



DRAFT

Developer Compliance Database

FOR USERS ONLY



Boston Redevelopment Authority

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1 USING THE SYSTEM: THE BASICS

Background and Introduction

The Boston Redevelopment Authority's Compliance Department is responsible for recording, tracking, and monitoring the progress of mitigation, community benefits and other contractual obligations between a developer, the community, and the BRA.

After testing proposed programs presented by outside contractors, the Compliance Department created its own automated Developer Compliance Database (DCD) in 2008. Its purpose is to track and monitor the progress of these commitments to ensure timely completion. Prior to October 2004, the BRA did not have a centralized Compliance Department; the Project Managers were responsible for monitoring the progress of community benefits. Each Manager had a different style of tracking, and there wasn't a cohesive system in place within the BRA to track the status of all developer commitments.

In March 2008, a Project Assistant was hired to assist the tracking and monitoring of the commitments and to design an automated system to record all of the commitments contained in the project documents. The task at hand was to gather and review hundreds of project files to identify and isolate active commitments, as well as adding new projects to the system, then gathering evidence that obligations had been fulfilled.

The database is a mix between open and closed projects containing current, completed and ongoing commitments. The system includes a series of reports that help isolate certain types of information contained in the vast amount of information in the database.

The Developer Compliance Database, which is written in Microsoft Access, consists of two parts: (1) identifying information about an individual project; and, (2) commitments within the project. The two parts interact via integrated tables; however, there is one main data input screen.

This guide will provide easy access to the information in the Developer Compliance Database, including: how to enter data from the Project Documents; how to run reports in order to determine the status of a given commitment; how to review a specific project; how to update information as commitments are completed and projects move forward; and, how to maintain system operations and what to do if something unexpected occurs.

Key Terms

This guide uses certain key terms when referring to particular documents and programs.

Project Documents:

Project Documents include any document pertaining to an individual project, some of which are found in a hard copy project folder and most are also scanned and are maintained by the Compliance Department. The Legal Department, each project manager and the Secretary's Office keep their own originals and copies. Typical documents found in the project folder include: Cooperation Agreements, Land Disposition Agreements, Development Impact Project Agreements, Boston Residents Construction Employment Plans, Board Memos and Internal and External Correspondence. More information on each type is listed below.

Cooperation Agreements

A Cooperation Agreement is the most important document in the project file. It is the legally binding agreement containing the commitments made by a developer to the BRA and other entities.

Development Impact Project Agreements

DIP Agreements contain Housing and Job Exaction commitments (linkage). The amounts, due dates and other pertinent details regarding linkage are included in this document. The Cooperation Agreement will indicate whether or not the project triggers a DIP status.

Land Disposition Agreements

LDAs detail the agreements involving the disposition of BRA/City owned land. The LDA incorporates the commitments made by the developer and there usually is no separate Cooperation Agreement.

Board Memos

Board Memos contain some of the information regarding commitments, but may not contain all of the commitments. Use both Board Memos and Cooperation Agreements to ensure all commitments have been captured. Board Memos are a great source for background information on a project, including project location and history, players on the development team and BRA staff involved with the project. Read these documents first to get a broad sense of the project's scope.

Boston Residents Construction

Employment Plan

Text pending

Internal and External Correspondence

Consists of interoffice emails, proof of payment or completion of commitments.

The Pipeline

The Pipeline is the BRA's active database to track the progress of and to provide pertinent information about each project. The data primarily comes from the Project Managers. Some records are more thorough than others.

The Pipeline is a great tool for getting more background information about a project, including: information on the current construction phase; the neighborhood locale; the project manager; the developer; and the intended uses of the building.

The DCD's essential project information comes directly from the Pipeline. This critical relationship requires the DCD to use the project name given in the Pipeline.

When determining an alternative name for a project, use the Pipeline to cross reference information from the Project Documents to ensure the two projects are one and the same. Also, when entering information about the neighborhood and project status, always refer to the Pipeline to make sure the information is consistent.

Sometimes the Pipeline has outdated information if a project is old or hasn't been recently updated. Check the Last Edited date field to determine how recent the data is. If you suspect the information is incorrect, ask the Deputy Director for Compliance for assistance.

The screenshot displays a web-based interface for managing projects. At the top, there are buttons for 'Display Project Info', 'Save', 'Edit', 'Undo', 'Manage Contacts', and 'Close Project'. The main form is divided into several sections:

- Project Information:** Project Name: 1 Westinghouse Plaza; Project Manager: Rodney Sinclair x4349; Entered: 1/11/2006; Last Edited: 2/4/2009; Project ID: 1199; Category: Under Construction.
- PROJECT BASICS:** Project Name: 1 Westinghouse Plaza; Project Cost: \$0; Proponent: [dropdown]; Developer: The Hamilton Company; Contact Name: Carl Valeri; Title: [text]; Mailing Address: [text]; Phone Number: [text]; eMail Address: [text]; Total Residential Units: [text]; Height Tallest Building: [text].
- PROJECT ADDRESS:** Neighborhood: Hyde Park; Parcel ID #: [text]; Additional Parcels: [button].
- DEVELOPMENT PROGRAM:** Office, Hotel, Retail, R & D, Parking, Industrial, Institutional, Medical Clinical, Medical Research, Other Research, Residential, Rental, Ownership, Dormitory, Educational, Cultural, Other Type.
- PLANNING AND ZONING:** Zoning District, Zoning Classification, Zoning Comment, Harbor Plan, PDA Master Plan, Inst. Master Plan, Zoning Relief Sought, Empowerment Zone, U District, PDA, EDA, 121A, Urban Renewal Area, URA Modification.
- HOUSING TRACKING:** Land Sq Ft: 0; Gross SF of Dev.: 120,000; Estimated FAR: 0.00; Number of Bldgs.: 1; Parking Spaces: 70; At Grade Spaces: 0; Structured Spaces: 0; Below Grade Spaces: 0; Non Accessory Sqft: 0.

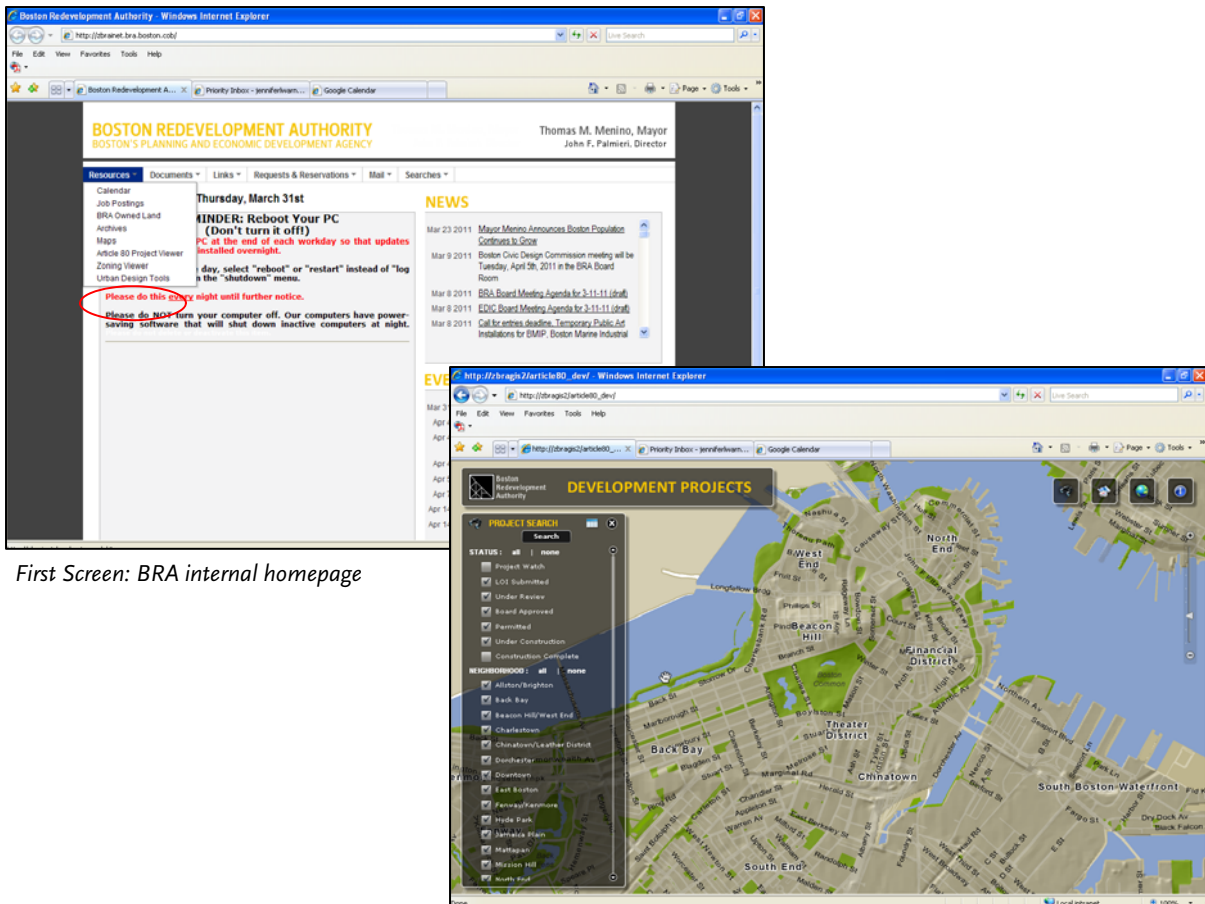
Article 80 Project Viewer

This online application is found on the BRA's intranet. Select Article 80 Project Viewer located under the Documents Tab on the upper left-hand corner.

The next screen is the project viewer. Use this application to help find projects that may not appear in the Pipeline, projects with multiple names or other reference information.

