REQUEST FOR PROPOSALS

50 - 52 Montebello Road, Jamaica Plain

Affordable Rental or Homeownership Housing

CITY OF BOSTON

DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT

Contact Information:	Department of Neighborhood Development 26 Court Street, 8th Floor Boston, MA 02108 Attn: Hendrik Van Leesten Hendrik.VanLeesten@boston.gov (617) 635-0343
How to obtain the Request for Proposals and supporting documents via the DND website:	Go to: http://www.CityofBoston.gov/DND/RFP Click on "Request a Copy." If you have any problems accessing the system, please call (617) 635-0343.
Proposal Submittal Deadline:	Proposals will be received until May 11, 2015 at 4:00 p.m. (EST) at: Department of Neighborhood Development 26 Court Street, 10th Floor (Bid Counter) Boston, MA 02108

PROPOSAL SUMMARY: 50-52 Montebello Road

This is provided for the convenience of prospective bidders to facilitate their navigation of this Request For Proposals. For bidders who have downloaded this from the web, you can get more detailed information by selecting the More Information links provided here that will take you directly to the appropriate section of this document.

AVAILABLE PROPERTY	One 6- unit residential building and an abutting 5,625 square foot vacant land parcel *More information on page 5 & 6*	
LOCATION	Egleston Square Neighborhood of Jamaica Plain *More information on page 5 & 6*	
REQUIRED USES	100% affordable homeownership or rental housing with vacant land open space improvements *More information on page 7*	
PRICE	**Proposed Use** 100 % Affordable Rental or Homeownership Housing	**Required Price** The asking price for the site is **$1,261,000,** the assessed value of the property. See page 10 for a full description of offer price factors. *More information on page 10*
PUBLIC FUNDING	No funds are made available in the RFP. However, if needed for project feasibility, applicants that meet the RFP Affordability/Income Mix may pursue DND funds at a later date. *More Information on page 6*	
SUBMISSION REQUIREMENTS	Original and three copies each and thumbdrive: Proposal Summary & Narrative Proposal Forms in Appendices 1, 4 & 5 Proposal Checklist Documents *More information on pages 13 and 22*	
SUBMISSION DEADLINE	May 11, 2015 To Bid Counter at DND, 26 Court St, 10th floor by 4:00PM. *More information on page 13*	
BUILDING VIEWING	April 13, 2015 from 11:00 A.M. – 1:00 P.M. Arrive by 11:30. *More information on page 13*	
DND CONTACT	Hendrik Van Leesten, Development Officer. 617-635-0343, hendrik.vanleesten@boston.gov	

50 – 52 MONTEBELLO ROAD RFP

TABLE OF CONTENTS

SECTION		PAGE
1.	SUMMARY STATEMENT	4
2.	LOCUS MAP	5
3.	SCOPE OF PROJECT	6
4.	DEVELOPMENT OBJECTIVES	6
5.	PROJECT REQUIREMENTS	10
6.	SUBMISSION INSTRUCTIONS AND BUILDING VIEWING	13
7.	REQUIRED SUBMISSION DOCUMENTS	13
8.	PROPOSAL SUMMARY	14
9.	EVALUATION PROCESS	15
10.	COMMUNITY PARTICIPATION	17
11.	AWARD OF CONTRACT AND DEVELOPMENT SCHEDULE	18
12.	WITHDRAWAL OF PROPOSALS	19
13.	QUESTIONS	20
14.	TERMS AND CONDITIONS	20

Appendix 1-	Proposal Checklist	22
Appendix 2-	Design Submission Requirements	23
Appendix 3-	Affordability Income and Monthly Rent Limits	24
Appendix 4-	DND Form Links	25
Appendix 5-	Development Timetable	26

1. SUMMARY STATEMENT

Since its inception in 1966, the Department of Neighborhood Development (DND), formerly the Public Facilities Department, has acted as the primary local government agency charged with providing affordable housing opportunities for the residents of the City of Boston (City). As an agency of the City, established under Massachusetts statute and through the Public Facilities Commission, DND has been directly responsible for the planning, financing and implementation of publicly funded housing programs. DND has also worked in collaboration with governmental agencies and private entities to educate the community, policy leaders, and various stakeholders about the issues surrounding affordable housing, and identify potential actions to address the affordable housing shortage.

DND applies its resources to the following areas of work:

1. Creating affordable and mixed-income housing;
2. Supporting the preservation of historic architecture;
3. Developing open spaces, including community gardens and farms;
4. Providing homeownership opportunities and trainings;
5. Implementing programs to support the economic development of small businesses;
6. Providing pre-purchase counseling and 1st time homebuyer financial assistance, and homeowner's assistance in the upkeep of their homes.

The City, through DND, sells city-owned parcels to private buyers to encourage development in Boston. One of the goals of DND's land disposition is to reduce the amount of unused, neglected property existing in the City, placing it back on the tax rolls and adding to the inventory of available housing. DND's land disposition process helps to alleviate the housing crisis by enabling DND to offer buildable lots to home builders/developers to encourage construction of housing in Boston's neighborhoods.

This Request for Proposals (RFP) offers Eligible Applicants an opportunity to submit proposals to acquire and rehabilitate a 6 unit residential building and a +/- 5,625 square foot parcel of vacant land (to be developed as open space/green space) currently owned by the City of Boston and located in the Egleston Square neighborhood of Jamaica Plain in Boston. The RFP seeks qualified proposals to develop the parcels for residential purposes, and may include affordable rental or ownership housing.

