January 2024

Request for Proposal

626 Warren Street

James Arthur Jemison
Director/Chief of Planning

Priscilla Rojas
Chair

Kate Bennett
Member

Raheem Shepard
Member

Dr. Theodore C. Landsmark
Member

Teresa Polhemus
Executive Director/Secretary

Michelle Goldberg
Director of Finance/
Chief Procurement Officer

Boston Redevelopment Authority (D/B/A
Boston Planning & Development Agency)
One City Hall Square | Boston, MA 02201

TABLE OF CONTENTS

Introduction & Instructions 2

Property Description 5

Development Objectives and Design Guidelines 8

Public Funding Resources 19

Minimum Submission Requirements 21

Evaluation of Proposals 33

Contract Terms and Conditions 39

Appendix A: Information Resources 43

Appendix B: Required Forms 44

01

Introduction & Instructions

Purpose

The purpose of this Request for Proposals ("RFP") is to solicit proposals for the redevelopment and disposition of vacant land owned by the Boston Redevelopment Authority (“BRA”) doing business as the Boston Planning & Development Agency (“the BPDA”). This land consists of approximately 5,013 square feet of vacant land in the Washington Park Urban Renewal Area, Project No. Mass. R-24, Parcel 0, known as 626 Warren St. in the Grove Hall neighborhood of Boston (the "Property").

The BPDA seeks to convey the Property to allow the development of a residential housing or a mixed-use building containing a commercial first floor and residential above. Proposals will be subject to review and approval by the BPDA including applicable planning and zoning controls, and the development objectives and guidelines described herein.

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

It should be further noted that the BPDA makes no warranty or representations as to title for the Proposed Property Site and recommends that Proponents conduct their own title examinations. Additionally, the BPDA offers the Proposed Project Site in "as is" condition.

Instructions

Accessing the RFP and Addenda

The RFP will be available for download beginning on **January 19st, 2024** on the BPDA Procurement Webpage.

Proponents must register when downloading the RFP to ensure they receive any addendum. Requests for clarification or any questions about the RFP must be submitted by email to:

Jonathan Short
Real Estate Development Officer
Boston Planning & Development Agency (BPDA)
Jonathan.Short@boston.gov

The BPDA will not respond to any requests for clarification or questions concerning the RFP received after **February 19th, 2024**. With any request for clarification or question, proponents must include their name, address, telephone number and email address. An addendum with questions and answers will be emailed to all prospective responders on record and posted on the BPDA website no later than five business days prior to the RFP deadline.

Proponents are advised to view the Property by walking or driving by the parcel location at 626 Warren St. Access to the Property by the public is not available at the present time.

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

Proposal Submissions

There is a fee of Five Hundred Dollars ($500) to submit the RFP, which check should be made payable to the Boston Redevelopment Authority. This required Submission Fee will be applied to the security deposit for the selected proponent and returned for all other proponents.

The Submission Requirements in Section 5 should be submitted electronically on a flash drive.

Proposals must be submitted no later than **Monday, March 19th, 2024** at **12:00 pm (noon)** to:

Teresa Polhemus
Executive Director/Secretary
Boston Planning & Development Agency
12 Channel Street, Suite 901
Boston, MA 02201

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

Proposal Opening

The opening of proposals received by the deadline will take place on **March 19th, 2024 at 01:00 pm** (the "Proposal Opening Time"). Proposals will be stored in a secure location until the Proposal Opening Time. The BPDA will hold a virtual proposal opening by live-streaming and recording the event, with no in-person viewing available.

Proponents can access the live-streamed RFP opening at the following link: https://bit.ly/626WProposalOpening. Attendees must also register in advance of the event using such link. The video of the RFP opening will be posted on the BPDA website no later than **March 19th, 2024 at 05:00 pm**.

02

Property Description

Site Description

The Property consists of approximately 5,013 square feet of vacant land in the Washington Park Urban Renewal Area, Project No. Mass. R-24, Parcel 0. The Property is located at 626 Warren St., which is the southeast corner at the intersection of Warren St. and Sunderland St., in the Grove Hall neighborhood of Boston.

The parcel was originally used for residential housing before 1931. The Property consisted of a two and a half story wood framed building. The housing on the parcel was razed between the years of 1931-1969 and it has remained vacant land since that time. The parcel is located in the heart of the Grove Hall business district and has great access to community shopping and dining at the "Grove Hall Mecca" and other small businesses on the highly active strip. Directly across the street from the parcel is Freedom House Inc. which is an organization providing support to the education of black, brown, and immigrant students in the Roxbury neighborhood.

Lastly, the MBTA transit line for the 14, 19, 23, and 28 bus line stop in front of the parcel on Warren St thus providing access to two of the three free bus lines in the city.

Planning and Zoning Context

The Property is in the Roxbury zoning district and is sub-zoned for Multi-Family Residential (MFR). The MFR zoning code can be found in "Article 50 –

Tables/Table F – Roxbury Neighborhood District – Residential Sub districts – Dimensional Regulations/MFR and MFR/LS" For details on zoning, please consult: ARTICLE 50 - TABLES | Redevelopment Authority | Boston, MA | Municode Library

The Property is located within a Boulevard Planning District ("BPD") with overlays to underlying sub-districts as noted in Section 50-37. Within BPDs, special design review requirements and design guidelines apply as set forth in Subsection 50-38.1, Section 50-39, and Section 50-40; and screening and buffering requirements apply as set forth in Section 50-41. The Code and maps can be found at www.bostonplans.org/zoning. Zoning relief will be required for retail development.

