



November 9<sup>th</sup>, 2016

Greg Watson  
MassHousing  
1 Beacon Street  
Boston, MA 02108

*Re: Updated Materials -Site Approval Application – 1299 Beacon*

Dear Greg,

We are formally submitting updated sections of the site approval application for 1299 Beacon Street which was originally submitted on July 8<sup>th</sup>, 2016. The development program has been modified based on feedback the Applicant has received during the Site Approval review process. The following sections have been updated and both a hard copy and electronic version has been provided:

- Updated architectural plans - a reduction of four residential floors and one level of parking
- Updated architectural narrative
- Updated waiver list
- Updated sustainable development principles
- Revised parking plan
- Updated site approval application – pages 4, 9, 10, and 14-19

Please let us know if you have any questions about any of the updated information.

Sincerely,

Geoffrey Engler

Cc: Town of Brookline



## **Comprehensive Permit Site Approval Application/**Rental****

[www.masshousing.com](http://www.masshousing.com) | [www.masshousingrental.com](http://www.masshousingrental.com)

## **Comprehensive Permit Site Approval Application/Rental**

Attached is the Massachusetts Housing Finance Agency ("MassHousing") application form for Project Eligibility/Site Approval ("Site Approval") under the state's comprehensive permit statute (M.G.L. c. 40B, Sections 20-23 enacted as Chapter 774 of the Acts of 1969) known as "Chapter 40B". Developers seeking a comprehensive permit to construct affordable housing under Chapter 40B and intending to use a MassHousing financing program or financing through the New England Fund ("NEF") program must receive Site Approval from MassHousing. This approval (also referred to as "project eligibility approval") is a required component of any comprehensive permit application to be submitted to the local Zoning Board of Appeals of the municipality in which the development is to be located.

As part of its review of your application, MassHousing will conduct an inspection of the site and will solicit comments from the relevant municipality. MassHousing will consider any relevant concerns that the municipality might have about the proposed project or the developer. The applicant is encouraged, therefore, to make contact with the municipality prior to submitting the Site Approval application in order to ensure that the applicant understands any concerns that the municipality may be likely to raise regarding the proposed development.

In order for a project to receive Site Approval, MassHousing must determine that (i) the applicant has sufficient legal control of the site; (ii) the applicant is a public agency, non-profit organization or limited dividend organization; and (iii) the applicant and the project are generally eligible under the requirements of the MassHousing program selected by the applicant, subject to final eligibility review and approval. Furthermore, MassHousing must determine that the site of the proposed project is generally appropriate for residential development (taking into consideration municipal actions previously taken to meet affordable housing needs) and that the conceptual project design is generally appropriate for the site. In order for MassHousing to be able to make these findings (required by 760 CMR 56.04 (4)), it is important that you answer all questions in the application and include all required attachments.

**Please note that MassHousing requires that all applicants meet with a member of our 40B Department staff before submitting their application. Applications for any projects that have not been the subject of a required pre-application meeting will not be accepted or processed.**

Upon completion of its analysis, MassHousing will either issue a Site Approval Letter that approves, conditionally approves or denies the application. If the application is approved, the applicant should apply to the Zoning Board of Appeals within two years from the date of the Site Approval Letter (unless MassHousing extends such term in writing).

Please note that Site Approval from MassHousing does not constitute a loan commitment by MassHousing or any other financing program. All potential MassHousing financing is subject to further review and underwriting by MassHousing's Rental Lending Department.

Please be sure you have familiarized yourself with all of the applicable requirements set forth in the Chapter 40B regulations and guidelines, which can be found at

[www.mass.gov/hed/economic/eohed/dhcd/legal/reggs/760-cmr-56.html](http://www.mass.gov/hed/economic/eohed/dhcd/legal/reggs/760-cmr-56.html) and  
[www.mass.gov/hed/docs/dhcd/legal/comprehensivepermitguidelines.pdf](http://www.mass.gov/hed/docs/dhcd/legal/comprehensivepermitguidelines.pdf)

Instructions for completing the Site Approval Application are included in the application form, which is attached. The completed application form and all additional documentation should be sent, after your pre-application meeting has been held, to

**Gregory Watson, Manager of Comprehensive Permit Programs**  
**MassHousing, One Beacon Street, Boston, MA 02108**

We look forward to working with you on your proposed development. Please contact Gregory Watson at 617-854-1880 or [gwatson@masshousing.com](mailto:gwatson@masshousing.com) to discuss scheduling your pre-application meeting or if there is any assistance that we can provide in the meantime to make your application process a smooth and efficient one.

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### **Our Commitment to You**

MassHousing recognizes that applicants seek some measure of predictability regarding the timeframe for our processing of their applications. Our staff will endeavor to adhere to the following schedule for reviewing applications for site approval:

Within two (2) business days of receipt of your application (provided that you have attended a required pre-application meeting) a member of our staff will notify you of any of the items listed on the checklist at the end of the application form that were missing from your application package. Please note that our acknowledgement of receipt of an item does not indicate that any substantive review has yet taken place.

**If your application package is missing any of the items indicated on the checklist by an asterisk, we will not be able to continue processing your application until such items are received.**

If we have received the information that is crucial to the commencement of our review process, we will proceed to (i) give the municipality a period of thirty (30) days in which to submit comments relating to your proposal; (ii) schedule and conduct a site visit; and (iii) solicit bids for and commission and review an "as is" appraisal of your site.

If during our review of your application package we determine that additional information or clarification is needed, we will notify you as soon as possible. Depending on when we receive such additional information, this may affect the amount of time required for MassHousing to complete the site approval process.

Assuming that your application package was complete and that you respond in a timely manner to requests for additional information or clarification, we would expect to issue or deny your site approval within 60 days of our receipt of your application package.



**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Rental Projects**

Please be sure to answer ALL questions. Indicate “N/A”, “None” or “Same” when necessary.

**Section 1: GENERAL INFORMATION** (also see Required Attachments listed at end of Section 1)

Name of Proposed Project: \_\_\_\_\_

Municipality: \_\_\_\_\_

Address of Site: \_\_\_\_\_

Cross Street (if applicable): \_\_\_\_\_

Zip Code: \_\_\_\_\_

Tax Parcel I.D. Number(s) (Map/Block/Lot): \_\_\_\_\_

**Name of Proposed Development Entity** (typically a single purpose entity): \_\_\_\_\_

Entity Type: Limited Dividend Organization \_\_\_\_\_ Non-Profit\* \_\_\_\_\_ Government Agency \_\_\_\_\_

*\* If the Proposed Development Entity is a Non-Profit, please contact MassHousing regarding additional documentation that must be submitted.*

Has this entity already been formed? Yes \_\_\_ No \_\_\_

**Name of Applicant** (typically the Proposed Development Entity or its controlling entity or individual): \_\_\_\_\_

Applicant’s Web Address, if any: \_\_\_\_\_

Does the Applicant have an identity of interest with any other member of the development team or other party to the Proposed Project? Yes \_\_\_ No \_\_\_ If yes, please explain: \_\_\_\_\_

**Primary Contact Information** (required)

Name of Individual: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

Name of Company (if any): \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone (office and cell) and Email: \_\_\_\_\_

**Secondary Contact Information** (required)

Name of Individual: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

Name of Company (if any): \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone (office and cell) and Email: \_\_\_\_\_

**Additional Contact Information** *(optional)*

Name of Individual: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

Name of Company *(if any)*: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone *(office and cell)* and Email: \_\_\_\_\_

**Anticipated Construction Financing:** MassHousing \_\_\_\_\_ NEF Bank \_\_\_\_\_

If NEF Bank, Name of Bank: \_\_\_\_\_

**Anticipated Permanent Financing:** MassHousing \_\_\_\_\_ NEF Bank \_\_\_\_\_

If NEF Bank, Name of Bank: \_\_\_\_\_

Total Number of Units \_\_\_\_\_ # Affordable Units \_\_\_\_\_ # Market Rate Units \_\_\_\_\_

Age Restricted? Yes/No \_\_\_\_\_ If Yes, 55+ or 62+? \_\_\_\_\_

**Brief Project Description (150 words or less):** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Required Attachments Relating to Section 1**

**1.1 Location Map**

Provide a USGS or other form of map clearly marked to show the site's location, and an approximate property boundary.

**1.2 Tax Map**

Provide a copy of municipal tax map (assessor's plan) with subject parcels and parcel ID #'s clearly identified.

**1.3 Directions**

Provide detailed written directions to the site, noting the entrance to the site, relevant boundaries and any prominent landmarks that can be used for identification purposes.

**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Rental Projects**

**Section 2: EXISTING CONDITIONS / SITE INFORMATION** (also see Required Attachments listed at end of Section 2)

*In order to issue Site Approval, MassHousing must find (as required by 760 CMR 56.04 (4)) that the site is generally appropriate for residential development.*

Name of Proposed Project: \_\_\_\_\_

**Buildable Area Calculations**

**Sq. Feet/Acres** (enter “0” if applicable—do not leave blank)

<b>Total Site Area</b>	
Wetland Area (per MA DEP)	
Flood/Hazard Area (per FEMA)	
Endangered Species Habitat (per MESA)	
Conservation/Article 97 Land	
Protected Agricultural Land (i.e., EO 193)	
Other Non-Buildable (Describe)	
<b>Total Non-Buildable Area</b>	
<b>Total Buildable Site Area</b>	

Current use of the site and prior use if known: \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

Is the site located entirely within one municipality? Yes \_\_\_ No \_\_\_

If not, in what other municipality is the site located? \_\_\_\_\_

How much land is in each municipality? (the Existing Conditions Plan must show the municipal boundary lines) \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

Current zoning classification and principal permitted uses: \_\_\_\_\_

**Previous Development Efforts**

Please list (on the following page) any previous applications pertaining to construction on or development of the site, including (i) type of application (comprehensive permit, subdivision, special permit, etc.); (ii) application filing date; (iii) date of denial, approval or withdrawal. Also indicate the current Applicant’s role, if any, in the previous applications. Note that, pursuant to 760 CMR 56.03 (1), a decision of a Zoning Board of Appeals to deny a Comprehensive Permit, or (if the Statutory Minima defined at 760 CMR 56.03 (3) (b or c) have been satisfied) grant a Comprehensive Permit with conditions, shall be upheld if a related application has previously been received, as set forth in 760 CMR 56.03 (7).

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To the best of your knowledge, has this site ever been rejected for project eligibility/site approval by another subsidizing agency or authority? \_\_\_\_\_

Existing Utilities and Infrastructure	Yes/No	Description
Wastewater-private wastewater treatment		
Wastewater-public sewer		
Storm Sewer		
Water-public water		
Water-private well		
Natural Gas		
Electricity		
Roadway Access to Site		
Sidewalk Access to Site		
Other		

Describe surrounding land use(s): \_\_\_\_\_

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Surrounding Land Use/Amenities	Distance from Site	Available by Public Transportation?
Shopping Facilities		
Schools		
Government Offices		
Multi-Family Housing		
Public Safety Facilities		
Office/Industrial Uses		
Conservation Land		
Recreational Facilities		
Houses of Worship		
Other		

List any public transportation near the site, including type of transportation and distance from the site:

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**Site Characteristics and Development Constraints**

Please answer "Yes", "No" or "Unknown" to the following questions. If the answer is "Yes" please identify on Existing Conditions Plan as required for Attachment 2.1 and provide additional information and documentation as an attachment as instructed for Attachment 2.4, "Documentation Regarding Site Characteristics/Constraints".

Are there any easements, rights of way or other restrictions of record affecting the development of the site? \_\_\_\_\_

Are there documented hazardous waste sites on or within a 1/2 mile radius of the site? \_\_\_\_\_

Is there any evidence of underground storage tanks or releases of hazardous material, including hazardous waste, on the site or within close proximity to the site? \_\_\_\_\_

Are there any above-ground storage containers with flammable or explosive petroleum products or chemicals on or within 1/2 mile of the site? \_\_\_\_\_

Is the site, or any portion thereof, located within a designated flood hazard area? \_\_\_\_\_

Does the site include areas designated by Natural Heritage as endangered species habitat? \_\_\_\_\_

Are there documented state-designated wetlands on the site? \_\_\_\_\_

Are there documented vernal pools on the site? \_\_\_\_\_

Is the site within a local, state or federal Historic District? \_\_\_\_\_

Is the site or any building(s) on the site listed, nominated or eligible for listing on the National Register of Historic Places? \_\_\_\_\_

Has the site or any building(s) on the site been designated as a local, state or national landmark? \_\_\_\_\_

Are there existing buildings and structures on site? \_\_\_\_\_

Does the site include documented archeological resources? \_\_\_\_\_

Does the site include significant areas of ledge? \_\_\_\_\_

Does the site include areas with slopes greater than 10%? \_\_\_\_\_

If applying for MassHousing Financing, is any portion of the site considered "Prime" or "Unique" agricultural land under Executive Order 193? \_\_\_\_\_

## Required Attachments Relating to Section 2

### 2.1 Existing Conditions Plan

Please provide a detailed Existing Conditions Plan showing the entire site prepared, signed and stamped by a registered engineer or land surveyor. Plans should be prepared at a scale of 1"=100' or 1"= 200' and should include the following information:

- a. Reduced scale locus map
- b. Surveyed property boundaries
- c. Topography (2' contours)
- d. Wetland boundaries (if applicable)
- e. Existing utilities (subsurface and above ground)
- f. Natural features including bodies of water, rock outcroppings
- g. Existing easements and/or rights of way on the property
- h. Existing buildings and structures, including walls, fences, wells
- i. Existing vegetated areas; specimen trees or those with caliper greater than 18" should be shown individually
- j. Existing site entries and egresses

Please provide two (2) sets of full size (30" x 40" plans) along with three (3) sets of 11" x 17" reproductions.