DND's property disposition process operates in accordance with Massachusetts General Law (M.G.L.), Chapter 30B which governs municipal property dispositions. Accordingly, DND reviews all proposals it receives under this Request For Proposals (RFP), disqualifies any that do not meet the "Minimum Eligibility Criteria" described in Section 9 of this RFP, ranks the remaining proposals according to the General Evaluation Criteria and Compliance Evaluation Criteria set forth in Section 9, and then designates the selected applicant as the tentative developer for the property (i.e., Successful Applicant).

Before offering City property for sale to the public, DND consults with local residents and community leaders to establish Development Objectives that reflect community desires. Those Development Objectives are incorporated into the RFP.

2. LOCUS MAP

50 - 52 Montebello Road Jamaica Plain

PARCEL INFORMATION:

52 Montebello Road- Ward 11 (6 Parcels and Condo Association Parcel ID)

Parcel 02369004 (856 Square Feet)
Parcel 02369006 (856 Square Feet)
Parcel 02369008 (856 Square Feet)
Parcel 02369010 (856 Square Feet)
Parcel 02369012 (856 Square Feet)
Parcel 02369002 (831 Square Feet)

52 Montebello Road- Ward 11 Parcel 02369000 (LOT SIZE 6,000 SQUARE FEET)

50 Montebello Road- Ward 11 Parcel 02370000 (Vacant Land) 5,625 SQUARE FEET

TOTAL LAND AREA: 11, 625 Square Feet

3. SCOPE OF PROJECT

In this RFP, DND is seeking a developer to develop 50 - 52 Montebello Road as rental or ownership housing. Proposals must include both parcels listed in the RFP in the development plan. Proposals that do not demonstrate a plan to develop and maintain both parcels will be rejected as non-responsive.

This RFP is for the vacant building and abutting vacant land as described in the RFP only . If needed for project feasibility, the Successful Applicant that meets the preferred affordability, outlined in Section 4. "Development Objectives"- *Use Guidelines*, may pursue DND subsidy funding at a later date, which may include but is not limited to the City of Boston's Neighborhood Housing Trust (NHT) and Inclusionary Development Program (IDP) funds.

Please contact Christine O'Keefe, DND Senior Development Officer, at (617) 635-0351 for questions regarding DND, NHT or IDP funding.

4. DEVELOPMENT OBJECTIVES

Community Vision

Comments from residents at a community meeting have shaped the basic outline of the vision for the redevelopment of 50 and 52 Montebello Road. The core goal of the community vision is to strongly encourage development proposals that address the need for affordable residential

rental or homeownership housing. Members of the community have expressed the need to develop long-term affordable housing opportunities; supporting and maintaining affordability is a high priority.

The community vision also encourages thoughtful open space use and landscaping plans for 50 Montebello Road that abuts the currently vacant, 6-unit building at 52 Montebello Road.

The community envisions improving the aesthetics of the property through extensive landscaping of both the residential property and 50 Montebello Road, while providing a sense of connectivity between Montebello Road and Iffley Road.

50-52 Montebello Road

52 Montebello Road- (Parcel ID: 1102369000) - The property consists of an existing 6 unit building with 3 units on each side and common entrance. These 6 units were most recently developed as condominiums and each fell into foreclosure; the City of Boston acquired ownership of these 6 units by foreclosure. There are 6 - 2 bedroom units with 1 bathroom in each unit. Each unit consists of +/-850 square feet of living space with a total living area of 5,100 square feet. The building sits on a 5,625 square foot lot with no off street parking. The units are in need of rehabilitation.

50 Montebello Road- (Parcel ID: 1102370000) - The property consists of vacant land. The site is a sloped lot totaling approximately 5,625 square feet that abuts 52 Montebello Road; it has several mature trees located on the site. This site will remain as open space and be landscaped to support the redevelopment of 52 Montebello Road. The community has voiced a desire for this parcel to remain as open space.

Existing Conditions

50 -52 Montebello Road is situated in Jamaica Plain in the Egleston Square neighborhood of Boston. The site is located east of Washington Street on Montebello Road and to the South of Iffley Road. The site is a 10 minute walk to the Stony Brook Orange Line MBTA stop. There are also several bus routes that can carry passengers to the other train stops and bus hubs located nearby at Forest Hills, Jackson Square, Ruggles and Dudley Station. Montebello Road is a 5 minute walk to Walnut Avenue and the western portion of Franklin Park.

The neighborhood consists of a mix of 1, 2 and 3 family residential homes. There are also condominium conversions of former 2 & 3 family homes, and multifamily apartment buildings throughout the community, primarily on Washington Street. Restaurants, convenience stores, commercial, retail, warehouse storage, light manufacturing and mechanic & auto body shops also are located on Washington Street.

Use Guidelines

Residential Uses

Proposals must include multi-unit rehabilitation to create affordable residential homeownership or rental housing units. If homeownership is proposed including condominium ownership, proposals must outline developer plans for their involvement in the condominium association, member training and long-term role to ensure condominium success.

Units/Unit Mix

Proposals must include 6 units; the current number and configuration of units and unit sizes are to be maintained. Applicants may consider minimal reconfiguring of the units if it is determined that livability and unit size issues need to be addressed, and can be done in a manner that is not cost prohibitive and is within the existing building footprint.

Affordability/ Income Mix

The redevelopment must include 100% affordability. The income mix must include units affordable to households at or below 80% of the Boston Area Median Income. For rental, the community has expressed support for development proposals that provide deep affordability, targeting households at 30%, 50% and 60% of Area Median Income, to the extent financially feasible and using available public subsides.