Aerial view of the Property

Title

Proponents are fully responsible for conducting their own title examination to ensure that the title to the Property is clear. To the best of the BPDA's knowledge, the BPDA is the owner of the Property and the title is not encumbered. However, the BPDA makes no representations or warranties as to the accuracy of any title examinations it may have conducted and recommends that proponents conduct their own title examinations. The BPDA further recommends that proponents commission their own boundary surveys to determine the existence of any encroachments that could exist.

03

Development Objectives and Design Guidelines

Development Objectives

Through the BPDA's community engagement process for this parcel, the Roxbury community made it clear that the ideal development for this parcel would be mixed-use development consisting of retail space on the first floor and affordable homeownership above. However, development consisting of a mixed use development would require the acquisition of at least of the abutter parcels in order for there to be enough space to accommodate the building. Therefore the development objectives in this RFP allows for proponents to submit proposals for a solely residential development if the 628 Warren Street parcel is the only parcel being developed. If the proponent has acquired one of the parcels abutting 628 Warren there are required to develop a mixed-use building for the site.

1. Residential Redevelopment

Proposals for solely for residential development are required to redevelop the Property in a manner consistent with the following goals:

- Housing affordability: This project is an opportunity to provide affordable homeownership or rental uses to a community hit hard by increasing housing cost. Consistent with the goals identified in previous community meetings, the successful proponent will be

responsible for securing the resources necessary to support affordable rental or homeownership opportunities in the development. Preference will be given to proposals that provide a residential development consisting 1/3 of the units offered at 70% AMI, 1/3 of units offered at 100% AMI, and 1/3 of the units offered at Market Rate.

- Housing Models: community members have expressed interest in both rental and homeownership family-sized units, with a preference for proposals that maximize the number of homeownership units large enough to house families. Preference will be given to proposals that provide homeownership units with two to four bedrooms.

- Parking: The development may include off-street accessory parking as part of the proposed project. Warren St. and Sunderland St. are both at capacity for on street parking. Often street parking spaces would provide limit the impact of bring new residents into a densely developed area. The maximum parking ratio that can be proposed for this site is a 1:1 parking ratio.

- Green Space: Access to green space for residential and public use is priority for the BPDA. Proposal should include grassy areas and gardens for residents to enjoy. Further, the proposed project should seek to maintain the mature trees on the parcel. Maintaining the tree canopy has been an objective of the community and City of Boston.

2. Mixed Use Redevelopment

If a proponent has acquired or controls one or both of the abutting parcels they are required to propose a mixed-used development in their proposals. Proposals for mixed-use redevelopment are required to redevelop the Property in a manner consistent with the goals for residential development above and the goals below:

- Consistency with Area Planning History: The Property falls within the catchment area of the Roxbury Strategic Master Plan. Proposal should capture and address the current needs of the community for

affordable housing, community development, and wealth creation through homeownership.

- Ground Floor Space: The Property should be developed in a manner that benefits the greater Roxbury neighborhood by investing in the public realm, particularly through ground-floor activation on the site. It was determined through the community process that proposals should prioritize uses such as neighborhood services, retail, restaurants, and community spaces within the ground floor of any development. The community has expressed a preference for an activated ground floor use such as a café or sit down restaurant.

- Roof-Top Planting Opportunities: In order to create usable and productive open spaces and capitalize on all sun-exposed rooftop spaces, the project should include urban farming or community gardening strategies in these areas and for the building residents. Green roofs are helpful with stormwater collection, abating urban heat island effect to the direct benefit of the building operational costs, as well as in providing cooling benefits to the neighborhood, at large.

City Funds and Land Requirements

All housing developments utilizing City funds or City land must comply with the City's Affirmative Marketing Program requirements. Proposals that include 1 to 4 units of housing (small housing developments) must also comply as follows:

- Proponents of small housing developments using City funds or City Land must advertise in a neighborhood newspaper or daily general and list on Metrolist.

- Owner-occupants of City-funded projects with fewer than five units must be informed of the services provided by Metrolist and encouraged to list vacancies for rental units through the Metrolist listing form.

DND will notify the Boston Fair Housing Commission of these projects by sending the Affirmative Marketing Program a copy of the project approval letter to affirmativemarketing@boston.gov.

Selection Preference for Individuals and Families Displaced by Washington Park Urban Renewals

In remembrance and understanding of the harm caused by Urban Renewal, families and individuals previously displaced from the Washington Park Urban Renewal Project Area due to past clearance and redevelopment activity of the Boston Redevelopment Authority ("Displacees"), must be given preference during the affordable housing lottery and market rate lease up and sales. The successful proponent will be required to include additional marketing plans for this program as a part of their Affirmative Fair Housing Marketing Plan. For market rate units, Displacees must be able to pay rents or prices equal to that charged to other families for similar or comparable market rate dwelling units built as part of the same redevelopment. Qualifying Displacees will receive preference in the income-restricted lottery for units designated as having such restrictions. The Proponent agrees to make the requirements outlined in this section a term of any conveyance of the Leased or Disposed Property.

Development without Displacement

Proposals must describe measures they will take to avoid exclusionary displacement of existing residents of the Roxbury neighborhood. As part of their submission, proponents must include a narrative describing how their proposal supports the community's goal of "development without displacement." More details on the requirements of the development without displacement narrative can be found below in Section 06 - Submission Requirements.

