

REQUEST FOR PROPOSALS

Under The

MIDDLE INCOME HOUSING INITIATIVE

For

Callender Street Sites

Proposal Submission Deadline: 4:00 pm June 24, 2013

**CITY OF BOSTON
Thomas M. Menino, Mayor**

**Department Of Neighborhood Development
Sheila A. Dillon, Chief of Housing**

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Notice to Bidders Regarding Downloadable RFPs

If you have picked up this Request for Proposals from DND’s Bid Counter, you should know that this RFP is also available for download at <http://www.cityofboston.gov/dnd/rfp>. The on-line version of the RFP is identical to the version available through the Bid Counter but it has extra features that make it easier for bidders to prepare a proposal. The on-line version of this RFP has downloadable forms that can be filled in, saved and printed from your computer. To access this function you will need the most recent edition of Adobe Reader installed on your computer. A link to the free download program is provided in the right hand column of the webpage listed above. Remember to select “save as” on your computer before printing to ensure you retain an electronic copy of your filled-in forms. You will still need to submit paper copies of your proposal to the Bid Counter in the form specified in this RFP – DND does not accept electronic submissions.

1. The Middle Income Housing Initiative

Announced by Mayor Menino in his 2013 State of The City address, this new initiative will support the construction of well-designed new housing for middle income families in Boston's neighborhoods. Up to 1 million square feet of City-owned real estate will be made available to small builders at below-market prices in 2013 and 2014. This initiative has three core goals: 1) increase the number of middle-income homeowners in Boston's neighborhoods to offset some of losses that resulted from the foreclosure crisis, 2) support property values in the higher-foreclosure neighborhoods by replacing vacant lots with well-designed homes, and 3) create business opportunities for smaller locally-based contractor-builders to stimulate construction-sector employment

Before putting any properties on the market, the City meets with local residents and abutters to review the opportunities presented by this initiative. After a mutually-agreeable development plan has been reached, properties are offered in accordance with that plan.

2 to 10 buildable house lots will be offered for development that will enable small, but experienced, contractor/builders to compete for these development opportunities. To enable smaller builders to participate, the real estate offerings will be in smaller sub-packages, so that builders can propose to develop some or all of the available parcels depending on their size and capacity. The minimum asking price of each property will be *half* of its current assessed value to encourage builders to invest more in superior design and higher-quality building materials. In addition, DND reserves the right to accept a lower purchase price at closing than originally offered to offset unanticipated costs that are discovered after the builder has been selected.

Other than reduced real estate costs, there is no other direct financial assistance from the City. The City will also defer receiving payment for its land until after all permits are in place to reduce predevelopment carrying costs and risk. The City will also offer pre-marketing assistance to find qualified homebuyers through the Boston Home Center. To promote local employment opportunities, modular construction is not permitted.

To select a winning proposal, DND will be looking primarily for:

- 1) proposals that best achieve the community's preferred development outcomes,
- 2) builders with a demonstrated capacity to complete the project as planned,
- 3) designs that complement the character of the neighborhood, and
- 4) efficient buildings that keep down operating and maintenance costs.

Before finalizing the selection of a builder, the community will review the proposed development plan.

2. Site & Neighborhood Information: Callender Street Sites



PACKAGE 1: 21-29 CALLENDER



PACKAGE 2: 24-28 CALLENDER, 10-12 TUCKER



**PACKAGE 3:
52, 56 CALLENDER ST, 16 LAURIAT ST**

AVAILABLE PARCELS:

Three packages are available. Proposers may offer to develop either Package 1, Package 2, or Package 3 or any combination of Packages. Proposers must, however, offer to develop ALL of the parcels within any Package they are proposing to develop.

PACKAGE 1	Street Address	Assessor Parcel Numbers	Square Footage	Current zoning
21-29 Callender	Calender	1402835000	4,064	3F-5000
	Calender	1402836000	4,072	3F-5000
	Calender	1402836001	4,080	3F-5000
	25-27 Calender	1402837000	4,106	3F-5000
	Calender	1402838000	5,166	3F-5000

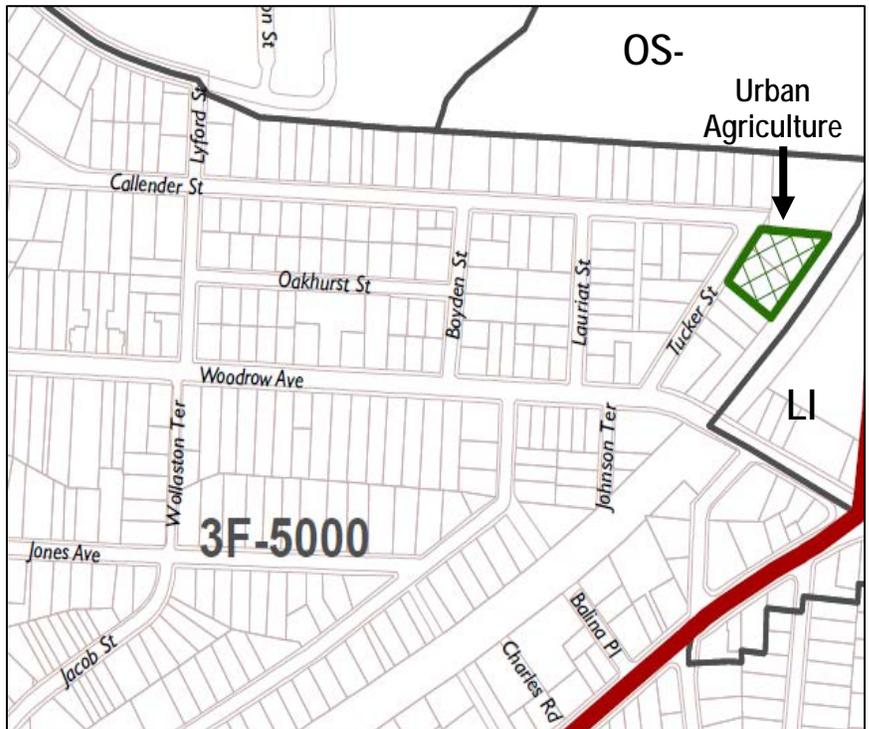
PACKAGE 2	Street Address	Assessor Parcel Numbers	Square Footage	Current zoning
24-28 Callender, 10-12 Tucker	10-12 TUCKER	1402949000	5,798	3F-5000
	TUCKER	1402948000	3,449	3F-5000
	Calender	1402947000	5,112	3F-5000

