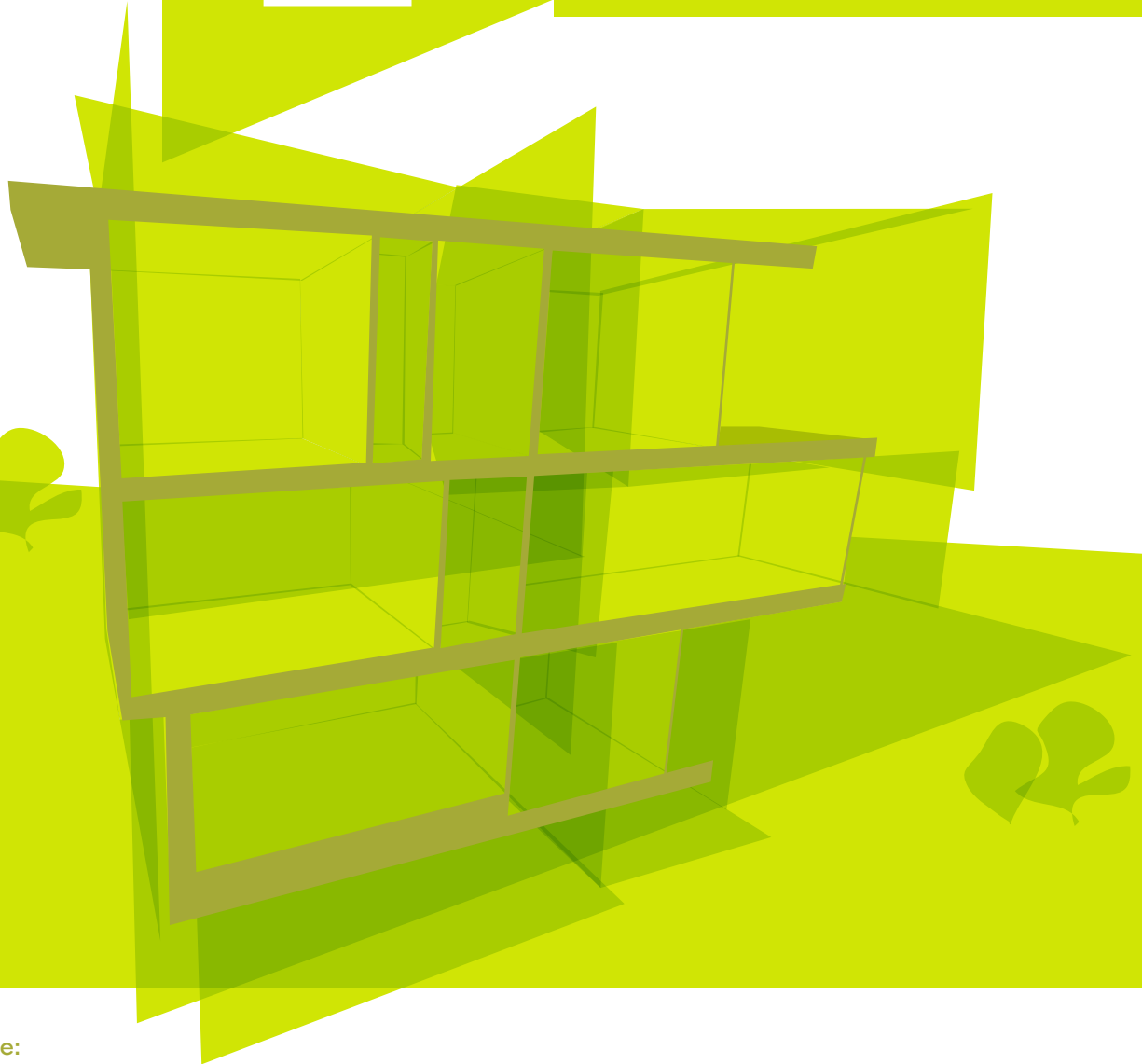


BRA

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REQUESTS FOR PROPOSALS

A One to Four Family
Green Designer / Builder RFP



An initiative of the:

City of Boston
Thomas M. Menino, Mayor

Department of Neighborhood Development
Evelyn Friedman, Director

Boston Redevelopment Authority
John. F. Palmieri Director

Clarence J. Jones Chairman
Paul Foster Vice Chairman
Consuelo Gonzales-Thornell Treasurer
James M. Coyle Member
Timothy J. Burke Member

Brian P. Golden Executive Director/Secretary



One City Hall Square
Boston, Massachusetts 02201
March 2011



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REQUEST FOR PROPOSALS

Mayor's E+ Green Building Demonstration Program

The Boston Redevelopment Authority (BRA) is issuing a Request for Proposals (RFP) for the design and development of energy positive 1 to 4 unit residential, home ownership, green buildings on the following Boston parcels:

- 156 Highland Street, Highland Park, Roxbury neighborhood, Ward 11, Parcels: 00170002, and 00170001.
- 61 Marcella Avenue, Highland Park, Roxbury neighborhood, Ward 11, Parcels: 00430000, 00427000, 0042800, and 00429000.
- 64 Catherine Street, Woodbourne, Jamaica Plain neighborhood, Ward 19, Parcel: 1904328000

The BRA is requesting proposals from joint design and construction development teams that can demonstrate an integrated approach to green residential design and construction and produce replicable high performance residential green building prototypes.

Request for Proposal Availability

This RFP is available starting on **March 14, 2011** from the Executive Director/Secretary Office, Boston Redevelopment Authority, Boston City Hall, One City Hall Square, Room 910, Boston, MA 02201-1007, for a non-refundable fee of One Hundred Dollars (\$100.00). Checks should be made payable to the "Boston Redevelopment Authority" or "BRA". Proposals will only be accepted from individuals or teams with a member who has registered with the BRA and purchased this RFP.

Pre-bid Conference

A pre-bid conference will be held on Wednesday, April 20, 2011 from 10:00 AM to 11:00 at Boston Redevelopment Authority, Boston City Hall, One City Hall Square, Room 900, Boston, MA 02201-1007

Proposal Submission Deadline

All responses to this RFP must be returned no later than 12:00 noon on **May 31, 2011** to:

Brian Golden, Executive Director/Secretary
Boston Redevelopment Authority
One City Hall Square, Room 910
Boston, MA 02201-1007

Fee proposals must be submitted under separate cover and in a sealed envelope with the property address clearly marked. Absolutely no responses will be accepted after the due date and time.

To ensure notice of updates, addendums or revisions to this RFP, proposals will ONLY be accepted from teams or teams with a member who has purchased this RFP and registered with the BRA.

The BRA reserves the right to reject any or all proposals. This RFP is a demonstration project and the BRA reserves the right to make modifications to the program, proposals, and development teams that are in the best interest of the demonstration project.

The award of each parcel shell is subject to approval by the BRA Board.

Brian P. Golden
Executive Director/Secretary

SUMMARY



The Mayor's Energy Positive (E+) Green Building Demonstration Program seeks to advance industry practice and public awareness of energy efficient green buildings and to construct high performance 1 to 4 unit residential, home ownership, green building prototypes that can serve as models for future practice. E+ buildings give energy back to the grid. This program is a pilot initiative of the City of Boston's Department of Neighborhood Development (DND), Office of Environment & Energy Services, and the Boston Redevelopment Authority.

In support of this initiative, the Boston Redevelopment Authority ("BRA") is pleased to issue this Request for Proposals ("RFP") for the sale and development of energy positive green residential buildings on following Boston parcels:

- 156 Highland Street, Highland Park, Roxbury neighborhood
- 61 Marcella Avenue, Highland Park, Roxbury neighborhood
- 64 Catherine Street, Woodbourne, Jamaica Plain neighborhood



To advance industry practice, this RFP seeks the participation of the very best architects, engineers, builders and developers. Development proposals must be for individual sites; teams may submit individual proposals for one, two or all three parcels. A single development team may seek designation for more than one parcel but must submit separate proposals for each site.