Proponents are encouraged to use the Housing and Household Composition Community Profile tool to tailor proposed affordability levels, bedroom composition, etc. to the specific needs of the neighborhood.

Equitable Mobility

The new development must be oriented and programmed strategically to make easy connections to/through the site and to nearby community amenities and transportation nodes such as Grove Hall Mecca, existing bus stops, landmarks, and public parks like Franklin Park. The new development should enhance connectivity, site access, and circulation prioritizing pedestrians and people that use mobility devices.

Go Boston 2030 is a plan that envisions a city where all residents have better and more equitable travel choices. We are working to build efficient transportation networks that create economic opportunity. We'll also take much needed steps to prepare for climate change. Since the plan was put in place it is expected that all dispositions that multiunit residential development will take the guidelines under consideration. Proponents' proposals should have the right-size parking count that is in alignment with the city's Go Boston 2030 goals of reducing car dependency and complying with the city's Maximum Parking Ratio for this area, while balancing the community's need for parking for low-income families.

Bike Support

The proposed development should provide safe bike connectivity and must provide secure on-site bike storage for all users and residents, in compliance with the Boston Transportation Department's Bicycle Parking Guidelines. The proponent must comply with the requirements for short and long-term secure bike parking and contribute to the city's bike-share network.

Loading

Entrances to off-street loading areas (loading docks, waste pickup, and other areas often required for the efficient operation and maintenance of a building site) should be no larger than necessary to minimize the impact on the public realm and enhance safety for all roadway users.

Service loading and unloading facilities should be screened and buffered from view. Service loading and unloading facilities should be designed to

prevent truck back-up maneuvers in the public right-of-way and that conflict with pedestrians.

Garage doors and loading area entrances that interrupt a continuous building facade reduce the opportunity for street-level retail and other active ground floor uses, as a result curb cuts should be minimized as much as possible in the overall Project.

Service loading and unloading facilities should be strategically placed to minimize impact. The BPDA encourages proponents to strive for only one vehicular entrance and one associated curb cut for a building. For any mixed use development, the proponent can only use the existing curb cuts on abutting parcels. For a residential development, new curb cuts will only be allowed on Sunderland Street. These singular access point will ideally allow access for vehicles loading and unloading, as well as to parking areas for passenger vehicles.

If designated, the Proponent must perform an analysis regarding the anticipated size and relative frequency of each loading vehicle intended to access the site. The Proponent must provide turn radius diagrams to the BPDA as well. Wherever feasible, the loading drive access point(s) should be on the side or at the rear of the site, and preferably connecting to a side street or alleyway to maintain an uninterrupted sidewalk on the primary street. Coordination must occur with BPDA and other city agencies to determine the appropriate placement of access drives in relation to intersections.

04

Design Guidelines

The urban design guidelines are set forth herein to ensure that development of the Property preserves and respects the general scale of the surrounding area. Proponents are encouraged to present exceptional designs and include quality and creative contributions to the public realm. The following guidelines are for both residential and mixed-use development. Key urban design guidelines are as follows:

1. The proposed design should enhance and complement the architectural characteristics of the area by carefully taking into consideration the existing building types, footprints, street frontages, height and architectural styles of the Grove Hall Business District. Architectural detailing should be executed using materials of the highest quality and be compatible with existing buildings in the business district.

2. The new construction on the Property should be innovatively designed and programmed to activate its frontage and reinforce the streetscape with thoughtful contributions to the public realm. The Multi-family Residential zoning sub-district limits the building height to 45feet and 4 stories. The proposed development should be compatible with existing building heights in the area and the design should recognize the visually prominent location of the Property.

3. Landscaping site improvements should include the use of loam and seed on all non-paved areas of the Property. New trees, shrubs and other plantings are strongly encouraged at both the property lines and

within the Property. Any exposed concrete foundation should be screened by landscaping treatment.

4. Existing mature trees over eight (8) inch caliper should be pruned and protected. New trees should be at least three and one-half inch (3-l/2) caliper.

5. Fencing type and height should be designed and selected in order to reflect location and function properly.

6. Disposal areas, accessory storage areas or structures and dumpsters should be placed at the rear of the Property and appropriately screened from view.

7. The selected proponent must repair and/or replace, as appropriate, any alteration or damage of existing sidewalks, paving, lights and street trees that occurs during construction.

8. Due to the planned redevelopment of the Warren Street bus lines the proponent must plan to work with the Massachusetts Bay Transportation Authority to provide space for a new bus stop shelter to be placed on the property.

Resilient Development and Green Building Design Guidelines

Proposed projects should support the community's and City of Boston's Carbon Free, Climate Resilient, and Healthy Community goals including the 2019 Carbon Free Boston report and DND's Zero Emission Buildings guidebook for affordable housing projects. See Article 37 Green Building and Climate Resiliency Guidelines for additional information.

Green buildings support a comprehensive approach to addressing the adverse impacts of the built environment and to promoting human health and the wellbeing of our communities. **Accordingly, proposed projects are strongly encouraged to include the following items. Proponents should describe in their design narratives how each consideration will be incorporated into their proposed project.**

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

2. **Integrated Project Planning**: Include a LEED Accredited Professional(s) with the appropriate specialty(s) and, for residential uses, a LEED Homes Rater. Proposals should describe the team's approach to integrated project planning, including the use of preliminary and whole building energy modeling.

3. **Site Development:** Employ strategies to eliminate construction phase environmental impacts including off-site tracking of soils and construction debris. Site designs should include strategies to reduce heat island and storm water runoff impacts, and promote area natural habitats.