PACKAGE 3	Street Address	Assessor Parcel Numbers	Square Footage	Current zoning
52-56 Callender 16 Lauriat	52 CALLENDER	1402966000	4,468	3F-5000
	56 CALLENDER	1402965000	5,070	3F-5000
	16 LAURIAT	1402967000	5,750	3F-5000

ZONING:

These parcels all zoned 3F-5000 in the Mattapan District. More zoning information for this project is provided in Appendix 4 of this RFP. More information about the specific zoning requirements can be obtained from the Boston Redevelopment Authority at:

http://bostonredevelopmentauthority.org/pdf/ZoningCode/Maps/8B_Mattapan.pdf
and <http://bostonredevelopmentauthority.org/pdf/ZoningCode/Article60.pdf>.



NEIGHBORHOOD & MARKET CONDITIONS

Callender Street is in the Franklin Field South section of Dorchester. The sites are within walking distance of Harambee Park, Roberts Playground, and the Lucerne/Balsam Street Garden. The Talbot Avenue Commuter Rail Station is just half a mile away. Within a half-mile radius of the development sites, the following housing and market conditions exist:

Housing Stock:

31% are 1-family homes, 30% are 2-family homes, 32% are 3-family homes, 8% are 4+ unit, condominium, and mixed use buildings. 65% of the 1-3 family homes are owner-occupied.

Housing Market:

Median 1-3 family home prices: \$293,000. Median home prices are up \$103,750 (55%) since 2009.

	Median Sales Price
2009	\$189,250
2010	\$216,400
2011	\$255,000
2012	\$272,150
2013	\$293,000

Since new construction homes are expected to be valued at the upper range of the market, the top quartile of 2011-2013 sales prices are:

	Upper Quartile Price Range
1-Fam	\$280,000-\$381,000
2-Fam	\$335,000-\$420,000
3-Fam	\$350,500-\$386,000

Insufficient sales to calculate upper quartile

3. Price

The **minimum** offer price for all three packages is \$204,950. This is 50% of the combined FY13 assessed land valuation for all of parcels being offered under this RFP. Three Packages are available. Proposers may offer to develop one, two or all three packages. Proposers must offer at least the Minimum Offer Price for each Package for their proposal to be eligible for further consideration.

PACKAGE	MINIMUM OFFER
PACKAGE 1: 21-29 Callender St	\$91,089
PACKAGE 2: 24-28 Callender St, 10-12 Tucker St	\$45,544
PACKAGE 3: 52-56 Callender St, 16 Lauriat St	\$68,317
TOTAL: ALL CALLENDER STREET PACKAGES	\$204,950

In the event that one or more parcels offered in this RFP becomes unavailable after the submission deadline for this RFP due to title or other issues, all Proposers' offer prices for the effected Package will be reduced proportionate to the square footage of that parcel relative to the total square footage of the Package.

Price Offsets. Where there are costs that could not be reasonably anticipated at the time the Proposer made their submission and such costs are both documented and substantial enough to threaten the financial viability of the project, DND reserves the right to negotiate and accept a lower price as a means of offsetting some of these costs where in its determination such concessions are necessary for the successful completion of the proposed project. Any such price offsets must be agreed to in writing between DND and the Proposer prior to the closing on the sale.

Special Note Regarding Package 2. While acquired through foreclosure and owned by the City, two of the parcels in this Package have title issues that the City is working to rectify. This may result in a delayed timetable for designation and subsequent construction. In the event that the title issues are not resolved at the time the developer is selected, DND will allow the developer to retain their selected developer status at no cost to the developer until all title

defects have been resolved. The developer will not be expected to make any investments in preparation for the development of Package 2 until DND certifies that it is has rectified all outstanding title issues. If the delay is substantive, DND will also be responsible for notifying the community of the reason for the delayed development timetable.

4. Proposal Submission Deadline

Proposals must be received by Monday June 24, 2013 by 4:00 p.m. and in accordance with the standards described in Section 7 of this RFP.

5. Development Objectives

In cooperation with area residents, DND has established the following development objectives for each site.

GENERAL:

Consider the impact of new curb cuts to minimize the impact on existing on-street parking. Callender is a primary but narrow street. Lauriat is a secondary street where at most two curb cuts are recommended.

Townhomes must suit the massing and design context of 1- and 2-family homes in the immediate context and be structured as fee simple homeownership dwellings.

PACKAGE 1:

21-29 CALLENDER STREET: Construct up to four buildings consisting of 1- and/or 2-family homes including townhouse style. Proposals must preserve significant natural elements such as mature trees (there are two). A mix of 1- and/or 2-family homes is encouraged.

PACKAGE 2:

24-28 CALLENDER: Construct one 2-family home or two townhome units in one structure facing Callender Street provided that a significant portion of the property at the corner of Callender and Tucker remains as undeveloped yardspace.

10-12 TUCKER ST: Construct one (1) single family (preferred) or 2 family home (a homeowner and a renter) facing Tucker Street.

PACKAGE 3:

52, 56 CALLENDER ST, 16 LAURIAT ST: Construct up to three 1- and/or 2-family homes including townhouse style. NOTE: the selected developer must be especially concerned with a buffer to the adjacent property on Lauriat Street.

