
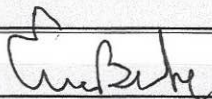


Appendix 1: Cover Sheet Form

SOLICITATION, OFFER AND AWARD				
1. PROJECT NAME	2. TYPE OF SOLICITATION		3. DATE ISSUED	
Holborn Street Package NHI	<input type="checkbox"/> Invitation for Bids <input checked="" type="checkbox"/> Negotiated (RFP)	March 9, 2020		
4. ISSUED BY: City of Boston, Department of Neighborhood Development 26 Court Street, 11 th Floor Boston, MA 02108		5. ADDRESS OFFER TO: (If other than item 4)		
SOLICITATION				
6. SEALED OFFERS (original and 3 copies) will be received at the place specified in item 4 until 4:00 p.m. (EST) April 14, 2020 . CAUTION: Late submissions, Modifications, and Withdrawals: See Section 10. All offers are subject to all terms and conditions contained in this solicitation.				
7. For Information Contact:	7a. Name Anne Conway	7b. Telephone (617)- 635-0182	7c. Fax (617) 635-0383	7d. E-mail Anne.conway@boston.gov
OFFER				
8. In accordance with the terms of this RFP, the undersigned agrees, if this offer is accepted, to furnish any and all supporting documentation upon request by DND.				
OFFER PRICE:	\$400	This is \$100 per parcel for the affordable homes plus the land price calculated for the Market-Rate homes in Appendix 2		
9. SUBMISSION CHECKLIST				
<input checked="" type="checkbox"/>	Cover Sheet Form (Appendix 1)	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Financials: Affordable Homes (Appendix 2)	<input type="checkbox" value="N"/>	Developer's Qualifications Statement included	
<input checked="" type="checkbox"/>	Key Construction Elements (Appendix 3)	<input type="checkbox" value="Y"/>	Developers Qualification Statement included with a different NHI Package: NHI Callender, FLoyd, Stratton, Jones	
<input checked="" type="checkbox"/>	Development Timetable (Appendix 4)			
<input checked="" type="checkbox"/>	My signature below signifies that I have read the Terms & Conditions as specified in Appendix 6 and that I will abide by those requirements should I be selected as developer under this Request for Proposals			
10. ADDRESS OF OFFEROR Castle Rock Properties 77 Pond Ave., #1508 Brookline, MA 02445		11. Name and Title of Authorized Signatory (Print) Eric Berke		
		12. Signature 		
13. Phone Number 617-413-3348		14. Offer Date 5/22/20		

APPENDIX 2: DEVELOPMENT FINANCIALS FOR AFFORDABLE HOMES

Instructions: Complete all shaded boxes, all other boxes will self-calculate. Refer to Tab 1 For Market-Rate Financials

I. DEVELOPMENT BUDGET					
PROPERTY ADDRESS	15-15A Holborn	15-15A Holborn	17 Holborn	14-14A Holborn	ALL
HOUSE MODEL	Single Family Type A2	Two Family Type B	Single Family Type A3	Two Family Type B	This Page
GROSS SQUARE FOOTAGE	1,865	2,994	1,684	2,994	9,537
NET SQUARE FOOTAGE	1,432	1,924	1,225	1,924	6,505
1 LAND ACQUISITION	\$100	\$100	\$100	\$100	\$400
CONSTRUCTION					
2 Direct Construction Costs	\$457,100	\$624,000	\$417,500	\$624,000	\$2,122,600
3 Hard Cost Contingency	\$22,855	\$31,200	\$20,875	\$31,200	\$106,130
4 Allocation for potential soil remediation	\$10,970	\$16,030	\$9,330	\$16,030	\$52,360
5 Other Contingency					\$0
6 Subtotal: Construction Expense	\$490,925	\$671,230	\$447,705	\$671,230	\$2,281,090
GENERAL DEVELOPMENT COSTS					
7 Survey/Siting & Permits	\$12,500	\$12,500	\$12,500	\$12,500	\$50,000
8 Architect	\$17,500	\$17,500	\$17,500	\$17,500	\$70,000
9 Legal	\$11,250	\$11,250	\$11,250	\$11,250	\$45,000
10 Title & Recording	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
11 Appraisal	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
12 Real Estate Taxes	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
13 Insurance	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
14 Construction Loan Interest	\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
15 Construction Inspection Fees	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
16 Utilities & Back Charges	\$6,500	\$6,500	\$6,500	\$6,500	\$26,000
17 Fees to Construction Lender	\$3,500	\$3,500	\$3,500	\$3,500	\$14,000
18 Other: Environmental/Testing	\$3,750	\$3,750	\$3,750	\$3,750	\$15,000
19 Other: Accounting	\$1,600	\$1,600	\$1,600	\$1,600	\$6,400
20 Other: Development Consultant	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
21 Other:	\$0	\$0	\$0	\$0	\$0
22 Soft Cost Contingency	\$11,895	\$11,895	\$11,895	\$11,895	\$47,580
23 Subtotal: General Development	\$91,195	\$91,195	\$91,195	\$91,195	\$364,780
24 DEVELOPER FEE & OVERHEAD	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
25 TOTAL COST TO BUILD AS SPECIFIED	\$632,220	\$812,525	\$589,000	\$812,525	\$2,846,270
RECOMMENDED COST SAVING REVISIONS TO SPECIFICATIONS¹					
Describe	Savings	Savings	Savings	Savings	Savings
26 COVID-19 Costs if Applicable (costs not savings)	\$15,000	\$15,000	\$15,000	\$15,000	\$45,000
27					\$0
28					\$0
29					\$0