Sustainability and green building experts Nadav Malin, (President BuildingGreen) and Stefan Behnisch (Behnisch Architekten) will assist the BRA in selecting winning teams and awarding Innovations in Design.

Through the generous support of our sponsors, awards recognizing the best proposed designs and the best built project may be provided:

- Design Innovation Awards Up to Four Awards
- E+ Completed Project Award \$10,000 (One Award)

To expand public awareness of E+ Green Buildings and this program, an exhibit of design submissions, publications, forums and professional discussions may be organized to advance practice and promote green building awareness. The BRA retains the right to use submissions to this RFP for additional exhibits, publications, web postings, case studies and reports.

The BRA will review all proposals on a competitive basis with regard to green building outcomes, modeled energy performance, urban design, development team expertise and capacity, and development feasibility; see "Designation and Award Criteria" section.

This RFP is designed to inform prospective development teams about program, goals, selection criteria and requirements and to guide potential respondents in preparing their development proposals to the BRA. The preparation and submission of all proposals by any person, group or organization, is totally at the expense of such person, group or organization.

Responses to questions and updates for this RFP will be distributed collectively to all contacts registered with the BRA's Executive Director / Secretary Office.

Only written questions will be accepted and may be submitted to:

John Dalzell, Sr. Architect
John.Dalzell.BRA@cityofboston.gov

VISION

The objectives of the Mayor's E+ Green Building Demonstration Program and this RFP are:

Future Prototypes Construct energy efficient high performance 1 to 4 unit residential green building prototypes that can serve as models for future practice.

Demonstration Projects Test and prove the feasibility and performance potential for energy positive residential green buildings.

Awareness Raise professional and public awareness of energy efficient high performance 1 to 4 unit residential green building design and construction practices.

Housing Opportunities Advance neighborhood sustainability by providing new housing opportunities connected to nearby community amenities and affordable to a variety of income earners.

Urban Design Reinvigorate Boston neighborhoods with new development that is both contemporary, expressing high performance green building features, and contextually respectful, reflecting the scale and character of nearby structures and the neighborhood.

PROGRAM PARTNERS

The Mayor's E+ Green Building Demonstration Program is a City of Boston initiative supported by local and national sponsors who will assist with promoting the initiative and recognizing selected submissions for innovations in design and construction that advance the goals of E+ Green Building Program.

Sponsors	NSTAR Electric & Gas	National Grid
	US Green Building Council	Massachusetts USGBC Chapter
	Wainwright Bank	Boston Society of Architects

PROJECT FUNDING AND SUPPORT

Grants, rebates, awards and technical assistance are provided to support the program, and assist participating development teams. Program promotional efforts will recognize selected participants, projects, and innovations in design and construction. Development projects and teams will be eligible for the following assistance:

NSTAR & National Grid NSTAR and National Grid, jointly working through their program provider ICF International, Inc. will provide selected development teams with the following:

- Massachusetts New Homes with Energy Star, Tier III – up to \$8,000 of construction rebates for meeting requirements. For addition information see: www.MassSave.com
- Completed Project Award – an E+ Award of \$10,000 for the best energy performing and deepest green building completed.

**Boston
Redevelopment
Authority**

The BRA will provide the following awards and assistance:

- E+ Green Building Award - \$15,000 for each proposed housing unit.
- Affordable Housing Award – approximately \$60,000 for each affordable housing unit, *for one unit at 61 Marcella St. and one unit at 156 Highland St.*

Affordable Housing Units must be priced according to the BRA Inclusionary Housing Policy and affordable to families with incomes at 80% of the Area Medium Average income. Each Affordable Housing Award will be based on the differential between the cost of development and the allowed sale price of the affordable unit. See Appendix A for information on BRA Affordable Housing requirements.

To realize the goals of this demonstration program, additional awards maybe made by the BRA at its discretion.

Wainwright Bank

Participating development teams and new home buyers will be offered:

- Construction lending with preferred rates and terms for project construction financing.
- Permanent financing for homeowners at preferred rates and terms.

**Massachusetts Chapter
of the USGBC**

The Massachusetts Chapter will provide the following assistance:

- Sponsoring events and promoting the initiative and the RFP to membership and the general public.
- Promoting selected designs, project teams, and projects to membership and the general public.

**US Green Building
Council**

The USGBC will provide the following assistance:

- Sponsorship of USGBC LEED for Home Project Registration and Certification fees for designated projects (this does NOT include the cost or expenses for the LEED Rater that is required for USGBC LEED for Home Certification).

**Boston Society of
Architects**

The BSA will provide the following assistance:

- Sponsoring events and promoting the initiative and the RFP to membership and the general public.
- Promoting selected designs, project teams, and projects to membership and the general public.

GENERAL GUIDELINES

DEVELOPMENT GUIDELINES

This RFP seeks to redevelop three individual project sites. Each proposal will be evaluated in accordance with the following general development guidelines and site specific guidelines as well as additional conditions and requirements included in this RFP.

Individual Development Opportunities Each of the three sites in this RFP is offered as an individual development opportunity.

A project team may submit more than one proposal; however each proposal must be site specific and address both the general and specific guidelines.

Local Business and Jobs Opportunities Preference will be given to responses that propose on-site construction rather than off-site, prefabricated, modular, or panelized construction methods.

USE GUIDELINES

The primary use of each site is to be residential for home ownership. While ancillary residential uses will be considered, there should be no commercial or other non residential uses on site.

Residential Uses Provide two, three and / or four bedroom residential unit types and consider a mix of unit types. For each unit, provide private outdoor use space(s) including balconies, porches and patios. For each site, provide either private or shared outdoor activity space(s) including lawns, yards, gardens, patios and terraces.

Market Rate Housing The E+ program and this RFP seek to increase the sustainability of the community by constructing new market rate home owner housing affordable to a range of income earners and of a variety of housing types.

Affordable Housing Proposals including affordable housing that is in addition to the one required unit at 61 Marcella Street and the one required unit at 156 Highland Street must identify any and all funding resources necessary for the timely completion and feasible development of the selected site.

GREEN BUILDING DESIGN

Buildings are to be designed and constructed to achieve and surpass the USGBC's LEED for Homes Platinum requirements. The Project Team should include both a LEED Homes Accredited Professional and a LEED Homes Rater; both should be identified on the Project Team. The developer is responsible for all LEED Rater expenses. Projects are to be registered upon designation and certified by the US Green Building Council within 6 months of construction completion. Green building strategies should include the following:

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:

- Dry and mold free building designs including 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 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.

Energy Efficiency and Renewable Energy

Proposed projects should first minimize all energy demands before employing renewable energy sources. It is expected that buildings will be designed to achieve a HERS Index of 20 to 40 producing buildings that will use 60% to 80% less energy than a home built to the International Code Council's standards for minimum energy efficiency and surpassing the requirements for Massachusetts New Homes with Energy Star, Tier III. 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.

Onsite renewable and clean energy sources should be provided to surpass the net annual energy needs of the buildings. Buildings should be designed to maximize solar photo voltaic, solar thermal renewable energy generation as well as clean energy sources such as combined heat and power systems. The dense residential condition of each site may preclude onsite wind turbines.

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 onsite reuse and ground water recharge.
- Stormwater harvesting and onsite ground water recharging.
- Drought resistant planting and non-potable water irrigation.

Connectivity

Encourage and support non personal vehicle means of travel including public transit, walking and bicycling and reduced personal vehicle travel by promoting the use of close by schools, shopping, recreation, and work opportunities. Strategies should include easily accessible bicycle storage space, shared parking, car share program membership and transit pass programs.

Site Construction and Development

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

Education and Public Awareness

Provide for educating new and future homeowners about the building's equipment, green features and how to maximize building performance. Include owner training and operation manual, and active energy and water performance reporting and tracking systems capable of linking to online project performance tracking.

Provide for educating the area community and industry professionals on the benefits for green buildings and project design and construction practices including: construction phase open wall tours, construction phase documentation and post occupancy building performance reporting.

Innovation

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 buildings and achieve an energy positive development. In either case, replicability and ease of use of innovations and best practices for future Boston residential projects of similar scale must be highlighted.