### 2.2 Aerial Photographs

Please provide one or more aerial photograph(s) of the site (such as those available online) showing the immediate surrounding area if available. Site boundaries and existing site entrance and access points must be clearly marked.

### 2.3 Site/Context Photographs

Please provide photographs of the site and surrounding physical and neighborhood context, including nearby buildings, significant natural features and land uses. Please identify the subject and location of all photographs.

### 2.4 Documentation Regarding Site Characteristics/Constraints

Please provide documentation of site characteristics and constraints as directed including available narratives, summaries and relevant documentation including:

- Flood Insurance Rate Map (FIRM) showing site boundaries
- Wetlands delineation
- Historic District nomination(s)

### 2.5 By-Right Site Plan *(if available)*

MassHousing will commission, at your expense, an "as-is" appraisal of the site in accordance with the Guidelines, Section B (1). Therefore, if there is a conceptual development plan which would be permitted under current zoning and which you would like the appraiser to take into consideration, or if permits have been issued for alternative development proposals for the site, please provide two (2) copies of a "by-right" site plan showing the highest and best use of the site under current zoning, and copies of any existing permits. These will assist the appraiser in determining the "as is" value of the site without any consideration being given to its potential for development under Chapter 40B.

**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Rental Projects**

**Section 3: PROJECT INFORMATION** (also see Required Attachments listed at end of Section 3)

*In order to issue Site Approval, MassHousing must find (as required by 760 CMR 56.04 (4)) that the proposed project appears generally eligible under the requirements of the housing subsidy program and that the conceptual project design is generally appropriate for the site.*

Name of Proposed Project: \_\_\_\_\_

Project Type (mark both if applicable): New Construction \_\_\_\_\_ Rehabilitation \_\_\_\_\_ Both \_\_\_\_\_

Total Number of Dwelling Units: \_\_\_\_\_

Total Number of Affordable Units: \_\_\_\_\_

Number of 50% AMI Affordable Units: \_\_\_\_\_

Number of 80% AMI Affordable Units: \_\_\_\_\_

Number of Market Rate Units: \_\_\_\_\_

**Unit Mix: Affordable Units**

Unit Type	0 Bedroom	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number of Bathrooms					
Square Feet/Unit					

**Unit Mix: Market Rate**

Unit Type	0 Bedroom	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number of Bathrooms					
Square Feet/Unit					

Percentage of Units with 3 or More Bedrooms\*: \_\_\_\_\_

*\* Note that the January 17, 2014 Interagency Agreement Regarding Housing Opportunities for Families with Children requires that at least 10% of the units in the Project must have three (3) or more bedrooms. Evidence of compliance with this requirement must be provided at Final Approval.*

Number of Handicapped Accessible Units: \_\_\_\_\_ Market Rate: \_\_\_\_\_ Affordable: \_\_\_\_\_

Gross Density (units per acre): \_\_\_\_\_

Net Density (units per buildable acre): \_\_\_\_\_

**Residential Building Information**

Building Type and Style <i>(single-family detached, townhouse, multi-family)</i>	Construction or Rehabilitation	Number of Stories	Height	GFA	Number Bldgs. of this type

**Non-Residential Building Information**

Building Type and Style	Construction or Rehabilitation	Number of Stories	Height	GFA	Number Bldgs. of this type

Will all features and amenities available to market unit residents also be available to affordable unit residents?  
 If not, explain the differences: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Parking**

Total Parking Spaces Provided: \_\_\_\_\_

Ratio of Parking Spaces to Housing Units: \_\_\_\_\_

**Lot Coverage** *(Estimate the percentage of the site used for the following)*

Buildings: \_\_\_\_\_

Parking and Paved Areas: \_\_\_\_\_

Usable Open Space: \_\_\_\_\_

Unusable Open Space: \_\_\_\_\_

Lot Coverage: \_\_\_\_\_

Does project fit definition of "Large Project" (as defined in 760 CMR 56.03 (6))? Yes/No \_\_\_\_\_

## Required Attachments Relating to Section 3

### 3.1 Preliminary Site Layout Plan(s)

Please provide preliminary site layout plans of the entire site prepared, signed and stamped by a registered architect or engineer. Plans should be prepared at a scale of 1"=100' or 1"=200', and should show

- Proposed site grading (2' contours)
- Existing lot lines
- Easements (existing and proposed)
- Access to a public way must be identified
- Required setbacks
- Proposed site circulation (entrances/egresses, roadways, driveways, parking areas, walk ways, paths, trails)
- Building and structure footprints (label)
- Utilities (existing and proposed)
- Open space areas
- Schematic landscaping and screening
- Wetland and other restricted area boundaries and buffer zones

Please provide two (2) sets of full size (30" x 40") plans along with three (3) sets of 11" x 17" reproductions.

### 3.2 Graphic Representations of Project/Preliminary Architectural Plans

- Typical floor plans
- Unit plans showing dimensions, bedrooms, bathrooms and overall unit layout
- Exterior elevations, sections, perspectives and illustrative rendering.

### 3.3 Narrative Description of Design Approach

Provide a narrative description of the approach to building massing, style and exterior materials; site layout; and the relationship of the project to adjacent properties, rights of way and existing development patterns. The handbook called [Approach to Chapter 40B Design Reviews](#) prepared by the Cecil Group in January 2011 may be helpful in demonstrating the nature of the discussion that MassHousing seeks in this narrative.

### 3.4 Tabular Zoning Analysis

Zoning analysis in tabular form comparing existing zoning requirements to the waivers that you will request from the Zoning Board of Appeals for the proposed project, showing required and proposed dimensional requirements including lot area; frontage; front, side and rear setbacks; maximum building coverage; maximum lot coverage; height; number of stories; maximum gross floor area ratio; units per acre, units per buildable acre; number of parking spaces per unit/square foot and total number of parking spaces (proposed and required).

### 3.5 Completed Sustainable Development Principles Evaluation Assessment Form *(see attached form)*

All developments seeking Chapter 40B site approval must demonstrate consistency with the Commonwealth's May 2007 Sustainable Development Principles.

**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Rental Projects**

**Section 4: SITE CONTROL** (also see Required Attachments listed at end of Section 4)

*In order to issue Site Approval, MassHousing must find (as required by 760 CRM 56.04 (4)) that the Applicant controls the site.*

Name of Proposed Project: \_\_\_\_\_

Describe current ownership status of the entire site as shown on the site layout plans (attach additional sheets as necessary if the site is comprised of multiple parcels governed by multiple deeds or agreements):

Owned (or ground leased) by Development Entity or Applicant \_\_\_\_\_

Under Purchase and Sale Agreement \_\_\_\_\_

Under Option Agreement \_\_\_\_\_

*Note: The Grantee/Buyer on each document must be either the Applicant or the Proposed Development Entity, or you must attach an explanation showing direct control of the Grantee/Buyer by the Applicant or the Proposed Development Entity.*

Grantor/Seller: \_\_\_\_\_

Grantee/Buyer: \_\_\_\_\_

Grantee/Buyer is (check one):

Applicant \_\_\_\_\_ Development Entity \_\_\_\_\_ Managing General Partner of Development Entity \_\_\_\_\_

General Partner of Development Entity \_\_\_\_\_ Other (explain) \_\_\_\_\_

Are the Parties Related? \_\_\_\_\_

**For Deeds or Ground Leases**

Date(s) of Deed(s) or Ground Lease(s): \_\_\_\_\_

Purchase Price: \_\_\_\_\_

**For Purchase and Sale Agreements or Option Agreements**

Date of Agreement: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

If an extension has been granted, date of extension: \_\_\_\_\_

If an extension has been granted, new expiration date: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

Will any easements or rights of way over other properties be required in order to develop the site as proposed?

Yes \_\_\_\_\_ No \_\_\_\_\_

If Yes, please describe current status of easement:

Owned (or ground leased) by Development Entity or Applicant \_\_\_\_\_

Under Purchase and Sale Agreement \_\_\_\_\_

Under Option Agreement \_\_\_\_\_

Note: The Grantee/Buyer on each document must be either the Applicant or the Proposed Development Entity, or you must attach an explanation showing direct control of the Grantee/Buyer by the Applicant or the Proposed Development Entity.

Grantor/Seller: \_\_\_\_\_

Grantee/Buyer: \_\_\_\_\_

Are the Parties Related? \_\_\_\_\_

**For Easements**

Date(s) of Easement(s): \_\_\_\_\_

Purchase Price: \_\_\_\_\_

**For Easement Purchase and Sale Agreements or Easement Option Agreements**

Date of Agreement: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

If an extension has been granted, date of extension: \_\_\_\_\_

If an extension has been granted, new expiration date: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

**Required Attachments Relating to Section 4**

**4.1 Evidence of Site Control (required)**

Copies of all applicable, fully executed documents (deed, ground lease, purchase and sale agreement, option agreement, land disposition agreement, agreements to purchase easements) showing evidence of site control, including any required easements, along with copies of all amendments and extensions. Copies of all plans referenced in documents must be included.

## Application for Chapter 40B Project Eligibility/Site Approval for MassHousing-Financed and New England Fund (“NEF”) Rental Projects

### Section 5: FINANCIAL INFORMATION – Site Approval Application Rental 40B

*In order to issue Site Approval, MassHousing must find (as required by 760 CMR 56.04 (4)) that an initial pro forma has been reviewed and that the Proposed Project appears financially feasible and consistent with the Chapter 40B Guidelines, and that the Proposed Project is fundable under the applicable program.*

Name of Proposed Project: \_\_\_\_\_

### Initial Capital Budget *(please enter “0” when no such source or use is anticipated)*

#### Sources

Description	Source	Budgeted
Private Equity	Owner's Cash Equity	
Private Equity	Tax Credit Equity	
Private Equity	Developer Fee Contributed or Loaned	
Private Equity	Developer Overhead Contributed or Loaned	
Other Private Equity		
Public/Soft Debt		
Subordinate Debt		
Permanent Debt		
Permanent Debt		
Construction Debt	<i>For informational purposes only, not to be included in Sources total</i>	
Additional Source <i>(please identify)</i>		
Additional Source <i>(please identify)</i>		
<b>Total Sources</b>		<b>\$</b>

#### Pre-Permit Land Value, Reasonable Carrying Costs

Item	Budgeted
Site Acquisition: pre-permit land value <i>(to be determined by MassHousing commissioned appraisal)</i> plus reasonable carrying costs.	

**Uses (Costs)**

Item	Budgeted
<b>Acquisition Cost (Actual)</b>	
Actual Acquisition Cost: Land	_____
Actual Acquisition Cost: Buildings	_____
<b>Subtotal</b> – Acquisition Costs	_____
<b>Construction Costs – Building Structural Costs (Hard Costs)</b>	
Building Structure Costs	_____
Hard Cost Contingency	_____
<b>Subtotal</b> – Building Structural Costs (Hard Costs)	_____
<b>Construction Costs – Site Work (Hard Costs)</b>	
Earth Work	_____
Utilities: On Site	_____
Utilities: Off-Site	_____
Roads and Walks	_____
Site Improvement	_____
Lawns and Planting	_____
Geotechnical Condition	_____
Environmental Remediation	_____
Demolition	_____
Unusual Site Conditions/Other Site Work	_____
<b>Subtotal</b> –Site Work (Hard Costs)	_____
<b>Construction Costs – General Conditions, Builders Overhead and Profit (Hard Costs)</b>	
General Conditions	_____
Builder's Overhead	_____
Builder's Profit	_____
<b>Subtotal</b> – General Conditions Builders Overhead and Profit (Hard Costs)	_____
<b>General Development Costs (Soft Costs)</b>	
Appraisal and Marketing Study <i>(not 40B "as is" appraisal)</i>	_____
Marketing and Initial Rent Up <i>(include model units, if any)</i>	_____
Real Estate Taxes <i>(during construction)</i>	_____
Utility Usage <i>(during construction)</i>	_____
Insurance <i>(during construction)</i>	_____
Security <i>(during construction)</i>	_____
Inspecting Engineer	_____

Item	Budgeted
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**General Development Costs (Soft Costs) – Continued**

Fees to Others	_____
Construction Loan Interest	_____
Fees to Construction Lender	_____
Fees to Permanent Lender	_____
Architecture/Engineering	_____
Survey, Permits, etc.	_____
Clerk of the Works	_____
Construction Manager	_____
Bond Premiums ( <i>Payment/Performance/Lien Bond</i> )	_____
Environmental Engineer	_____
Legal	_____
Title ( <i>including title insurance</i> ) and Recording	_____
Accounting and Cost Certification ( <i>incl. 40B</i> )	_____
Relocation	_____
40B Site Approval Processing Fee	_____
40B Technical Assistance/Mediation Fund Fee	_____
40B Land Appraisal Cost ( <i>as-is value</i> )	_____
40B Final Approval Processing Fee	_____
40B Subsidizing Agency Cost Certification Examination Fee	_____
40B Monitoring Agent Fees	_____
MIP	_____
Credit Enhancement	_____
Letter of Credit Fees	_____
Other Financing Fees: Tax Credit Allocation Fee	_____
Other Financing Fees	_____
Development Consultant	_____
Other Consultants ( <i>describe</i> ) _____	_____
Other Consultants ( <i>describe</i> ) _____	_____
Syndication Costs	_____
Soft Cost Contingency	_____
Other Development (Soft) Costs	_____
<b>Subtotal</b> – General Development Costs (Soft Costs)	_____

**Developer Fee and Overhead**

Developer Fee	_____
Developer Overhead	_____
<b>Subtotal</b> – Developer Fee and Overhead	_____

**Capitalized Reserves**

Development Reserves	_____
Initial Rent-Up Reserves	_____
Operating Reserves	_____
Net Worth Account	_____
Other Capitalized Reserves	_____
<b>Subtotal</b> – Capitalized Reserves	_____

**Summary of Subtotals**

Item	Budgeted
Acquisition: Land	_____
Acquisition: Building	_____
Building Structural Costs (Hard Costs)	_____
Site Work (Hard Costs)	_____
Builder's Overhead, Profit and General Conditions (Hard Costs)	_____
Developer Fee and Overhead	_____
General Development Costs (Soft Costs)	_____
Capitalized Reserves	_____
Total Development Costs (TDC)	_____
<b>Summary</b>	
Total Sources	_____
Total Uses (TDC)	_____

Projected Developer Fee and Overhead\*: \_\_\_\_\_

Maximum Allowable Developer Fee and Overhead\*\*: \_\_\_\_\_

Projected Developer Fee and Overhead equals \_\_\_\_% of Maximum Allowable Fee and Overhead

\* Note in particular the provisions of Section IV.B.5.a of the Guidelines, which detail the tasks (i) for which a developer may or may not receive compensation beyond the Maximum Allowable Developer Fee and Overhead and (ii) the costs of which must, if the tasks were performed by third parties, be included within the Maximum Allowable Developer Fee and Overhead.