¹ DND may select some or all of these cost-saving measures to enhance financial feasibility. You are encouraged to more fully explain the advantages of your proposed changes on a separate sheet, clearly marked "Cost-Saving Recommendations"

II. CONSTRUCTION FINANCING PLAN					
PROPERTY ADDRESS	15-15A Holborn	15-15A Holborn	17 Holborn	14-14A Holborn	ALL
HOUSE MODEL	A2	B	A3	B	This Page
30 TOTAL COST TO BUILD (Line 25)	\$632,220	\$812,525	\$589,000	\$812,525	\$2,846,270
31 Construction Loan ¹	\$582,220	\$762,525	\$539,000	\$762,525	\$2,646,270
32 Equity: Deferred Developer Fees/OH	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
33 Other Equity:					\$0
34 Other Equity:					\$0
35 TOTAL CONSTRUCTION FINANCING	\$632,220	\$812,525	\$589,000	\$812,525	\$2,846,270

¹ Part of this construction financing will come from advances of DND subsidy funds during the construction period. Amount of DND funding not yet determined.

APPENDIX 2: DEVELOPMENT FINANCIALS FOR AFFORDABLE HOMES

Instructions: No data needed - all boxes will self-calculate

		ALL
		AFFORDABLE
	GROSS SQUARE FOOTAGE	9,537
	NET SQUARE FOOTAGE	6,505
1	LAND ACQUISITION	\$400
	CONSTRUCTION	
2	Direct Construction Costs	\$2,122,600
3	Hard Cost Contingency	\$106,130
4	Allocation for potential soil remediation	\$52,360
5	Other Contingency	\$0
6	Subtotal: Construction Expense	\$2,281,090
	GENERAL DEVELOPMENT COSTS	
7	Survey/Siting & Permits	\$50,000
8	Architect	\$70,000
9	Legal	\$45,000
10	Title & Recording	\$10,000
11	Appraisal	\$4,800
12	Real Estate Taxes	\$8,000
13	Insurance	\$12,000
14	Construction Loan Interest	\$24,000
15	Construction Inspection Fees	\$12,000
16	Utilities & Back Charges	\$26,000
17	Fees to Construction Lender	\$14,000
18	Other:	\$15,000
19	Other:	\$6,400
20	Other:	\$20,000
21	Other:	\$0
22	Soft Cost Contingency	\$47,580
23	Subtotal: General Development	\$364,780
24	DEVELOPER FEE & OVERHEAD	\$150,000
25	TOTAL COST TO BUILD AS SPECIFIED	\$2,846,270
	RECOMMENDED COST SAVING REVISIONS TO SPECIFICATIONS¹	
	Describe	Savings
26		\$45,000
27		\$0
28		\$0
29		\$0

¹ DND may select some or all of these cost-saving measures to enhance financial feasibility. You are encouraged to more fully explain the advantages of your proposed changes on a separate sheet, clearly marked "Cost-Saving Recommendations"

		ALL
		AFFORDABLE
30	TOTAL COST TO BUILD (Line 25)	\$2,846,270
31	Construction Loan ¹	\$2,646,270
32	Equity: Deferred Developer Fees/OH	\$200,000
33	Other Equity:	\$0
34	Other Equity:	\$0
35	TOTAL CONSTRUCTION FINANCING	\$2,846,270

¹ Part of this construction financing will come from advances of DND subsidy funds during the construction period. Amount of DND funding not yet determined.