Local Business and Job Opportunities

Redevelopment of the parcels should enhance the local economy and provide local job opportunities. Preference will be given to applications that support local hiring for construction, management and contracting of services. Projects must pursue best efforts to comply with the Boston Residents Jobs Policy. There is community support for efforts to exceed the policy.

Site Vision & Design Guidelines

Building Height & Massing

The current building height and massing will remain and will not be altered.

Open Space

Applicants are to enhance the site open space at the front, side and rear of 52 Montebello Road. Furthermore, 50 Montebello Road shall be open and green space; proposals must provide a detailed landscaping plan for both sites.

Access & Parking

Only on- street parking will be considered. 52 Montebello Road does not have parking, and 50 Montebello Road is sloped and parking would be infeasible, and the site will be designed as open, landscaped green space. Proposals should consider access linkages such as a pedestrian pathway between Montebello Road and Iffley Road.

Site Landscaping

Proposals should provide high quality landscaping throughout the site including drought resistant and native plant materials. Include plantings and ornamental fencing along edges and screening for all mechanical equipment and ventilation openings.

Green Building and Site Design

Compliance with DND Design Guidelines, as outlined in the document “Design Requirements and Guidelines”, is required. To the extent there are questions regarding applicability of DND’s Design Requirements to the rehabilitation of 52 Montebello Road, please contact Jay Lee, DND Assistant Director of Design, at 617-635-0207 or at jay.lee@boston.gov.

The document can be uploaded at:
https://dnd.cityofboston.gov/portal/v1/contentRepository/Public/dnd%20pdfs/HousingDevelopment/14-1_Design_Standards-Final-August-2014.pdf

Green building strategies should include the following:

Innovation

With development costs in mind, project teams are strongly encouraged to 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. In either case, replicability and ease of use of innovations and best practices for future Boston residential projects of similar scale should be highlighted.

Indoor Environmental Quality

Provide high quality healthy indoor environments by maximizing fresh air indoors and minimizing moisture and exposure to toxins and pollutants. Strategies should include:

- Proper ground surface drainage.
- Non-paper gypsum board.
- Passive and active fresh air systems and active ventilation at moisture and combustion sources.
- Building products and construction materials free of VOC's, toxins, hazardous chemicals, pollutants and other contaminants.
- Entryway walk-off mats and smooth floor finishes that reduce the presence of asthma triggers, allergens and respiratory irritants.
- Safe and easily cleaned and maintained built conditions.

DND strongly encourages applicants to incorporate smoke free policies in their proposal. Beyond improving the health and safety of residents, smoke free policies can reduce operating costs through savings on renovations between occupants and eligibility for fire safe insurance discounts. Applicants are encouraged to develop and maintain a written occupancy policy for the proposed affordable housing proposal that prohibits smoking in all units and all common areas of the development. In addition, DND encourages the owner to make educational materials on tobacco cessation programs, including the phone number for the statewide Smokers' Helpline at 1-800-Try-to-Stop, available to all residents of the Project.

Energy Efficiency

Energy efficiency strategies should at minimum include:

- High performance building envelopes that are air tight, super insulated and eliminate thermal bridging with high efficiency windows and doors.
- Energy Star high efficiency appliances and equipment sized to meet but not exceed building needs. Passive (day) lighting strategies and high efficiency lighting fixtures including CFL and LED lighting technology.

Water Efficiency

Use innovative strategies to minimize water use and to reuse storm and waste water including:

- High efficiency low flow bathroom and kitchen fixtures.
- Gray water filtration systems for reuse and ground water recharge.
- Storm water harvesting and onsite ground water recharging.
- Drought resistant planting and non-potable water irrigation.

Site Construction and Development

Employ low impact construction strategies and management practices to reduce erosion and eliminate construction phase storm water runoff and off-site tracking of soils and construction debris. Include landscaping and other site elements that protect the land and support area natural habitats.

Materials Selection

Use materials and resources selected from sustainably harvested, responsibly processed sources. Strategies should include:

- Products made with recycled and reclaimed materials.
- Materials and products from responsibly harvested and rapidly renewable sources.
- Locally sourced products and materials within 500 miles of Boston.
- Durable products and materials for low maintenance costs and operations.

5. PROJECT REQUIREMENTS

General:

i. The asking price for the site is **$1,261,000,** the assessed value* of the property. The price offered by the Proposer is one of the many factors used in determining the most highly advantageous proposal, so proposers are encouraged to make competitive offers. For more information on comparative evaluation criteria, please refer to Section 9. A Proposer may offer less than the asking price, but he/she must credibly demonstrate that his/her development concept is not financially feasible at the asking price. Reasons for this may include, but not be limited to, extraordinary expenses to be incurred, or specific community benefits that the development will provide which will prohibit the Proposer from maximizing operating income. In order to offer less than the asking price, the Proposer must include a written description of why his/her offer price is reduced, and provide development pro formas that support the lower offer price.

DND reserves the right to conduct an appraisal of the property by a licensed appraiser, if in its estimation, the ultimate completed value of the proposed redeveloped property will significantly exceed the Total Development Cost of the project. Should this occur, DND reserves the right to renegotiate the purchase price upwards to ensure a more equitable purchase price for the City and the tax payers of Boston.