6. Developer Selection Process

Each package will have a separate review and selection process using a 3-part process. First, proposals must meet the City's Minimum Eligibility Criteria as described below. Proposals that meet these standards will then be reviewed based on a set of Evaluation Criteria. Prior to designation by the Public Facilities Commission, the selected developer will be subject to a final set of Additional Reviews to determine compliance with various City regulations, ordinances and policies.

MINIMUM ELIGIBILITY CRITERIA

Minimum Eligibility Criteria:

1. **Proposal Received by Deadline.** Only proposals that are received by the date and time and at the location described in Section 7 of this RFP will be accepted
2. **Complete Proposal Submission.** Proposals must be complete including all necessary forms, signatures and certifications.

3. **Licensed Builder.** Proposal must have a licensed builder as part of the development team.
4. **Plan to Develop All Parcels Within A Package.** Proposers may offer to develop Package 1, Package 2 or Package 3 or any combination of Packages, but all the parcels within the selected Packages(s) must be included in the development plan or the proposal will be considered incomplete and ineligible for further review.
5. **Minimum Offer Prices.** Only proposals that have offer prices equal to or greater than the Minimum Offer Prices for each Package they propose to develop will be accepted.

EVALUATION CRITERIA

For each package, all proposals that meet the Minimum Eligibility Criteria described above will then be evaluated on the Evaluation Criteria described below. The Selection Committee shall then assign a composite rating for each proposal it evaluates. The most advantageous proposal from a responsive and responsible proposer, taking into consideration all evaluation criteria, will be selected.

All forms, disclosures and certifications required for DND’s evaluation of the Evaluation Criteria are included in Appendix 2 of this Request For Proposals.

There are eight Evaluation Criteria:

1. **Offer Prices.** This will be evaluated based on the offer price relative to all other qualified offers received for each package.
2. **Development Plan.** This will be evaluated based on how well the proposal meets the Development Objectives set out in Section 5.
3. **Developer Experience and Capacity.** This will be evaluated based on how many similar good-quality projects the developer has completed in the last ten years, and how many of those projects have been in the City of Boston.
4. **Financial Feasibility.** This will be evaluated based on the reasonableness of the proposed costs and sales prices as well as the developer’s relative ability to secure the necessary financing.
5. **Design.** This will be evaluated based on how well the design complements the existing architecture of the street, the relative quality of materials and finishes, and the quality of the landscape design of the outdoor spaces. Guidance on preferred Design & Construction quality elements is available at www.DNDPropertyForSale.com: select the Middle Income Housing Initiative icon and go to the Builders Information page.
6. **Construction Quality.** This will be evaluated based on the relative amount of above-code features that offer greater durability, lower maintenance costs and greater operating/energy efficiency. Guidance on preferred Design & Construction quality elements is available at www.DNDPropertyForSale.com: select the Middle Income Housing Initiative icon and go to the Builders Information page.
7. **Construction Employment.** This will be evaluated based on whether the proposer is a Boston-based firm, as well as the Proposer’s relative ability to demonstrate its capacity to employ Boston resident, minority and female construction workers.
8. **Development Schedule.** This will be evaluated based on the amount of time between developer designation and construction completion relative to other proposals for the same sites. Developers are advised that while timeliness is one factor in the City’s

evaluation of proposals, quality design and good site plans are very important to local residents and developers should pursue the best possible design even if that requires the extra time that comes with seeking a variance from the Boston Zoning Code.

To facilitate the City's evaluation of some criteria, the City may require that the developer make a presentation to the community. Where a developer is asked to make such a presentation, DND will allow the developer to submit new or better drawings to facilitate that presentation provided that the drawings only clarify the proposed structures as originally submitted.

ADDITIONAL REVIEWS

Prior to bringing the selected developer to the Public Facilities Commission for a Tentative Developer Designation Vote, additional reviews will be conducted to ensure that the development team is compliant with various City of Boston policies and regulations.

All forms, disclosures and certifications required for DND's evaluation of the Additional Reviews are included in Appendix 3 of this Request For Proposals.

There are six Additional Reviews:

- 1. Employee Eligibility**
- 2. Obligations to The City**
- 3. Housing Code Compliance**
- 4. DND Program Participation Compliance**
- 5. Fair Housing**
- 6. Arson Prevention**

7. Proposal Submission Instructions and Checklist

Formally Obtaining A Request For Proposals. The RFP package will be available at the Department of Neighborhood Development, Bid Counter, 26 Court Street, 10th Floor, Boston, MA 02108 or you can download an RFP by registering at <http://www.cityofboston.gov/dnd/rfp>

Preparing A Complete Proposal. The following is a checklist 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. Proposers may offer to develop one, two or all three packages with a single application.

CHECKLIST OF DOCUMENTS NEEDED FOR A COMPLETE PROPOSAL

Proposal Cover Form (Appendix 1)

Evaluation Criteria Documentation (see Appendix 2 for instructions and forms)

Evaluation Criteria Form 1: *Offer Price*

Development Plan for each site

Developer Experience narrative

Evaluation Criteria Form 2: *Development Budget*

Evaluation Criteria Form 3: *Sales Plan*

Evidence of Financing

Design and Site Plans for each site

Construction Quality Statement

Evaluation Criteria Form 4: *Construction Employment Statement*

Evaluation Criteria Form 5: *Development Timetable*

Additional Review Documentation (see Appendix 3 for instructions and forms)

Additional Review Form 1: Property Affidavit

Additional Review Form 2: Affidavit of Eligibility & Chapter 803 Disclosure Statement

Additional Review Form 3: Beneficial Interest Statement

Proposal Submission Requirements. Applicants must list the following information on a sealed envelope containing the proposal:

Department of Neighborhood Development:
Callender Street Middle Income Sites: (List Packages(s) included in the application)
The submission Due Date of Monday June 24, 2013 by 4:00 p.m.
Applicant's Name and Address

PROPOSALS WITHOUT SUFFICIENT IDENTIFICATION WILL BE REJECTED.