NET ENERGY POSITIVE PERFORMANCE

The goal of the Mayor's E+ Green Building Program is to demonstrate the feasibility of urban 1 to 4 unit residential buildings that are net energy positive and produce more on-site energy on an annual basis than is needed for the buildings.

Net Energy Positive

For the purposes of the E+ Program and this RFP, a Net Energy Positive building produces enough energy on-site to exceed its annual energy use.

Utility Connected

It is expected that projects will use existing electrical and gas services when on-site renewable energy generation does not meet buildings loads. When on-site energy generation exceeds building loads, it is expected that excess energy will be exported to the electrical grid.

Modeled Energy Performance

Evaluation of proposals for Developer Selection will, in part, be based on the energy modeling performed by ICF International for the BRA. Any and all energy modeling, HERS scoring and related evaluations will be as determined by the BRA and final.

URBAN AND ARCHITECTURAL DESIGN

The overriding urban design guideline for these parcels is to ensure that the general scale and unique, local urban characteristics of the surrounding neighborhood are reflected in the proposed design. Proposed designs may be contemporary in character and detail and complimentary to the scale, typology and architectural style of the local neighborhood.

Architectural Typology Buildings should be 1 to 4 unit residential structures and of duplex over flat, side-by-side, row house, or townhouse typology.

Building Character and Materials Proposed designs should be of high quality and include careful detailing and selection of exterior materials. Exterior finishes should be of high quality and reflective of the area character while also exemplifying the very best building performance and sustainable development practices. Building characteristics and materials should be consistent on all sides of any new buildings.

Site Design and Landscaping The landscape designs and planting materials should enhance the area streetscape while providing usable private and shared open spaces for occupant use. Site design and landscaping plantings should define public, private and shared spaces and provide a buffer between surrounding uses, along edges.

Provide high quality landscaping throughout the site with an emphasis on drought resistant and native plant materials. Employ permeable surfaces, rain gardens, “bio-beds” and / or other landscape designs so as to manage all stormwater on-site.

Minimal tree removal and or trimming is recommended to accommodate new construction and provide solar exposure for building roofs. Where ever possible, preserve existing trees of significant size or character. Removed trees must be replaced with new trees at rate of 2 new trees for each tree over 4” in caliper that is removed. New tree species and locations should minimize the risk of future shading of solar exposures.

Trash and recycling containers and ground-mounted mechanical equipment shall be placed at the rear of the property and will be appropriately screened from view.

Residential Program Unit Sizes

UNIT TYPE	NET SF	BATH(S)	NOTES
2 Bedroom / Flat	900 SF	1 Bath	
2 Bedroom / Duplex	1,000 SF	1.5 Bath	
3 Bedroom / Flat	1,200 SF	1 Bath	
3 Bedroom / Duplex	1,300 SF	1.5 Bath	
4+ Bedroom	1,400 SF	2 Bath	

Note: Net Square Footage is measured from the inside face of the exterior wall, and includes usable storage space, stairwells and hallways inside the unit, the space occupied by interior walls and 50% of the area under sloped ceilings with greater than 5'-0" clearance and less than 7'-6" clearance. Net Square Footage does not include basement or attic storage areas, common stairwells, and common hallways.

**Residential Program
Room Sizes**

USE/ROOM	MIN. AREA	MIN. DIM	NOTES
Living Room	150 SF	12'-0"	
Dining Room	100 SF	10'-0"	
Primary Bedroom	120 SF	10'-6"	
Secondary Bedrooms	100 SF	9'-0"	
Full Bath	40 SF	5'-0"	
Half Bath	12 SF	3'-0"	
Coat Closet	6 SF	2'-0"	
Bedroom Closet	8 SF	2'-0"	
Linen Closet	8 SF	2'-0"	
Storage	30 SF	2'-0"	Basement or other inside area
Kitchen – 2 Bdrm.	80 SF		Min. 8 LF of counter top
Kitchen – 3 Bdrm.	100 SF		Min. 10 LF of counter top
Kitchen – 4 Bdrm.	120 SF		Min. 12 LF of counter top
Laundry			As required for Washer & Dryer

Note: Minimum counter top LF excludes sink, stove and refrigerator space.

Parking The City seeks to reduce car dependency and promote the use of public transit, walking, and bicycling by up to 1 parking space per unit.

Parking should be located at the side or rear the building and screened from street views with landscaping and fencing. Building integrated parking should be situated at the side or rear of the buildings.

Bicycle Storage Provide one Secured / Covered bicycle parking space per unit located in an easily accessed basement storage area or adjacent / attached garage or shed.

Approvals Based on the specific design, the proposed development may need to seek zoning variance(s) from the ZBA, and will be subject to BRA Design Review.

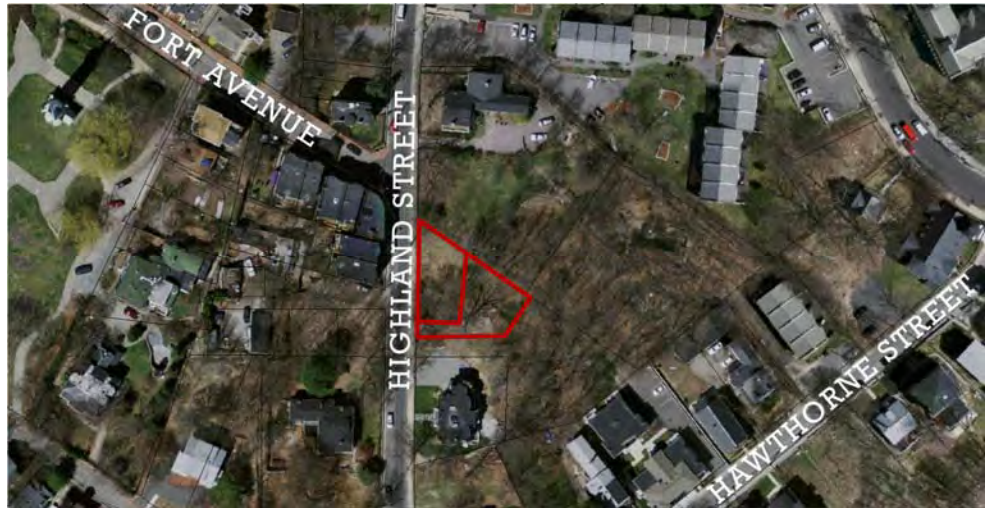
SITE SPECIFIC GUIDELINES

156 HIGHLAND STREET, HIGHLAND PARK, ROXBURY NEIGHBORHOOD

Parcel Information	Address	Ward / Parcel #	Parcel Area (approximate)
	156- 158 Highland Street	11 / 00170002	4,489 SF
	160 Highland Street	11 / 00170001	4,644 SF

Site Description

- *Adjacent Uses* - The site is surrounded by residential uses including one and two family wood frame and brick buildings and brick row house buildings.
- *Site Conditions* - The site fronts on Highland St and is generally east facing. The site rises up from Highland St. and is then generally flat. The site is vacant however records from 1899 show a single residential building and garage on the site and stone walls, steps, curb cut and driveway remain. There is some evidence of rock ledge and or “Roxbury Pudding Stone” on the site and in the surrounding area.
- *Zoning* - The Project Site is zoned 3F-4000 / 2F-5000, as shown on Map 6D of the Boston Zoning Maps in the Roxbury Crossing District. (Zoning codes and maps can be found at: <http://www.cityofboston.gov/bra/zoning/zoning.asp>). Zoning relief may be required to achieve the requirements of this RFP.



Residential Use

Provide for four residential units in a fee simple or condominium configuration.

Building Height and Massing

Building(s) may be three stories in height (approximately 35') with the massing configured into one or two buildings.

Arrange building height, scale, and massing to be compatible with surrounding buildings and provide roof areas with clear solar exposure for solar thermal and photo voltaic panels.

**Orientation and
Street Wall**

Orient the building(s) with the primary frontage on Highland Street. Design and situate building massing to reflect and enhance the existing street wall condition.