When a project has multiple names, it is best to try to locate the project on the map, using the legal descriptions in the Project Documents to guide the search. Often, you will discover the other name that the project is formally known as within the system. Make a notation of the alternate name in the Project Documents so others will be able to find the name in the future.

It is also very important to be certain that the project on the map and the project in question are one and the same. One way to double check is to ask the Project Manager involved with the project, or make sure the legal description matches the map exactly. Print out a copy of the map to keep in the project file to prevent further confusion.



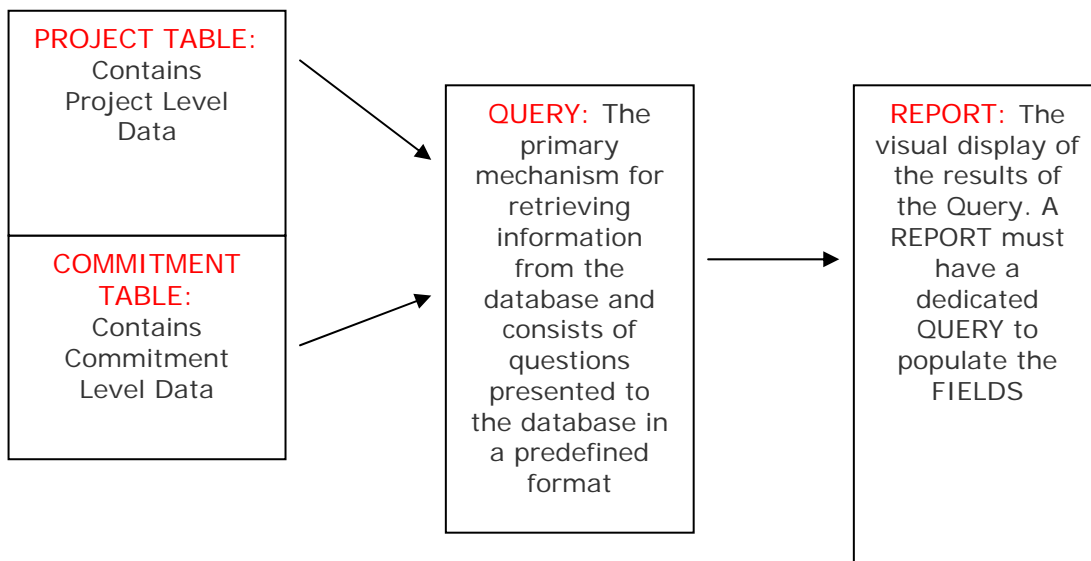
First Screen: BRA internal homepage

Second Screen: Article 80 Project Viewer

2 USING THE SYSTEM: DATABASE ORGANIZATION

SECTION 1: DATABASE LAYOUT

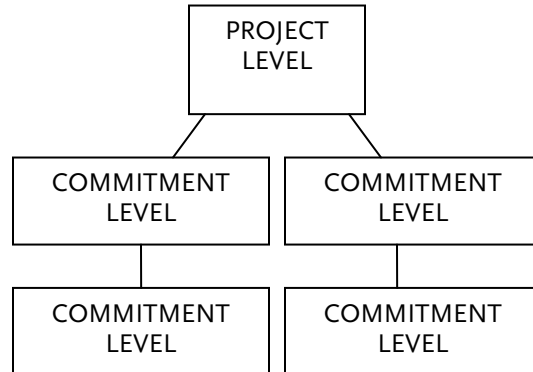
There are four main components to the database: The Project Table, the Commitment Table, the Queries and the Reports.



All of the data enters the database via a data entry form. Each piece of data then populates the tables, which then goes into the queries, and is ultimately displayed in the reports.