4. **Connectivity:** Promote and support non-personal vehicle means of travel including walking and bicycling, public transit, and reduced personal vehicle travel. Strategies should include easily accessible, secure and enclosed bicycle storage space (see Boston Bicycle Parking Guidelines), shared parking, transit pass programs, and car and bike share programs. Other elements that promote connectivity include open space courtyards with landscaping and seating, desire-line footpaths, public viewing areas, and communal gardening spaces.

5. **Water Efficiency:** Minimize water use and reuse storm and wastewater. Strategies should include low flow plumbing fixtures; rainwater harvesting for gardens and building systems and ground water recharging; and drought resistant planting and non-potable water irrigation.

6. **Energy Efficiency:** Minimize all energy uses with a priority on passive building strategies. Small residential buildings should target a HERS Index of 40 (based on a current Commonwealth of Massachusetts

Stretch Code of 55). Large residential/commercial buildings should target modeled performance 25% below the current Commonwealth of Massachusetts Stretch Code.

a. Passive building strategies should include building orientation and massing; high performance building envelopes that are airtight, well insulated, have appropriate window to wall ratios, and include high efficiency windows and doors; and natural ventilation and daylighting.

b. Active building strategies should include Energy Star high efficiency appliances and equipment, dedicated outside air systems with energy recovery ventilation, air and ground source heat pump systems for building thermal conditioning and hot water systems, and high efficiency LED lighting fixtures and advanced lighting control systems and technologies.

7. **Renewable, Clean Energy Sources and Storage:** Include and maximize the potential for onsite solar PV. Additionally, clean energy (e.g. combined heat and power), electric battery, and thermal energy storage systems should be considered.

8. **Energy Efficiency Incentives:** Fully utilize any available federal, state, and utility energy efficiency and renewable energy programs.

9. **Indoor Environmental Quality:** Provide high quality healthy indoor environments by utilizing strategies that include extended roof overhangs, proper ground surface drainage and non-paper gypsum board in moist areas; passive and active fresh air systems and active ventilation at moisture and combustion sources; building products and construction materials that are be free of VOC's, toxins, hazardous chemicals, pollutants and other contaminants; entryway walk-off mats and smooth floors that reduce the presence of asthma triggers, allergens and respiratory irritants; and easily cleaned and maintained finishes.

10. **Materials Selection:** Include sustainably harvested and responsibly processed materials. Strategies should include products made with recycled and reclaimed materials; materials and products from responsibly harvested and rapidly renewable sources; and locally sourced products and materials (within 500 miles).

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

05

Public Funding Resources

Proponents may wish to pursue the following public sources of funding:

Community Development Financial Institutions

- Local Initiative Support Corporation, "LISC," Margaret Keaveny mkeaveny@lisc.org
- Local Enterprise Assistance Corporation, "LEAF," Josh Glickenhaus jglickenhaus@leaffund.org
- Massachusetts Housing Investment Corporation, "MHIC," Deb Favreau favreau@mhic.com
- Dorchester Bay Economic Development Corporation, Neighborhood Business Loans (link)

City Agencies

- Mayor's Office of Housing, https://www.boston.gov/departments/housing, Christine Okeefe christine.okeefe@boston.gov
- Boston Housing Authority, Boston Housing Authority Faircloth Subsidy, Review the Faircloth-To-RAD Requirements for further information.

State and Quasi-State Agencies

- Summary of state real estate development-oriented assistance programs (link)
- MassDevelopment, David Bancroft, dbancroft@massdevelopment.com
- Mass. Growth Capital Corporation (link)

Other Business-oriented

- Foundation for Business Equity, (link) Glynn Lloyd, g.lloyd@FBEguity.org
- Boston Local Development Corporation, (link) Bill Nickerson, bill.nickerson@boston.gov
- Jamaica Plain Neighborhood Development Corporation, Small Business Services (link)

06

Minimum Submission Requirements

Proposals must include the Submission Requirements set forth in this section. These Submission Requirements must also be submitted in accordance with the instructions set forth in Section 01 of this RFP. Omission of any of the required information may lead to a determination that the proposal is non-responsive.

Development Submission

The following information shall be submitted in the written Development Submission. This is an opportunity for the proponent to convey how the proposed development will be a highly beneficial use of the Property that will be cost-effective, completed in a timely fashion, and provide options superior to those currently available to the community.

Please provide the following items as listed:

1. **Introduction/Development Team:**

    a. Provide a letter of interest signed by the principal(s) of the proponent. This letter should introduce the development team and organization structure, including the developer, attorney, architect, contractor, marketing agent/broker, management company, and any other consultants for the proposed development. For joint ventures, the proponent shall provide a

copy of the Partnership Agreement detailing the authority and participation of all parties.

b. Include all contact information for team principals, including full address, phone numbers and e-mail addresses.

c. Developer Qualifications, Experience and References: A narrative supported by relevant data regarding qualifications and past experience with similar projects. Proponents must provide detailed descriptions of previous relevant work completed and the results or outcome of that work. Proponents shall also furnish three (3) current references including: names, addresses, e-mail addresses, phone numbers, and principal contacts in which the Proponent has provided comparable services. Include resumes for key personnel of the development team, including lead designers. Please emphasize past experience with mixed use facilities and the team's design portfolio examples.

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

e. The proponent shall provide a listing/description of any lawsuits brought against the proponent or any principals of the proponent in courts situated within the United States within the past five years.