Due Date. Applicants must submit an original and three (3) copies of the proposal in the sealed envelope to the Bid Counter either in person or by mail before 4:00 pm on Monday, June 24, 2013. Any proposals received after the date and time specified in this RFP will be rejected as non-responsive, and not considered for evaluation. The Bid Counter is located at:

City of Boston Department of Neighborhood Development
The Bid Counter
26 Court Street, 10th Floor
Boston, MA 02108

Bid Counter hours are Monday—Friday from 9:00 AM - 12:00 Noon and 1:00 PM - 4:00 PM. The Bid counter is closed Monday through Friday from 12 Noon to 1:00 P.M. and after 4 P.M. Please plan accordingly as late proposals cannot be accepted for any reason and DND apologizes for any inconvenience this may cause.

WITHDRAWAL OF PROPOSALS

Prior to the date and time for opening of proposals, an applicant may correct, modify or withdraw his/her proposal only by written notice to the City of Boston at:

The City of Boston
Department of Neighborhood Development
26 Court Street
Boston, Massachusetts 02108
Attention: Bob Jones

Workshop. A Builders Workshop will be held to answer any questions bidders may have about the Middle Income Housing Initiative, this RFP and DND's selection process. As Workshops are scheduled they will be posted on the Builders Information Page for the Middle Income Housing Initiative website. You can go to www.DNDPropertyForSale.com and follow the links to the Middle Income Housing Initiative. The next scheduled MIHI Builders Workshop is:

MIHI BUILDERS WORKSHOP
Thursday June 6th, 2013 at 11:00 a.m.
26 Court Street 11th floor, Room 11A, Boston, MA. 02108

Questions and Answers resulting from this workshop will be posted on DND's RFP website at <http://www.cityofboston.gov/dnd/rfp/>.

Questions. Questions regarding this RFP should be directed in writing to the Project Manager, Bob Jones, via facsimile at (617) 635-0383 or by email to bjones.dnd@cityofboston.gov. DND will post on-line answers to all pertinent questions at <http://www.cityofboston.gov/dnd/rfp/>

Disclaimer. The City of Boston will attempt to communicate any changes/addenda to this application package; however, it is the applicant's responsibility to check the Department's website regularly for any updates, corrections or information about deadline extensions.

8. City Of Boston Real Estate Disposition Terms and Conditions

APPLICANT'S RESPONSIBILITY FOR PROPOSAL PREPARATION

The City accepts no financial responsibility for costs incurred by applicants in responding to this Request for Proposals. Proposals will become the property of the City. Applicants are responsible for any and all risks and costs incurred in order to provide the City with the required submission. After opening, all proposals are public documents and are subject to the requirements of the Massachusetts public records law (G.L. c. 4, § 7(26)).

TERMS OF SALE

After a proposal has been selected, the selected developer will be contacted by the City to negotiate the terms of the sale. The terms of the sale must be consistent with this Request for Proposal, including the required purchase price and the development required. The use of the property will be restricted to that which is proposed in the selected proposal.

The terms of the sale will require the selected developer to abide by equal opportunity and fair housing laws and not to discriminate or permit discrimination, upon the basis of race, color, religious creed, marital status, sex, age, ancestry, sexual orientation, military status, disability, national origin, source of income, or the presence of children, in the sale and/or rental of the property.

The selected developer must execute a Purchase and Sales Agreement with the City of Boston. DND encourages the selected developer to retain appropriate legal counsel to work with DND's legal staff to complete the sale. Selected developers must close on the sale within ninety (90) days of the execution of the Purchase and Sales Agreement, unless otherwise agreed upon. At closing, the selected developer may be required to sign a DND mortgage/covenant to secure his/her obligations to DND under this conveyance. Failure to comply with these obligations will result in foreclosure on the mortgage. Buyers cannot assign their rights under this agreement without prior written approval of the Director of the Department of Neighborhood Development.

CONVEYANCE

DND's Legal Staff will prepare all necessary conveyance documents. DND will convey the Site in 'AS IS CONDITION' without warranty or representation as to the Status or Quality of Title. Final conveyance of each property will be contingent on the buyer's ability to demonstrate that all necessary financing and permits are in place and construction can commence forthwith. Applicants are hereby informed that in the event the City/DND has erected a temporary fence upon the property, the City/DND reserves the right, in its sole discretion, to remove the fence at any time prior to conveyance of the property offered pursuant to this RFP. The City/DND shall not, however, be obligated to do so. Any and all site improvements such as utility connections or street work are the responsibility of the builder. The buyer 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.

PAYMENT POLICY

Unless otherwise agreed in writing between DND and the buyer, DND requires payment in full by a treasurer's or cashier's check, for the purchase price at the time that the property is conveyed. In addition, the Selected Developer will be responsible for making a pro forma tax payment, as well as paying all recording and registration fees including, but not limited to, the cost of recording the Deed and conveyance documents at the Suffolk County Registry of Deeds.

NEGOTIATIONS

The City reserves the right to negotiate changes in 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, the City may decline to sell the property even after the selection as the proposed developer and having entered into the negotiations described in this paragraph.

CHANGES TO DEVELOPMENT PROGRAM

DND reserves the right to change aspects of the development program outlined in this RFP depending on the needs of the development, providing that the rights of other applicants are not prejudiced and DND uses its best judgment to further our mission after accepting developer's application.

THE BOSTON JOBS AND LIVING WAGE ORDINANCE

If you are a for-profit firm with 25 or more full time employees, or a non-profit firm with 100 or more employees, and you are a direct recipient ("Beneficiary") of at least One Hundred Thousand Dollars (\$100,000.00) of assistance, 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. Assistance is defined as any grant, loan, tax incentive, bond financing, subsidy, debt forgiveness, or other form of assistance of One Hundred Thousand Dollars (\$100,000.00) or more realized by or through the authority or approval of the City of Boston, including, but not limited to Industrial Development Bonds, Community Development Block Grant (CDBG) loans and federal Enhanced Enterprise Community designations awarded after the effective date of this Ordinance.