APPENDIX 3: Hard Costs- Affordable Homes

PROPERTY	15-15A Holborn	15-15A Holborn	17 Holborn	TOTAL
HOUSE MODEL	Single Family Type A2	Two Family Type B	Single Family Type A3	All Affordable
GROSS SQUARE FOOTAGE	1865	2994	1684	6,543
NET SQUARE FOOTAGE	1432	1924	1225	4,581
DIVISION 2: SITEWORK				
1 Earthwork-Excavation & Backfill	\$6,900	\$9,800	\$6,000	\$22,700
2 Utilities-Water,Gas, Electric, Phone, Cable	\$13,800	\$30,500	\$14,000	\$58,300
3 Paving	\$11,500	\$14,000	\$11,700	\$37,200
4 Road and Walks	\$700	\$1,300	\$700	\$2,700
5 Site Improvements	\$20,900	\$38,000	\$21,200	\$80,100
6 Geotechnical Conditions	\$0	\$0	\$0	\$0
7 Landscaping	\$8,200	\$9,700	\$8,300	\$26,200
8 Environmental Remediation	\$0	\$0	\$0	\$0
9 Demolition	\$0	\$0	\$0	\$0
10 Other On-Site Improvements	\$11,300	\$10,900	\$12,800	\$35,000
11 Subtotal: Sitework	\$73,300	\$114,200	\$74,700	\$262,200
DIVISION 3: CONCRETE				
12 Subtotal: Concrete	\$38,900	\$42,400	\$33,600	\$114,900
DIVISION 4: MASONRY				
13 Subtotal Masonry	\$0	\$0	\$0	\$0
DIVISION 5: METALS				
14 Subtotal: Metals	\$0	\$0	\$0	\$0
DIVISION 6: CARPENTRY				
15 Rough Carpentry	\$90,300	\$114,200	\$77,900	\$282,400
16 Finish Carpentry & Millwork	\$20,900	\$30,000	\$18,400	\$69,300
17 Cabinets	\$10,900	\$18,100	\$9,600	\$38,600
18 Subtotal: Carpentry	\$122,100	\$162,300	\$105,900	\$390,300
DIVISION 7: THERMAL & MOISTURE PROTECTION				
19 Dampproofing & Waterproofing	\$3,200	\$3,400	\$3,300	\$9,900
20 Building Insulation	\$14,800	\$23,000	\$12,700	\$50,500
21 Roofing	\$8,400	\$12,100	\$7,400	\$27,900
22 Sheet Metal & Flashing	\$3,800	\$3,700	\$3,800	\$11,300
23 Exterior Siding	\$49,900	\$57,200	\$43,900	\$151,000
24 Subtotal: Thermal & Moisture Protection	\$80,100	\$99,400	\$71,100	\$250,600
Division 8: DOORS & WINDOWS				
25 Doors, Frames & Hardware	\$7,900	\$11,900	\$7,000	\$26,800
26 Windows	\$15,600	\$16,900	\$15,800	\$48,300
27 Glazing	\$0	\$0	\$0	\$0
28 Subtotal: Doors & Windows	\$23,500	\$28,800	\$22,800	\$75,100
DIVISION 9: FINISHES				
29 Gypsum Wall Board & Plaster	\$18,700	\$30,600	\$15,800	\$65,100
30 Tile	\$9,200	\$9,500	\$9,300	\$28,000
31 Wood Flooring	\$12,300	\$21,300	\$10,400	\$44,000
32 Painting	\$14,800	\$20,700	\$12,500	\$48,000
33 Subtotal: Finishes	\$55,000	\$82,100	\$48,000	\$185,100
DIVISION 10: SPECIALTIES				
34 Subtotal: Specialties	\$0	\$1,200	\$1,100	\$2,300
DIVISION 11: Equipment				
35 Appliances	\$4,400	\$8,500	\$4,500	\$17,400
36 Special Equipment	\$0	\$0	\$0	\$0
37 Subtotal: Equipment	\$4,400	\$8,500	\$4,500	\$17,400
DIVISION 12: FURNISHING				
38 Window Treatments	\$1,500	\$1,500	\$1,600	\$4,600
39 Other Furnishings	\$0	\$0	\$0	\$0
40 Subtotal: Furnishing	\$1,500	\$1,500	\$1,600	\$4,600
DIVISION 13: SPECIAL CONSTRUCTION				
41 Subtotal: Special Construction	\$0	\$0	\$0	\$0
DIVISION 14: CONVEYING SYSTEMS				
42 Subtotal: Conveying Systems	\$0	\$0	\$0	\$0
DIVISION 15: MECHANICAL				
43 HVAC	\$13,200	\$15,900	\$11,600	\$40,700
44 Plumbing & Hot Water	\$21,300	\$41,200	\$21,600	\$84,100
45 Fire Protection	\$0	\$0	\$0	\$0
46 Subtotal : Mechanical	\$34,500	\$57,100	\$33,200	\$124,800
DIVISION 16: ELECTRICAL				
47 Subtotal: Electrical	\$23,800	\$26,500	\$21,000	\$71,300
48 TOTAL COST TO BUILD AS SPECIFIED	\$457,100	\$624,000	\$417,500	\$1,498,600

APPENDIX 3: Hard Costs - Affordable Homes

Instructions: Complete all shaded boxes, all other boxes will self-calculate.

