐ [applicable as indicated in previous design conversations or reviews]

Development Team Signatures

Developer/Owner: _____
Signature Date

Project Architect: _____
Signature Date

Project Name: _____

Project Architect: _____

MOH Design Reviewer: _____(leave blank if not known)

Date: _____

Notes: _____

*****INTERNAL USE ONLY***:**

- ☐ MOH Design Reviewer has reviewed any design changes in the submission with the Planning Department review team and incorporated any feedback into this document.
- ☐ Once this box is checked, the project may move forward with finalizing the Contractor selection. Any remaining MOH comments must be addressed in the next submission.

Construction Pricing & Contractor Selection Checklist

This submission provides MOH Design with documentation of the fair and open bid process and proposed contractor selection. MOH Design will approve the selection of the lowest reasonable bidder. A higher bidder may alternatively be approved if the selection rationale is reasonable.

Complete and include this checklist and all previous MOH design checklists for this project with your submission indicating that all content is included and all "Submission items" items listed below are included in the submission to MOH. Sign and date this document as indicated at the end of the checklist.

Submission items:

- ☐ A digital copy of the bidding documentation described below
- ☐ A digital copy of this completed checklist and all previous checklists for this project

Bidding documentation that must be included:

- ☐ Any additional information provided to contractors during bidding
- ☐ Brief narrative describing the selection rationale and preferred contractor
- ☐ Bid proposal copies
- ☐ Bid proposal side-by-side comparison of trade values
- ☐ Draft G702 application for payment (template)

Pricing documentation:

For projects where the developer is also acting as the contractor or where a contractor has been selected prior to the Construction Documents phase, submit the pricing documentation below in lieu of the bidding documentation described above.

- ☐ Confirmation that the contractor has reviewed the 95% Construction Documents
- ☐ Price estimates received from subs for each trade (at least three for each major trade)
- ☐ A side-by-side comparison of the sub pricing organized by trade and company

- ☐ Buyout rationale for each trade including factors such as lowest reasonable cost, compliance with Section 3 and Boston Residents Jobs Policy requirements, and the subcontractors' experience, quality of work, and capacity

Qualifications & Assumptions:

- ☐ Once a contractor is selected, the development team will incorporate any accepted qualifications and assumptions into the the project's contract documents rather than using a Qualifications & Assumptions document as an exhibit in the construction contract

Development Team Signatures

Developer/Owner: _____
Signature Date

Project Architect: _____
Signature Date

Project Name: _____
Project Architect: _____
MOH Design Reviewer: _____ (leave blank if not known)
Date: _____
Notes: _____

INTERNAL USE ONLY:

- ☐ MOH Design Reviewer has reviewed any design changes in the submission with the Planning Department review team and incorporated any feedback into this document.

Draft Construction Contract Checklist

MOH's Contract Proviso contains MOH's policy content as it applies to the construction contract and construction procedures, and the project team should review these requirements to ensure consistency within the contract documents and exhibits. MOH Design will review this submission for coordination and completeness of content.

Complete and include this checklist and all previous MOH design checklists for this project with your submission indicating that all content is included and all "Submission items" listed below are included in the submission to MOH. Sign and date this document as indicated at the end of the checklist.

Submission items:

- ☐ A digital copy of the construction contract and all exhibits including the drawings and specifications
☐ A digital copy of this completed checklist and all previous checklists for this project

Construction contract content that must be included:

- ☐ Draft construction contract (typically AIA A101 and AIA A201; should not be a Guaranteed Maximum Price)
☐ A copy of MOH's Contract Proviso
☐ A copy of the most current Boston Residents Jobs Policy Pre-Construction Packet
☐ If Section 3 is applicable, a copy of the Section 3 package found on the Mayor's Office of Housing Policies website: <https://www.boston.gov/departments/housing/policies>
☐ Davis Bacon Wage Rates, if applicable
☐ Schedule of Values
☐ If there is a commercial component to the project, the SOV shows both the total and the breakout for residential and commercial
☐ If there are any allowances, they are listed as their own line items on the SOV
☐ Unit prices (for soils, if applicable, at minimum)
☐ Any alternates, with references to where the detailed drawing or specification content can be found
☐ Any allowances (limited to items where the scope may be variable, such as winter conditions, but not weather conditions or climate control)

- ☐ Construction Schedule
- ☐ Final construction drawings and specifications
- ☐ LEED checklist and narrative describing that at minimum Silver certifiable will be achieved
- ☐ Any addenda
- ☐ Any other attachments referenced in the draft contract

Qualifications & Assumptions:

- ☐ Any accepted qualifications and assumptions have been incorporated into the contract documents in lieu of including a list of Qualifications & Assumptions as a contract exhibit

Draft Requisition

- ☐ Draft G702 first application for payment including schedule of values

Development Team Signatures

Developer/Owner: _____
Signature Date

Project Architect: _____
Signature Date

Project Name: _____
Project Architect: _____
MOH Design Reviewer: _____ (leave blank if not known)
Date: _____
Notes: _____

INTERNAL USE ONLY:

- ☐ Once this box is checked, this document confirms MOH's Design Approval for this project.

Closing Design Checklist

This submission is important because it provides documentation of the final construction contract and construction documents. MOH Design staff will use these documents to assign a Construction Specialist to the project who will assist with quality and cost control during construction.

Complete and include this checklist and all previous MOH design checklists for this project with your submission indicating that all "Submission items" listed below are included in the submission to MOH. Sign and date this document as indicated at the end of the checklist.

Submission items:

- ☐ A digital copy of the executed construction contract
- ☐ A digital copy of the drawings listed in the construction contract
- ☐ A digital copy of the specifications listed in the construction contract
- ☐ A digital copy of this completed checklist and all previous checklists for this project

Construction Conditions, Requirements, and Approvals:

- All methods and materials of construction shall meet or exceed industry standards and practices.
- All changes in the scope of work or "value engineering" must be approved by MOH.
- It is assumed that the Developer has reviewed MOH's Design Standards and the plans for the building, site, parking, landscape design, etc. meet or exceed MOH's Design Standards. The Developer is responsible for meeting all requirements for new construction. Failure of MOH to note any deviance or deficiencies from these standards does not relieve the Developer from meeting the requirements.
- Architect and developer shall be present at foundations placement to ensure that top of foundations are a minimum of 3'-0" above grade. Any exception to this requirement must be requested in writing and approved by MOH. Failure to meet this requirement and any cost associated with correcting foundation height problems shall be the responsibility of the developer.
- All exterior materials, windows, trim and colors must be submitted to MOH for approval prior to being purchased/ordered/acquired for the project. MOH will require a minimum of two weeks to review and

approve. For renovations, this is applicable for any exterior materials that are different from the existing materials.

- A mock-up panel shall be erected and approved by MOH and Planning. For renovations, this is applicable for any exterior materials that are different from the existing materials.
- Final location of gas meters and electric meters shall be reviewed and approved by MOH prior to installation.
- Any design changes must be approved by MOH. Failure to obtain MOH approval for these changes may result in the removal of the nonconforming element at the Developer's or Owner's expense.

Development Team Signatures

Developer/Owner: _____
Signature Date

Project Architect: _____
Signature Date

MOH Signatures

MOH staff will sign below once the development team has signed above.

MOH Staff Architect: _____
Signature Date

MOH Assistant Director for
Design Construction & Openspace: _____
Signature Date