SECTION 2: HOW DATA IS ORGANIZED

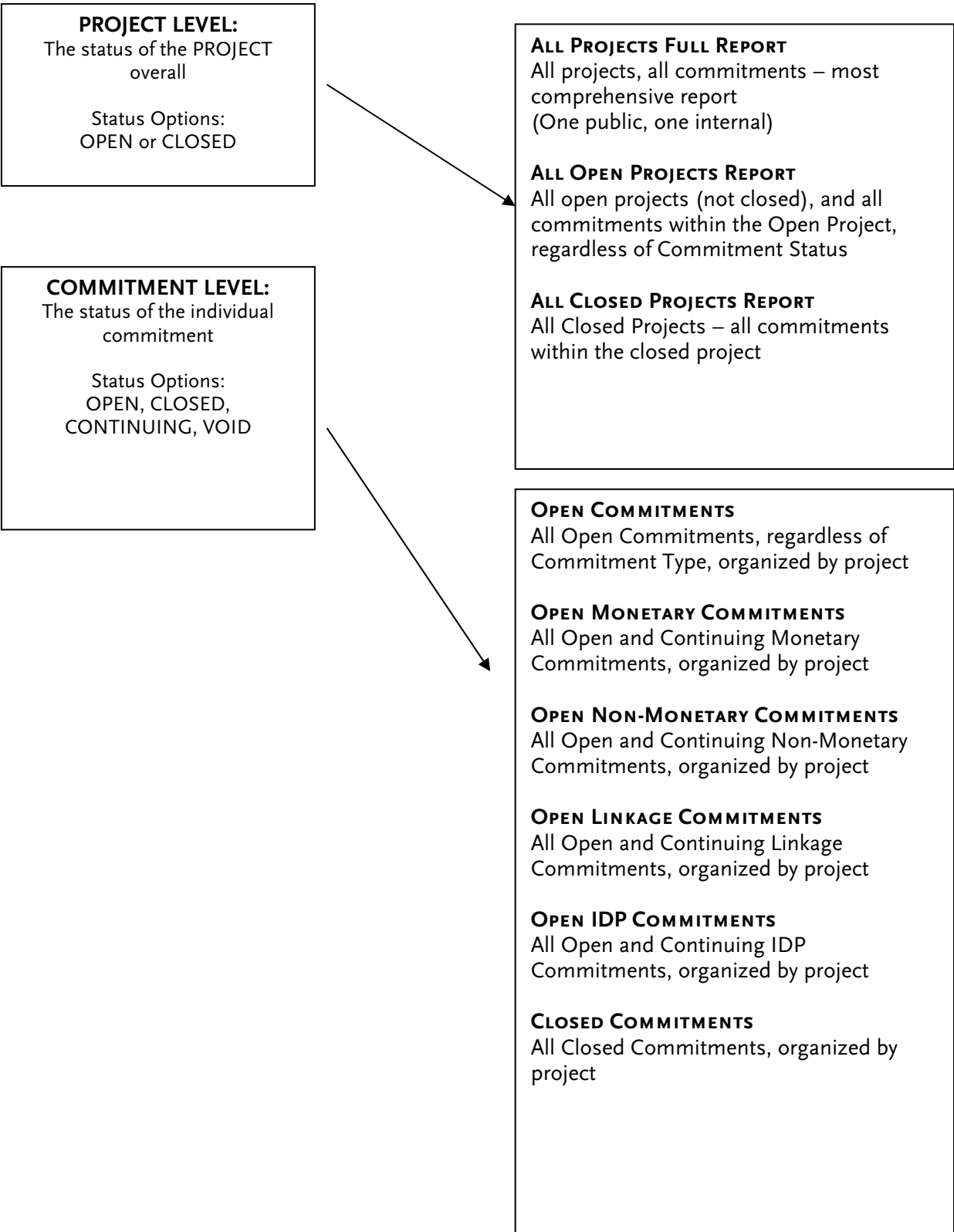
There are two “levels” of data contained in each project as illustrated below:



Each project will have one or more individual commitments associated with it. The data is organized around this structure and the tables operate accordingly.

The relationships are defined in the database to support this structure and organize automatically.

The Project level table and the Commitment level table each generate specific reports via queries as indicated below. Definitions for these terms can be found on page 39 and 43.



SECTION 3: TABLES

The tables contain the all of data entered into the database via the data entry form. There are two main tables: Project Level and Commitment Level. The tables below illustrate the fields in each table, what type of data the field requires and where the data comes from.

Table 1: Project Level Items

Field Name	Data Type	How Data Enters the System
Record ID	Autonumber	Auto generated for each new record
Project ID	Number	Unique number identifies each project across tables; auto generated
Project Manager ID	Number	Auto generated for each project manager
Project Name	Text	Pulls from Pipeline
Project Manager	Text	Autofilled from Pipeline
Project Type	Text	Drop down menu
Project Status	Text	Open or Closed; Manually entered
Project Closed Date	Date/Time	Date project is certified as closed; manually entered
Internal Project Status	Text	Open or Closed; Manually entered
Neighborhood	Text	Drop down menu
Bldg Permit Issue Date	Date/time	Pulls from Pipeline
Est Const Start Qtr	Date/time	Pulls from Pipeline
Est Const End Qtr	Date/time	Pulls from Pipeline
Phase	Text	Drop down menu
Cert Occupancy Date	Date/time	Pulls from Pipeline
Board Approval Date	Date/time	Pulls from Pipeline
Cooperation Agreement Date	Date/time	Manually entered
Comments	Memo	Manually entered
Project Notes	Text	Manually entered

Table 2: Commitment Level Items

Field Name	Data Type	How Data Enters the System
Record ID	Autonumber	Auto generated for each new record
Project ID	Number	Unique number identifies each project across tables
Phase Due	Text	Drop down menu
Start Date	Text	Manually entered
Due Date	Text	Manually entered
Commitment Type	Text	Drop down menu
Total Amount Due	Currency	Manually entered
Amount Paid	Currency	Manually entered
Balance	Currency	Manually entered
Source Document	Text	Manually entered
Citation	Text	Manually entered
Description	Text	Manually entered
Notes	Text	Manually entered
Commitment Status	Text	Drop down menu
Actively Due	Text	Check box. Will be indicated in the table as a "-1" for actively due
Closed Date	Text	Manually entered

Beyond the main tables, there are additional tables that provide support for the drop down menus on the data entry form. These serve a specific function but are not involved in the main operations of the database.