PROPERTY	14-14A Holborn	TOTAL
HOUSE MODEL	Two Family Type B	All Market Rate
GROSS SQUARE FOOTAGE	2994	2,994
NET SQUARE FOOTAGE	1924	1,924
DIVISION 2: SITEWORK		
1	Earthwork-Excavation & Backfill	\$9,800
2	Utilities-Water,Gas, Electric, Phone, Cable	\$30,500
3	Paving	\$14,000
4	Road and Walks	\$1,300
5	Site Improvements	\$38,000
6	Geotechnical Conditions	\$0
7	Landscaping	\$9,700
8	Environmental Remediation	\$0
9	Demolition	\$0
10	Other On-Site Improvements	\$10,900
11	Subtotal: Sitework	\$114,200
DIVISION 3: CONCRETE		
12	Subtotal: Concrete	\$42,400
DIVISION 4: MASONRY		
13	Subtotal Masonry	\$0
DIVISION 5: METALS		
14	Subtotal: Metals	\$0
DIVISION 6: CARPENTRY		
15	Rough Carpentry	\$114,200
16	Finish Carpentry & Millwork	\$30,000
17	Cabinets	\$18,100
18	Subtotal: Carpentry	\$162,300
DIVISION 7: THERMAL & MOISTURE PROTECTION		
19	Dampproofing & Waterproofing	\$3,400
20	Building Insulation	\$23,000
21	Roofing	\$12,100
22	Sheet Metal & Flashing	\$3,700
23	Exterior Siding	\$57,200
24	Subtotal: Thermal & Moisture Protection	\$99,400
Division 8: DOORS & WINDOWS		
25	Doors, Frames & Hardware	\$11,900
26	Windows	\$16,900
27	Glazing	\$0
28	Subtotal: Doors & Windows	\$28,800
DIVISION 9: FINISHES		
29	Gypsum Wall Board & Plaster	\$30,600
30	Tile	\$9,500
31	Wood Flooring	\$21,300
32	Painting	\$20,700
33	Subtotal: Finishes	\$82,100
DIVISION 10: SPECIALTIES		
34	Subtotal: Specialties	\$1,200
DIVISION 11: Equipment		
35	Appliances	\$8,500
36	Special Equipment	\$0
37	Subtotal: Equipment	\$8,500
DIVISION 12: FURNISHING		
38	Window Treatments	\$1,500
39	Other Furnishings	\$0
40	Subtotal: Furnishing	\$1,500
DIVISION 13: SPECIAL CONSTRUCTION		
41	Subtotal: Special Construction	\$0
DIVISION 14: CONVEYING SYSTEMS		
42	Subtotal: Conveying Systems	\$0
DIVISION 15: MECHANICAL		
43	HVAC	\$15,900
44	Plumbing & Hot Water	\$41,200
45	Fire Protection	\$0
46	Subtotal : Mechanical	\$57,100
DIVISION 16: ELECTRICAL		
47	Subtotal: Electrical	\$26,500
48	TOTAL COST TO BUILD AS SPECIFIED	\$624,000

Appendix 4: Development Timetable

With an increasing need for additional new affordable homeownership housing in Boston, there is an urgency to start construction on NHI developments. DND will make available any existing surveys and environmental testing, site plans, zoning information, and CAD files of home designs (which have been reviewed by the community) in an effort to accelerate the predevelopment period. DND will also assist the designated developer with the community process and zoning board of appeals (if required) in order to streamline the permitting process. Therefore, DND has established a development schedule for the project that must be adhered to:

Presentation by Preferred Developer at Community Meeting	3 weeks from Application Due Date
Submission to PFC by DND for Developer Designation.	2 months from Application Due Date
Application to Inspectional Services Department:	2 months from Developer Designation
If ZBA:	3 months from ISD App.
Permits:	2 months from ZBA approval
Bank Commitment:	4 months (or 8 months if ZBA) from Developer Designation Date
DND and Bank Project Closing:	6 months (or 10 months if ZBA) from Developer Designation Date
Start Construction:	6 months (or 10 months if ZBA) from Developer Designation Date

If designated, Castle Rock Properties will meet or exceed the project schedule outlined above. As the house designs for this project are similar to other houses that we have designed recently, we anticipate being able to start the permitting process immediately upon designation, and complete the process expeditiously.

Appendix 5: General Project Requirements

The following General Project Requirements are required of all Neighborhood Homes developments.