\*\* Maximum Allowable Developer Fee and Overhead is calculated as follows: 5% of acquisition costs, plus 15% of the first \$3 million of fee-based development costs, plus 12.5% of fee-based development costs between \$3 and \$5 million, plus 10% of fee-based development costs in excess of \$5 million (Per DHCD QAP Guidelines).

**Initial Unit/Rent Schedule**

Affordable Units @ 80% AMI	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number Square Feet					
Monthly Rent					
Utility Allowance					

Affordable Units @ 50% AMI	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number Square Feet					
Monthly Rent					
Utility Allowance					

Describe utility allowance assumptions (*utilities to be paid by tenants*): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Market Rate Units	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units					
Number Square Feet					
Monthly Rent					

**Initial Rental Operating Pro-Forma** (for year one of operations)

Item	Notes	Amount
<b>Permanent Debt Assumptions</b>		
Loan Amount	Lender:	
Annual Rate		
Term		
Amortization		
Lender Required Debt Service Coverage Ratio		
<b>Gross Rental Income</b>		
Other Income (utilities, parking)		
Less Vacancy (Market Units)	5% (vacancy rate)	
Less Vacancy (Affordable Units)	5% (vacancy rate)	
<b>Gross Effective Income</b>		
Less Operating Expenses	Per Unit:	
<b>Net Operating Income</b>		
Less Permanent Loan Debt Service		
Cash Flow		
Debt Service Coverage		

Describe "other income": \_\_\_\_\_  
 \_\_\_\_\_

**Rental Operating Expense Assumption**

Item	Notes	Amount
Assumed Maximum Operating Expenses	Calculated based on Net Operating Income, Debt Service and required Debt Service Coverage listed above.	
Assumed Maximum Operating Expense/Unit*	Number of Units:	

\* MassHousing may request further detail regarding projected operating expenses if such expenses appear higher or lower than market comparables.

## **Required Attachments Relating to Section 5**

### **5.1 New England Fund Lender Letter of Interest** *(required for projects with NEF financing)*

Please attach a Letter of Interest from a current Federal Home Loan Bank of Boston (FHLBB) member bank regarding financing for the proposed development. The letter of interest must include, at a minimum, the following:

- Identification of proposed borrower, and brief description of the bank's familiarity with the borrower;
- Brief description of the Proposed Project, including location, number of units and type of building (townhouse, garden style, etc.);
- Confirmation that the bank is a current FHLBB member bank and that the bank will specifically use NEF funds for the proposed development.

*NOTE: Binding Construction and Permanent Financing Commitments (or evidence of closed loans) will be required at the time you apply for Final Approval from MassHousing.*

### **5.2 Market Rental Comparables** *(required)*

Please provide a listing of market rents being achieved in properties comparable to the proposed project.

### **5.3 Market Study** *(if available)*

MassHousing may require a market study at Final Approval for projects located in areas where the need or demand for the type of housing being proposed cannot be clearly demonstrated.

**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Rental Projects**

**Section 6: APPLICANT QUALIFICATIONS, ENTITY INFORMATION AND CERTIFICATION**

*In order to issue Site Approval, MassHousing must find (as required by 760 CRM 56.04 (4)) that the applicant is either a non-profit public agency or would be eligible to apply as a Limited Dividend Organization and meets the general eligibility standards of the program.*

Name of Proposed Project: \_\_\_\_\_

**Development Team**

Developer/Applicant: \_\_\_\_\_

Development Consultant (if any): \_\_\_\_\_

Attorney: \_\_\_\_\_

Architect: \_\_\_\_\_

Contractor: \_\_\_\_\_

Lottery Agent: \_\_\_\_\_

Management Agent: \_\_\_\_\_

Other (specify): \_\_\_\_\_

Other (specify): \_\_\_\_\_

**Role of Applicant in Current Proposal**

Development Task	Developer/Applicant	Development Consultant (identify)
Architecture and Engineering		
Local Permitting		
Financing Package		
Construction Management		
Other		

**Applicant's Ownership Entity Information**

Please identify for each of (i) the Applicant and, if different (ii) the Proposed Development Entity, the following (collectively with the Applicant and the Proposed Development Entity, the "Applicant Entities"): the Managing Entities, Principals, Controlling Entities and Affiliates of each.

*Note: For the purposes hereof, "Managing Entities" shall include all persons and entities (e.g., natural persons, corporations, partnerships, limited liability companies, etc., including beneficiaries of nominee trusts) who are managers of limited liability companies, general partners of limited partnerships, managing general partners of limited liability partnerships, directors and officers of corporations, trustees of trusts, and other similar persons and entities that have the power to manage and control the activities of the Applicant and/or Proposed Development Entity.*

*"Principal or Controlling Entities" shall include all persons and entities (e.g., natural persons, corporations, partnerships, limited liability companies, etc., including beneficiaries of nominee trusts) that shall have the right to*

- (i) approve the terms and conditions of any proposed purchase, sale or mortgage;*
- (ii) approve the appointment of a property manager; and/or*
- (iii) approve managerial decisions other than a decision to liquidate, file for bankruptcy or incur additional indebtedness.*

*Such rights may be exercisable either (i) directly as a result of such person's or entity's role within the Applicant or the Proposed Development Entity or the Managing Entities of either or (ii) indirectly through other entities that are included within the organizational structure of the Applicant and/or Proposed Development Entity and the Managing Entities of either.*

*In considering an application, MassHousing will presume that there is at least one Principal or Controlling Entity of the Applicant and of the Proposed Development Entity. Any person or persons who have purchased an interest for fair market value in the Applicant and/or Proposed Development Entity solely for investment purposes shall not be deemed a Principal or Controlling Entity.*

*"Affiliates" shall include all entities that are related to the subject organization by reason of common control, financial interdependence or other means.*

**Applicant**

Name of Applicant: \_\_\_\_\_

Entity Type (limited liability company, limited partnership, limited liability partnership, corporation, trust, etc.):  
\_\_\_\_\_

State in which registered/formed: \_\_\_\_\_

List **all** Managing Entities of Applicant (*you must list at least one*): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List **all** Principals and Controlling Entities of Applicant and (*unless the Managing Entity is an individual*) its Managing Entities (*use additional pages as necessary*): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List **all** Affiliates of Applicant and its Managing Entities (*use additional pages as necessary*): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. Proposed Development Entity**

Name of Proposed Development Entity: \_\_\_\_\_

Entity Type *(limited liability company, limited partnership, limited liability partnership, corporation, trust, etc.):*  
 \_\_\_\_\_

State in which registered/formed: \_\_\_\_\_

List **all** Managing Entities of Proposed Development Entity *(you must list at least one):* \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

List **all** Principals and Controlling Entities of Proposed Development Entity and *(unless the Managing Entity is an individual)* its Managing Entities *(use additional pages as necessary):* \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

List **all** Affiliates of Proposed Development Entity and its Managing Entities *(use additional pages as necessary):* \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Applicant Entity 40B Experience**

Please identify **every** Chapter 40B project in which the Applicant or a member of the project team has or had an interest. For each such project, state whether the construction has been completed and whether cost examination has been submitted *(use additional pages as necessary)*.

40B Project	Applicant or Team Member	Role	Municipality	Number of Units/Type	Year Completed	Cost Cert Submitted?

**Certification**

I hereby certify on behalf of the Applicant, *under pains and penalties of perjury*, that the information provided above for each of the Applicant Entities is, to the best of my knowledge, true and complete; and that each of the following questions has been answered correctly to the best of my knowledge and belief:

*(Please attach a written explanation for all of the following questions that are answered with a "Yes". Explanations should be attached to this Section 6.)*

Is there pending litigation with respect to any of the Applicant Entities? **Yes** \_\_\_ **No** \_\_\_

Are there any outstanding liens or judgments against any properties owned by any of the Applicant Entities? **Yes** \_\_\_ **No** \_\_\_

Have any of the Applicant Entities failed to comply with provisions of Massachusetts law related to taxes, reporting of employees and contractors, or withholding of child support? **Yes** \_\_\_ **No** \_\_\_

Have any of the Applicant Entities ever been the subject of a felony indictment or conviction? **Yes** \_\_\_ **No** \_\_\_

During the last 10 years, have any of the Applicant Entities ever been a defendant in a lawsuit involving fraud, gross negligence, misrepresentation, dishonesty, breach of fiduciary responsibility or bankruptcy? **Yes** \_\_\_ **No** \_\_\_

Have any of the Applicant Entities failed to carry out obligations in connection with a Comprehensive Permit issued pursuant to M.G.L. c. 40B and any regulations or guidelines promulgated thereunder (whether or not MassHousing is or was the Subsidizing Agency/Project Administrator) including, but not limited to, completion of a cost examination and return of any excess profits or distributions? **Yes** \_\_\_ **No** \_\_\_

Have any of the Applicant Entities ever been charged with a violation of state or federal fair housing requirements? **Yes** \_\_\_ **No** \_\_\_

Are any of the Applicant Entities not current on all existing obligations to the Commonwealth of Massachusetts, and any agency, authority or instrument thereof? **Yes** \_\_\_ **No** \_\_\_

I further certify that the information set forth set forth in this application (including attachments) is true, accurate and complete as of the date hereof to the best of my/our knowledge, information and belief. I further understand that MassHousing is relying on this information in processing the request for Site Approval in connection with the above-referenced project; and

I further certify that we have met with a representative of the 40B Department at MassHousing and understand the requirements for a) completing this application and b) the procedures if and when Site Approval is granted, including the requirement for (i) the use of the standard MassHousing Regulatory Agreement, (ii) submission to MassHousing, of a cost certification examined in accordance with AICPA attestation standards by ninety days of project completion (and prior to permanent loan closing if MassHousing is the permanent lender), of an audited cost certification by an approved certified public accountant and (iii) the posting of surety for completion of the cost certification as a condition of Final Approval by MassHousing under Chapter 40B.

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

## **Required Attachments Relating to Section 6**

### **6.1 Development Team Qualifications**

Please attach resumes for principal team members (Applicant, consultant, attorney, architect, general contractor, management agent, lottery agent, etc.) and list of all relevant project experience for 1) the team as a whole and 2) individual team members. Particular attention should be given to demonstrating experience with (i) projects of a similar scale and complexity of site conditions, (ii) permitting an affordable housing development, (iii) design, and (iv) financing. The development team should demonstrate the ability to perform as proposed and to complete the project in a competent and timely manner, including the ability to pursue and carry out permitting, financing, marketing, design and construction.

*(If the Applicant (or, if the Applicant is a single purpose entity, its parent developer entity) has received financing from MassHousing within the past five (5) years for a development of comparable size and complexity to the Proposed Project, no resume or list of project experience need be submitted for the Applicant or, as applicable, its parent developer entity. Information regarding the other team members still will be required.)*

### **6.2 Applicant's Certification**

Please attach any additional sheets and any written explanations for questions answered with "yes" as required for Certification.

**Application for Chapter 40B Project Eligibility/Site Approval  
for MassHousing-Financed and New England Fund (“NEF”) Rental Projects**

**Section 7: NOTIFICATIONS AND FEES**

Name of Proposed Project: \_\_\_\_\_

**Notice**

Date(s) of meetings, if any, with municipal officials prior to submission of application to MassHousing: \_\_\_\_\_

Date copy of complete application sent to chief elected office of municipality: \_\_\_\_\_

Date notice of application sent to DHCD: \_\_\_\_\_

**Fees** *(all fees should be payable to MassHousing)*

MassHousing Application Processing Fee (\$2500): \_\_\_\_\_

Chapter 40B Technical Assistance/Mediation Fee

a. Base Fee: \_\_\_\_\_  
*(Limited Dividend Sponsor \$2500, Non-Profit or Public Agency Sponsor \$1,000)*

b. Unit Fee *(all projects)* \$30 per Unit: \_\_\_\_\_

Total TA/Mediation Fee *(Base Fee plus Unit Fee)*: \_\_\_\_\_

Total Fees Due: \_\_\_\_\_

**Land Appraisal Cost**

*You will be required to pay for an “as-is” market value appraisal of the Site to be commissioned by MassHousing. MassHousing will contact you once a quote has been received for the cost of the appraisal.*

## **Required Attachments Relating to Section 7**

- 7.1 Narrative describing any prior correspondence and/or meetings with municipal officials
- 7.2 Evidence (such as a certified mail receipt) that a copy of the complete application package was sent to the chief elected official of municipality (may be submitted after the application is submitted to MassHousing)
- 7.3 Copy of notice of application sent to DHCD
- 7.4 Check made payable to MassHousing for Processing Fee (\$2500)
- 7.5 Check made payable to MassHousing for Technical Assistance/Mediation Fee
- 7.6 W-9 (Taxpayer Identification Number)

## Application Checklist

The documentation listed below must, where applicable, accompany each application. For detailed descriptions of these required documents, please see the relevant sections of the application form.