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. Pursuant to this policy, developers of 5 or more units for sale or rent will be required to have an Affirmative Marketing Plan approved by the Boston Fair Housing Commission.

CITY'S RESERVATION OF RIGHTS

The City 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. The City reserves the right to cancel a sale for any reason. The City reserves the right to select the next highest ranked proposal if the highest ranked proposal 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

END OF CALLENDER STREET REQUEST FOR PROPOSALS. DND THANKS YOU FOR YOUR INTEREST IN THE MIDDLE INCOME HOUSING INITIATIVE

The following Appendices provide all the instructions and forms necessary to prepare a complete proposal submission. Please read and follow these instructions carefully so that your proposal can be given full consideration.

**APPENDIX 1
PROPOSAL COVER FORM (Page 1 of 2)**

SUBMITTED TO: DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT
BID COUNTER
26 COURT STREET, 10TH FLOOR
BOSTON, MASSACHUSETTS 02108

DATE RECEIVED BY DND: _____

SUBMITTED BY: _____
Name

Address

Telephone _____ Email _____

Under the conditions set forth by DND, the accompanying proposal is submitted for:

- | | |
|--|--|
| <u>Callender St Middle Income Package 1</u> | Check All That Apply
<input type="checkbox"/> |
| <u>Callender St Middle Income Package 2</u> | <input type="checkbox"/> |
| <u>Callender St Middle Income Package 3</u> | <input type="checkbox"/> |

For this proposal to be properly evaluated all questions must be answered by the Proposer. The Awarding Authority (the Department of Neighborhood Development) will regard all responses to questions and all submissions as accurate portrayals of the Proposer's qualifications and any discrepancy between these statements and any subsequent investigation may result in the proposal being rejected.

The name(s) and address (es) of all persons participating in this application as principals other than the undersigned are (use separate sheet and attach if additional principals are involved):

_____ Name	_____ Address
_____ Name	_____ Address
_____ Name	_____ Address

Name of licensed builder that is participating in this development proposal:

_____ Name	_____ Builder License Number	_____ and Expiry Date
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The applicant is a/an:

(Individual/Partnership/Joint Venture/Corporation Trust, etc.)

If applicant is a Partnership, state name and residential address of both general and limited partners:

_____ Name	_____ Address
_____ Name	_____ Address
_____ Name	_____ Address

PROPOSAL COVER FORM (Pg 2 of 2)

If applicant is a Corporation, state the following:

State of Incorporation

Place of Business

President

Treasurer

If applicant is a Joint Venture, state the names and business addresses of each person, firm or company that is a party to the joint venture:

Name

Address

Name

Address

Name

Address

A copy of the joint venture agreement is on file at: _____ and will be delivered to the Official on request.

If applicant is a Trust, state the name and residential address of all Trustees and beneficiaries as:

Name

Address

Name

Address

Name

Address

Trust documents are on file at _____ and will be delivered to the Official on request.

If business is conducted under any title other than the real name of the owner, state the time when, and place where, the certificate required by General Laws, c.110, §5 was filed:

Date of Filing

Filing Place

Number of years organization has been in business under current name: _____

Has organization ever failed to perform any contract? YES NO

If YES, state circumstances here

AUTHORIZATION: The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of individual submitting proposal

Date

Title

Legal Name of Organization

APPENDIX 2 INSTRUCTIONS, FORMS AND DOCUMENTS FOR EVALUATION CRITERIA

Offer Prices

Complete, sign and date Comparative Evaluation Criteria Form 1, *Offer Prices*

Development Plans.

For each site, provide a narrative description of the proposed development including site context and use, building types, unit mixes and any other information that is relevant to evaluating the proposed development against the community's development objectives described in Section 5 of this RFP. Include a zoning analysis indicating how the proposed project is in compliance with, or in need of a variance from, the Boston Zoning Code. Zoning information for this project is available in Appendix 4 of this RFP. Label this document "Development Plan" clearly listing the package number, site name and proposer's name.

Developer Experience and Capacity.

On a separate sheet labeled "Developer Experience" also labeled with the proposer's name, indicate how many comparable (residential new construction) projects you have completed in the last ten years with a listing of all addresses that were in the City of Boston. You may supplement this information with project descriptions and as-completed photographs for up to five of these projects that you believe best represent the type of construction that you are proposing for these sites. Include a financing reference/contact for a least one recently completed project. You may also submit completed gut rehabilitation projects as demonstration of your construction experience provided that at least one of your listed projects is a new construction project.

Also provide resumes of the principal parties in your development team including the developer, contractor, and architect.

Financial Feasibility.

Complete Evaluation Form 2, *Preliminary Development Budget* and Evaluation Form 3 *Sales Plan*. The developer is expected to be responsible for typical urban infill site redevelopment costs including utility connections or street work and these costs must be accounted for in the Site Preparation/Environmental line item of the development budget. If DND determines that your Preliminary Development Budget & Sales Plan is not sufficiently detailed to fairly evaluate your proposal, you will be requested to resubmit this document in more detailed form or be disqualified from further consideration.

On a separate sheet labeled "Evidence Of Financing Statement" that is also clearly labeled with the proposer's name, provide reasonable evidence (e.g. bank statements, lines of credit statement, lender agreements) that you will be able to access the funding sources as listed in your Preliminary Development Budget. Ensure that you clearly identify how much equity you and your development team is investing as this is a significant factor in assessing financial capacity. Developers should understand that if you are selected as developer, DND will require verification of these funding sources prior proceeding to a Tentative Developer Designation vote.