1. STATUTORY COMPLIANCE REQUIREMENTS:

All purchasers of real estate from DND must be in compliance with the following statutory requirements:

Tax Delinquency Review. The City of Boston Collector-Treasurer's Office will conduct a review of the selected Applicant's property tax history. The selected Applicant cannot be delinquent in the payment of taxes on any property owned within the City of Boston. The selected Applicant must cure any such delinquency prior to the conveyance of the Property. If the selected Applicant has been foreclosed upon by the City of Boston for failure to pay property taxes, then said Applicant will be deemed ineligible for conveyance of the Property offered pursuant to this RFP, unless such Applicant promptly causes the decree(s) or judgment(s) of foreclosure to be vacated by the Land Court and the City made whole. DND, in its sole discretion, shall determine the timeliness of the selected Applicant's corrective action in this regard and will disqualify the Applicant if vacating the tax-title foreclosure is not prosecuted expeditiously and in good faith, so as to avoid undue delay.

Water and Sewer Review. The City of Boston Water and Sewer Commission will conduct a review of the selected Applicant's water and sewer account(s). The selected Applicant cannot be delinquent in the payment of water and sewer charges on any property owned within the City of Boston and, if found to be delinquent, must cure such delinquency prior to a vote request to the Public Facilities Commission for conveyance of the Property.

Property Portfolio Review. The City will review the selected Applicant's portfolio of property owned to ascertain whether there has/have been abandonment, Inspectional Services Department (ISD) code violations or substantial disrepair. If unacceptable conditions exist in the selected Applicant's property portfolio, DND may deem the selected Applicant ineligible for conveyance of the Property.

Prior Participation Review. The City will review the Applicant's prior participation in any City of Boston programs, including DND programs, to ascertain Applicant's previous performance. Applicants found to have not fulfilled their duties or obligations under previous agreement with the City may be deemed to be ineligible for conveyance of the Property.

Employee Review. Neither the Applicant, nor any of the Applicant's immediate family, nor those with whom s/he has business ties may be currently, or have been within the last twelve (12) months, an employee, agent, consultant, officer, or an elected official of the City of Boston, including DND. An "immediate family member" shall include parents, spouse, siblings or children, irrespective of their place of residence. Any Applicant who fails to satisfy this requirement may be deemed to be ineligible for conveyance of the Property.

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 advertising and providing equal access to information regarding housing and development opportunities. The Boston Fair Housing Commission will screen all Applicants. Any Applicant who fails to satisfy this requirement may be deemed to be ineligible for conveyance of the Property.

2. OFFER PRICE.

The minimum acceptable offer price for the property is \$100 per parcel. Religious Organizations – In accordance with Massachusetts Constitution religious organizations must pay 100% of the appraised value of the any public property as established by a qualified appraiser.

3. TITLE.

While DND has conducted title examinations of the properties, DND makes no warranty or representations as to the accuracy of such reports and recommends that Applicants conduct their own title examinations.

4. SURVEYS.

When available, DND will provide complete predevelopment site surveys to the selected developer including property line, utility and topographical information. The surveyor will be authorized to reissue the complete survey to the selected developer.

5. MISCELLANEOUS FEES.

Applicants are responsible for budgeting for all miscellaneous fees, including fees at the Department of Public Works, Boston Water and Sewer Commission, Inspectional Services Department, as appropriate. These fees should be included in the budgets for the affordable and market rate homes.

6. PROJECT MANAGEMENT

Performance under this Request for Proposals will be closely coordinated with the Project Manager and any other staff member designated by DND. Questions pertaining to requests for technical guidance and direction should be directed to the assigned Project Manager, or other designated DND representative. However, such DND representative(s) will only provide necessary background information and guidance; they will under no circumstances change the terms and conditions of this engagement. The Successful Applicant will confirm all scheduled project milestones with DND prior to initiating work.

7. APPLICANT'S DESIGNATED REPRESENTATIVE.

The Successful Applicant shall designate qualified representatives as point of contact to assist DND as needed throughout the engagement. Names, phone numbers, and e-mail addresses of proposed representatives are to be listed in the proposal.

8. TIMELY DEVELOPMENT.

The Successful Applicant will produce an appropriate plan of development that satisfies the City's needs within specified time frames. If the Property has not been developed according to the proposal specifications and sold to a homebuyer within two (2) years, DND may choose to grant additional time for performance or to rescind the contract, at its discretion. The determination of whether services were performed satisfactorily is at the sole discretion of DND.

9. PROPERTY MANAGEMENT.

The Successful Applicant will be ultimately responsible for the condition of the property. They must take any steps necessary to keep the property free of trash, debris, and snow.

10. FAIR HOUSING.

DND administers its development 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, all NHI homes will be affirmatively marketed in accordance with the NHI Blanket Affirmative Marketing Plan.