\* Applications missing any of the documents indicated by an asterisk will not be processed by MassHousing until MassHousing receives the missing item(s).

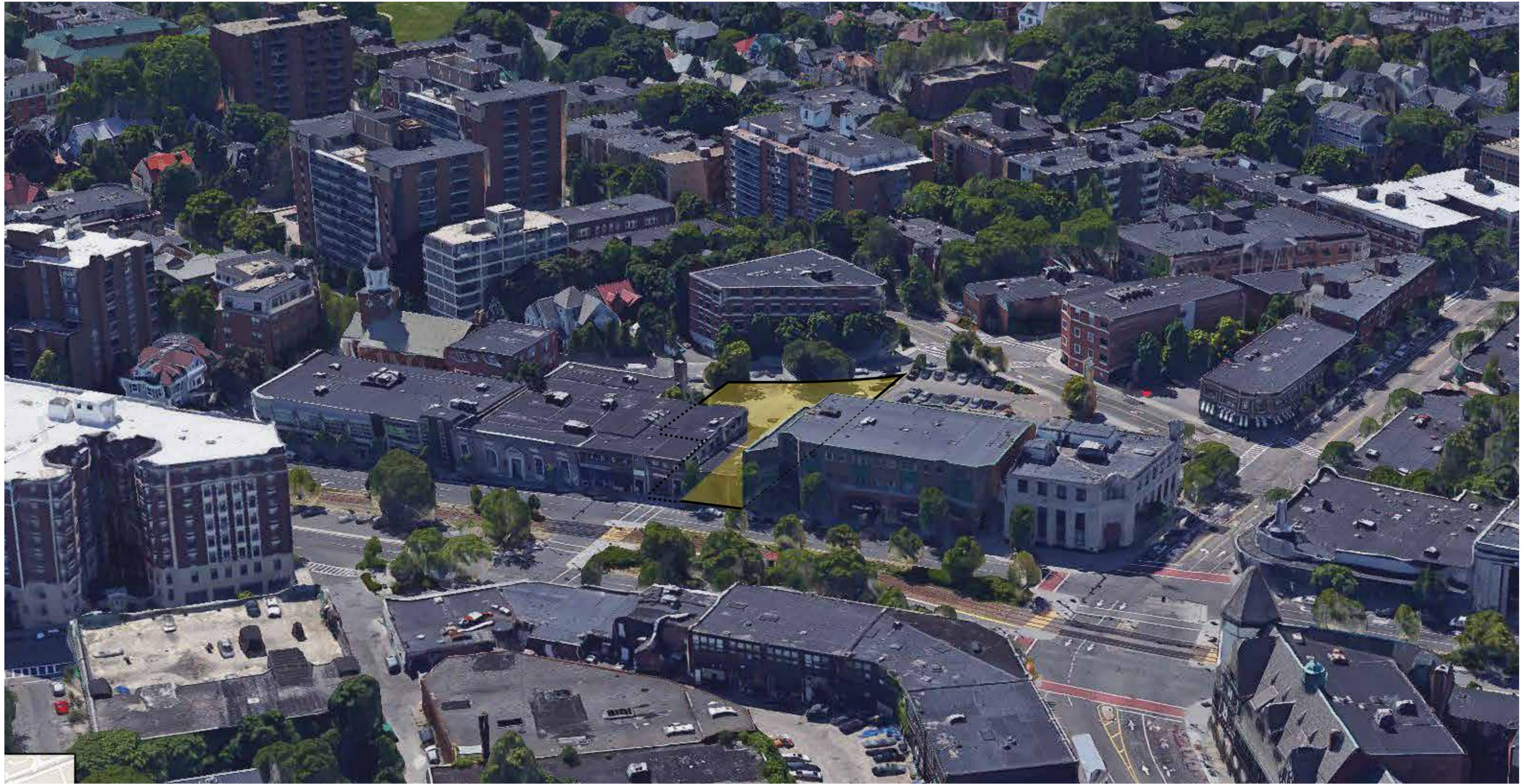
- \* Completed application form, and certification under pains and penalties of perjury (*one (1) signed original accompanied by two (2) copies of the complete application package*)
- \* Location Map
- Tax Map
- \* Directions to the Proposed Site
- \* Existing Conditions Plan
- Aerial Photographs
- Site/Context Photographs
- \* Documentation Regarding Site Characteristics/Constraints
- \* By Right Site Plan, if Applicable
- \* Preliminary Site Layout Plan(s)
- \* Graphic Representations of Project/Preliminary Architectural Plans
- \* Narrative Description of Design Approach
- \* Tabular Zoning Analysis
- Sustainable Development Principles Evaluation Assessment Form
- \* Evidence of Site Control (*documents and any plans referenced therein*)
- Land Disposition Agreement, if Applicable
- \* NEF Lender Letter of Interest
- Market Rental Comparables
- Market Study, if Required by MassHousing
- \* Development Team Qualifications
- Applicant's Certification (*any required additional sheets*)
- Narrative describing prior contact (*if any*) with municipal officials
- \* Evidence that a copy of the application package has been received by the chief elected official in the municipality (*may follow after initial submission of application package, but site visit will not be scheduled nor request for municipal comments made until such evidence is received by MassHousing*)
- Copy of Notification Letter to DHCD
- \* Fees (\$5,000 plus \$30 per unit of housing proposed) payable to MassHousing (*once an appraiser has been selected by MassHousing and an appraisal fee quoted, an additional non-refundable appraisal fee will be required*)

**[ATTACH SUSTAINABLE DEVELOPMENT SCORECARD HERE]**



# 1299 Beacon

**1299 Beacon**  
1299 Beacon st, Brookline MA  
11.01.2016



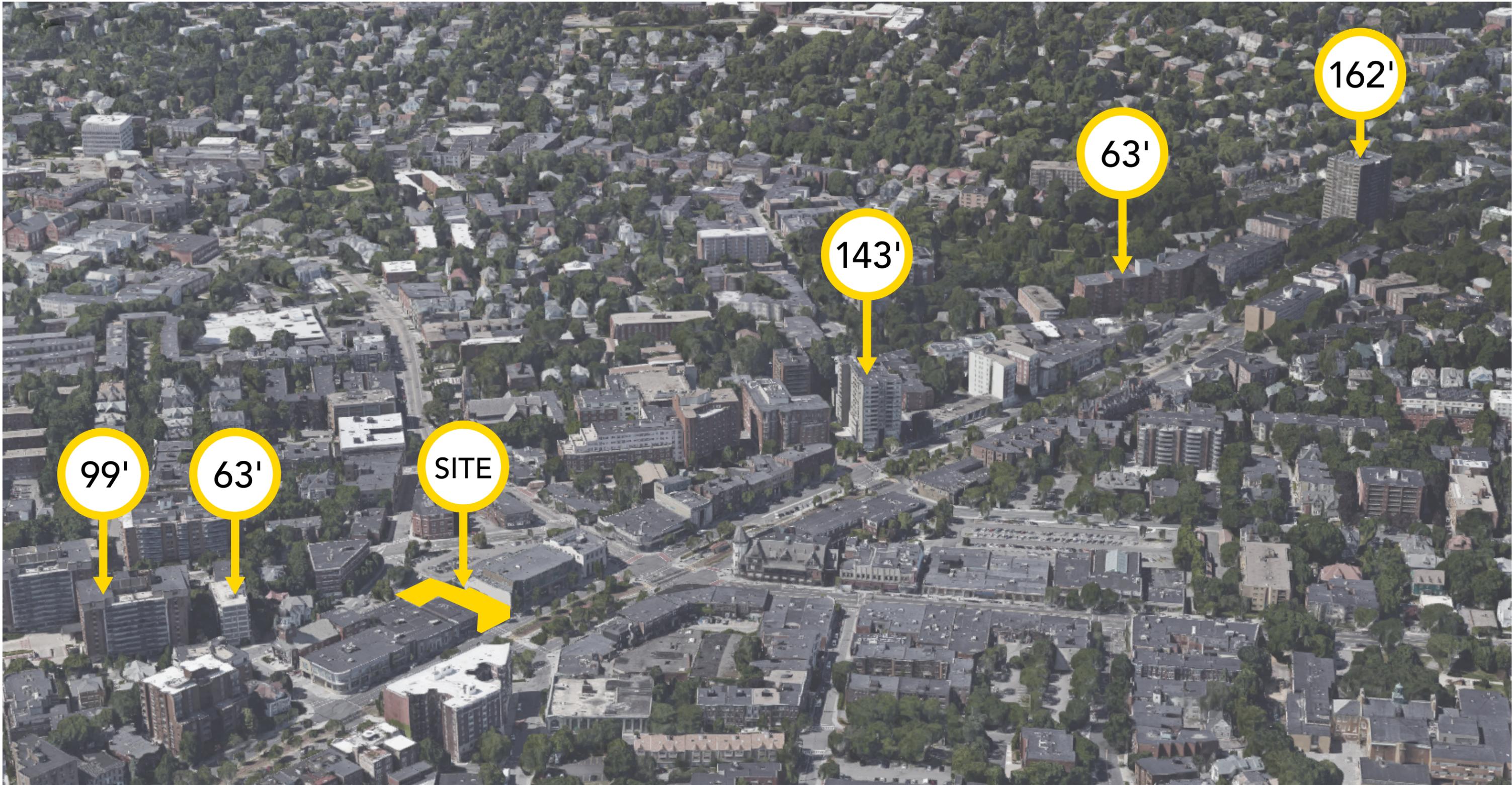
Site Aerial - Southeast



Site Aerial - Southwest



**1299 Beacon**  
1299 Beacon st, Brookline MA  
11.01.2016



Height Comparison



**NORTH ELEVATION**  
1/16" = 1'-0"



WEST ELEVATION  
1/16" = 1'-0"



EAST ELEVATION  
1/16" = 1'-0"



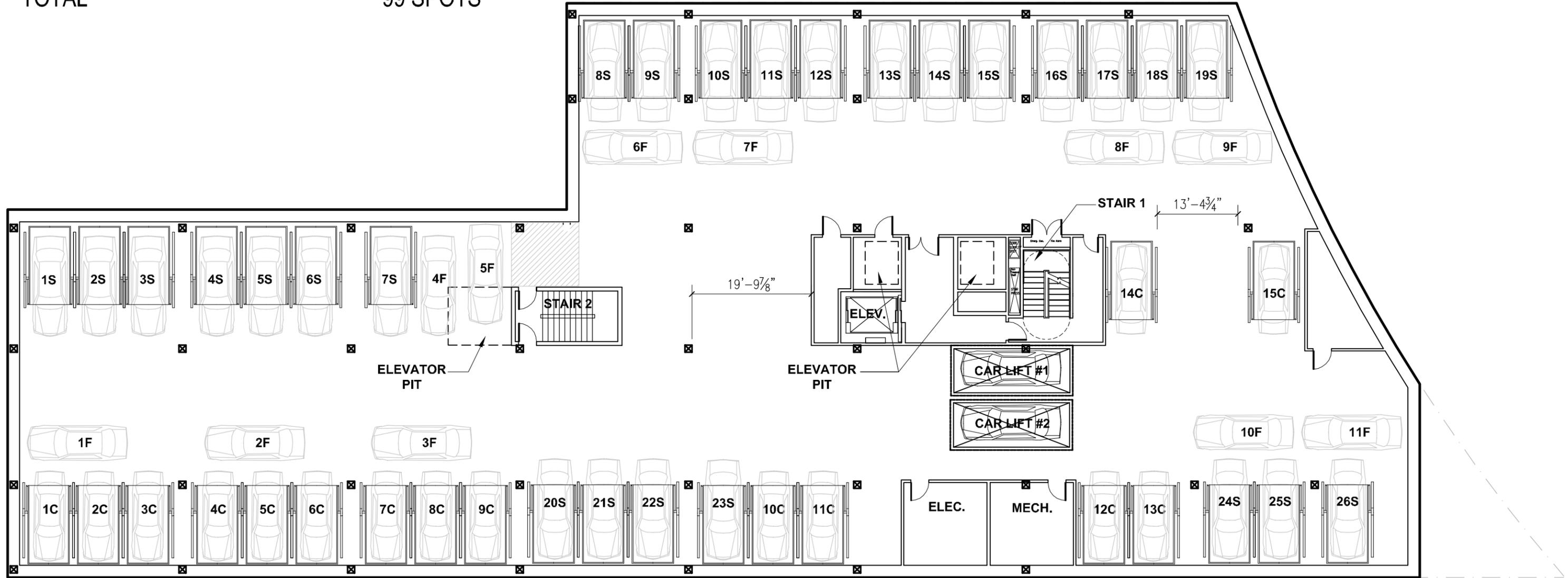
ROOF  
EL. 122'-0"