2. Development Concept:

a. Describe the proposed development's uses and the total square footage of each use, along with a description of how the proposed uses and design will satisfy the Development Objectives of this RFP.

b. Describe how the proposed development will benefit the surrounding community.

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

d. Proposals must include a narrative of the community benefits supported by the development, including any benefits to the local community that are above those generated by the development itself.

3. **Development Plan:**

a. Describe how the development concept will be implemented. The description should include a detailed timeline that lists all pre-development tasks from the date of Tentative Designation by the BPDA through loan closing and construction commencement. It should also indicate the start and end dates for each pre-development task.

b. Provide a summary of the plan for the operation of the proposed development upon development completion. Include the anticipated annual costs, as well as the planned sources of funding.

c. Provide an outline of all required regulatory approvals and a projected timeline to obtain these approvals. The proponent should note the currently applicable zoning districts, overlays and provisions that govern development of the Property and discuss the type of zoning amendments or variances that are required for the proposed development, or indicate if the proposed development can be constructed "as-of-right" under existing zoning.

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

5. **Diversity and Inclusion Plan**. The City of Boston and the BPDA are strongly committed to ensuring that the disposition of BPDA properties provide opportunities for diversity and inclusion, wealth-creation, and workforce participation for businesses and individuals who have historically been underrepresented in real estate development.

   Proponents must submit a Diversity and Inclusion Plan which reflects the extent to which the proponent plans to include significant and impactful economic participation, employment, and management roles by people of color, women, certified Minority-Owned Businesses ("MBEs"), and Women-Owned Business Enterprises ("WBEs") (collectively referred to as 'M/WBEs") on this project.

   MBEs and WBEs must have received or have pending applications for certification under the State of Massachusetts Supplier Diversity Office or City of Boston. Firms with pending certification may be included in a proposal on the condition that certification is granted by the start of work or the firm is replaced by a firm certified under the State of Massachusetts Supplier Diversity Office or City of Boston. All replacements or substitutions must be approved by the BPDA.

   The Diversity and Inclusion Plan should address all phases of development, including but not limited to:

   - pre-development (ex. development entity, ownership, equity and debt investment, design, engineering, legal, other consultants);
   - construction (ex. general contractor, sub-contractor, trades, workers performing construction, suppliers, engineering and other professional services); and
   - ongoing operations (ex. building tenants, facilities management, contracted services).

The Diversity and Inclusion Plan should include the following good faith measures relating to M/WBE participation:

- Providing information as to the M/WBE-owned firms participating in the development, the nature of their participation in the particular phase(s) of the development, and the extent to which such M/WBE involvement is committed as of the date of proposal submission. Where possible proponents should include detailed information on the M/WBE role, responsibility and total contract value in the development.

- The proponent's strategy for supplier diversity and M/WBE outreach, including its goals and its good faith efforts the proponent may propose for M/WBE participation. Proposals should indicate what strategies will be pursued, or are being pursued, to identify M/WBE participation, including outreach and identification activities to timely inform the M/WBE community of upcoming opportunities.

- Strategies which support sustainable capacity development in M/WBE firms, such as mentor-protégé relationships or joint ventures. These partnerships for capacity development should describe the impact of participating in this project on the M/WBE firm's future business growth and opportunities.

- The proponent's strategy to support workforce training/capacity building for populations underrepresented in the construction trades as well as other fields of real estate development.

- A description of the Development Team's prior experience and track record undertaking similar programs at other locations including examples deployed on private property.

The Diversity and Inclusion Plan should discuss why it is specific, realistic, executable, and impactful. The Diversity and Inclusion Plan

evaluation criterion shall comprise 25% of the BPDA's comparative evaluation of each proposal submitted

6. **Development without Displacement Plan**. Proponents must include a narrative explaining how their proposal supports the community's goal of "development without displacement." Specifically, this narrative should address how the proposed development will assist the current residents of Roxbury to remain in their community in the future, afford housing, and find pathways to economic opportunity. At a minimum this narrative should include the affordable housing production goals of the project and articulate how the proposed rents meet the needs of Roxbury residents, as well as other local residents. This discussion should also identify how proposed sizes of units meet the needs of community members, taking into consideration that community members have suggested that larger unit sizes of two, three and four bedrooms are needed for local families, while smaller unit sizes may be appropriate for seniors.

The development team's track record for supporting projects and policies which promote development without displacement should also be included. Note that while the Property being disposed of by the BPDA in this RFP is vacant, proponents including any abutting or nearby properties in their proposals should disclose if any direct evictions are contemplated on these properties.

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

8. **Additional Data**. Any other relevant information the proponent believes is essential to the evaluation of the proposal (i.e., aesthetic designs, environmental sustainability goals, property management plans, ideas for selection of subcontractors, methods of obtaining community engagement, etc.).

Design Submission

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

Design Narrative

1. A written and graphic description explaining how the proposed design will meet the Development Objectives and Design Guidelines of this RFP. These documents must describe and illustrate all program elements and the organization of these spaces within the building.

2. A description and illustration of the bicycle parking, automobile parking and transportation and circulation plan for the proposed development based on the Urban Design Guidelines set forth in this RFP.