Access and Parking

Onsite parking should be from Highland Street; consideration should be given to using the existing curb cut with up to one addition curb cut.

Affordable Housing

The Highland Park community and the City seek to maintain the affordability of housing in the neighborhood by promoting the development of new market rate and affordable housing

Provide one affordable residential unit priced according to the BRA Inclusionary Housing Policy and affordable to families with incomes between 80% and 100% of the Area Medium Average income. The affordable unit should be similar in size and character to the other units in the development. See Appendix for BRA Inclusionary Housing Policy.

61 MARCELLA STREET, HIGHLAND PARK, ROXBURY NEIGHBORHOOD

Parcel Information	Address	Ward / Parcel #	Parcel Area (approximate)
	226 Highland Street	11/00430000	3,271 SF
	61 Marcella Street	11/00427000	2,100 SF
	65 Marcella Street	11/00428000	2,035 SF
	67-69 Marcella Street	11/00429000	1,965 SF

Site Description

- *Adjacent Uses* - The site is surrounded by residential uses with one, two, three, and multi-family wood frame house buildings. Across Marcella St. is the Connolly Playground, a tree edged neighborhood park with sport fields, courts, play structures and passive use areas.
- *Site Conditions* - The site fronts on Marcella Ave., Highland St., and Fulda St. The site is slightly sloping rising up from Marcella Ave. to Fulda St. The site is vacant however records from 1899 show a multiple residential buildings tight fitted on the site.
- *Zoning* - The Project Site is zoned 3F-4000 / 2F-5000, as shown on Map 6D of the Boston Zoning Maps in the Roxbury Crossing District. (Zoning codes and maps can be found at <http://www.cityofboston.gov/bra/zoning/zoning.asp>). Zoning relief may be required to achieve the requirements of this RFP.



Residential Use

Provide for four residential units in a fee simple or condominium configuration.

Building Height and Massing

Building(s) may be three stories in height (approximately 35') with the massing configured into one or two buildings.

Arrange building height, scale, and massing to be compatible with surrounding buildings and provide roof areas with clear solar exposure for solar thermal and photo voltaic panels.

- Orientation and Street Wall** Orient the building(s) with the primary frontage on Highland Street, or on Highland and Marcella Streets, while respecting both the Marcella St. and Fulda St. side wall conditions. Design and situate building massing to reflect and enhance the existing street wall conditions.
- Access & Parking** Onsite parking should be from Marcella and / or Fulda Street.
- Affordable Housing** The Highland Park community and the City seek to maintain the affordability of housing in the neighborhood by promoting the development of new market rate and affordable housing
- Provide one affordable residential unit priced according to the BRA Inclusionary Housing Policy and affordable to families with incomes between 80% and 100% of the Area Medium Average income. The affordable unit should be similar in size and character to the other units in the development. See Appendix for BRA Inclusionary Housing Policy.
- Site Sub-division** The designated developer is required to partition and transfer ownership of a section of the City parcel along the southern edge of the site to allow the abutter at 59 Marcella St space for a driveway. The partitioned area is to be approx. 10' x 70', match the depth of the parcel at 59 Marcella St.

64 CATHERINE STREET, WOODBOURNE, JAMAICA PLAIN NEIGHBORHOOD

Parcel Information	Address	Ward / Parcel #	Parcel Area (approximate)
	64 Catherine Street	19 / 1904328000	5,624 SF

Site Description

- *Adjacent Uses* - The site is surrounded by residential uses with one and two family wood frame house buildings.
- *Site Conditions* - The site fronts on Catherine St. and Florian St. The site is generally flat and abuts a Boston Water and Sewer Easement for the Stonybrook Culvert, a deep storm sewer tunnel. The site is vacant but includes a curb cut suggesting a prior residential use.
- *Zoning* - The Project Site is zoned 2F-5000, as shown on Map 9C of the Boston Zoning Maps in the Jamaica Plain Neighborhood. (Zoning codes and maps can be found at <http://www.cityofboston.gov/bra/zoning/zoning.asp>). Zoning relief may be required to achieve the requirements of this RFP.



Residential Use

Provide for two residential units in a fee simple or condominium configuration.

Building Height & Massing

Building height should be two and a half or three stories (approximately 35') and configured in one building.

Arrange building height, scale, and massing to be compatible with surrounding buildings and provide roof areas with clear solar exposure for solar thermal and photo voltaic panels.

Orientation and Street Wall

Orient the building with the primary frontage on Catherine Street. Design and situate building massing to reflect and enhance the existing street wall condition.

Access & Parking

Onsite parking should be from Catherine Street and consideration should be given to using the existing curb cut.

DESIGNATION AND DISPOSITION PROCESS

DESIGNATION AND AWARD CRITERIA

The BRA will review all proposals on a competitive basis with regard to green building outcomes, modeled energy performance, urban design, development team expertise and capacity, and development feasibility. Proposals will be grouped by site and then proposals for each site will be individually evaluated.

Sustainability and green building experts Nadav Malin (President of BuildingGreen) and Stefan Behnisch (Behnisch Architekten) will assist the BRA in selecting winning teams and awarding Innovations in Design.

Development / Design Team Selection

To be eligible for designation, proposals must meet AND will be evaluated according to the following criteria:

- A.** The extent to which the proposal fulfills the Vision of this RFP and the development team articulates a clear and replicable green design vision for small scale residential development in Boston.
- B.** Evidence of a highly integrated design-build team and innovative approaches to sustainable design and construction.
- C.** The extent to which the proposal responds to both the General and Site Specific Guidelines of this RFP.
- D.** The extent to which the proposed design responds to the net energy positive goal and the modeled energy performance of the proposed design as evaluated and measured by the BRA and the Program Partners.
- E.** The extent to which the proposed design responds to the Green Building Design guidelines and the resultant LEED for Home score.
- F.** Evidence that the individual or a member of the submitting team has registered with the BRA and purchased this RFP.
- G.** Evidence that the applicant and their development team members have the capability, experience, and financial capacity to successfully undertake and complete the proposed redevelopment project.
- H.** Evidence that the proposed development is financially feasible.
- I.** Evidence that the development can be completed within 18 months after BRA designation.
- J.** Documentation that the applicant has no outstanding property tax delinquency owed to the City of Boston; no outstanding sanitary code violations documented by the Inspectional Services Department; no record of conviction for arson; and no unresolved fair housing complaints as determined by the Boston Fair Housing Commission.
- K.** The applicant's ability to work successfully with the BRA, other public agencies, and the local community.
- L.** The extent to which the proposed development produces local business and job opportunities.

**Design
Innovation
Awards**

In addition to the designation of Development Teams, at the BRA's discretion, Innovations in Design may be awarded in the following categories:

- A.** Restorative Green Award – for the design that best exemplifies restorative Green Building strategies for occupant health, water, energy and material conservation and resource restoration, environmental restoration, occupant management, and for achieving the highest LEED for Homes outcome.
- B.** High Performance Home Award – for the design that best demonstrates strategies for exceptionally efficient energy performance, low HERS score and achieving net positive energy performance.
- C.** Urban Design Award – for exceptional building and site design that both captures the spirit of innovation and restorative design and demonstrates an understanding of the existing built context.
- D.** Public Awareness Award – for exceptional approaches to public engagement in the design and construction process and expanding both the public and professional understanding and awareness of Energy Efficiency and Green Building.

CONVEYANCE TERMS

Acquisition Fee

Upon the initial sale of the market rate units from developer to homebuyers, a land acquisition fee is to be paid to the BRA by the designated development teams as follows:

- 156 Highland Street - 4% of the gross sale price of each market rate unit.
- 63 Marcella Street - 0% of the gross sale price of each market rate unit.
- 61 Catherine Street - \$90,000 plus 4% of the gross sale price of each market rate unit.

While the above site specific acquisition fee must be reflected in each submission financial statement, to further the goals of the E+ Green Building Program, the BRA reserves the right to waive or reduce acquisition fees at its discretion.