*If a Proposer is a church or religious entity, in accordance with the Massachusetts constitution, it must offer **100% of the assessed value.** Failure to make such offer will be grounds for disqualification of the proposal.

ii. While DND has conducted a title examination of the property, DND makes no warranty or representations as to its accuracy and recommends that Successful Applicants conduct their own title examinations.

iii. If selected as a finalist, Applicants will be required to present their plan of development at a community meeting organized by DND.

iv. Performance under this Request for Proposals will be closely coordinated with the Development Officer and any other staff member designated by DND. Questions pertaining to requests for technical guidance and direction should be directed in writing to the assigned Development Officer, 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 RFP.

v. 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.

Developmental:

i. The Successful Applicant will produce an appropriate plan of development that satisfies the City's requirements within specified time frames. See Development Objectives.

ii. The contract period of performance shall be for twelve (12) months from the tentative designation award. If the Property has not been made development-ready within twelve (12) months, DND may choose to grant additional time for performance or to rescind the award, at its discretion.

iii. The determination of whether services were performed satisfactorily is at the sole discretion of DND.

iv. For entering Sources and Uses of Funds, operating budget and other budget items, Applicants must use a One-Stop Application format that can be downloaded from www.mhic.com (in the site, see tab "One Stop Center" then "Downloads" then "OneStop2000"). All cost line items must be included in the budget. Sources must equal uses.

v. Construction Cost. Applicants are required to provide a General Contractor estimate for hard costs at the time of application.

vi. Site Work. The Successful Applicant is responsible for typical urban site redevelopment costs and these costs must be clearly itemized and carried in the hard cost budget. Base the cost of site work and grading on all foreseeable (known) site dimensions, topography and visible ledge evidenced on site. Include all site work including grading in your construction costs. Include in the development budget all fees and costs associated with street and sidewalk reconstruction, curb cuts and street opening permits. Contact the Public Works Department for information regarding these items. Furthermore, costs of cutting and capping existing underground utility lines are the responsibility of the developer and must be included in the development budget. Contact Boston Water and Sewer Commission for information regarding this requirement.

vii. Environmental Site Costs. Applicants shall include in the proposal a hard cost line item allowance to cover environmental remediation costs. This should be included separate from the "direct construction" line in the "Construction" subtotal category. Furthermore, a soft cost line item allowance ("Environmental Testing") should be included for additional testing and engineering services. Applicants should provide an explanation of how the cost was determined. DND reserves the right to remove a site(s) as a result of remediation costs.

ix. Hard and Soft Cost Contingency. Provide a hard cost contingency of 10%, based on total construction costs. Assume a soft cost contingency of 2.5% based on total soft costs.

Design

i. Successful Applicants are required to comply with DND Residential Design Standards and Development Objectives for the site (See Section 4).

ii. Applicants must propose a development design scheme that addresses site and design information provided in this RFP with schematic designs for the siting, massing, unit configuration, non-residential program, open space, parking, etc. Variations of the zoning requirements will be considered for project proposals that offer an appropriate and reasonable design approach that is consistent with building context and neighborhood character and is consistent with the RFP design standards.

iii. Building materials must be of good quality and take advantage of sustainable building principles and MEP systems.

iv. Applicants must present a design that includes a thoughtful exterior, with attractive windows, doors, and exterior cladding and/or masonry.

Operational:

i. Affordability. The redevelopment must include 100% affordability. The income mix must include units affordable to households at or below 80% of the Boston Area Median Income. For rental, the community has expressed support for development proposals that provide deep affordability, targeting households at 30%, 50% and 60% of Area Median Income, to the extent financially feasible and using available public subsides.

ii. Wages. 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. The Successful Applicant shall maintain a safety and environmental program that complies with all applicable local, state and federal regulations. 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. NOTE: DND reserves the right to change the number of affordable units and other aspects of the development program outlined in this RFP depending on the needs of the development, provided that the rights of the Successful Applicant and other applicants are not prejudiced.

iii. The Successful Applicant shall maintain a safety and environmental program that complies with all applicable local, state and federal regulations. 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.

iv. Lead Abatement: The rehabilitation must demonstrate compliance with federal lead abatement regulations and the Successful Applicant will be required to provide lead certificates at the end of rehabilitation. Furthermore, compliance is met if the property has been found to be free of lead-based paint by a certified inspector. As part of the rehabilitation, a Lead Inspection Report will be required to identify the required lead remediation to be done during rehabilitation. The Successful Applicant will be required to obtain a Lead inspection Report and base lead remediation work, and a budget, on the report.

NOTE: DND reserves the right to change the number of affordable units and other aspects of the development program outline in this RFP depending on the needs of the development, provided that the rights of the Successful Applicant and other applicants are not prejudiced.

6. SUBMISSION INSTRUCTIONS AND BUILDING VIEWING

Applicants MUST submit one (1) original and two (2) copies, including a thumb drive, of the proposal in a sealed envelope clearly marked "50 - 52 Montebello Road RFP Application" **by May 11, 2015 at 4:00 p.m.**

Proposals must be submitted to:

The Department of Neighborhood Development, Bid Counter (either in person or by mail)
26 Court Street, 10th Floor
Boston, MA 02108

Bid Counter hours are Monday—Friday from 9:00 a.m. - 12:00 noon and 1:00 p.m. - 4:00 p.m. The Bid counter is closed Monday through Friday from 12 noon to 1:00 p.m. and after 4 p.m. Please plan accordingly.

Any proposals received after the date and time specified in this RFP will be rejected as non-responsive, and not considered for evaluation.