**SOUTH ELEVATION**  
1/16" = 1'-0"

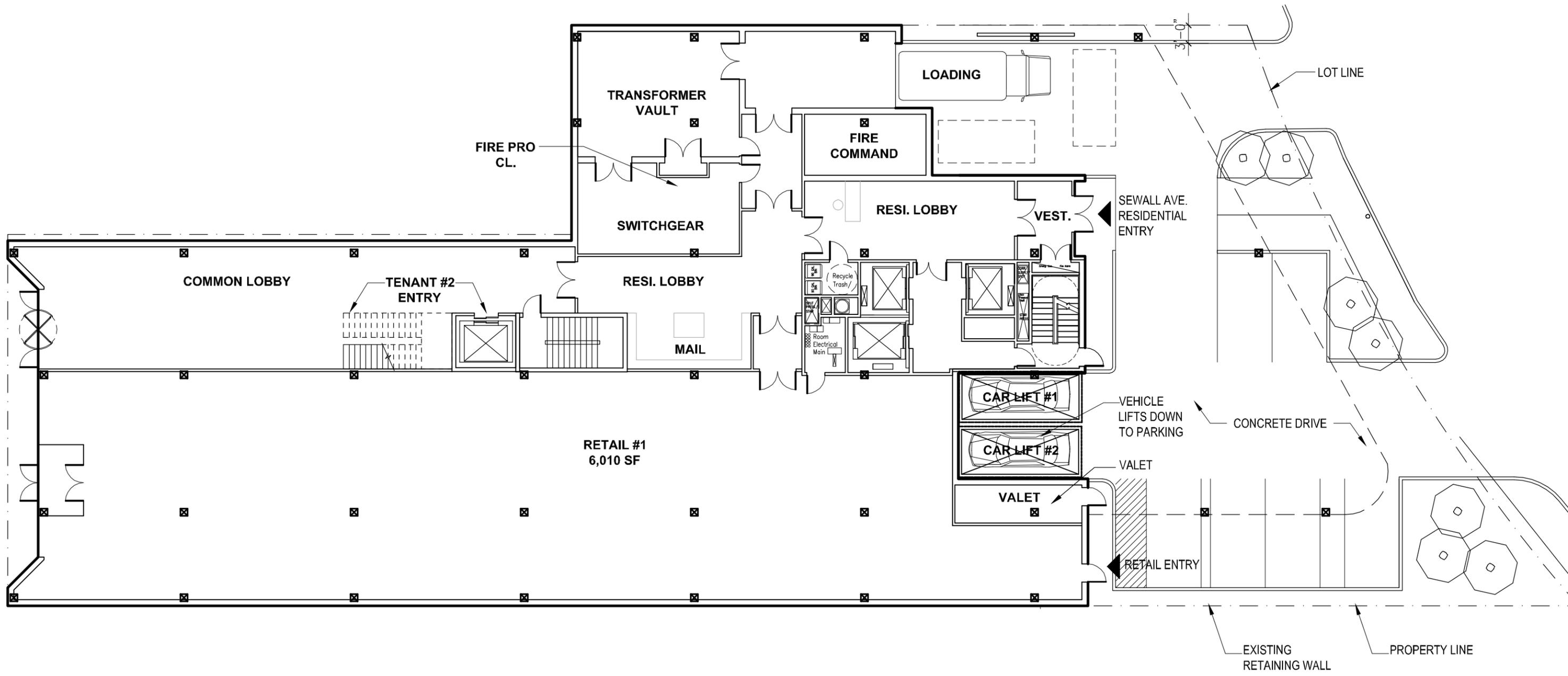


VIEW FROM PLEASANT ST

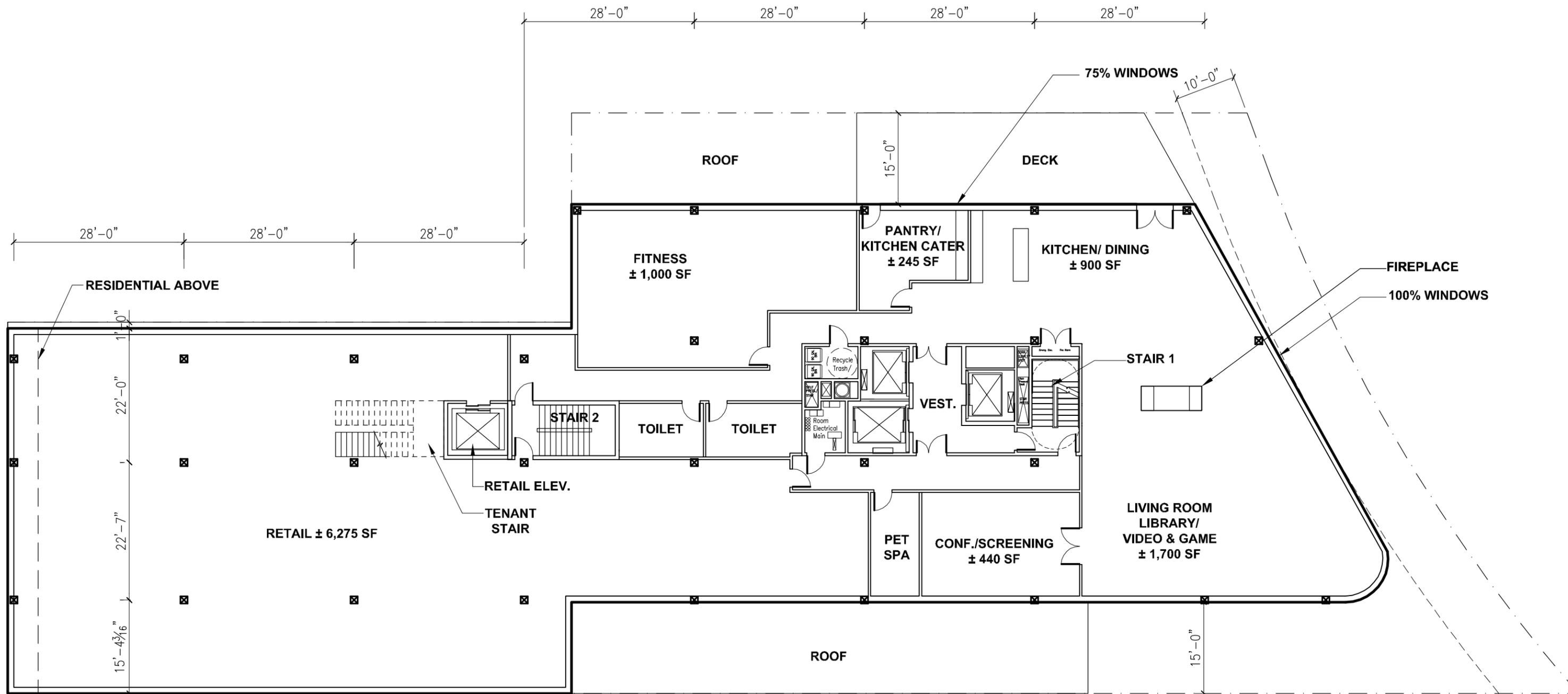
28% - COMPACT SPACES (xC)	30 SPOTS (15 SPACES X 2)
58% - STACKER SPACES (xS)	52 SPOTS (26 SPACES x2)
9% - FLOOR SPACES (xF)	11 SPOTS
6% - SURFACE SPACES	6 SPOTS
<b>TOTAL</b>	<b>99 SPOTS</b>



**PARKING LEVEL PLAN**  
1/16" = 1'-0"

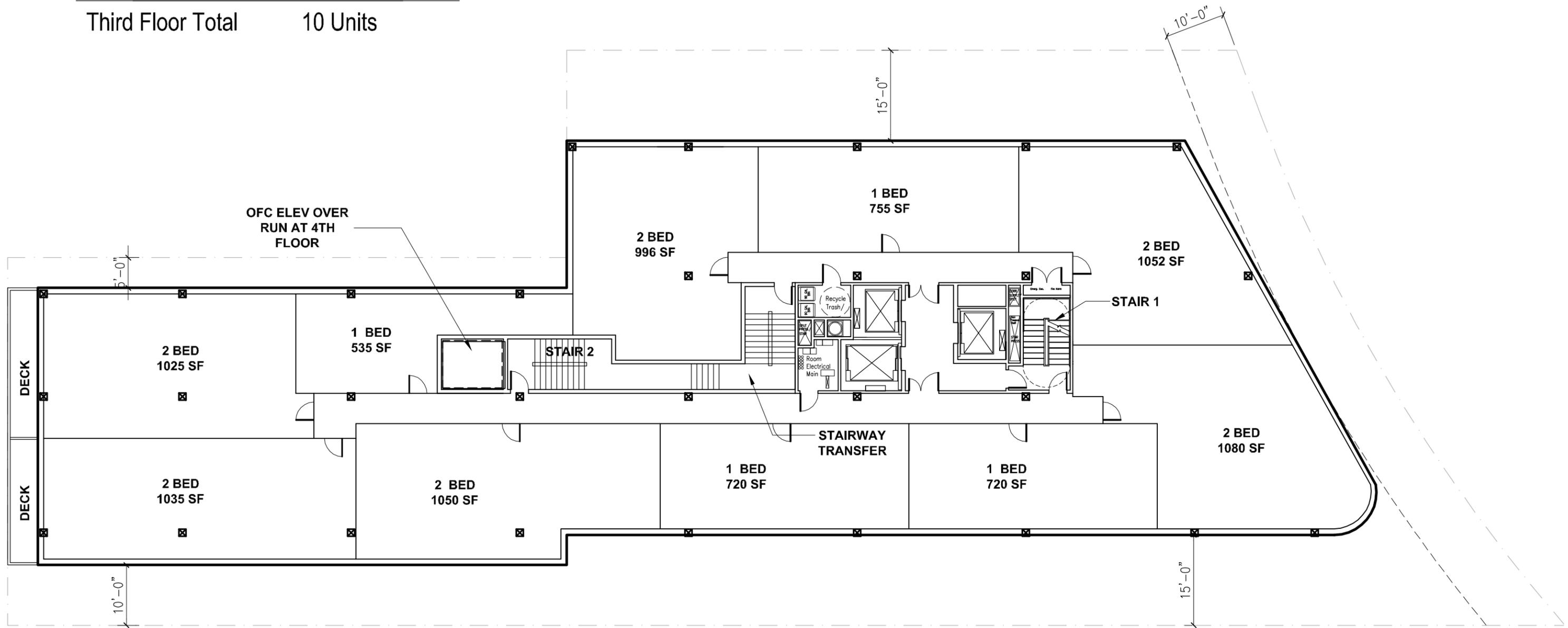


**GROUND LEVEL PLAN**  
1/16" = 1'-0"



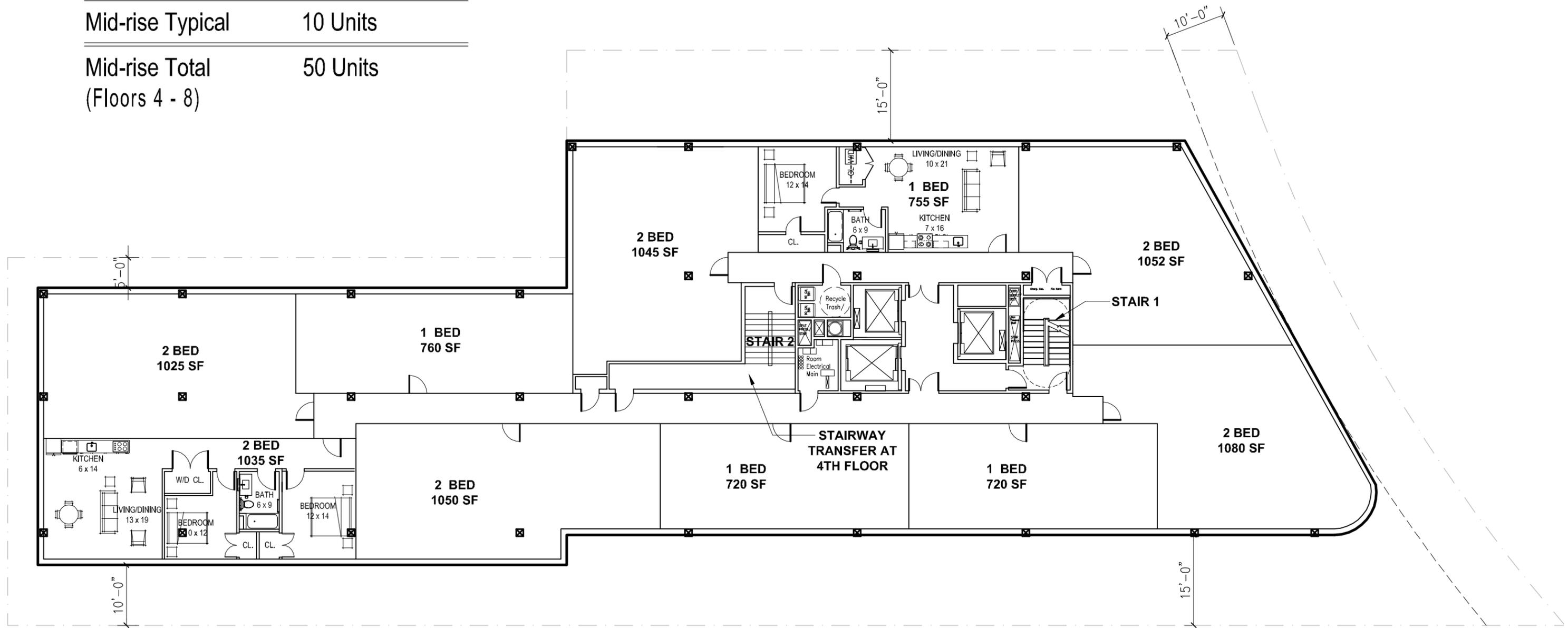
**SECOND LEVEL PLAN**  
1/16" = 1'-0"