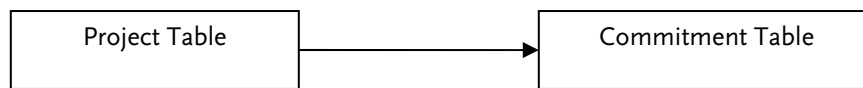
Additional Support Tables:

- Commitment Status
- Name AutoCorrect Save Failures
- Neighborhoods
- Paste Errors
- Phase Due
- Project Phase
- Project Status
- Project Type

SECTION 4: QUERIES

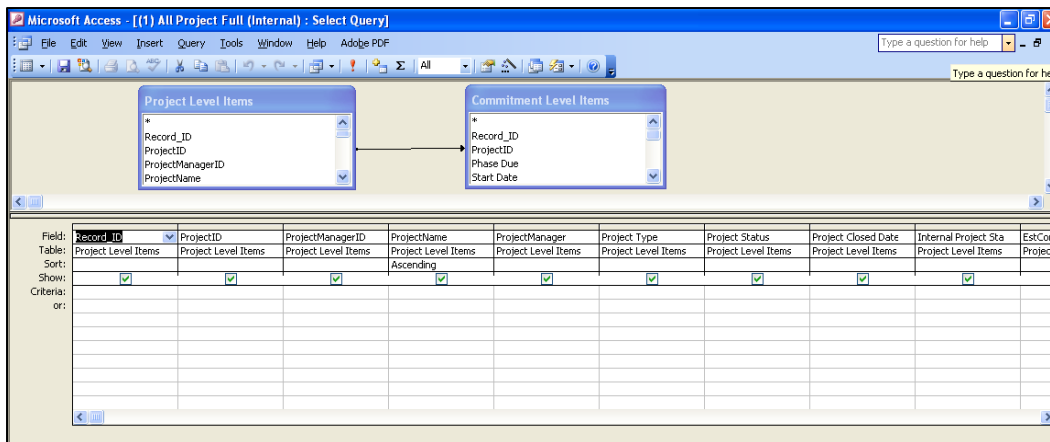
How Queries Work:

The queries' function is to integrate the two separate tables through a series of established relationships. The diagram below illustrates how the Project Table is the dominant table and the Commitment Table is the subservient table. This was designed so the commitments would fall under their appropriate project in accordance with the graphic in Section 2.



Specific fields from each table are brought down to create the query, which then builds a specific table that includes and excludes data based on a set of rules.

For example, this screen shot displays the All Projects Full Query as it looks in design mode:



Each item brought into the area below the two tables are individual fields that were selected for this query. These fields can be manipulated in order to include or exclude whatever data is necessary to satisfy any inquiry.

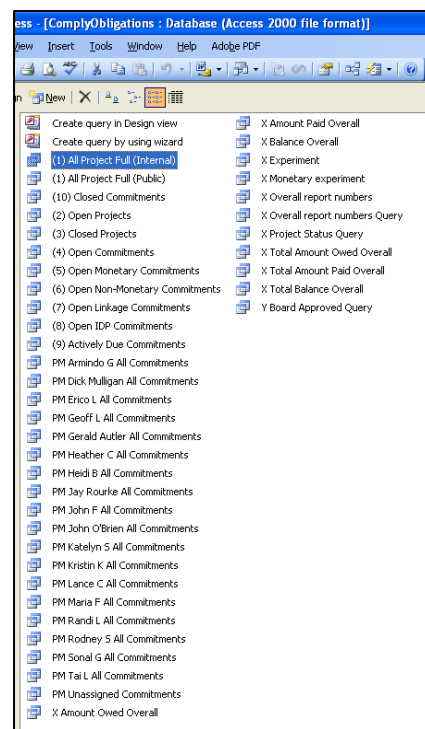
Once the query is designed, the database creates and populates a table that contains all of the relevant data.