Building Viewing: An Applicant's viewing of the building will be held at 52 Montebello Road on **April 13, 2015 from 11:00 A.M. – 1:00 P.M. Arrive by 11:30.**

7. REQUIRED SUBMISSION DOCUMENTS

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

Introductory Documents:

i. Appendix 1: Proposal Checklist

ii. Proposal Summary and Written Narrative

General Evaluation Criteria Documentation:

i. Appendix 4: Project Summary

ii. Appendix 4: Proposal Form- Price

iii. Appendix 4: Construction Employment Statement

iv. Appendix 5: Development Timetable

Compliance Review Documentation:

i. Appendix 4: DND Form Links -City of Boston Affidavits and Certifications

8. PROPOSAL SUMMARY

In addition to the required forms listed in Section 7, the following information must be included in the application. This is an opportunity for the Applicant to convey, in their own words- and with backup documentation and material- to the Evaluation Team how the proposed project will be a highly-beneficial use of the Property, cost-effective, timely, and provide options superior to those currently available to the community. Omission of any of the required information may lead to a determination that the proposal is non-responsive.

Introduction

i. A narrative introduction to the Applicant and Proposal that includes a statement of the Applicant's interest in Project, and overview of the proposal.

ii. A description of the organizational structure, including a list of qualified representatives and key personnel and the roles and responsibilities of each party.

iii. A description of any lawsuits related to Real Estate ventures brought against the Applicant or principals in courts situated within Massachusetts within the past five years.

Development Plan

i. Applicants must indicate and fully explain their plan for development and how it coincides with the Development Objectives and Project Requirements for the site outlined in this RFP. Also, Applicants must provide a credible plan for accomplishing its stated goals and/or objectives.

ii. A time line schedule proposed to meet the tasks listed in Section 11.

iii. One Stop Application Development Budget as outlined in Section 5.

iv. A financing letter of interest or a commitment letter to fund from an established financial institution or equity investors.

v. Provide design submission items outlined in Appendix 2. Residential components are required to comply with DND's Residential Design Standards as detailed in Section 4. These standards can be found on the DND website:

https://dnd.cityofboston.gov/portal/v1/contentRepository/Public/dnd%20pdfs/Housing Development/14-1_Design_Standards-Final-August-2014.pdf

vi. Include narrative and description of Green Building elements; LEED for Homes checklist and HERS index.

Developer Qualifications, Experience and References

i. Furnish a narrative supported by relevant data regarding qualifications and past experience with similar projects. Applicant must provide detailed description of previous relevant work completed and the results or outcome of that work. Each Applicant shall also

furnish 3 current references including, names, addresses, e-mail addresses, phone numbers, and principal contacts.

ii. Resumes of development team members.

Subcontractors or Partnerships

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

9. EVALUATION PROCESS

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

1. First, proposals must meet the City's **Minimum Eligibility Criteria** as described below.

2. Proposals that meet the Minimum Eligibility Criteria will then be comparatively reviewed based on the **General Evaluation Criteria** described below. DND's selection committee shall then assign a composite rating based on those criteria for each proposal it evaluates. The most advantageous proposal, taking into consideration all evaluation criteria, will be selected (the "Successful Applicant"). To facilitate DND's evaluation of some of General Evaluation Criteria, DND will require that Applicants meeting Minimum Eligibility Criteria present their plan of development to the community.

3. Finally, prior to designation by the Public Facilities Commission, the "Successful Applicant" who has satisfied the Minimum Eligibility Criteria and is found to have the highest composite score based on the General Evaluation Criteria, will be subject to the **Statutory Compliance Requirements,** as described below, to determine compliance with various City regulations, ordinances and policies.

Minimum Eligibility Criteria ("Responsive" Applicant):

i. Proposal Received by Deadline. Only proposals that are received by the date, time, and at the location indicated in Section 6 of this RFP will be accepted.

ii. Offer Price. Only proposals that adhere to the Acquisition Price requirements, as described in Section 5, will be accepted.

iii. Complete Proposal Submission. Proposals must contain all necessary forms and documents and signatures as required in Sections 7 & 8 of this RFP. Proposal submissions must be of sufficient detail and completeness that DND can fairly evaluate the proposal using the General Evaluation Criteria specified below. Proposals that fail to provide sufficient information for this review will be rejected.

iv. Proposals must comply with Development Objectives and Requirements in the RFP.

General Evaluation Criteria ("Responsible" Applicant):

v. **Developer Experience and Capacity.** This is an evaluation of Applicants experience, along with the experience and capacity of identify team members in developing projects of a

nature comparable to the given project.

vi. **Plan of Development.** This is an evaluation of the proposed uses and redevelopment of the property, including all major physical changes to the property and the planned end use of the property, consistent with RFP Development Objectives.

vii. **Design Concept.** This is an evaluation of how well the proposal incorporates the Design Requirements set out in Section 4, and whether the Applicant's design proposal appears to be reasonably attainable.

viii. **Development Cost Feasibility.** This evaluation is based on the strength of the Development Budget. DND will focus on cost to build and Total Development Cost and applicant efforts to minimize the need for DND subsidy. DND will assess projected development expenses, including site prep, environmental remediation expenses, construction and all associated soft costs, and will determine whether, in its opinion, the stated cost of development is sufficiently inclusive and reasonable.

ix. **Developer's Financial Capacity.** This is an evaluation of Applicant's ability to secure, in a timely manner, all financing stated in their Development Budget.

x. **Operational Plan.** This is an evaluation of how well the proposal meets the Operational Requirements set out in Section 5.

xi. **Development Schedule.** This is an evaluation of the Applicant's planned Development Timetable, relative to other proposals. The total construction time (from developer selection to completion) will be an important evaluation factor. DND will evaluate applicant task timelines against the Development Schedule in Section 11.