40% - 1 Bed	4 Units
60% - 2 Bed	6 Units
<b>Third Floor Total</b>	<b>10 Units</b>



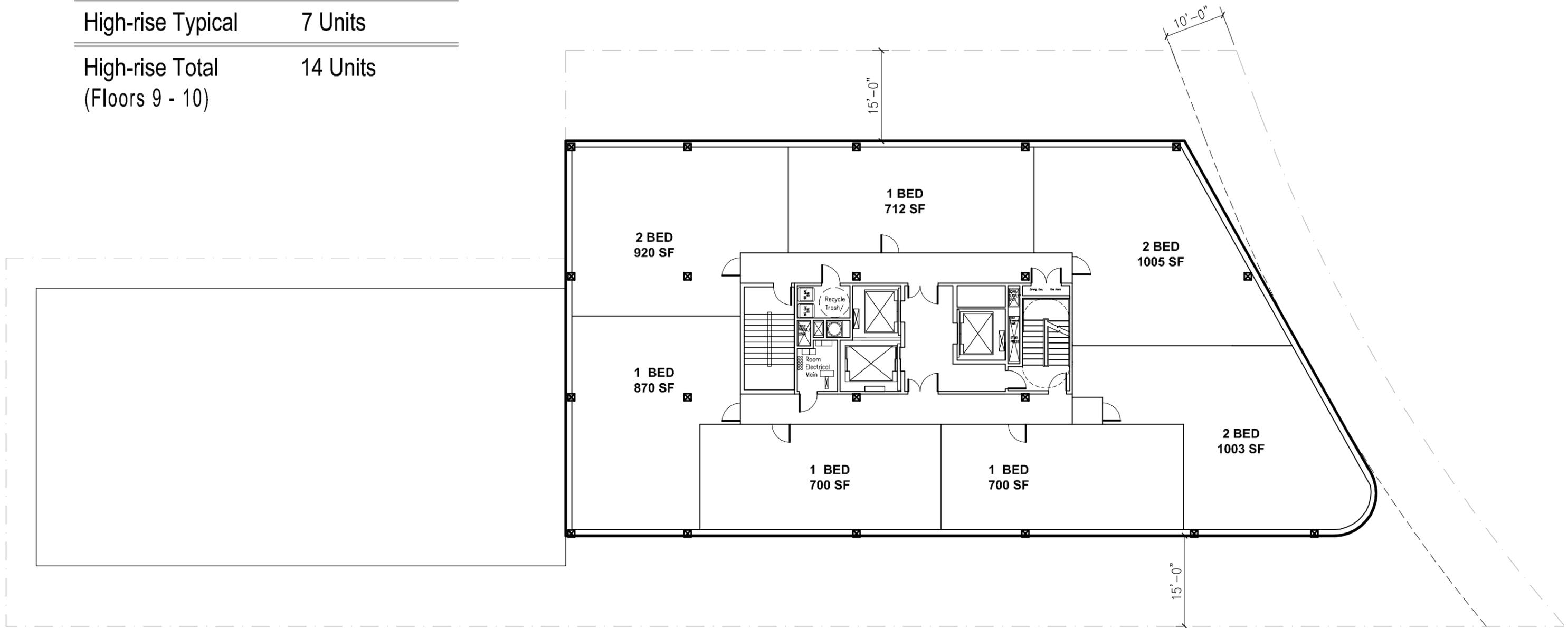
**THIRD LEVEL PLAN**  
1/16" = 1'-0"

40% - 1 Bed	4 Units
60% - 2 Bed	6 Units
Mid-rise Typical	10 Units
Mid-rise Total (Floors 4 - 8)	50 Units



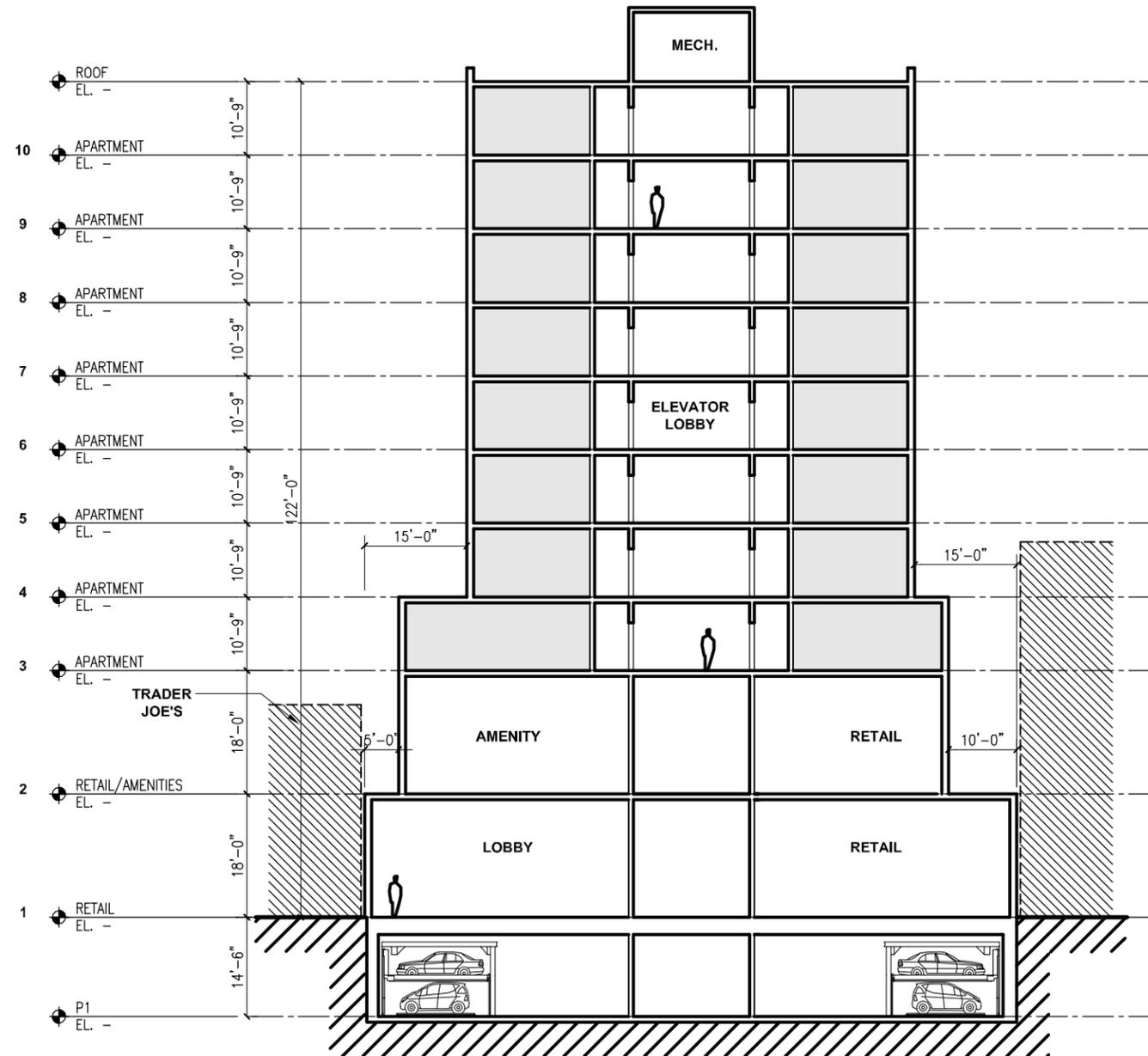
MID-RISE PLAN  
1/16" = 1'-0"

57% - 1 Bed	4 Units
43% - 2 Bed	3 Units
<hr/>	
High-rise Typical	7 Units
<hr/>	
High-rise Total (Floors 9 - 10)	14 Units



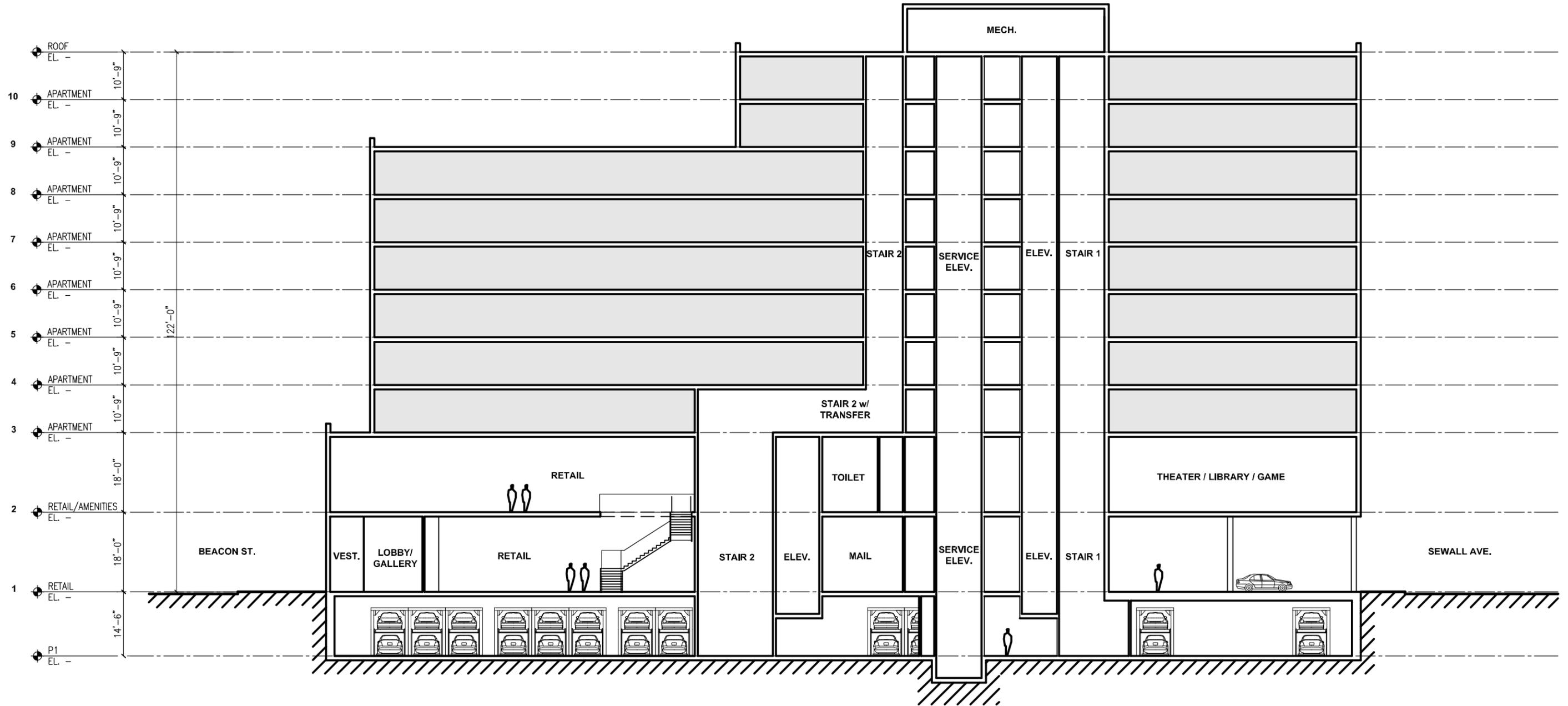
TYPICAL HIGH-RISE PLAN  
1/16" = 1'-0"

40% - 1 Bed	32 Units
60% - 2 Bed	42 Units
<hr/>	
Floor 3	10 Units
Floors 4-8	50 Units
Floors 9-10	14 Units
<hr/>	
Building Total	74 Units