Project Level In	Project Manager	Project Name	Project Type	Project Status	Project Closed	Internal Project	EstConstructor	EstConstructi
1397	John Fitzgerald	201 1 Beacon Street		Open	4/4/4444	Closed		
1199	Rodney Sinclair	177 1 Westinghouse Plaza	Cultural	Open		Closed		
1416	Geoff Lewis	111 100 Arlington Street	Residential	Open				
342	Heather Campis	38 100 Cambridge Street (Salt)	Mixed Use	Open			1/1/2002	10/1/2002
342	Heather Campis	38 100 Cambridge Street (Salt)	Mixed Use	Open			1/1/2002	10/1/2002
342	Heather Campis	38 100 Cambridge Street (Salt)	Mixed Use	Open			1/1/2002	10/1/2002
342	Heather Campis	38 100 Cambridge Street (Salt)	Mixed Use	Open			1/1/2002	10/1/2002
342	Heather Campis	38 100 Cambridge Street (Salt)	Mixed Use	Open			1/1/2002	10/1/2002
342	Heather Campis	38 100 Cambridge Street (Salt)	Mixed Use	Open			1/1/2002	10/1/2002
1422	John Fitzgerald	201 1000 Washington Street	Commercial	Open				3/31/201
1422	John Fitzgerald	201 1000 Washington Street	Commercial	Open				3/31/201
1322	John Fitzgerald	201 1047 Commonwealth Ave		Open		Closed		
1209	Lance Campbel	133 12 Humphrey Street		Open		Closed		
1280	Kashin Kara	138 120 Kingston Street	Mixed Use	Open		Open		
856	Tai Lim	165 120 Mountfort Street		Open			4/1/2004	7/1/2002
310	Lance Campbel	133 120 West 7th Street	Residential	Open		In Review	10/1/2002	
1147	Jay Rourke	191 121-127 Portland Street (T)	Residential	Open		Closed		
1115	Rodney Sinclair	177 125 B Street	Residential	Open		Open		
319	Heather Campis	38 131 Morton Street		Open		Closed	8/16/2001	7/1/2002
923	Geoff Lewis	111 1330 Boylston Street	Mixed Use	Open	4/4/4444	Open	10/1/2006	7/1/2002
923	Geoff Lewis	111 1330 Boylston Street	Mixed Use	Open	4/4/4444	Open	10/1/2006	7/1/2002
923	Geoff Lewis	111 1330 Boylston Street	Mixed Use	Open	4/4/4444	Open	10/1/2006	7/1/2002
1220	Jay Rourke	191 141 West Second Street		Open		Closed		
1210	Lance Campbel	133 1460 Dorchester Avenue		Open		Closed	4/1/2007	10/1/2002
926	Geoff Lewis	111 148 Dorchester Avenue		Open		Closed	10/1/2004	5/31/2002
1153	Euseo Lopez	210 1486 Tremont Street		Open		Closed	10/1/2006	10/1/2002
1163	Lance Campbel	133 150 Chestnut Hill Ave	Residential	Open		Open		
871	Tai Lim	165 150 McClellan Highway - I	Industrial	Open		Open		
1176	Jay Rourke	191 154 West Second Street (T)		Open		Closed		
1262	Jay Rourke	191 156 Lincoln Street		Open		Closed		
1202	Lance Campbel	133 157 Washington Street	Mixed Use	Open		Closed		
1205	Tai Lim	165 17 Moxley Street	Residential	Open		Open		
1390	Tai Lim	165 170 Mavensok Street	Residential	Open		Closed		
1279	Rodney Sinclair	177 179 Lincoln Street	Commercial	Open		Open		
1279	Rodney Sinclair	177 179 Lincoln Street	Commercial	Open		Open		
1279	Rodney Sinclair	177 179 Lincoln Street	Commercial	Open		Open		

Queries in this Database

There are 41 queries currently in the database, most of which correspond to a specific report.

- The queries that begin with a number such as (1) and (2) indicate the queries that support the main reports used in the database as illustrated in Section 2 of this chapter.
- The queries that begin with PM are the queries that support the Project Manager specific reports.
- The queries that begin with X and Y are the queries that support some experimental reports.



(1) All Projects Full Report (Internal)

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	
Actively Due	✓	
Closed Date	✓	

(1) All Projects Full Report (Public)

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager		
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	
Actively Due	✓	
Closed Date	✓	

(2) Open Projects

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	"Open"
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	
Actively Due	✓	
Closed Date	✓	

(3) Closed Projects

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	"Closed"
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	
Actively Due	✓	
Closed Date	✓	

(4) Open Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	"Open"
Actively Due	✓	
Closed Date	✓	

(5) Open Monetary Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	"Monetary"
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	"Open"
Actively Due	✓	
Closed Date	✓	

(6) Open Non-Monetary Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	“Non-Monetary”
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	“Open”
Actively Due	✓	
Closed Date	✓	

(7) Open Linkage Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	"Linkage"
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	"Open"
Actively Due	✓	
Closed Date	✓	

(8) Open IDP Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	"IDP"
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	"Open"
Actively Due	✓	
Closed Date	✓	

(g) Actively Due Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	
Actively Due	✓	"-1"
Closed Date	✓	

(10) Closed Commitments

Project Table

Record ID	✓	
Project ID	✓	
Project Manager ID	✓	
Project Name	✓	
Project Manager	✓	
Project Type	✓	
Project Status	✓	
Project Closed Date	✓	
Internal Project Status	✓	
Neighborhood		
Bldg Permit Issue Date		
Est Const Start Qtr	✓	
Est Const End Qtr	✓	
Phase	✓	
Cert Occupancy Date		
Board Approval Date		
Cooperation Agreement Date		
Comments		
Project Notes	✓	