11. BOSTON JOBS & LIVING WAGE ORDINANCE.

If the Successful Applicant is a for-profit firm with 25 or more full time employees, or a non-profit firm with 100 or more employees, you will be required to make best efforts to adhere to the Boston Jobs and Living Wage Ordinance, and the provisions of the Promulgated Regulations, including the "First Source Hiring Agreement" provisions of said Ordinance.

Appendix 6: Terms & Conditions

The City, acting by and through its Public Facilities Commission by the Director of DND, is soliciting proposals for the acquisition of, and funding for, the properties located in the Roxbury area. The City will award a contract to the highest-rated, most advantageous proposal based on the above-listed criteria.

DND will review and evaluate proposals promptly after the submission deadline specified on the Proposal Cover Page.

DND reserves the right to award contracts to multiple Applicants, to reject any or all proposals, to waive any informality in the proposal process, or to cancel in whole, or in part, this solicitation if it is in the best interest of the City to do so. A proposal may be rejected if it is incomplete, illegible, or conditional. An acceptable offer will not include conditional requirements, such as:

- Altering the square footage of the Property;
- Proposing a use for the Property beyond mixed-income housing; or
- Proposing a use for the Property that does not benefit the residents of Boston.

DND reserves the right to obtain opinion of Counsel regarding the legality and sufficiency of proposals. The contract will be awarded, if at all, to the responsive, responsible Applicant(s) that receive the highest overall composite rating in the evaluation process.

Assumption of Risk. The City accepts NO financial responsibility for costs incurred by Applicants in responding to this Request for Proposals. Applicants are responsible for any and all risks and costs incurred in order to provide the City with the required submission.

Public Property. Proposals submitted to DND will become property of the City. After opening, all proposals become public documents and are subject to the requirements of the Massachusetts Public Records Law (M.G.L. c. 4, § 7(26)).

Terms of Sale. After a final proposal has been selected, the Successful Applicant will be contacted by DND to finalize the terms of the sale. The terms of the sale will and MUST be consistent with this Request for Proposals, including the advertised purchase price and Project Requirements.

“As Is” Conveyance. DND will convey the property in “AS IS CONDITION” without warranty or representation as to the status or quality of title. The Successful Applicant/Buyer shall, to the fullest extent permitted by law, assume any and all liability for environmental remediation and removal of soils pursuant to Chapter 21E of the Massachusetts General Laws. Finally, any and all site improvements, such as utility connections and/or street repairs, are the responsibility of the Successful Applicant.

Negotiations. DND reserves the right to negotiate for changes to the selected proposal. These negotiations may encompass values described in the Request for Proposal, as well as values and items identified during the Request for Proposal and negotiation process. On the basis of these negotiations, DND may decline to sell the property even after the selection process is complete and negotiations have begun.

Closing. The Successful Applicant must execute a Purchase and Sales Agreement and then close on the sale within ninety (90) days of the date of execution, unless otherwise agreed upon (in writing) by DND. Failure to comply with the obligations of closing may result in the rescission of any prior agreement(s) with DND regarding the Property.

Restrictions on Transfer. All properties sold under the Neighborhood Home Initiative will have a deed restriction requiring owner-occupancy. Homes that are designated as “affordable” will also have a 50-year deed rider and mortgage on the end homebuyer that requires owner-occupancy, prohibits condominium conversion, and limits future resale prices. The Successful Applicant will only be permitted to transfer the property to a homebuyer under

terms specified by DND. Any other transfer or failure to fulfill the development requirements specified by DND will trigger a reversionary clause in the deed, automatically transferring title of the Property back to DND.

Payment. Unless otherwise agreed in writing between DND and the Selected Developer, DND requires payment in full by a treasurer's or cashier's check, for the full 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.

Reservation of Rights. DND reserves the right to postpone or withdraw this RFP; to accept or reject any and all proposals; to modify or amend the terms of this RFP through an addendum; to waive any informality, and to interview, question and/or hold discussions regarding the terms of any proposal received in response to this RFP. DND reserves the right to cancel a sale for any reason. DND reserves the right to select the next highest ranked proposal, if the initially Successful Applicant is unable to proceed in a timely manner or otherwise fails to satisfactorily perform. DND reserves the right to waive any requirement or restriction set forth in this RFP or conveyance documents, if such waiver is deemed appropriate by DND, in its sole discretion.

Changes to Program. DND reserves the right to change aspects of the development program outlined in this RFP, using its best judgment as to the needs of the program and the furtherance of its mission, provided that the rights of the Applicants are not prejudiced.