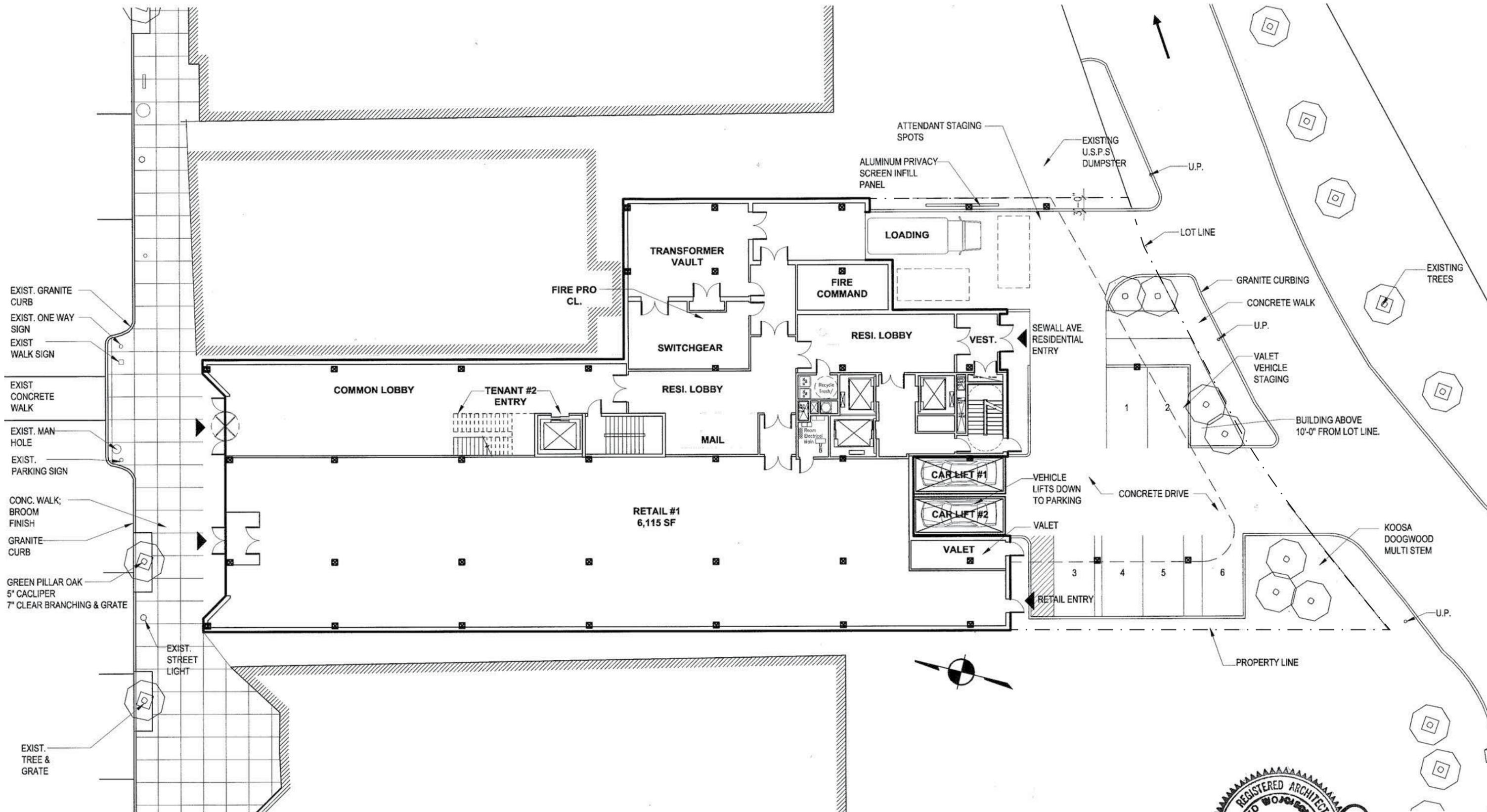


**EAST WEST SECTION**  
1/16" = 1'-0"

40% - 1 Bed	32 Units
60% - 2 Bed	42 Units
<hr/>	
Floor 3	10 Units
Floors 4-8	50 Units
Floors 9-10	14 Units
<hr/>	
Building Total	74 Units



NORTH SOUTH SECTION  
1/16"=1'-0"



**1299 Beacon**  
 1299 Beacon st, Brookline MA  
 11.01.2016



**SITE PLAN**  
 1:20

# STATISTICS / FIGURES

HEIGHT	= 122'-0"
# OF STORIES	= 8 in front, 10 in back (10'9" floor to floor)
GSF	= 112,782 sf
SITE AREA	= 18,632 sf
F.A.R	= 6.05
TYPICAL LOWER FLOOR	= 11,889 (10 units)
TYPICAL UPPER FLOOR	= 7,864 (7 units)
RETAIL SF	= 12,285 sf
RESIDENTIAL SF	= 72,500 sf
# OF UNITS	= 74 (32 <i>1bed</i> , 42 <i>2bed</i> )
# OF PARKING	= 93 below grade, 6 surface

**PUBLIC TRANSIT:** Adjacent to Coolidge Corner green line stop, #66 Bus stop, hubway bike station

**PRECEDENT IMAGES:** (clockwise from top left) nyc, london, nyc, cambridge, nyc, london, nyc, boston

**1299 Boylston Street  
Brookline, MA**

**Architectural Narrative:**

The proposed mixed use building at 1299 Beacon Street consists of age-restricted market-rate and affordable residential rental units, and retail. The narrow site is a ½ acre thru block lot connecting Beacon Street to Sewall Avenue. The 74 residential units occupy 8 floors and sit over a 2 story retail and residential amenity base. The one level of below-grade parking is accessed via a pair of vehicle lifts. This building has MBTA train and bus stops at its front door and Coolidge Corner provides most tenants service, retail, grocery, social, and entertainment needs within walking distance. Being located on the south side of a major street, the shadows from this building almost entirely fall on parking lots and commercial roofs.

Along Beacon Street, the thru block ground floor retail visually connects to the public way by a welcoming full height glass storefront and signage system. The Residential Lobby is located off of both Beacon Street and Sewall Avenue and has good visibility out to the sidewalk. It has a seating area and a Lobby Gallery that accesses Mail, Recycling, Bicycle Room, and other resident amenities. The one story podium continues the adjacent building heights and then steps back at the third floor for a terrace that serves the residential units along Beacon.

Off Sewall Avenue, orientated between Trader Joe's Loading and Parking and the USPS's loading docks is the Car and Loading activity for this building. The arrival from Sewall Avenue is covered, screened and landscaped. It's removed from the busy Coolidge Corner intersection. Here, the Valet serves a Resident's and Retail Entry that connects pedestrians thru the block, with Beacon Street. The Valet Parking Attendant coordinates vehicle lift and the 6 surface Retail parking spaces.

Overhead, the residential component is scaled down through the use of multiple massing techniques. The first is the use of three stepped masses that suggests three smaller buildings arranged together: a podium, a north, and a south buildings. Second, a frame system with double and triple height expressed openings. The third is the use of alternating the percentages of façade materials on the north and south building forms. Within these frame openings, the composition of mullion patterns and infill panels that span multiple floors contribute further to the reduction of scale as well as the to the frames visual depth. Allowing the frames to wrap and open at the corners, creates a horizontal expression necessary to balance the buildings overall verticality. At the rooftop, all the mechanical areas are screened for visual and sound control.

On the 2<sup>nd</sup> floor, the Retail Space connects to the first floor via an open stair. The Residential Amenities share this level and include Fitness, Pantry, Group Kitchen & Dining, Game and Screening Rooms, and a Deck. On the upper, residential levels, the residential units are accessed by a double-loaded corridor with egress stairs at each end. A central core contains elevators, trash chute, and building support spaces. Typical one and two-bedroom units are designed with open kitchen/living areas, comfortable bedrooms that feature large walk-in

closets, and large windows to provide abundant natural light. In addition to high-quality finishes and individual environmental controls, each unit will contain energy-efficient appliances, in-unit laundry, and low-energy lighting fixtures that, in combination, offer a sense of luxury.

### **Materials:**

Overall, the building is composed around a multi-story “frame” expression which wraps two different height building masses. This frame system nearest to Beacon Street (north 6 floor half) is mostly terracotta rain screen panel system with a composite aluminum panel infill. Aluminum frame windows system with operators and clear glass make up the balance of the slightly recessed infill areas. The frame system (south 8 floor half) closest to Sewall Avenue is composed of the same materials except that the proportion of terracotta is reduced and the composite metal panels are increased.

At the pedestrian level, the Beacon Street retail has a full height glass storefront entry system and a one story terracotta surround. The retail signage system is integrated into the glass entry vestibules. Along Sewall Avenue, the ground floor is composed of composite aluminum panels, steel paneled doors at the vehicle lifts, and aluminum glass storefront entry system. Open aluminum privacy panel screens the off-street loading area from the USPS property.

At the first two levels where the solid portion of the building is nearest to the side property lines, insulated horizontal aluminum panels are used that meet Fire Code requirements.

The rooftop mechanical areas are screened with an articulated metal panel system.

**1299 BEACON STREET  
PROPOSED WAIVER LIST  
G - 1.75 Zoning District**

<b>Brookline Zoning By-Laws</b>				
<b>Bylaw Section</b>	<b>Requirement</b>	<b>Requested Waiver(s)</b>	<b>Details of Proposal Requiring Waiver</b>	<b>Waiver Letter</b>
<b>§§ 3.00(3) &amp; 4.07 (Table of Use Regulations)</b>	Multi-Family Uses	Use property as a multi-family dwelling without a special permit.*	The Development is a multi-family housing development containing 74 units. Approval of a Comprehensive Permit by Zoning Board of Appeals under M.G.L. c. 40B, § 20-23, allows proposed use.*	A
<b>§4.08</b>	Affordable Housing Requirements	Use property for affordable housing without complying with specific requirements.	The Development is a multi-family housing development under c.40B and all affordable housing requirements are governed by the Comprehensive Permit.	B
<b>§5.06(b)(1,2,4)</b>	Special District Regulations for the G-1.75 District	Project design and other approvals and dimensional requirements not under §5.06.	Design and other approvals granted by and dimensional requirements determined by Zoning Board of Appeals per M.G.L. c. 40B, § 20-23.	C
<b>§5.09</b>	Design Review	Project design approval without Design Review under §5.09.	Design elements included in Comprehensive Permit plans to be reviewed by the Zoning Board of Appeals per M.G.L. c. 40B, § 20-23.	D

<b>Table §5.01 and §5.14</b>	Minimum Lot Frontage	None. Required lot frontage is 20 FT.	The Lot Frontage is 61FT.	NA
<b>Table §5.01</b>	Minimum Lot Size	None. There is no minimum lot size in the G-1.75 District.	The lot is 18,632.3 SF.	NA
<b>Table §5.01</b>	Minimum Lot Width	None. There is no minimum lot width in the G-1.75 District.	The Minimum Lot Width is 82 FT.	NA
<b>Table §5.01</b>	Maximum Floor Area Ratio	Waiver from maximum ratio of gross floor area to lot area of 1.75.	The Development includes 74 units in 10 stories on a 18,632.3 SF lot and will have a floor area ratio of approximately 6.03 which excludes the gross floor area for underground parking per § 5.06(b)(3).	E
<b>Table §5.01</b>	Maximum Height of Buildings	Waiver from maximum building height of 45 FT.	The proposed building height is 122 FT.	F
<b>Table § 5.01</b>	Minimum Front Yard/ Beacon Street	None. There is no minimum front yard in the G-1.75 District.	The proposed front yard off Beacon Street is 0 FT.	NA
<b>Table § 5.01</b>	Minimum Front Yard/ Sewall Road	None. There is no minimum front yard in the G-1.75 District.	The proposed front yard off Sewall Avenue is 10 FT.	

		The entrance to a garage or covered vehicular area passageway must be setback 20 FT. A waiver is requested for the covered passageway.	The proposed covered passageway setback is 10 FT. The proposed garage setback is 60 FT.	G (for covered passageway setback)
<b>Table § 5.01, Footnote 2</b>	Wall Length and Side Yard	Waiver from 70 FT side wall length and 10+L/10 side yard.	From Beacons Street, north and south wall lengths of 95± FT. From Sewall Avenue, north and south wall lengths of, respectively, 111± FT and 136± FT. Side yard of 0 FT for first and second floors only.	H
<b>Table § 5.01, § 5.41 and § 5.07</b>	Minimum Side Yard	Waiver from $H + L/6$ or 65.5 FT. (see M-2.0)	The proposed side yard is 0 FT for the first and second floors only.	I
<b>Table § 5.01 and § 5.07</b>	Minimum Rear Yard	None. The rear yard requirement is $H+L/6$ or 38.5 FT. (see M-2.0)	This provision is inapplicable as the lot has two front yards and no rear yard.	NA
<b>Table § 5.01</b>	Minimum Open Space (landscaped)	None. There is no minimum Landscaped Open Space in the G-1.75 District.	There is 1,269 SF of Landscaped Open Space.	NA
<b>Table § 5.01 and § 5.07</b>			There is 2045 SF of Usable	NA

	Minimum Open Space (usable)	None. There is no Usable Open Space required in the G-1.75 District. (see M-2.0)	Open Space.	
<b>Table §6.02</b>	Parking Spaces – 2.0/residential unit	Waiver from 2 spaces/dwelling unit.	1.22 spaces/dwelling unit sought.  There are 99 total spaces, 93 of which will be attended parking spaces. 45 of the 99 spaces are for the Retail Use and 54 spaces service the Multi-family Use. The Development’s proximity to public transportation and the parking spaces and lots nearby allow for a lower parking ratio.	J
<b>Article VI</b>	Vehicular Service Uses Requirements	Waiver from all dimensional and design requirements for off-street parking.	Off-Street parking design and dimensions per Comprehensive Permit plans.	K
<b>§ 6.06</b>	Number of Off-Street Loading Spaces	None. Project complies.	The project will have 1 loading space.	NA
<b>§ 6.07</b>	Design and Layout of Off-Street Loading Facilities	Waiver from design and layout requirements.	Design and layout per plans submitted for Comprehensive Permit.	L
<b>§3.17</b>	Department of Public Works (DPW)	Waiver from DPW site plan approval process, curb cut procedure, tree removal, and construction and maintenance related parking permits.	Comprehensive Permit, as may be granted by Zoning Board of Appeals shall provide all local permits per M.G.L. c. 40B § 20-23.	M

Information Requested by MassHousing but not Required by the Zoning Bylaw	
<b>Lot Coverage</b>	88.1% lot coverage
<b>Stories</b>	10 stories
<b>Units/Acre</b>	_173 units/acre

\*The first and second floors also include “Retail and Consumer Services Uses” which are allowed by Special Permit.



**SUSTAINABLE DEVELOPMENT CRITERIA SCORECARD**

Project Name:	1299 Beacon Street
Project Number:	
Program Name:	
Date:	10/31/2016

MassHousing encourages housing development that is consistent with sustainable development designs and green building practices. Prior to completing this form, please refer to the Commonwealth's Sustainable Development Principles (adopted May 2007) available at:

[Sustainable Development Principles](#)

**DEVELOPER SELF-ASSESSMENT**  
(for consistency with the Sustainable Development Principles)

**Method 1:**

**Redevelop First**

<i>Check "X" Below</i>		
Yes	No	NA
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

*If Rehabilitation:*

- Rehabilitation/Redevelopment/Improvements to Structure
- Rehabilitation/Redevelopment/Improvements to Infrastructure

<i>Check "X" below if applicable</i>	
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

*If New Construction:*

- Contributes to revitalization of town center or neighborhood
- Walkable to:
  - (a) transit
  - (b) downtown or village center
  - (c) school
  - (d) library
  - (e) retail, services or employment center
- Located in municipally-approved growth center

<input type="checkbox"/>

**Explanation (Required)**

**Optional - Demonstration of Municipal Support:**

Check "X" below if applicable

- Letter of Support from the Chief Elected Official of the municipality\*
- Housing development involves municipal funding
- Housing development involves land owned or donated by the municipality

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

\*Other acceptable evidence: Zoning variance issued by ZBA for project; Minutes from Board of Selectman meeting showing that project was discussed and approved, etc.