3. A preliminary zoning analysis

4. A written and graphic description of how the proposed development will satisfy the Resilient Development and Green Building guidelines of this RFP that includes:

    a. The team's approach to integrated project design and delivery;

    b. Zero Carbon Building Assessment including performance targets for energy use and carbon emissions (or Home Energy Rating System ("HERS") index score);

    c. Preliminary LEED Checklist;

    d. Preliminary Boston Climate Resiliency Checklist reflecting proposed outcomes;

    e. Key resilient development; and

    f. Green building strategies

Design Drawings

1. A neighborhood plan (at appropriate scale, e.g.1"=40') as well as a site plan (1” = 20’) showing how the proposed design will fit within the immediate context of existing buildings and within the larger context of the neighborhood. The purpose of the neighborhood plan is to illustrate how the project meets the Design Guidelines set forth in this RFP. Therefore, the proposed building(s), existing building footprints, lot lines, streets, street names and any other relevant contextual information should be included in the neighborhood plan. The purpose of the site plan is to illustrate the building footprint and its placement on the site, the general building organization, open space, landscape elements, driveways, curb cuts, fencing, walkways and streetscape improvements. The neighborhood plan and site plan should coordinate through the inclusion of renderings, perspective drawings and aerial views of the project.

2. Schematic floor plans (1/8" = 1'-0" scale) showing the basement, ground floor, upper floor(s), and roof, including room dimensions, square footage of rooms, overall building dimensions, and the gross square footage of the building.

3. Building Elevations (1/8" = 1'-0" scale) showing all sides of the proposed building, architectural details, building height and notations of proposed materials.

4. Street elevations (at appropriate scale, e.g. 1/8"=1'-0") showing the relationships of the proposed building to the massing, building height and architectural style of adjacent buildings. This street context drawing may combine drawings with photographs in any manner that clearly depicts the relationship of the new building to existing buildings.

5. Perspective drawings drawn at eye-level and aerial views that show the project in the context of the surrounding area.

Financial Submission

The Financial Submission should include, but not be limited to the information listed below.

1. Financial Documents:

    a. Financial Statements or Annual Reports for the three most recent fiscal years;

    b. Interim Financial Statements for Proponent (if applicable, most recent month ending within thirty days);

    c. Personal Financial Statement of principal owners of Proponent (upon request);

    d. Financial Statements of any tenants, lessees and occupants intended to occupy the premises (if applicable); and financing commitments or project specific letters of interest from recognized funding sources.

2. **Financial Submission Workbook:** Using the template provided in Appendix B, provide the following information:

    a. **Sheet 1**: Development Program

    b. **Sheet 2: Development Cost Pro Forma.** All costs identified must be supported by realistic funding sources and uses must equal sources.

    c. **Sheet 3:** Stabilized Operating Pro Forma.

    d. **Sheet 4:** Fifteen Year Operating Pro-Forma

3. **One-Stop**: If the sources of funds for the proposed project include City or State subsidies for affordable housing, the financial submission must include a One-Stop Application that can be downloaded from www.mhic.com (see tab "One Stop Center," then "Downloads," then "OneStop2000.") The One Stop should only include financial

information for the affordable housing portion of the proposed project. Sources must equal uses. If applicable, land costs for privately owned parcels that would be included in the proposed development must be identified in the "Acquisition" line. At the time of application, the proponent must have an accepted offer to purchase, an executed purchase and sale agreement or a deed and the price must be supported by an as-is appraisal for that property.

4. **Financial Narrative:** In addition to the pro forma spreadsheets, the Proposal must include a narrative which describes the following:

    a. An implementation plan for the proposed development, including a development schedule with key milestone dates and a projected occupancy date. The development schedule should outline the required regulatory approvals for the proposed development and the anticipated timing for obtaining such approvals;

    b. All contingencies, specifying whether for hard costs, soft costs or total costs, design or construction, financing or other critical components of the total project costs;

    c. Sources of debt and equity for the total project cost;

    d. All assumptions regarding financing terms on acquisitions, pre-development, construction, and permanent loans;

    e. Any other project related expense not included in the above categories; and

    f. Calculation of total project costs.

5. **Price Proposal:** Using the price proposal form included in Appendix B, clearly outline the financial offer to the BPDA by indicating the amount of your offer per gross square foot of the development constructed. This form must be signed by the authorized principal.

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

7. Financing:

    a. Developer Equity: The proponent must demonstrate the availability of financial resources to fund working capital and equity requirements for the proposed project. Acceptable documentation includes current bank statements, brokerage statements, and/or audited financial statements; and

    b. Financing Commitments: Letters of interest and/or commitment from debt and equity sources for construction and permanent financing. Letters should include a term sheet that provides the Loan-To-Value ("LTV") and Debt Service Coverage ("DSC") requirements, fees, term, amortization, etc.

8. Applicants may be required to provide formation documents at the BPDA's request, such as: Articles of Incorporation; Certificate of Status/Good Standing; Certificate of Incorporation; By-laws; Certificate of Organization (LLC 1, or LLP 1 in some states, if applicable); Borrowing Resolution; Operating/Partnership Agreement (if LLC or LLP); and Certificate of Registration as a Foreign Entity (if applicable).

Disclosures

Proponents must submit the following forms, which are referred to as the "Disclosures" (Appendix B):

1. Disclosure Statement for Transaction with a Public Agency Concerning Real Property

2. BPDA & City of Boston Disclosure Statement

3. Certificate of Tax, Employment Security and Contract Compliance

4. HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility (Only required for property in an Urban Renewal Area with a housing use)

Submission Checklist

Proponents must submit the Submission Checklist (Appendix B).