Appendix 7: Developer Qualification Forms

DEVELOPER QUALIFICATION FORMS. Download and complete these forms that are required by City and/or State law or regulation:

[Affidavit of Eligibility](#)

[Developer's Disclosure of Property Owned](#)

[Conflict of Interest Affidavit](#)

[Living Wage Division: Beneficiary Affidavit](#)

[Chapter 803 Disclosure Statement \(Arson Disclosure\)](#)

Below are two additional notifications and resources that all proposers should read:

[Living Wage Division: Notice to Beneficiaries](#)

[Living Wage Division: Certified Referral Agencies and Boston One Stop Career Centers](#)

If you require hard copies of the forms please contact Anne Conway at (617) 635-0182 or at [**anne.conway@boston.gov**](mailto:anne.conway@boston.gov)

AFFIDAVIT OF ELIGIBILITY FORM

Developer's Name: Castle Rock Properties

Any person submitting an application for under this RFP must truthfully complete this Affidavit and submit it with their application.

1. Do any of the principals owe the City of Boston any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?
No

2. Are any of the principals employed by the City of Boston? If so, in what capacity? (Please include name of principal, name of agency or department, and position held in that agency or department).
None

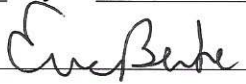
3. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?
No

5. Have any of the principals ever been convicted of any arson-related crimes, or currently under indictment for any such crime?
No

6. Have any of the principals been convicted of violating any law, code, statute or ordinance regarding conditions of human habitation within the last three (3) years?
No

Signed under the pains and penalties of perjury this

22nd day of May, 20 20

SIGNATURE: 

TITLE: President

ORGANIZATION: Castle Rock Properties

ADDRESS: 77 Pond Ave., #1508, Brookline, MA 02445

City of Boston (COB) – Property Affidavit Form

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. If there are any past due amounts owed to the Department of Neighborhood Development, the Inspectional Services Department, the Treasury Department and/or the Boston Water and Sewer Commission, such **must be paid in full** before: (1) a vote request can be presented to the City of Boston Public Facilities Commission concerning the sale of property to the applicant or any other business entity in which the applicant has an ownership or beneficial interest; OR (2) the commitment of funding to the applicant or any other business entity in which the applicant has an ownership or beneficial interest. Public Facilities Commission votes are not to be requested until the Property Affidavit has been approved and the Legal Unit has signed the Property Clearance Form.

Upon approval, the Property Affidavit will be valid for ninety (90) calendar days from the date it is signed by the Applicant.

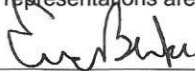
For any additional properties that do not fit on this form, attach a spreadsheet. Do not use another property affidavit form. Only one signature page is to be submitted. All entries made on this form must be typed in the form fields provided below.

Applicant:Castle Rock Properties, Inc. and Eric Berke

List Addresses of Boston Properties Owned:	PARCEL ID NUMBER
37 Ridgewood Street	1501099000
23 Forest Hills Street	1102297000
22-24 Hall Street	1103215000
249 Hyde Park Avenue	1905062000
869-871 South Street	2005466000
Boston Properties Previously Foreclosed Upon by COB:	PARCEL ID NUMBER

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

Eric Berke, manager



5/22/20

Print Name and Title

Authorized Representative's Signature

Date

617-413-3348

Applicant Contact (If different from above)

Telephone Number

OFFICIAL USE ONLY (Fax the completed form to DND at 635-0262. Delinquency Reported: (If Yes (Y) state the amount owed):

Boston Water & Sewer Commission

Y\$ _____ N

Signature and Date: _____

Notes:

Department of Neighborhood Development

Y\$ _____ N

Signature and Date: _____

Notes:

Public Works Department

Y\$ _____ N

Signature and Date: _____

Notes:

Treasury Department

Y\$ _____ N

Signature and Date: _____

Notes:

DND Contact

Division

Program

Phone: ext.

Additional properties for COB - Property Affidavit Form
For Castle Rock Properties, Inc. and Eric Berke

Submitted 5-22-20

Addresses of Boston Properties Owned:

Parcel ID Number

77-79 Wensley Street

1001305000

125-127 Belgrade Avenue

2000263000

Conflict of Interest Affidavit Form

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 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.

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

WITNESS:

BORROWER:

LL

Eric Burke

THE COMMONWEALTH OF MASSACHUSETTS

Suffolk, ss.

4/13/2020 20__

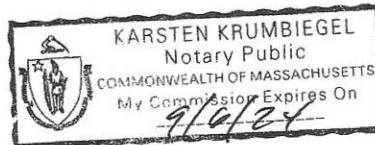
Then personally appeared the above named _____, (title) of (organization) and executed the foregoing instrument and acknowledged the foregoing instrument to be (his/her) free act and deed as (title) aforesaid and the free act and deed of (organization), before me.