Market Unit Resale Fee

Upon future resale of the market rate units, 2% of the gross sale price will be payable to the BRA. These funds will be used by the BRA for the creation of affordable housing or any other public purpose the BRA deems appropriate. These restrictions will be placed in the deed and in the LDA and / or any other document that the BRA deems appropriate.

OTHER DEVELOPMENT REQUIREMENTS

Applicant Responsibility	The preparation and submission of all proposals by any person, group or organization is totally at the expense of such person, group or organization. The designated developer shall be responsible for any and all costs incurred in connection with the planning, permitting, and development of the Site. The BRA and the City of Boston shall not be liable for any such costs nor shall be required to reimburse the redeveloper for such costs.
Policies And Regulations	Development projects shall comply with the City of Boston's zoning and building regulations and procedures; the Boston Job Policy; 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.
Site Survey	The designated developer is required to have the Project Site surveyed and to provide plans suitable for recording at its own expense.
Infrastructure Improvement Expenses	All site improvements, including sidewalks, street lights and street trees, shall be paid by the designated redeveloper, and the estimated costs for such improvements must be documented in the development pro forma. The designee will pay for the cost of any utility relocation not paid by a utility company. The designee will assume any and all liability for any environmental clean up pursuant to Chapter 21E of the Massachusetts General Laws ("M.G.L.").
Construction Signage	Prior to ground breaking and during the construction period, the developer shall provide at their expense, and display, the City of Boston "Getting the Job Done", or a similar sign, as directed by the BRA. The "Getting the Job Done" sign should be 4' x 8' and approved by the BRA staff prior to installation. The developer should also provide signage that describes the project, including the number of affordable units.
Site and Soil Remediation	The designee will assume any and all liability for any environmental clean up pursuant to Chapter 21E of the Massachusetts General Laws.

DISPOSITION PROCESS

Proposal Review *Development proposals must at minimum include all specified Submission Requirements. All proposals will be reviewed for compliance with, and are subject to, the criteria, procedures, requirements, and the general and specific guidelines included in this RFP.*

To ensure notice of updates, addendums or revisions to this RFP, proposals will ONLY be accepted from individuals or teams with a member who has registered with the BRA and purchased this RFP.

Development teams may be invited to make formal presentations to the BRA during the initial phase of the selection process.

The BRA reserves the right to request additional information from the applicant and to reject any and all proposals in whole or in part.

Developer Tentative Designation The BRA will recommend Tentative Designation of the developer whose proposal best meets the criteria listed in this RFP. If necessary, the BRA may request a team to further develop or modify their proposals so as to best meet the goals of the RFP. Proposals will be subject to subsequent stages of BRA development and design review prior to consideration for final designation. Additional submission requirements are identified in the Appendix.

Following Tentative Designation a license agreement with the developer will be issued so that the developer may investigate soil and geotechnical conditions, survey the site, and conduct related predevelopment activities associated with the planning and development of the project site.

If the designated developer has not met the above terms and conditions and final designation has not been granted within 180 days from the date of the tentative designation, the tentative designation may be rescinded by the BRA without prejudice and without further action by the BRA Board.

Public Presentation A public meeting will be scheduled for Tentatively Designated development teams to present their proposals to the community for input. The BRA may request the development teams to revise their proposals in response to BRA and community comments.

Final Designation and Conveyance Final designation will be granted upon satisfactorily completing all terms and conditions, and the Director of the BRA will be authorized for and on behalf of the BRA to execute and deliver a Land Disposition Agreement (“LDA”) and deed conveying the Site to the developer, said documents to be in the BRA's usual form. The final designation will be automatically rescinded without prejudice and without any further authorization or approvals by the BRA's Board, if the Site has not been conveyed by a designated time frame established by the BRA Board.

When improvements are completed in compliance with the LDA and according to the approved final construction documents, the BRA will issue a Certificate of Completion signifying that the improvements have been undertaken in compliance with all agreements between the BRA and the developer.

SUBMISSION REQUIREMENTS

REQUEST FOR PROPOSAL SUBMISSION

Responses to this RFP are to be separate for each individual site and must include three 8 ½” x 11” printed copies of the complete proposal, a PDF file of the complete proposal, Excel spreadsheets of the “Financial” section requirements, and JPG’s files at 600 dpi resolution of all images and drawings on a digital CD.

The BRA holds the rights to use any or all proposals, including images, in part or entirety, for exhibits, events, promotions, publications, case studies, or public awareness as deemed appropriate by the BRA.

Each proposal should contain following items:

Development Team

1. A letter of interest signed by the principal(s). This letter should introduce the development team, including the developer, architect, engineer, contractor, LEED H Accredited Professional, LEED H Rater and other key consultants for the proposed development. Indicate whether any of the individuals or businesses are minority/female owned businesses. For joint ventures, provide a copy of the Partnership Agreement detailing the authority and participation of all parties.

A chief contact person must be listed.

2. A written description of qualifications, experience and relevant background information of all team members highlighting the team’s ability to design, permit, build, and market the proposed project. Include a description of functional relations among team members, in particular the principal owner(s), partners (if any), the project manager, and key development consultants.

Development Concept

1. A written description of how the proposed project fulfills the E+ Green Building Vision of the RFP and the development team’s vision for replicable high performance residential green building.
2. A general description of the proposed development including building type(s), unit types, unit and total building square footage, and site uses and areas.

Implementation Plan

1. An overall development timeline from the date of tentative designation by the BRA through construction completion and sales. Indicate start and end dates for major tasks and project phases.
2. A detailed pre-development task timeline from tentative designation to construction start including, each design phase, permitting, loan closing construction commencement tasks. Indicate all start and end dates.
3. An outline of required regulatory approvals including zoning and building permitting. The outline should include current zoning conditions, preliminary zoning calculations, and what, if any, zoning variances would be required for the proposed development.

Design Proposed design concepts and strategies should be effectively and efficiently communicated. Each proposal must include, but is not limited to, the following materials:

1. *A Written Description* of the teams approach to integrated project planning and innovations in sustainable design and construction.
2. *Development Program* summarizing site and building uses and square footage and an area summary of each unit including uses and square footage.
3. *Neighborhood Plan* (at appropriate scale) showing the lot, building footprint, street names, and existing buildings on the neighboring sites.
4. *Site Plan* (1"=10' scale min.) showing the building footprint, the zoning setback, and all site improvements including shared and private open spaces, gardens, parking, landscaping, and fencing (items 3 and 4 may be combined).
5. *Street Elevations* (at appropriate scale) showing the relationships of the proposed design to the massing and height of adjacent buildings. These illustrations may combine drawings with photographs in any manner that clearly depicts the relationship of the new building to existing neighborhood context.
6. *Schematic Floor Plans* (1/16" = 1'0" scale) showing spaces and uses, main room dimensions and square footage, overall building dimensions.
7. *Building Elevations* (1/16" = 1'0" scale) showing primary building façades, exterior materials, architectural details, and building height.
8. *Wall Sections and Diagrams* illustrating the proposed building design, wall construction, energy efficiency and green building features.
9. *Perspectives and Sketches* including eye-level illustrations of the proposed building design in the context of the surrounding buildings.

Exhibit Boards and Digital Media

Each proposal must include the following for exhibit purposes:

1. *Presentation Boards* depicting the proposed building(s) and site design and highlighting restorative features including energy efficient, high performance, green building, and healthy home elements. A maximum of two, 30" x 40", horizontal formatted presentation boards
2. Provide high quality, high resolution digital presentation board images in JPG image and PDF formats on digital CD.

Energy Efficiency and Performance

1. *A Written Description* of how the proposed design responds to the energy efficiency and net energy positive goals and including passive and active building and equipment strategies.
2. *HERS index* for the proposed design including an itemization of key building features and elements.
3. *Energy Use and Source Summary* listing projected energy uses, on-site renewable energy sources, and building net energy performance.