Commitment Table

Record ID	✓	
Project ID	✓	
Phase Due	✓	
Start Date	✓	
Due Date	✓	
Commitment Type	✓	
Total Amount Due	✓	
Amount Paid	✓	
Balance	✓	
Source Document	✓	
Citation	✓	
Description	✓	
Notes	✓	
Commitment Status	✓	"Closed"
Actively Due	✓	
Closed Date	✓	

(11) Overall Report

(11) Overall Report : Report

Page Header

DEVELOPER COMPLIANCE DATABASE OVERALL REPORT

Detail

	AMOUNT OWED	AMOUNT PAID	AMOUNT DUE
IDP	Report Header	Report Header	Report Header
LINKAGE	Page Header	Page Header	Page Header
MONETARY	Detail	Detail	Detail
NON-MONETARY	SUM OF TOTAL A	SUM OF AMC	SUM OF BA
TOTAL	Report Header	Report Header	Report Header
	Page Header	Page Header	Page Header
	Detail	Detail	Detail
	SUM OF SUM OF TOTAL A	SUM OF SUM OF AMC	SUM OF SUM OF BA

SECTION 5: REPORT DESIGN

All reports are designed the same way. The first thing to examine is the layout from the design view. There are five elements to the report: Page Header, ProjectName Header, Detail, ProjectName Footer and Page Footer.

This report design is used for reports (1)-(10) and all (PM) reports.

Page Header:

Contains the name of the report.

Formatting:

Scala Sans Caps, Size 26, Centered

Page Footer:

Contains the date the report is printed and page number. Both are automatically determined by the database.

Formatting:

Date:

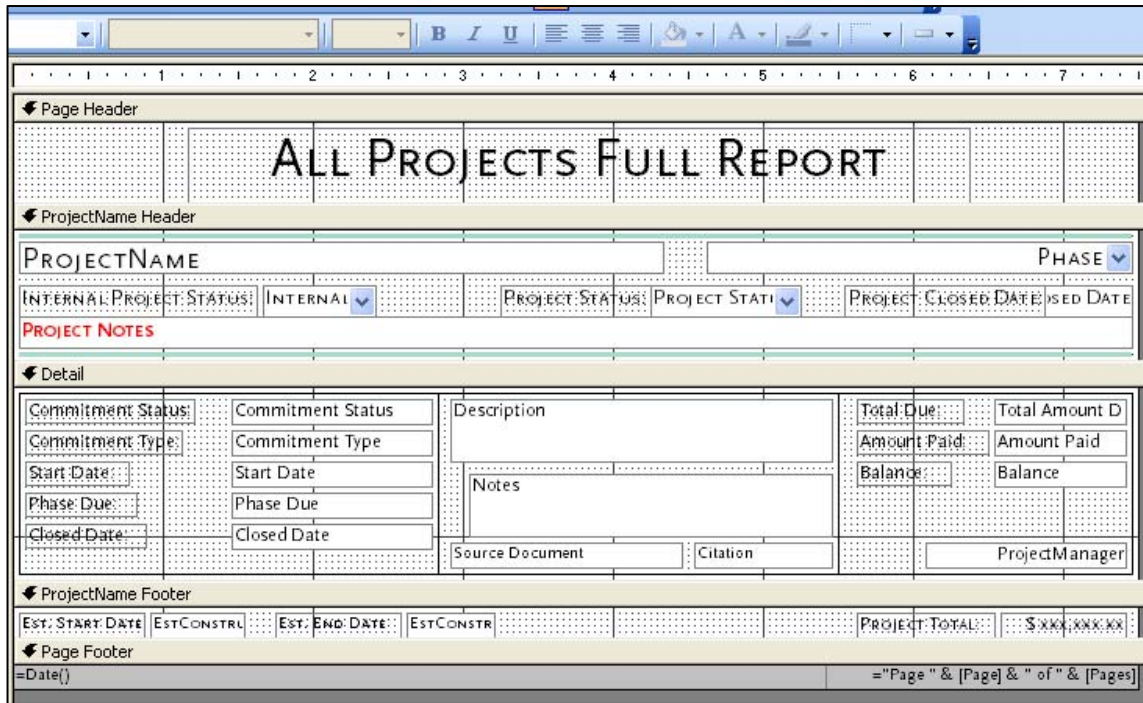
Scala Sans, Size 8, Left Justified

Page Number:

Scala Sans, Size 8, Right Justified

Page Header Properties:

Page Footer Properties:



Project Name Header:

Contains most of the Project Level data.