Provide supporting documents that demonstrate the feasibility of your plan. For example, include broker's price opinions to document your proposed sales prices, or as-completed development budgets for one or more of the comparable projects you listed as evidence of Developer Experience above. Provide this information on a separate sheet labeled "Development Budget & Sales Plan Supporting Information" that is also clearly labeled with the proposer's name.

Design.

For each site, provide architectural drawings including plans, elevations and/or renderings of each building as it is expected to look. These drawings do not need to be “finalized,” but must be sufficient for the City and neighborhood residents to reasonably assess the visual and spatial impact of your proposed development. These drawings must include 1) elevations of *all* sides of each building and 2) all floor plans with labeled rooms and interior room dimensions. A rendering of the proposed development and buildings in context is not required but recommended because it will be needed for a community presentation should you become the recommended developer. Label this document “Design Plan” clearly listing package number, site name and proposer’s name.

For each site, provide a site plan showing where all structures will be placed on the site. These plans should clearly show how the site is to be developed including, for example, footprint and placement of all structures, setbacks from lot lines or neighboring buildings; driveways; proposed off street parking; landscape elements (e.g. yards, gardens, trees and plantings). Label this document “Site Plan” clearly listing the package number, site name and proposer’s name.

Prior to selection of a developer, DND may require builders to make a presentation to the local community. Where a developer is asked to make such a presentation, DND will allow the developer to submit new or better drawings to facilitate that presentation provided that the drawings only clarify the proposed structures as originally submitted.

To help builders prepare the most competitive proposal possible, DND has published ***Design & Construction Guidance for MIHI Builders*** that more fully explains some of design elements that DND would like to encourage. It can be found by going to www.DNDPropertyForSale.com, selecting the Middle Income Initiative icon, and going to the Builders Information Page.

Construction Quality

On a separate sheet labeled “Construction Quality Statement” that is also clearly labeled with the proposer’s name, list any significant construction quality elements that you are proposing that substantially exceed the State Building Code.

To help builders prepare the most competitive proposal possible, DND has published ***Design & Construction Guidance for MIHI Builders*** that more fully explains some of construction quality elements that DND would like to encourage. It can be found by going to www.DNDPropertyForSale.com, selecting the Middle Income Initiative icon, and going to the Builders Information Page.

To promote local employment opportunities, modular construction is not permitted.

Construction Employment

Complete the Comparative Evaluation Criteria Form 4, *Construction Employment and Minority/Women Business Statement*

Development Schedule

Complete Comparative Evaluation Criteria Form 5, *Development Timetable*

EVALUATION CRITERIA FORM 1 OFFER PRICES

Applicants are instructed to provide their offer prices for the development package(s) that they are proposing to acquire. Include your name, address, and signature. Failure to offer at least the minimum offer price for each parcel shall result in disqualification of the proposal. An offer price that includes any conditions or restrictions is prohibited and shall be disqualified.

Special instructions for religious organizations. In accordance with the Amendments to the Massachusetts Constitution, religious organizations must pay 100% of the appraised value for a property as established by a qualified appraiser hired at the Proponent's expense and approved by DND. If an applicant fails to comply with this pricing requirement, the proposal shall be disqualified

PACKAGE 1: 21-29 Callender St	MINIMUM OFFER	OFFER PRICE
	\$91,089	

PACKAGE 2: 24-28 Callender St, 10-12 Tucker St	MINIMUM OFFER	OFFER PRICE
	\$45,544	

PACKAGE 3: 52-56 Callender St, 16 Luariat St	MINIMUM OFFER	OFFER PRICE
	\$68,317	

Name of Proposer: _____

Address of Proposer: _____

Signature of Proposer: _____

EVALUATION CRITERIA FORM 2

PRELIMINARY DEVELOPMENT BUDGET

PROPOSER'S NAME: _____

Complete this Preliminary Development Budget for each site or you may substitute another form that provides substantially equivalent information. Note: Total of Uses of Funds should equal Total of Sources of Funds for each site.

CONSTRUCTION PERIOD USES OF FUNDING	TOTAL All Sites	PACKAGE 1:	PACKAGE 2:	PACKAGE 3:
		21-29 Callender	24-28 Callender, 10-12 Tucker	52-56 Callender, 16 Lauriat
Number of Homes	█	█	█	█
Acquisition - Land	\$ █	\$ █	\$ █	\$ █
Site Prep/Environmental	\$ █	\$ █	\$ █	\$ █
Construction	\$ █	\$ █	\$ █	\$ █
Construction Contingency	\$ █	\$ █	\$ █	\$ █
Architect	\$ █	\$ █	\$ █	\$ █
Survey and Permits	\$ █	\$ █	\$ █	\$ █
Legal	\$ █	\$ █	\$ █	\$ █
Title and Recording	\$ █	\$ █	\$ █	\$ █
Appraisal	\$ █	\$ █	\$ █	\$ █
Marketing	\$ █	\$ █	\$ █	\$ █
Real Estate Taxes	\$ █	\$ █	\$ █	\$ █
Insurance	\$ █	\$ █	\$ █	\$ █
Construction Loan Interest	\$ █	\$ █	\$ █	\$ █
Construction Inspection Fee	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
Soft Cost Contingency	\$ █	\$ █	\$ █	\$ █
Developer Overhead	\$ █	\$ █	\$ █	\$ █
Developer Fee	\$ █	\$ █	\$ █	\$ █
TOTAL: ALL USES	\$ █	\$ █	\$ █	\$ █

Show all of the sources of funding you plan to use from when you are selected as developer through the end of construction. Total of these sources should equal the total of uses shown above

CONSTRUCTION PERIOD SOURCES OF FUNDING	TOTAL All Sites	21-29 Callender	24-28 Callender, 10-12 Tucker	52-56 Callender, 16 Lauriat
Developer Equity	\$ █	\$ █	\$ █	\$ █
Bank Loans	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
Other: █	\$ █	\$ █	\$ █	\$ █
TOTAL ALL SOURCES:	\$ █	\$ █	\$ █	\$ █

EVALUATION CRITERIA FORM 3

SALES PLAN

PROPOSER'S NAME: _____

For each package that you are proposing to develop, list the planned addresses for all of the houses you plan to build, the type of house you are proposing to build (townhouse, 1-family, 2-family, etc.), the combined living area of all units in each house and your target sale price at completion. You should carefully consider your target sales prices because DND has committed to the community that the home prices at the time of sale will not be significantly higher than the prices included in the winning developer's proposal, and any substantive price changes from what you propose here will require prior approval from DND.