Compliance Review ("Disqualifiers"):

i. Tax Delinquency Review. The City of Boston Collector-Treasurer's Office will conduct a review of the selected Applicant's property tax history. The Successful Applicant cannot be delinquent in the payment of taxes on any property owned within the City of Boston. The Successful Applicant must cure any such delinquency prior to the Tentative Designation of the Property. If the Successful Applicant has been foreclosed upon by the City of Boston for failure to pay property taxes, then said applicant will be deemed ineligible for Tentative Designation 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 Successful 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.

ii. Water and Sewer Review. The City of Boston Water and Sewer Commission will conduct a review of the Successful Applicant's water and sewer account(s). The Successful 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 Tentative Designation of the Property.

iii. Property Portfolio Review. The City will review the Successful 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 Successful Applicant's property portfolio, DND may deem the

Successful Applicant ineligible for Tentative Designation of the Property.

iv. Prior Participation Review. The City will review the Successful Applicant's prior participation in any City of Boston programs, including DND programs, to ascertain Successful 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 Tentative Designation of the Property.

v. Employee Review. Neither the Successful 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. If the Successful Applicant fails to satisfy this requirement they may be deemed to be ineligible for Tentative Designation of the Property.

vi. 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 furthering fair housing and providing equal access to information about development opportunities.

vii. Fair Housing Review. The Boston Fair Housing Commission will screen applicants for the property offered pursuant to this RFP. The Successful Applicant must not have any unresolved housing discrimination complaints or convictions for violating fair housing laws.

10. COMMUNITY PARTICIPATION

DND has standard community participation policies and procedures. These are designed to:

- Ensure that community residents and local leaders are fully informed about the sale of any real estate sold by DND.
- Create a uniform and timely structure for this process so that developers and residents alike have a clear understanding of how the process works, enabling both to more effectively plan for and participate in the project development process; and
- Promote equal opportunity and fair housing in the disposition of residential sites.

DND works closely with neighborhood groups and local residents in new construction projects involving city-owned property. This involvement calls for substantial participation by the neighborhood at all stages of planning. The planning disposition and development process includes the following steps:

- Planning Meetings: DND staff holds public meetings with neighborhood residents and abutters to discuss use options and other development criteria for the parcels.
- Developer Presentation: DND holds a public meeting for the developers whose RFP submissions meet Minimum Eligibility Criteria to make detailed presentations to the neighborhood in order to receive comment and recommendations on their proposals.
- Qualified Developer Selected: DND, based on its review of applications against Evaluation Criteria, as set forth in Section 9, will recommend and select the developer through the Public Facilities Commission.

11. AWARD OF CONTRACT AND DEVELOPMENT SCHEDULE

The City, acting by and through its Public Facilities Commission by the Director of DND, is requesting proposals for the acquisition and development of a 6 unit residential building and 1 parcel of land located at 50 - 52 Montebello Road, Jamaica Plain. The City will award a contract to the highest-rated, most advantageous proposal based on the above-listed criteria.

Proposal Review

DND staff review of proposals will begin promptly after the submission deadline. If the proposal does not meet the Minimum Eligibility Criteria of the RFP, DND shall terminate further consideration of the proposal. In the event of minor informalities in a proposal, DND may attempt to seek clarification in order to determine whether it meets Minimum Eligibility Criteria, but reserves the right to declare the proposal non-responsive.

DND staff may interview Applicants to solicit clarifying information on their proposal and on their ability to finance and complete the project. Further evaluation may include site visits to other buildings constructed by the Applicant, a review of references, and/or examination of additional financial or design information.

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.

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 receives the highest overall composite rating in the evaluation process.

Developer Designation

DND staff will recommend a developer to the Director of the Department of Neighborhood Development, based on its review of proposals against Evaluation Criteria set forth in Section 9. In turn, the Director will make a recommendation to the Public Facilities Commission which, if in agreement, will vote a designation of "Tentative Developer."

Following tentative developer designation, all applicants will be notified of their status. DND will outline conditions of the tentative Developer Designation in a letter to the Successful Applicant. DND staff will work with the Successful Applicant to meet and finalize development tasks and timelines outlined in the Developer Designation letter. Upon successfully meeting Developer Designation tasks, DND staff will recommend a property Conveyance to the Director of DND. In turn, the Director will make a recommendation to the Public Facilities Commission which, if in agreement, will vote a Conveyance of the property. DND's legal counsel will then prepare all necessary conveyance documents. Each property will be conveyed "AS IS" and without warranty or representation as to the status or quality of title. The purchaser shall to the fullest extent permitted by law assume any and all liability for the property, including that liability related to environmental remediation under Chapter 21E of the Massachusetts General Laws.

Marketing

The Successful Applicant is responsible for all marketing tasks associated with the sale of the units, including income certifications to determine income eligibility for all proposed buyers, and meeting all DND policies and funding requirements.

The Successful Applicant must identify the marketing agent, if any, and outline the marketing plan for the development and demonstrate that the units will be affirmatively marketed and that a fair and open process for buyer selection will be followed.