07

Evaluation of Proposals

Description of Evaluation Process

All proposals meeting the Minimum Threshold Requirements will be reviewed by the Evaluation Committee. Final selection will be based upon an evaluation and analysis of the information and materials required under this RFP. Tentative Designation will be recommended for the responsive and responsible proponent who submits the most advantageous proposal, taking into consideration the financial offer and all other comparative evaluation criteria set forth in this RFP. If this RFP results in Tentative Designation, the BPDA will award Tentative Designation status to only one developer.

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

As part of the comparative evaluation process, the BPDA further reserves the right to interview proponents at a date and time to be scheduled and held at BPDA offices. Should a determination be made that interviews are necessary, the Evaluation Committee shall interview all proponents meeting Minimum Threshold Requirements. If the Evaluation Committee chooses to hold interviews, the interviews will be one criterion within the comparative

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

Rule for Award

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

Minimum Threshold Requirements

All proposals must meet the following minimum threshold criteria:

1. Only proposals that are received by the date, time, and at the location indicated in Section 1 of this RFP will be accepted.
2. Proposals must include all documentation specified under Submission Requirements.
3. The proponent shall have the necessary finances in place to pursue this project.
4. The proponent must demonstrate that it has adequate insurance.
5. The proponent shall comply with the Conflict of Interest Law.

Comparative Evaluation Criteria

The BPDA will use the following Comparative Evaluation Criteria to compare the merits of all qualifying proposals. For each evaluation criterion set forth below, the BPDA's selection committee will assign a rating of Highly Advantageous, Advantageous or Not Advantageous. The selection committee will then assign a composite rating of Highly Advantageous, Advantageous or Not Advantageous for each proposal it evaluates. The composite rating will weight the Diversity and Inclusion evaluation criterion at 25%. The other evaluation criteria comprising the remaining 75% will be weighted equally.

1. Demonstration of the Ability to Execute the Project as Presented:

The purpose of this criterion is to assess the extent to which proposals are able to demonstrate organization and qualifications of the development team to deliver a quality project that is able to be developed as presented, based upon the team's professional credentials and experience completing projects similar to the one proposed. The criterion is also designed to evaluate the proponent's ability to adhere to the proposed delivery schedule.

Proposals that most thoroughly and most effectively address all of the above requirements compared with other proposals submitted will be ranked as **Highly Advantageous.**

Proposals that address the above requirements, but do not address these requirements as effectively and thoroughly as other submitted proposals, will be ranked as **Advantageous.**

Proposals that do not offer sufficient detail or do not address all of the above requirements, and/or do not demonstrate experience with other projects similar to the one they propose, will be ranked as **Not Advantageous.**

2. Exceptional Design, Development Program and Public Realm Contribution:

This criterion assesses the extent to which the proposed project's development program, vision and aspirations as presented: a) is detailed and realistic in addressing the RFP's Development Objectives for the Property; b) consistent with applicable zoning and regulatory restrictions; c) contributes to the economy and public realm; d) provides quality, creative, innovative and contextual designs that achieve all of the BPDA's Development Objectives and Guidelines; and e) includes the use of high quality, durable materials.

Proposals that most thoroughly and most effectively address the above requirements by presenting a more compelling vision for a well-developed project compared with other proposals submitted, will be ranked as **Highly Advantageous.**

Proposals that address the above requirements, but are not as effective and thorough in covering all aspects of the considerations above as other submitted proposals, will be ranked as **Advantageous.**

Proposals that do not offer sufficient detail or do not address all of the above requirements, will be ranked as **Not Advantageous.**

3. Strength of Financial Offer and Finance Plan:

This criterion will examine the total value of the proposed full-term rent payments to the BPDA. It will evaluate this figure in the context of the relative strength of the proponent's equity, debt and capital sources and the overall viability of the plan to finance the project. The proponent's experience in financing projects of a similar complexity will also be taken into consideration.

Proposals with Financial Submissions that offer: the strongest financial offer of proposed full-term rent payments to the BPDA compared to other proposals received; well-substantiated viability of the overall financing plan; and include development teams with experience in financing similar projects of a similar complexity will be ranked as **Highly Advantageous.**

Proposals with Financial Submissions offering competitive proposed full-term rent payments to the BPDA similar to or equal to other proposals, taking into consideration the viability of the overall financing plan and the development team's experience in financing similar projects, will be ranked as **Advantageous.**

Proposals with Financial Submissions that offer: proposed full-term rent payments to the BPDA that are less competitive than other proposals; provide financing plans that are less feasible than other projects; include development teams that do not have experience financing similar projects; and/or do not meet the requirements described above will be ranked as **Not Advantageous.**

4. Diversity and Inclusion Plan:

This criterion evaluates the comprehensiveness of the proponent's Diversity and Inclusion Plan for creating increased opportunities for people of color, women, and M/WBEs to participate in the development of the Property, including specific strategies to achieve maximum participation by people of color, women, and M/WBEs in pre-development, construction, and operations. The Diversity and Inclusion Plan should be specific, realistic and executable.

This criterion shall comprise 25% of the BPDA's comparative evaluation of each proposal submitted.