Green Building

1. *A Written Description* of how the proposed design responds to the green building goals including approaches to promoting occupant health, water, energy and material conservation and resource restoration, environmental restoration, and occupant management. Key strategies to LEED H Pre-requisites and credits.
2. *LEED for Homes Checklist* for the proposed design with the projected project score and an itemization of key building features and elements.

Financial Each proposal must include, but is not limited to, the following materials:

1. *Development Program* tabulation of gross and net square footage for each unit, building and, if applicable, phase, including the number of parking spaces, and total for the entire project.
2. *Development Pro Forma* providing separate sources and uses for each project phase, if applicable, as well as a combined budget for the entire project. See Appendix B - Sample Development Pro Forma for format. All costs should be provided on a total, unit, and per gross square foot basis and include:
 - a. Land acquisition costs.
 - b. Construction Hard costs (disaggregated into site work, foundations, building, renewable energy, and contingencies).
 - c. Soft costs (disaggregated into individual line items such as architectural, engineering, legal, accounting, developer fees, financing fees, insurance, permits, real estate tax during construction, contingencies, etc.)
 - d. Any other project-related costs that are not included within the above categories.
 - e. Total development cost.
 - f. Sources of construction financing, including all assumptions regarding terms (fees, interest rates, amortization, participation, etc.) and required financial returns (return on cost, internal rate of return, etc).
3. *Sales Pro Forma* including:
 - a. Sales Schedule - A schedule of unit types showing the average net square feet (NSF), number of bedrooms, condominium fees, price per unit and price per NSF for each unit type.
 - b. Gross Sales Revenue
 - c. Sales costs, including brokerage, legal, and other conveyance costs.
 - d. Net Sales Revenue.
4. *Project Financing* including:
 - a. Developer Equity - The applicant must demonstrate the availability of financial resources to fund working capital and developer equity requirements. Acceptable documentation includes current bank statements, brokerage statements, and/or audited financial statements.
 - b. Financing Commitments - Letters of interest and/or commitment from debt and equity sources for construction financing. Letters should include loan terms.

5. *Market Analysis* - A preliminary market analysis, using empirical market data that demonstrates the feasibility of the proposed sale rates of the project.
6. *Forms and Disclosures* - Developer's Statement of Disclosure and Statement of Qualifications and Financial Responsibility; Disclosure Concerning Beneficial Interest; City of Boston Disclosure Statement.
7. Provided all Pro Forma in Microsoft Excel format on digital CD.

POST TENTATIVE DESIGNATION SUBMISSION

Implementation

1. Development Schedule
2. Recordable Site Survey
3. Reports on soil conditions, including all geotechnical and environmental investigations.

Financial and Marketing

1. Firm financial commitments for all elements of the proposed project
2. Affirmative Fair Housing Marketing Plan.
 - a. The designated redeveloper must submit an Affirmative Fair Housing Marketing Plan (Plan) to the Boston Fair Housing Commission and to the BRA in connection with the residential component of the project within ninety (90) days of tentative designation by the BRA. The Plan must be approved by both the BRA and Boston Fair Housing Commission prior to final designation of the developer.
 - b. Contact the Affirmative Marketing Specialist at the Boston Fair Housing Commission, 617-635-4408, for assistance in preparing the Plan. No rental, sales nor marketing for the market rate units or the affordable units can be done prior to filing and approval of the Plan. The Plan must describe all the steps the developer will take to guarantee fair and open access.

Design Development

BRA Design Approval is required prior to commencement of final design and contract documents. All drawings must be submitted in full size hard copy and digital PDF format. The following materials are required:

1. *Site Plan* (1"=10' scale min.) showing the building footprint, the zoning setback, and all site improvements including shared and private open spaces, gardens, parking, landscaping, and fencing
2. *Site Grading*, including typical existing and proposed grades at site lines.
3. *Site Sections* at an appropriate scale (e.g. 1" = 16' or as determined after approval of Schematic Design).
4. *Building Plans and Elevations* (including preliminary structural and mechanical drawings) sections and elevations at an appropriate scale (min. 1/8" = 1'-0") developed from approved schematic design drawings. Elevations shall show the project in the context of the surrounding area as required by the BRA to illustrate relationships of

character, scale and materials. All plans, sections and elevations shall reflect the impact of proposed structural and mechanical systems on the appearance of exterior facades and roofscape.

5. *Sections and Details*: Large-scale (e.g., $\frac{3}{4}'' = 1'-0''$) typical exterior wall sections, elevations and details sufficient to describe specific architectural components and methods of their assembly.
6. *Materials Specifications* (outline) for site improvements, exterior facades, roofscape and interior spaces.
7. *Perspective Drawings* drawn at eye-level showing the project in the context of the surrounding area.

Final Contract Documents

BRA Final Design Approval is required for application of Building Permits. Three full size sets of stamped drawings must be submitted to the BRA, two to be returned for submission to ISD. Final design drawings should also be submitted to the BRA in digital AUTOCAD format. The following materials are required:

1. *Written description* of the project, (including all program elements and space allocation for each element) and zoning calculations.
2. *Final site plan* showing all site improvements and amenities including landscaping, details for lighting, paving, planting, street furniture, utilities, grading, draining, access, service and parking.
3. *Complete architectural and engineering drawings and specifications*.
4. *Progress drawings*. During preparation of the Contract Documents, it is the developer's responsibility to notify the BRA promptly and secure its approval of all changes from the approved Design Development Drawings. Progress Drawings representing 50% completion of the Contract Documents may be required for review by the BRA.

Energy Efficiency and Performance

1. *Updated HERS index* for final design including an itemization of key building features and elements.
2. *Energy Use and Source Summary* listing projected energy uses, on-site renewable energy sources, and building net energy performance.

Green Building

1. *Updated LEED for Homes Checklist* for the proposed design including an itemization of key building features and elements.
2. *Green Building Report* of how the proposed design fulfills to the green building goals including approaches to promoting occupant health, water, energy and material conservation and resource restoration, environmental restoration, and occupant management. And how LEED for Homes Pre-requisites and Credits necessary for Platinum Certification will be exceeded.

E+ GREEN BUILDING RFP - SUBMISSION CHECK LIST

Provide Three 8 ½" X 11" Printed Copies, One Digital CD and Two Exhibit Boards

- Development Team
 - Letter of Interest
 - Team Qualifications

- Development Concept
 - Vision Statement
 - General Description

- Exhibit Boards and Digital Media
 - Presentation Boards
 - Digital Images

- Implementation Plan
 - Development Timeline
 - Pre-development Task List
 - Regulatory and Zoning Analysis

- Design Submission
 - Description of Project
 - Development Program
 - Neighborhood Plan
 - Site Plan
 - Street Elevations
 - Building Plans and Elevations
 - Wall Sections, Diagrams, Perspectives and Sketches

- Energy Efficiency and Performance
 - Description
 - HERS Index
 - Energy Use and Source Summary

- Green Building
 - Description
 - LEED for Homes Checklist

- Financial
 - Development Program
 - Development Pro Forma
 - Sales Pro Forma
 - Project Financing
 - Market Study
 - Forms and Disclosures including:
 - City of Boston Disclosure Statement
 - Disclosure Concerning Beneficial Interest
 - Developer's Statement for Public Disclosure and Statement of Qualifications and Financial Responsibility

APPENDIX

A - BRA AFFORDABLE HOUSING POLICY: Income, Sale & Rent Limits

BRA Inclusionary Development Policy 2010 Income Limits, Maximum Sales Prices, & Maximum Affordable Rents

Please see page 2 for income limits that apply to developments approved before October 2007 and all resale of BRA sponsored affordable units

Federal 2010 Income Limits for Metro Boston

Household size	70% AMI (Rental)	80% AMI (Ownership)	100% AMI (Ownership)
1	\$45,000	\$51,400	\$64,250
2	\$51,400	\$58,750	\$73,450
3	\$57,850	\$66,100	\$82,600
4	\$64,250	\$73,450	\$91,800
5	\$69,400	\$79,300	\$99,150
6	\$74,550	\$85,200	\$106,500
7	\$79,700	\$91,050	\$113,850
8	\$84,800	\$96,950	\$121,200

Maximum affordable sales prices

Bedrooms	80% AMI	100% AMI
0	\$151,600	\$194,000
1	\$172,800	\$222,100
2	\$194,000	\$250,500
3	\$215,300	\$278,700
4	\$236,500	\$307,000
5	\$259,000	\$335,200
6	\$281,700	\$363,500
7	\$304,100	\$391,700

Maximum Affordable Rents*

Bedrooms	70% AMI
0	\$1,046
1	\$1,162
2	\$1,327
3	\$1,494
4	\$1,659
5	\$1,792
6	\$1,925
7	\$2,058

* Maximum Affordable Rent represents the total gross rent; tenant-paid utilities shall be deducted in accordance with the Utility Allowance table to establish the contract rent.