Successful Applicants are also required to list the availability of ownership opportunities with the Boston Fair Housing Commission (BFHC) Metrolist.

i. Affirmative Marketing and Tenant Selection. Developers of 5 or more units for rent or for sale are required to submit an Affirmative Marketing and Tenant Selection Plan to the BFHC. The plan must be approved by the BFHC prior to project closing.

ii. Metrolist. Developers of newly created units which will be available for rent or for sale are required to list the availability of such housing with Metrolist.

Development Schedule

Below is the predetermined Development Schedule. The Successful Applicant's failure to meet these established benchmarks may be grounds for de-designation of the project. Should this occur, DND reserves the right to assume any and all contracts associated with the project.

TASK	DATE
RFP Available at DND Bid Counter	March 30, 2015
Proposal Submission Due Date	May 11, 2015
DND Presents Eligible Applicants to Community	June 2015
PFC Tentatively Designates Developer	July 2015
Zoning Board of Appeals Hearing (if needed)	Fall 2015
Construction Bidding/Contractor Selection/Cost Finalization	Fall 2015
Financing/Permitting Secured	Winter 2015
BFHC Approval and Other Marketing Requirements Complete	Winter 2015
Closing	Winter 2015
Construction Begins	Winter 2015
Construction Completed	Fall 2016
Full Development Sales/or Lease Up	Winter 2016

12. WITHDRAWAL OF PROPOSALS

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

13. QUESTIONS

The DND contact is Hendrik Van Leesten; his contact information is listed below.

Phone: (617) 635-0343
E-mail: hendrik.vanleesten@boston.gov
U.S. Mail: Department of Neighborhood Development
Attn: Hendrik Van Leesten, Development Officer
26 Court Street, 8th Floor
Boston, MA 02108

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

14. TERMS AND CONDITIONS

i. 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.

ii. 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)).

iii. 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.

iv. "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 shall, to the fullest extent permitted by law, assume any and all liability for environmental remediation 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.

v. 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.

vi. 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.

vii. Restrictions on Transfer. Unless authorized in writing by DND, the Successful Applicant may not substantially alter the use of the property; permanently cease operations; transfer title of the property; or have any unauthorized financial liens placed on the

property. Such actions will trigger a reversionary clause in the deed, automatically transferring title of the Property back to DND.

viii. Payment. Unless otherwise agreed to by DND in writing, the Successful Applicant is required, at the time of conveyance, to make full payment for the Property by Treasurer's or Cashier's Check. In addition, the Successful Applicant will be responsible for paying all recording and registrations fees (including the cost of recording the deed and conveyance documents at the Suffolk County Registry of Deeds), and making a pro forma tax payment.

ix. 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.

x. 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 other Applicants are not prejudiced.

DND THANKS YOU FOR YOUR INTEREST

Appendix 1 – Proposal Checklist

General Submission Requirements:

- 1 original and 2 application copies submitted
- Appendix 1: Proposal Checklist
- Appendix 4- Proposal Summary and Narrative
- Proposal Summary and Written Narrative
- Appendix 4: Proposal Form- Price
- Appendix 4: Construction Employment Statement
- Appendix 4: Other Required DND Forms
- Appendix 5: Development Timetable
- Pre-Development Sources and Uses Budget (w/ proof of cash availability)
- One Stop Application for Development Budget- Sections 1-7 including "Project Summary" Information
- Evidence of Financing- Letter of Interest or Commitment Letter from an established Financial Institution and/or Equity Investors
- Evidence of Acquisition of Privately-owned Land, if applicable
- Audited Financial Statement (most recent)
- Resumes of Development Team
- Design Submittal including scope of work, cost estimate (Section 3 in 1 Stop), site plan indicating site landscaping and improvements and design Plan (1/2 size set) if changes are proposed to the units

Appendix 2 - Design Submission Requirements

At Application, the Design Submission is to consist of the following:

- Scope of Work
- Cost Estimate (Section 3 in 1 Stop)
- Site plan indicating site landscaping and improvements
- Design Plan (1/2 size set) if changes are proposed to units
- Include description of Green Building elements; LEED for Homes checklist and HERS index.

HUD Income Limits - Calendar 2014

Household Size	(1) 30% of median income	(1) 50% of median income	(1) 60% of median income	(2) CDBG Moderate Income: 80% of median income	(4) 80% of median income	(4) 95% of median income	(4) 100% of median income	(4) 110% of median income	(4) 120% of median income	(3) Inclusionary 80% Ownership limits	(3) Inclusionary 100% Ownership limits	(3) Inclusionary Rental limits
1 person	19,800	32,950	39,660	**47,450**	52,700	62,600	65,850	72,450	79,050	52,700	65,850	46,100
2 persons	22,600	37,650	45,360	**54,200**	60,200	71,500	75,300	82,800	90,350	60,200	75,300	52,700
3 persons	25,450	42,350	51,000	**61,000**	67,750	80,450	84,700	93,150	101,650	67,750	84,700	59,300
4 persons	28,250	47,050	56,640	**67,750**	75,300	89,400	94,100	103,500	112,900	75,300	94,100	65,850
5 persons	30,550	50,850	61,200	**73,200**	81,300	96,550	101,650	111,800	121,950	81,300	101,650	71,150
6 persons	32,800	54,600	65,760	**78,600**	87,300	103,700	109,150	120,050	131,000	87,300	109,150	76,400
7 persons	35,100	58,350	70,260	**84,050**	93,350	110,850	116,700	128,350	140,000			
8 persons	37,300	62,150	74,820	**89,450**	99,350	118,000	124,200	136,650	149,050			

(1) Issued by HUD effective May 1, 2014, and calculated in accordance with the IRS guidelines for consistency with HOME & LIHTC Programs.