PACKAGE	STREET ADDRESS OF NEW HOME(s)	HOUSE TYPE	LIVING AREA	TARGET PRICE
PACKAGE 1				
21-29 Callender				\$
				\$
				\$
				\$
				\$
				\$
				\$
PACKAGE 2				
24-28 Callender, 10-12 Tucker				\$
				\$
				\$
				\$
				\$
PACKAGE 3				
52-56 Callender, 16 Lauriat				\$
				\$
				\$
				\$
				\$
				\$

Indicate how you plan to market the finished units and how you arrived at your target pricing (e.g. a broker's price opinion).

EVALUATION CRITERIA FORM 4
CONSTRUCTION EMPLOYMENT STATEMENT

PROPOSER'S NAME: _____

How many full time employees does your firm currently have?

Under 25 25 -99 100 or more

Are you a Boston-based business? YES NO

Boston Based: where the principal place of business and/or the primary residence of the Proposer is in the City of Boston.

Are you a Minority-owned Business Enterprise? YES NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? YES NO

Are you a Woman-owned Business Enterprise? YES NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? YES NO

RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT

DND encourages MIHI builders to seek to achieve the following construction employment goals:

Boston Residents 50% of project hours
Minority 25% of project hours
Female 10% of project hours

These are targets, not requirements, but proposals that provide better evidence of their ability to achieve these targets will be more highly ranked. Explain what actions you will undertake to promote employment of these groups:

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with "Supplementary Construction Employment Statement" and the Proposer's name. *Note: if you are, according the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND's employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City's Office of Jobs & Community Services, please list the most recent here: _____

EVALUATION CRITERIA FORM 4

DEVELOPMENT TIMETABLE

PROPOSER'S NAME: _____

For each site, *assuming that you are designated on August 1, 2013* indicate your planned development schedule on the form attached listing your target dates for achieving these key development milestones.

	PACKAGE 1	PACKAGE 2	PACKAGE 3
	21-29 Callender	24-28 Callender, 10-12 Tucker	52-56 Callender, 16 Lauriat
Apply for Building Permit	_____	_____	_____
Zoning Relief Anticipated? Y/N	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
All Financing Committed	_____	_____	_____
Permit Issued	_____	_____	_____
Financing Closed	_____	_____	_____
Construction Start	_____	_____	_____
Construction Complete	_____	_____	_____

If you plan to phase the construction, describe your phasing plan here:

APPENDIX 3

ADDITIONAL REVIEWS

These standards reflect a number of City policies that govern all property dispositions. All Proposers are subject to the following reviews and must satisfy the following requirements prior to conveyance. In the event that they do not satisfy these requirements the City will proceed to the next highest ranked eligible proposal.

Tax Delinquency Review

The City of Boston's Office of the Collector-Treasurers Office will conduct a review of the Proposers property tax history. The Proposer cannot be delinquent in the payment of taxes on any property owned within the City of Boston. A selected Proposer must cure such delinquency prior to conveyance of the Site. Any selected Proposer who has been foreclosed upon by the City of Boston for failure to pay property taxes will be deemed ineligible for conveyance of the Site/Property offered pursuant to this Request for Proposals unless such Proposer promptly causes the Decree(s) or Judgment(s) of Foreclosure to be vacated by the Land Court and the City made whole. The City, in its sole discretion shall determine the timeliness of Proposer's corrective action in this regard and will disqualify the Proposer if the vacating of the tax-title foreclosure is not prosecuted expeditiously and in good faith, so as to avoid undue delay of the development of the Site/Property.

Water and Sewer Review

The City of Boston Water and Sewer Commission will conduct a review of the Proposer's water and sewer account(s). Proposers cannot be delinquent in the payment of water and sewer charges on any property owned within the City of Boston and must cure such delinquency prior to conveyance of the Site.

DND Prior Participation Review/Outstanding Obligations

The City will review the Proposer's prior participation in any City of Boston programs, including DND programs, to ascertain his/her historic performance with City programs. Proposers not fulfilling requirements under a current or past agreement will be excluded from consideration in this RFP. Proposers must be current with all monies owed to DND and the City of Boston in order to contract for and close on conveyance of the Site.

Property Portfolio Review

The City will review the Proposer'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 Proposer's property portfolio, DND may deem the Proposer(s) ineligible for participation in this RFP.

Employee Review

Neither the Proposer, nor any of the Proposer's immediate family, nor those with whom s/he has business ties, may be currently or have been within the past twelve months, an employee, agent, consultant, officer, or an elected or appointed official of the City of Boston's Department of Neighborhood Development or the Boston Redevelopment Authority. An "immediate family member" shall include parents, spouse, siblings or children, irrespective of their place of residence. A Proposer who does not satisfy the Employee Review requirements will be deemed ineligible and their proposal will not be considered.