KR

Name:
Notary Public

My Commission Expires:

9/6/24





CITY OF BOSTON JOBS AND LIVING WAGE ORDINANCE

THE LIVING WAGE DIVISION ● (617) 918-5236

BENEFICIARY AFFIDAVIT

Any for-profit Beneficiary who employs at least 25 full-time equivalents (FTEs) or any not-for-profit Beneficiary who employs at least 100 FTEs who has been awarded assistance of \$100,000 or more from the City of Boston must comply with the **First Source Hiring Agreement** provisions of the Boston Jobs and Living Wage Ordinance.

If you are submitting a request for proposal, request for qualification, or invitation for bid, or negotiating a loan, grant, or other financial assistance that meets the above criteria, you must submit this affidavit along with your proposal. If you believe that you are exempt from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance, complete Part 4: Exemption From First Source Hiring Agreement Provisions, or if you are requesting a general waiver, please complete Part 5: General Waiver Reason(s).

IMPORTANT: Please print in ink or type all required information. Assistance in completing this form may be obtained by calling the Living Wage Administrator in the Living Wage Division of the Office of Workforce Development, telephone: (617) 918-5236.

PART 1: BENEFICIARY OF ASSISTANCE INFORMATION:

Name of Beneficiary: _____

Contact person: _____

Address: _____
Street City Zip

Telephone #: _____ E-Mail: _____

PART 2: ASSISTANCE INFORMATION:

Name of the program or project under which the assistance is being awarded:

City of Boston awarding department: _____

Bid or proposal amount: \$ _____

Date assistance documents executed: _____ Award end date: _____

Duration of award: 1 year 2 years 3 years Other: _____ (years)

PART 3: ADDITIONAL INFORMATION

Please answer the following questions regarding your company or organization:

1. Your company or organization is: *check one*:

- For Profit
- Not For Profit

2. Total number of employees whom you employ: _____

3. Total number of employees who will be assigned to work on the above-stated award: _____

4. Do you anticipate hiring any additional employees?

- Yes
- No

If yes, how many additional FTEs do you plan to hire? _____

PART 4: EXEMPTION FROM FIRST SOURCE HIRING AGREEMENT PROVISIONS OF THE BOSTON JOBS AND LIVING WAGE ORDINANCE

Any Beneficiary who qualifies may request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance by completing the following:

I hereby request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs and Living Wage Ordinance for the following reason(s): Attach any pertinent documents to this application to prove that you are exempt. Please check the appropriate box(es) below:

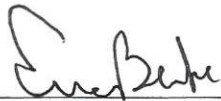
- The construction contract awarded by the City of Boston is subject to the state prevailing wage law; or
- Assistance awarded to youth programs, provided that the award is for stipends to youth in the program. "Youth Program" means any city, state, or federally funded program which employs youth, as defined by city, state, or federal guidelines, during the summer, or as part of a school to work program, or in other related seasonal or part-time program; or
- Assistance awarded to work-study or cooperative educational programs, provided that the assistance is for stipends to students in the programs; or
- Assistance awarded to vendors who provide services to the City and are awarded to vendors who provide trainees a stipend or wage as part of a job training program and provides the trainees with additional services, which may include but are not limited to room and board, case management, and job readiness services, and provided further that the trainees do not replace current City-funded positions.

Please give a full statement describing in detail the reasons you are exempt from the First Source Hiring Agreement provisions the Boston Jobs and Living Wage Ordinance (attach additional sheets if necessary):

CHAPTER 803 DISCLOSURE STATEMENT FORM

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 22 day
of May, 2020
Month Year



Proposer Signature

Co-Proposer Signature (If Applicable)

Appendix 8: Description of Key Construction Elements

To fairly evaluate different proposals, DND is seeking more specificity on what it considers the most important construction elements that benefit the end buyers. Describe with as much specificity as you can your construction specifications/standards for the key construction elements listed below. If you prefer, you can provide this information on separate sheet(s), clearly labeled with your name and the title "Description of Key Construction Elements". *Be sure to address all of the items listed here.*

CONSTRUCTION ELEMENT	DESCRIPTION
Insulation Foundation Exterior Wall Roof & Attic Sound	Indicate Type and Rating
Exterior Materials Roofing Siding Exterior Trim Window	Describe materials; describe warranties
Floor Finish Kitchen Bathroom Living & Sleeping Areas	Describe materials
Appliances Kitchen Laundry	Type, Size and Performance

CONSTRUCTION ELEMENT	DESCRIPTION
Cabinetry & Countertops Kitchen Bathrooms	Describe materials
Heating System Heat Hot Water	Describe materials, energy rating and warranties
Plumbing Plumbing fixtures, faucets and accessories	Describe materials
Bath Lavatory, Faucet and Tub	Describe materials
Electrical Lighting	Describe materials