(2) Income limits provided by HUD - May 1, 2014.

(3) Incomes set by the BRA for 2014.

(4) Incomes calculated based on the HUD published median income for a family of four in the Boston area, adjusted for family size and rounded to nearest 50.

Monthly Rent Limits

Bedroom Size	**Homeless** Set-Aside (**30%** of median)	(1) Low **HOME** (**50%** of median)	(1) High **Home** (**65%** of median)	**LIHTC** (**50%** of median)	**LIHTC** (**60%** of median)	(2) **CDBG** (**50%** of median)	(2) **CDBG** (**80%** of median)	(3) **Section 8 FMR**	**Section 8 110% of FMR**	**(5)** Inclusionary Rent Limits	**(6)** Maximum Rent 120% NSP Limits
SRO	371	642	782			618	890	776	853		1,482
0 BR/Eff.	495	856	1,042	824	991	824	1,186	1,035	1,139	1,020	1,976
1-BR	530	917	1,164	883	1,063	824 - 941	1,186 - 1,355	1,156	1,272	1,190	2,118
2-BR	636	1,101	1,408	1,058	1,275	941 - 1,176	1,355 - 1,694	1,444	1,588	1,361	2,541
3-BR	735	1,271	1,619	1,224	1,473	1,059 - 1,365	1,525 - 1,965	1,798	1,978	1,531	2,936
4-BR	820	1,418	1,786	1,365	1,644	1,271 - 1,554	1,694 - 2,236	1,955	2,151	1,701	3,275
5-BR	905	1,565	1,952	1,506	1,814	1,365 - 1,554	2,101 - 2,236	2,069	2,276		3,613
6-BR	933	1,711	2,118	-	-	1365+	2184+	2,339	2,573		4,106

(1) As issued by HUD January 22 2014, effective May 1, 2014

(2) As issued by City of Boston affordable rent statement

(3) As issued by HUD 8/3/12 **effective 10/1/12**

(5) as set by BRA dated 2014

(6) Maximum NSP Rents at 120% AMI

Utility Allowance - BHA Leased Housing Division, Effective 6/1/13

		SRO/0 BR	1BR	2BR	3BR	4BR	5BR	6+BR
Gas Heat	Single Family	32/42	57	68	86	97	113	130
	Duplex, 3 Decker	29/39	50	66	82	96	109	125
	Garden, Row/Townhouse	24/32	43	58	72	87	101	116
	Elevator/Highrise	25/33	37	44	54	61	76	88
Oil Heat	Single Family	107/142	193	231	291	329	382	440
	Duplex, 3 Decker	98/130	168	222	276	324	368	423
	Garden, Row/Townhouse	81/108	144	195	243	294	342	393
	Elevator/Highrise							
Electric Heat	Single Family	36/48	66	79	99	112	130	150
	Duplex, 3 Decker	33/44	57	76	94	110	125	144
	Garden, Row/Townhouse	28/37	49	66	83	100	116	134
	Elevator/Highrise	25/33	41	50	62	77	89	103
Water Heat	Gas	5/7	10	13	16	20	21	24
	Oil	17/23	30	40	49	61	66	75
	Electric	8/11	15	20	24	30	32	57
Water Use	Tenant Paid	37/49	71	92	120	136	158	179
Cooking	Gas Oven	5/6	8	10	13	16	17	20
	Electric Oven	5/7	9	12	14	18	19	22
Lights & Appliances		19/25	31	42	52	65	70	80
Refrigerator		2/3	3	3	5	5	7	7
Range		3/4	4	5	5	5	5	5

Inclusionary Development Price Limits 2014

		0 BR	1 BR	2 BR	3 BR	4BR
BRA	80% AMI	$134,300	$162,500	$190,500	$218,700	$246,900
	100% AMI	$176,500	$211,600	$246,900	$282,000	$317,200

HOME Purchase Price/Value Limits (as of 8/28/13)

Suffolk	1 Living Unit	2 Living Unit	3 Living Unit	4 Living Unit	Last Updated
Existing	285,000	365,000	442,000	547,000	8/28/2013
New	311,000	398,000	482,000	596,000	

Home Per Unit Subsidy Caps: Based on High Cost % effective 1/1/11

	0 BR & SRO's	1 BR Units	2 BR Units	3 BR Units	4+ BR Units
Boston	$132,813	$152,251	$185,136	$239,505	$262,903

Revised 5/6/2014

APPENDIX 4

DND Forms Links

- Project Summary
- Proposal Form - Price
- Affidavit of Eligibility
- Applicant's Disclosure of Property Owned
- Conflict of Interest Affidavit
- Notice to Beneficiaries
- One Stop Career Centers List
- Construction Employment Statement
- Beneficiary Affidavit
- Beneficiaries of Assistance

If you require hard copies of the forms please contact Hendrik Van Leesten at (617) 635-0343 or at **Hendrik.Vanleesten@boston.gov**

APPENDIX 5-

DEVELOPMENT TIMETABLE

Assuming that you are selected 45 days after the submission deadline for this Request for Proposals, indicate your planned development schedule on the form attached listing your target dates for achieving these key development milestones.

	Zoning Relief Required	Apply For Permit	Permit Issued	Financing Committed	Construction Start	Construction Complete
	Yes/No	DATE	DATE	DATE	DATE	DATE
50 – 50 Montebello Road	__Y __N	__/__/__	__/__/__	__/__/__	__/__/__	__/__/__