Developers and/or Property Managers should contact the BRA Housing Dept. with any questions regarding the Utility Allowance.

**2010 Income Limits, Sales Prices and Rents for BRA-Sponsored
Affordable Housing for Developments approved prior to Oct 2007 & Resales**

Federal 2010 Income Limits for Metro Boston

Income Limits

Household	50%	60%	70%	80%	90%	100%	110%	120%
1	\$32,150	\$38,580	\$45,000	\$51,400	\$57,850	\$64,250	\$70,700	\$77,100
2	\$36,750	\$44,100	\$51,400	\$58,750	\$66,100	\$73,450	\$80,800	\$88,150
3	\$41,350	\$49,620	\$57,850	\$66,100	\$74,350	\$82,600	\$90,900	\$99,150
4	\$45,900	\$55,080	\$64,250	\$73,450	\$82,600	\$91,800	\$101,000	\$110,150
5	\$49,600	\$59,520	\$69,400	\$79,300	\$89,250	\$99,150	\$109,050	\$118,950
6	\$53,250	\$63,900	\$74,550	\$85,200	\$95,850	\$106,500	\$117,150	\$127,800
7	\$56,950	\$68,340	\$79,700	\$91,050	\$102,450	\$113,850	\$125,200	\$136,600
8	\$60,600	\$72,720	\$84,800	\$96,950	\$109,050	\$121,200	\$133,300	\$145,400

Maximum Sales Price

Bedrooms	50%	60%	70%	80%	90%	100%	110%	120%
0	\$88,200	\$109,300	\$130,400	\$151,600	\$172,700	\$194,000	\$215,100	\$236,200
1	\$98,900	\$123,400	\$148,200	\$172,800	\$197,600	\$222,100	\$246,900	\$271,500
2	\$109,400	\$137,600	\$165,800	\$194,000	\$222,300	\$250,500	\$278,700	\$306,900
3	\$120,000	\$151,700	\$183,600	\$215,300	\$247,000	\$278,700	\$310,500	\$342,200
4	\$130,700	\$166,100	\$201,200	\$236,500	\$271,700	\$307,000	\$342,300	\$377,500
5	\$144,700	\$183,000	\$221,000	\$259,000	\$297,200	\$335,200	\$373,200	\$411,300
6	\$159,000	\$199,900	\$240,800	\$281,700	\$322,600	\$363,500	\$404,400	\$445,300
7	\$173,000	\$216,800	\$260,500	\$304,100	\$347,900	\$391,700	\$435,300	\$479,000

Maximum Affordable Rents*

Bedrooms	50%	60%	70%	80%	90%	100%	110%	120%
0	\$711	\$853	\$1,046	\$1,137	\$1,280	\$1,423	\$1,565	\$1,707
1	\$830	\$1,046	\$1,162	\$1,327	\$1,494	\$1,659	\$1,826	\$1,991
2	\$948	\$1,137	\$1,327	\$1,517	\$1,707	\$1,897	\$2,087	\$2,277
3	\$1,066	\$1,280	\$1,494	\$1,707	\$1,920	\$2,133	\$2,348	\$2,561
4	\$1,185	\$1,423	\$1,659	\$1,897	\$2,133	\$2,371	\$2,609	\$2,845
5	\$1,280	\$1,537	\$1,792	\$2,048	\$2,305	\$2,561	\$2,817	\$3,072
6	\$1,375	\$1,650	\$1,925	\$2,201	\$2,476	\$2,751	\$3,026	\$3,301
7	\$1,469	\$1,764	\$2,058	\$2,352	\$2,646	\$2,941	\$3,234	\$3,528

* Maximum Affordable Rent represents the total gross rent; tenant-paid utilities shall be deducted in accordance with the Utility Allowance table to establish the contract rent.

Developers and/or Property Managers should contact the BRA Housing Dept. with any questions regarding the Utility Allowance.

B - SAMPLE DEVELOPMENT PRO-FORMA

Project Pro-forma must at minimum include all of the items listed in the Submission Requirements, Financial section, Item 2.

Team Name / Site				
Sample Development Pro Forma				
	Site SF	0		
	Unit # SF	0		
	Unit # SF	0		
	Total Unit SF	0		
Development Costs	Per Unit	Per SF	Total	
Land Acquisition	\$0	\$0	\$0	
Construction	\$0	\$0	\$0	
Subcategories as needed	\$0	\$0	\$0	
Subcategories as needed	\$0	\$0	\$0	
Construction Contingency	\$0	\$0	\$0	
Total Construction	\$0	\$0	\$0	
Soft Costs	\$0	\$0	\$0	
Subcategories as needed	\$0	\$0	\$0	
Fee and OH	\$0	\$0	\$0	
Subcategories as needed	\$0	\$0	\$0	
Total Soft Costs and Fees	\$0	\$0	\$0	
Total Development Costs	\$0	\$0	\$0	
Construction Sources	Per Unit	Per SF	Total	
Construction Financing	\$0	\$0	\$0	
Developer Fee	\$0	\$0	\$0	
Mass. New Homes w Energy Star, Tier III	\$0	\$0	\$0	
Other as needed	\$0	\$0	\$0	
Total Construction Sources	\$0	\$0	\$0	
Permanent Sources	Per Unit	Per SF	Total	
Sale Price	\$0	\$0	\$0	
E+ GB Incentive (BRA)	\$0	\$0	\$0	
BRA Affordable Housing (if applicable)	\$0	\$0	\$0	
Total Permanent Sources	\$0	\$0	\$0	
TOTALS	Per Unit	Per SF	Total	
Total Profit	\$0	\$0	\$0	

C – CITY OF BOSTON DISCLOSURE STATEMENT

Any person submitting a development proposal to the City of Boston and/or Boston Redevelopment Authority (“BRA”) must truthfully complete this statement and submit it prior to being designated for any project.

1. Do any of the principals owe the City of Boston and/or BRA any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?
2. Are any of the principals employed by the City of Boston and/or BRA? If yes, in what capacity? (Please include name of agency or department and position held in that agency or department).
3. Do any of the principals own any real estate in Boston? If yes, where and what type of property?
4. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?
5. Have any of the principals ever been convicted of any arson related crimes or currently under indictment for any such crimes?
6. Have any of the principals been convicted of violating any law, code, ordinance regarding conditions of human habitation within the last three (3) years?

SIGNED under the penalty of perjury.

Date: _____

Signature: _____

Address: _____

D - DISCLOSURE STATEMENT CONCERNING BENEFICIAL INTEREST

1. Location of Project:
2. Grantor or Lessor: BOSTON REDEVELOPMENT AUTHORITY
3. Grantee or Lessee:
4. I hereby state, under the penalties of perjury, that the true name and addresses of all persons who have or will have a direct or indirect beneficial interest (including the amount of their beneficial interest accurate to within one-half percent) in the above-listed property are listed below in compliance with the provisions of Section 40J of Chapter 7.

Name and residence of all persons with said beneficial interest:

<u>NAME</u>	<u>Address</u>	<u>Percentage Interest</u>
-------------	----------------	----------------------------

5. The undersigned also acknowledges and states that none of the above-listed individuals is an official elected to public office in the Commonwealth of Massachusetts, nor is an employee of the Boston Redevelopment Authority.

SIGNED under the penalty of perjury.