Proposals that provide a Diversity and Inclusion Plan for a project of the type proposed that includes all of the elements described above and is clearly superior to that of all other proposals will be ranked as **Highly Advantageous.**

Proposals that provide a Diversity and Inclusion Plan for a project of the type proposed that includes all of the elements described above and is similar or equal to other submitted proposals will be ranked as **Advantageous.**

Proposals that do not provide a detailed Diversity and Inclusion Plan for a project of the type proposed, and/or it does not include the elements described above or propose a Diversity and Inclusion Plan that is inferior to other submitted proposals will be ranked as **Not Advantageous.**

5. Development Without Displacement Plan

This is an evaluation of the relative strength of the proposal for achieving the objective of development without displacement as articulated by the community. Proposals will be considered and rated based on the comprehensiveness of the Proponent's planned approach to assisting the current residents of Roxbury to remain in their community in the future, afford housing, and find pathways to economic opportunity.

Proposals that provide a comprehensive, highly reasonable, and achievable development without displacement strategy for a project of the type

proposed that is clearly superior to that of all other proposals shall be ranked **Highly Advantageous.**

Proposals that provide a reasonable and justifiable development without displacement strategy for a project of the type proposed that is similar or equal to all other submitted proposals shall be ranked **Advantageous**.

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

08

Contract Terms and Conditions

Price Proposal

The full and fair market value of the Property, as determined through a valuation done by a professional appraiser(s) licensed by the Commonwealth of Massachusetts, was determined to be $535,000 for three-story family building. Since price is a factor in this RFP, proponents are strongly encouraged to submit price proposals equaling, or in excess of $535,000. However, the BPDA may consider an offer price below the asking price if the proponent can demonstrate clear and quantifiable public value in a proposal that includes an offer for less than the appraised value.

Proponent Designation and Conveyance

Upon a satisfactory review of all proposals submitted to the BPDA pursuant to this RFP, as well as the completion of any subsequent applicable reviews resulting therefrom and relating thereto, BPDA will recommend Tentative Designation for the proponent whose proposal best meets the objectives set forth herein. BPDA staff will request BPDA Board approval to award a proponent Tentative Designation status. The Tentative Designation status of such proponent (the "selected proponent") shall be for a nine-month period. During the Tentative Designation period, the selected proponent shall accomplish, among other things, the following in order to be considered for Final Designation status:

- Provide evidence of necessary financing and equity;

- Obtain approval of its development schedule including submittal of development plans;
- BPDA Design Review;
- Article 37 Initial Filing Compliance (if appropriate);
- Completion of the Article 80 process with the BPDA (if appropriate);
- Issuance of all required building permits; and
- Negotiated terms and conditions of a ground lease.

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

Additional Terms and Conditions

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

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

- at least 12 percent of the total work hours of journey people and twelve percent of the total work hours of apprentices in each trade must go to women.

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

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

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

Signage During Construction. During the construction of the Property, the proponent shall provide and display, at their expense, appropriate signage as required by the BPDA. Such signage must be approved by the BPDA prior to installation. The proponent should also provide signage that describes the project, including the number of affordable units, if applicable.

Compliance with City of Boston Eviction Prevention Efforts. Data collected from Boston Housing Court in 2015 indicates that at least 67% of evicted tenants were evicted from subsidized units. Because tenants that are evicted are often unable to secure alternate housing and also may be disqualified from future affordable housing opportunities, the City of Boston and BPDA are implementing eviction prevention strategies. Selected proponents developing affordable housing financed with public resources will be required to submit data on the number of evictions and terminated tenancies that exist in their portfolio of property during the previous twelve-

month period. They may also be asked to submit an eviction prevention plan. If the information received from selected proponents receiving City of Boston funding indicates a significant presence of evictions or terminated tenancies, the award of these funds may be suspended.

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

Appendix A: Information Resources

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

- **[Plan of site (link)]** ← Will be added in Addendum
- **Zoning Map: 6B/6C (LINK)**
- BPDA Development Review Information, including Article 80 and Article 37 (**link**)
- **Boston Residents Jobs Policy (link)**
- Resources for M/WBE Outreach
    - Builders of Color Coalition (**link**)
    - Black Economic Council of Massachusetts **(link**)
    - Massachusetts Minority Contractors Association **(link**)
    - City of Boston Certified Business Directory (**link**)
    - Commonwealth of Massachusetts Certified Business Directory (**link**)

Appendix B: Required Forms

- **Price Proposal** (**LINK**)
- **Financial Submission Workbook** (**LINK**)
- **HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility** (**LINK**)
- **Disclosure Statement for Transaction with a Public Agency Concerning Real Property** (**LINK**)
- **BPDA & City of Boston Disclosure Statement (LINK)**
- **Certificate of Tax, Employment Security, and Contract Compliance** (**LINK**)
- **Submission Checklist** (**LINK**)

boston planning & development agency

Boston Redevelopment Authority (BRA)
D/B/A Boston Planning & Development Agency (BPDA)

REQUEST FOR PROPOSALS ("RFP") FOR THE REDEVELOPMENT OF 626 WARREN ST (the "Property")

ADDENDUM dated MARCH 19, 2024

Changing Zoom link for Virtual Proposal Opening

The 626 Warren RFP included a zoom link for the virtual RFP Opening scheduled for March 19, 2024 at 1pm. The zoom link has been updated. The new zoom information is listed below. The virtual meeting will still happen on March 19, 2024 at 1pm.

If you have any questions, please email Natalie Deduck at Natalie.deduck@boston.gov

Natalie Deduck is inviting you to a scheduled ZoomGov meeting.

Topic: Proposal Opening - 626 Warren

Time: Mar 19, 2024 01:00 PM Eastern Time (US and Canada)

Join ZoomGov Meeting

https://www.zoomgov.com/j/1607093689

Meeting ID: 160 709 3689