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

DND will disqualify any proposals that fail to comply with any of these Additional Reviews. To document that the Proposer meets the Additional Review standards, complete, and where appropriate, sign and notarize the following Forms:

1. Property Affidavit
2. Affidavit of Eligibility, Chapter 803 Disclosure
3. Beneficial Interest Statement

ADDITIONAL REVIEW FORM 1

City of Boston – Department of Neighborhood Development Property Affidavit

Instructions: List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest. For any additional properties that do not fit on this form, attach a spreadsheet. (Do not use another loops form. Only one signature page should be submitted.) **Entries in this form should be typewritten.**

Applicant: _____

List Addresses of Boston Properties Owned:	WARD	PARCEL	SUB-PARCEL
_____	█	█	█
_____	█	█	█
_____	█	█	█
_____	█	█	█
_____	█	█	█
(Additional properties are identified on attached spreadsheet.)			
Boston Properties Previously Foreclosed Upon by COB:			
_____	█	█	█
_____	█	█	█
_____	█	█	█

I declare under penalties of perjury that the foregoing representations are true, accurate, and complete and correct in all respects.

Print Name	Authorized Representative's Signature	Date
_____	_____	_____
Applicant Contact (if different from above)	Telephone Number	

OFFICIAL USE ONLY:	Delinquency Reported (If Y Include Amount):
---------------------------	---

Boston Water & Sewer Commission Y \$ _____ N

Signature & Date: _____

Notes: _____

Dept. of Neighborhood Development Y \$ _____ N

Signature & Date: _____

Notes: _____

Inspectional Services Department Y \$ _____ N

Signature & Date: _____

Notes: _____

Treasury Department Y \$ _____ N

Signature & Date: _____

Notes: _____

DND Contact, Division, & Project _____

ADDITIONAL REVIEW FORM 2

AFFIDAVIT OF ELIGIBILITY

The undersigned hereby certifies, under the pains and penalties of perjury, that neither they, nor those with whom they have business ties, nor any immediate family member of the undersigned, is currently or has been within the past twelve (12) months, an employee, agent, consultant, officer or elected or appointed official of the City of Boston Department of Neighborhood Development.

For purposes of this Affidavit, "immediate family member" shall include parents, spouse, siblings, or children, irrespective of their place of residence.

This statement is made under the pains and penalties of perjury this _____ day
of _____, _____
Month Year

Applicant Signature

Co-Applicant Signature (If Applicable)

CHAPTER 803 DISCLOSURE STATEMENT

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this _____ day
of _____, _____
Month Year

Applicant Signature

Co-Applicant Signature (If Applicable)

ADDITIONAL REVIEW FORM 3

BENEFICIAL INTEREST STATEMENT

WHEREAS, the undersigned intends to enter into an agreement to purchase real property located at:

Check here for Callender Street Package 1

Street Address	Assessor Parcel Numbers	Square Footage
CALLENDER	1402835000	4,064
CALLENDER	1402836000	4,072
CALLENDER	1402836001	4,080
25 CALLENDER	1402837000	4,106
CALLENDER	1402838000	5,166

Check here for Callender Street Package 2

Street Address	Assessor Parcel Numbers	Square Footage
10-12 TUCKER	1402949000	5,798
TUCKER	1402948000	3,449
CALLENDER	1402947000	5,112

Check here for Callender Street Package 3

Street Address	Assessor Parcel Numbers	Square Footage
52 CALLENDER	1402966000	4,468
56 CALLENDER	1402965000	5,070
16 LAURIAT	1402967000	5,750

MA from the City of Boston, I hereby certify pursuant to section 40J of Chapter 7 of M.G.L.:

That the following are the true names and addresses of all persons who have or have a direct or indirect beneficial interest in said property.

(Please print names and addresses of applicant and all co-applicants)

NAME

ADDRESS

This statement is made under the pains and penalties of perjury this _____ day
of _____, _____
Month Year

Applicant Signature

Co-Applicant Signature (If Applicable)

APPENDIX 4 ZONING ANALYSIS FOR CALLENDER STREET PACKAGES

This analysis has been provided by DND to help builders prepare a successful proposal. DND understands that where homes can be built without requiring variances from the Boston Zoning Code, they can be built more quickly and efficiently. This is an analysis of the potential buildout permitted under current zoning only, and it is *not* a specific recommendation from DND as to what is preferable on any given siteⁱ. DND makes no representations that development in accordance with this analysis ensures that no zoning variances are necessary.

Zoning Requirement: Greater Mattapan 3F-5000		PACKAGE 1:	PACKAGE 2:	PACKAGE 3:
		21-29 Callender	24-28 Callender, 10-12 Tucker	52-56 Callender, 16 Lauriat
		(21,488 sf)	(14,359 sf)	(15,288 sf)
Zoning Element	Requirement	Zoned Buildout	Zoned Buildout	Zoned Buildout
Min Lot Area Semi-attached Dwelling; Row house or Town house Building	2500 for 1 unit; 2500 each add. unit	8 unitsⁱⁱ	5 unitsⁱⁱⁱ	6 units^{iv}
Any other Dwelling or Use	5000 for 1 or 2 units; 2500 each add. unit	4 homes/4-8 units	2 homes/2-5 units	3 homes/3-6 units
Min Lot Width	25	25	25	25
Min Lot Frontage	25	25	25	25
Max FAR (Area)	.8	17,190 sf	11,487 sf	12,230 sf
Max Building Height	3 Stories/ 35 ft.	3 Stories/ 35 ft.	3 Stories/ 35 ft.	3 Stories/ 35 ft.
Min. Open space	600 sf/unit	600 sf/unit	600 sf/unit	600 sf/unit
Min. Front Yard Depth	15 (or nodal)	15 (or nodal)	15 (or nodal)	15 (or nodal)
Min. Side Yard Depth	10	10	10	10
Min. Rear Yard Depth	30	30	30	30
Min. Parking Ratio	1/unit	1/unit	1/unit	1/unit

ⁱ Refer to development objectives as the preferred use varies from this zoning chart.

ⁱⁱ Refer to development objectives as the preferred use varies from this zoning chart.

ⁱⁱⁱ Refer to development objectives as the preferred use varies from this zoning chart.

^{iv} Refer to development objectives as the preferred use varies from this zoning chart.