**Explanation (Required)**

**Method 2:** Development meets a minimum of **five (5)** of the Commonwealth's *Sustainable Development Principles*, as shown in the next section below.

If the development involves strong **municipal support** (evidence of such support must be submitted as an attachment), the development need only meet **four (4)** of the *Sustainable Development Principles*. However, one (1) of the Principles met must be **Protect Land and Ecosystems**.

Please explain at the end of each category how the development follows the relevant *Sustainable Development Principle(s)* and explain how the development demonstrates each of the checked "X" statements listed under the *Sustainable Development Principle(s)*.

**(1) Concentrate Development and Mix Uses**

Yes	No	NA
X	<input type="checkbox"/>	<input type="checkbox"/>

Support the revitalization of city and town centers and neighborhoods by promoting development that is compact, conserves land, protects historic resources, and integrates uses. Encourage remediation and reuse of existing sites, structures, and infrastructure rather than new construction in undeveloped areas. Create pedestrian friendly districts and neighborhoods that mix commercial, civic, cultural, educational, and recreational activities with open spaces and homes.

- Higher density than surrounding area
- Mixes uses or adds new uses to an existing neighborhood
- Includes multi-family housing
- Utilizes existing water/sewer infrastructure
- Compact and/or clustered so as to preserve undeveloped land
- Reuse existing sites, structures, or infrastructure
- Pedestrian friendly
- Other (discuss below)

Check "X" below if applicable

X
X
X
X
<input type="checkbox"/>
X
X
<input type="checkbox"/>

**Explanation (Required)**

The project is located on Beacon Street in a densely development mixed-use area. The proposed development is right in front of the MBTA Green Line and bus lines and a multitude of retail and commercial attractions are within immediate walking distance of the site. All utilities are immediately at the site and the proposal features age-restricted market rate rental housing which is needed in the Brookline market.

Check "X" Below

Yes	No	NA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**(2) Advance Equity & Make Efficient Decisions**

Promote equitable sharing of the benefits and burdens of development. Provide technical and strategic support for inclusive community planning and decision making to ensure social, economic, and environmental justice. Ensure that the interests of future generations are not compromised by today's decisions.

Promote development in accordance with smart growth and environmental stewardship.

Check "X" below if applicable

- Concerted public participation effort (beyond the minimally required public hearings)
- Streamlined permitting process, such as 40B or 40R
- Universal Design and/or visitability
- Creates affordable housing in middle to upper income area and/or meets regional need
- Creates affordable housing in high poverty area
- Promotes diversity and social equity and improves the neighborhood
- Includes environmental cleanup and/or neighborhood improvement in an Environmental Justice Community
- Other (discuss below)

**Explanation (Required)**

The project will use the comprehensive permit process with an objective to create market rate and moderate income rental housing catering to an underserved community in a very upscale community. The housing will be appropriate for a population with mobility impairments as well as other physical limitations. The developer and supporting team has and will continue to maintain an open line of communication with Town Officials and abutters throughout the permitting process; providing opportunities for feedback and keeping them informed of any project modifications.

Check "X" Below

Yes	No	NA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**(3) Protect Land and Ecosystems**

Protect and restore environmentally sensitive lands, natural resources, agricultural lands, critical habitats, wetlands and water resources, and cultural and historic landscapes. Increase the quantity, quality and accessibility of open spaces and recreational opportunities.

Check "X" below if applicable

- Creation or preservation of open space or passive recreational facilities
- Protection of sensitive land, including prime agricultural land, critical habitats, and wetlands
- Environmental remediation or clean up
- Responds to state or federal mandate (e.g., clean drinking water, drainage, etc.)
- Eliminates or reduces neighborhood blight
- Addresses public health and safety risk
- Cultural or Historic landscape/existing neighborhood enhancement
- Other (discuss below)

**Explanation (Required)**

**(4) Use Natural Resources Wisely**

*Check "X" Below*

Yes	No	NA
X		

Construct and promote developments, buildings, and infrastructure that conserve natural resources by reducing waste and pollution through efficient use of land, energy, water, and materials.

- Uses alternative technologies for water and/or wastewater treatment
- Uses low impact development (LID) or other innovative techniques
- Other (discuss below)

*Check "X" below if applicable*

X
X

**Explanation (Required)**

The project will be designed for energy efficiency, with a goal of reducing its overall energy consumption by approximately 20% over the baseline. Recycled and non-toxic materials will be used in the common areas and apartment units. Homes will be supplied with Energy Star rated lights and appliances and low flow plumbing fixtures.

**(5) Expand Housing Opportunities**

*Check "X" Below*

Yes	No	NA
X		

Support the construction and rehabilitation of homes to meet the needs of people of all abilities, income levels and household types. Build homes near jobs, transit, and where services are available. Foster the development of housing, particularly multifamily and single-family homes, in a way that is compatible with a community's character and vision and with providing new housing choices for people of all means.

- Includes rental units, including for low/mod households
- Includes homeownership units, including for low/mod households
- Includes housing options for special needs and disabled population
- Expands the term of affordability
- Homes are near jobs, transit, and other services
- Other (discuss below)

*Check "X" below if applicable*

X
X
X
X

**Explanation (Required)**

The proposed development will provide low income households (50% AMI) an additional rental housing option in Brookline. The project provides housing with good and redundant access to public transit and major employment hubs. The project expands the affordable housing stock in Brookline adding 74 units of mixed income rental housing in a compatible and attractive design. The project is served by all existing utility infrastructure. The term of affordability will be in perpetuity.

**(6) Provide Transportation Choice**

*Check "X" Below*

Yes	No	NA
X		

Maintain and expand transportation options that maximize mobility, reduce congestion, conserve fuel and improve air quality. Prioritize rail, bus, boat, rapid and surface transit, shared-vehicle and shared-ride services, bicycling, and walking. Invest strategically in existing and new passenger and freight transportation infrastructure that supports sound economic development consistent with smart growth objectives.

- |   |                                      |
|---|--------------------------------------|
|   | <i>Check "X" below if applicable</i> |
| - Walkable to public transportation   | <input checked="" type="checkbox"/>  |
| - Reduces dependence on private automobiles (e.g., provides previously unavailable shared transportation, such as Zip Car or shuttle buses)   | <input checked="" type="checkbox"/>  |
| - Increased bike & ped access   | <input checked="" type="checkbox"/>  |
| - For rural areas, located in close proximity (i.e., approximately one mile) to a transportation corridor that provides access to employment centers, retail/commercial centers, civic or cultural destinations | <input type="checkbox"/>             |
| - Other (discuss below)   | <input type="checkbox"/>             |

**Explanation (Required)**

The project is located immediately adjacent to the MBTA Green Line, bus-lines and is walkable to a variety of commercial and retail amenities and opportunities.

**(7) Increase Job and Business Opportunities**

- |  |                                     |                          |                          |
|--|-------------------------------------|--------------------------|--------------------------|
|  | <i>Check "X" Below</i>              |                          |                          |
|  | <b>Yes</b>                          | <b>No</b>                | <b>NA</b>                |
|  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Attract businesses and jobs to locations near housing, infrastructure, and transportation options. Promote economic development in industry clusters. Expand access to education, training, and entrepreneurial opportunities. Support growth of local businesses, including sustainable natural resource-based businesses, such as agriculture, forestry, clean energy technology, and fisheries.

- |  |                                      |
|--|--------------------------------------|
|  | <i>Check "X" below if applicable</i> |
| - Permanent jobs   | <input checked="" type="checkbox"/>  |
| - Permanent jobs for low- or moderate-income persons   | <input type="checkbox"/>             |
| - Jobs near housing, service or transit  | <input checked="" type="checkbox"/>  |
| - Housing near an employment center  | <input checked="" type="checkbox"/>  |
| - Expand access to education, training, or entrepreneurial opportunities   | <input type="checkbox"/>             |
| - Support local businesses   | <input checked="" type="checkbox"/>  |
| - Support natural resource-based businesses (i.e., farming, forestry, or aquaculture)                                | <input type="checkbox"/>             |
| - Re-uses or recycles materials from a local or regional industry's waste stream                                     | <input type="checkbox"/>             |
| - Support manufacture of resource-efficient materials, such as recycled or low-toxicity materials                    | <input checked="" type="checkbox"/>  |
| - Support businesses that utilize locally produced resources such as locally harvested wood or agricultural products | <input type="checkbox"/>             |
| - Other (discuss below)  | <input type="checkbox"/>             |

**Explanation (Required)**

The project will create housing near job opportunities in the retail, service, transportation and professional sectors. The project will create new opportunities for area businesses. The housing itself will create the opportunity for permanent jobs in the property management sector, both in administration and maintenance as well as in the service sector which will be contracted out for work..

**(8) Promote Clean Energy**

Check "X" Below

Maximize energy efficiency and renewable energy opportunities. Support energy conservation strategies, local clean power generation, distributed generation technologies, and innovative industries. Reduce greenhouse gas emissions and consumption of fossil fuels.

- Energy Star or equivalent\*
- Uses renewable energy source, recycled and/or non-/low-toxic materials, exceeds the state energy code, is configured to optimize solar access, and/or otherwise results in waste reduction and conservation of resources
- Other (discuss below)

Check "X" below if applicable

\* All units are required by MassHousing to be Energy Star Efficient. Please include in your explanation a description of how the development will meet Energy Star criteria.

**Explanation (Required)**

The overall efficiency and sustainability goals of the project will help reduce greenhouse gas emissions. The project will feature energy efficient, clear burning gas heating systems that also heat domestic hot water.

**(9) Plan Regionally**

Check "X" Below

Yes	No	NA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Support the development and implementation of local and regional, state and interstate plans that have broad public support and are consistent with these principles. Foster development projects, land and water conservation, transportation and housing that have a regional or multi-community benefit. Consider the long-term costs and benefits to the Commonwealth.

- Consistent with a municipally supported regional plan
- Addresses barriers identified in a Regional Analysis of Impediments to Fair Housing
- Measurable public benefit beyond the applicant community
- Other (discuss below)

Check "X" below if applicable

**Explanation (Required)**

The project supports a local and regional housing need and provides mixed income rental housing within convenient commute by train and bus to employment bus in the Boston/Metro West area. The project complies with various goals set by the Town of Brookline for area planning and housing development as well as the regional housing production goals of MAPC.

For further information regarding 40B applications, please contact Greg Watson, Manager, Comprehensive Permit Programs, at (617) 854-1880 or gwatson@masshousing.com



# **Parking Plan**

## **1299 Beacon Street**

### **Brookline, MA 02446**

#### **Description of Parking Facility**

The proposed parking facility will be located one (1) level below grade and will have a capacity of Ninety-Three (93) parking spaces which includes the installation of forty-one (41) high density double parking stackers (41 elevated spaces / 41 spaces on slab). As this will be a residential building having 74 apartments (for residents age 55 and over), we believe that it is safe to assume that the parking garage as it is designed is sufficient for the demand of the development. The daily average for morning egress from Monday through Friday (6:30 A.M. to 9 A.M.) is approximately Forty (40 %) percent of residents, in addition we typically use a vacancy factor of 10% at all times. If a vehicle were stored on a stacker and a resident requested their vehicle for a morning exit, we would ask that the garage be provided with sufficient notice before the resident arrives preferably the night before. The vehicles that would be stored on the parking stackers would be used for "storing vehicles" which typically are those vehicles that are used infrequently or on weekends and not on a daily basis. Many residents may also be walking or using the Green Line (both the C and D lines are within walking distance) to get to work or to do errands rather than driving (the #66 bus is also very close by, as well as several other bus lines).

The parking facility will be accessed by entering a driveway off of Sewall Avenue to the rear of the building, where there are Two (2) vehicle freight elevators to bring the vehicles to the lower. All vehicles entering and exiting the facility will be handled by a professional parking services company that will be hired by ownership. It is anticipated that the facility will be operated on a 24 / 7 basis as tenants in the residential component will not have access to the lower level.

In addition to the 74 apartments in the building, there is 12,285 of retail space proposed on the first two levels of the building (6,010 on the first floor, and 6275 sf on the second floor). The Town requirement for parking of this size space would be approximately 60 parking spaces. However, we expect that many retail employees and customers will use public transportation or walk to the building, and of course, a number of the residents (and their cars) may be out of the building during peak retail hours. Trader Joes also currently rents 20 parking spaces from the property owner (Brighton Allston Properties), although there is no long-term parking arrangement between Trader Joes and the property owner.

In addition to the 93 parking spaces located within the parking garage there are also 6 spaces located in the driveway area. These spaces will be designated for short term loading and unloading of tenants' vehicles and will be used by the attendants for those residents who have called for their vehicles and have not yet arrived, or in a few cases, for retail customers.

As this facility will be operating on a 24 / 7 basis, there will be two (2) attendants on site at all times with the exception of the overnight shift (after 11 p.m.) We do not anticipate any sizeable number of transient vehicles entering the facility during morning peak egress hours as the retail components of the venue would open after those hours.