Signature: _____

Date: _____

E – DEVELOPERS STATEMENT FOR PUBLIC DISCLOSURE

HUD Form 6004: Developer's Statement for Public Disclosure and Developer's Statement of Qualifications and Financial Responsibility

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE

(If space on this form is inadequate for any requested information, it should be furnished on an attached page, which is referred to under the appropriate numbered item on the form.)

A. Developer and Land

1. Name and address of developer:

2. The land on which the developer proposes to enter into a contract for, or understanding with respect to the purchase or lease of land from:

BOSTON REDEVELOPMENT AUTHORITY

(Name of Local Public Agency)

In:

(Name of Urban Renewal Area)

in the City of Boston, State of Massachusetts, is described as follows:

3. If the developer is not an individual doing business under his own name, the developer has the status indicated below and is organized or operating under the laws of:

- A corporation.
- A nonprofit or charitable institution or corporation.
- A partnership known as
- A business association or joint venture known as
- A federal, State or Local Government or instrumentality thereof.
- Other (explain)

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE *(continued)*

4. If the developer is not an individual or a government agency or instrumentality, give date of organization:

5. Names, addresses, title of position (if any), and nature and extent of the interest of the officers and principal member shareholders and investors of the developers, other than a government agency or instrumentality, are set forth as follows:
 - a. If the developer is a corporation, the officers, directors or trustees, and each stockholder owning more than 10% of any class of stock.
 - b. If the developer is a nonprofit or charitable institution or corporation, the members who constitute the board of trustees or board of directors or similar governing body.
 - c. If the developer is a partnership, each partner, whether a general or limited partner, and either the percent of interest or a description of the character and extent of interest.
 - d. If the developer is a business association or a joint venture, each participant and either the percent of interest or a description of the character and extent of interest.
 - e. If the developer is some other entity, the officers, the members of the governing body, and each person having an interest of more than 10%.

NAME AND ADDRESS

POSITION, TITLE (if any) AND PERCENT OF INTEREST OR DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

6. Name, address and nature and extent of interest of each person or entity (not named in response to item 5) who has a beneficial interest in any of the shareholders or investors named in response to item 5 which gives such person or entity more than a computed 10% interest in the developer (for example, more than 20% of the stock in a corporation which holds 50% of the stock of the developer; or more than 50% of the stock in a corporation which hold 20% of the stock of the developer):

NAME AND ADDRESS

DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE (continued)

7. Names (if not given above) of officers and directors or trustees of any corporation or firm listed under item 5 or item 6 above:

B. RESIDENTIAL REDEVELOPMENT OR REHABILITATION

(The developer is to furnish the following information, but only if land is to be redeveloped or rehabilitated in whole or in part for residential purposes.)

1. State the developer's estimates, exclusive of payment for the land, for:

- a. Total cost of any residential development..... \$
- b. Cost per dwelling unit of any residential development..... \$

2. a. State the developer's estimate of the average monthly rental (if to be rented) or average sale price (if to be sold) for each type and size of dwelling unit involved in such development:

<u>TYPE AND SIZE OF DWELLING UNIT</u>	<u>ESTIMATED AVERAGE MONTHLY RENTAL</u>	<u>ESTIMATED AVERAGE SALE PRICE</u>
	\$	\$

b. State the utilities and parking facilities, if any, included in the foregoing estimates of rentals:

c. State equipment, such as refrigerators, washing machines, air conditioners, if any, include in the foregoing estimates of sale prices:

U.S DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
PART I -DEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE *(continued)*

CERTIFICATION

I (we)¹ _____ certify that this Developer's Statement for Public Disclosure is true and correct to the best of my (our) knowledge and belief.

Dated: _____

Dated: _____

Signature

Signature

Title

Title

Address

Address

¹ If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY

1. Name and address of developer:

2. Is the developer a subsidiary of or affiliated with any other corporation or corporations or any other firm or firms?

YES _____ NO _____

If Yes, list such corporation or firm by name and address. Specify its relationship to the developer, and identify the officers and directors or trustees common to the developer such other corporation or firm.

3. a. The financial condition of the developer as of _____, 20__ is as reflected in the attached financial statement.

NOTE: Attach to this statement a certified financial statement (of the corporation; for each partner in a partnership; or for the individual) showing the assets and the liabilities, including contingent liabilities, fully itemized in accordance with accepted accounting standards and based on a proper audit. (Financial statements for individuals do not need to be audited but they must be dated and signed by the applicant.) If the date of the certified financial statement precedes the date of this submission by more than six months, also attached an interim balance sheet not more than 60 days old.

b. Name and address of auditor or public accountant who performed the audit on which said financial statement is based:

4. If funds for the development of the land are to be obtained from the sources other than the developer's own funds, a statement of the developer's plan for financing the acquisition and development of the land:

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

5. Sources and amount of cash available to developer to meet equity requirements of the proposed undertaking:

a. In banks:

NAME AND ADDRESS OF BANK

AMOUNT

\$

b. By loans from affiliated or associated corporations or firms:

NAME AND ADDRESS OF SOURCE

AMOUNT

\$

c. By sale of readily salable assets:

DESCRIPTION

MARKET VALUE

MORTGAGES OR LIENS

\$

6. Names and addresses of bank references:

7. a. Has the developer or (if any) the parent corporation or any subsidiary or affiliated corporation of the developer or said parent corporation, or any of the developer's officers or principal members shareholders or investors, or other interested parties (as listed in the response to item 5, 6, and 7 of the Developer's Statement for Public Disclosure and referred to herein as "principals of the developer") been adjudged bankrupt, either voluntary or involuntary, within the past 10 years?

YES _____ NO _____

If Yes, give date, place and under what name.

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

- b. Has the developer or anyone referred to above as "principals of the developer" been indicted for or convicted of any felony within the past 10 years?
YES _____ NO _____

If Yes, give for each case (1) date, (2) charge, (3) place, (4) court and (5) action taken. Attach any explanation deemed necessary.

8. a. Undertakings, comparable to the proposed development work which have been completed by the developer or any of the principals of the developer, including identification and brief description of each project and date of completion:

<u>PROPERTY NAME AND ADDRESS</u>	<u>DESCRIPTION</u>	<u>DATE COMPLETED</u>
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- b. If the developer or any of the principals of developer has ever been an employee, in such supervisory capacity, for construction contractor or builder on undertaking comparable to the proposed redevelopment work, name of such employee, name and address of employer, title of position, and brief description of work.

9. Other federally aided urban renewal projects under Title I of the Housing Act of 1949, as amended, in which the developer or any of the principals of the developer is or has been the developer, or stockholder, officer, director or trustee or partner of such a developer:

PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

10. If the developer or parent corporation, a subsidiary and affiliate or a principal of the developer is to participate in the development of the land as a construction contractor or builder:

a. Name and address of such contractor or builder:

b. Has such contractor or builder within the last 10 years ever failed to qualify as a responsible bidder, refused to enter into a contract after an award has been made, or failed to complete a construction or development contract?

YES _____ NO _____

If Yes explain:

c. Total amount of construction or development work performed by such contractor or builder during the last three years: \$ _____

General description of such work:

d. Construction contracts or developments now being performed by such contractor or builder:

<u>IDENTIFICATION OF CONTRACT OR DEVELOPMENT</u>	<u>LOCATION</u>	<u>AMOUNT</u> \$	<u>DATE TO BE COMPLETED</u>
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e. Outstanding construction-construction bids of such contractor or builder:

<u>AWARDING AGENCY</u>	<u>AMOUNT</u> \$	<u>DATE OPENED</u>
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PART II - DEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY *(continued)*

CERTIFICATION

I (we)¹ _____ certify that this Developer's Statement of Qualifications and Financial Responsibility and the attached evidence of the developer's qualifications and financial responsibility, including financial statement are true and correct to the best of my (our) knowledge and belief.

Dated: _____

Dated: _____

Signature

Signature

Title

Title

Address

Address

¹ If the developer is a corporation, this statement should be signed by the president and secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the developer.