Project Name Header Properties:

Formatting:

Project Name:

Scala Sans Caps, Size 14, Left Justified

Phase:

Scala Sans Caps, Size 12, Right Justified

Internal Project Status Label and Box:

Scala Sans Caps, Size 10, Left Justified

Project Status Label and Box:

Scala Sans Caps, Size 10, Centered

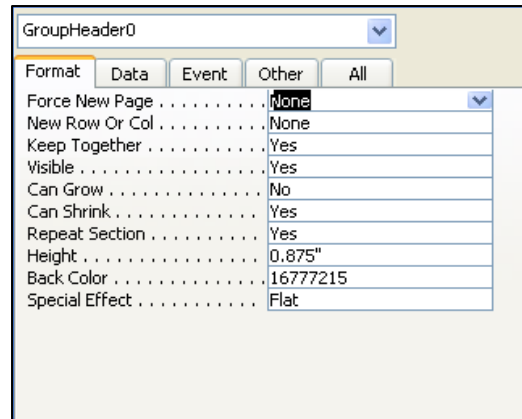
Project Closed Date:

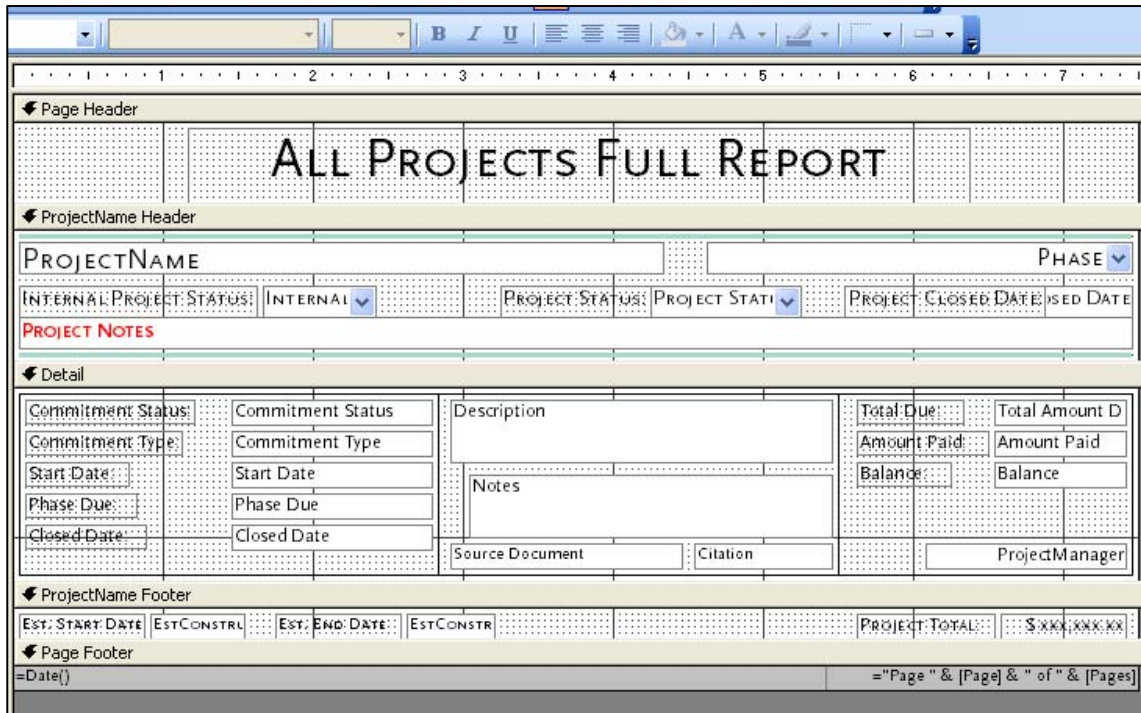
Scala Sans Caps, Size 10, Right Justified

Project Notes:

Scala Sans Caps, Size 10, Left Justified, Bold,

Red Font Color





Detail:

Contains all of the Commitment Level data

Formatting

Commitment Status Label and Box:

Scala Sans, Size 9, Left Justified, Conditional Formatting on Open, Continuing, Closed

Commitment Type and Box:

Scala Sans, Size 9, Left Justified

Start Date Label and Box:

Scala Sans, Size 9, Left Justified

Phase Due Label and Box:

Scala Sans, Size 9, Left Justified

Closed Date Label and Box:

Scala Sans, Size 9, Left Justified

Description:

Scala Sans, Size 9, Left Justified

Notes:

Scala Sans, Size 9, Left Justified,

Source Document:

Scala Sans, Size 8, Left Justified

Citation:

Scala Sans, Size 8, Left Justified

Total Due Label and Box:

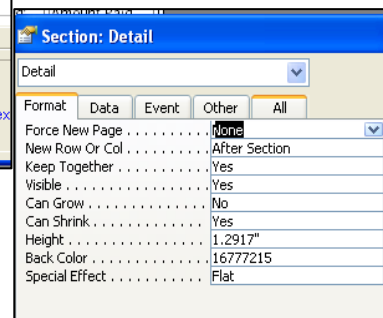
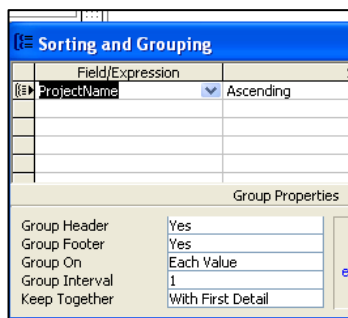
Scala Sans, Size 9, Left Justified

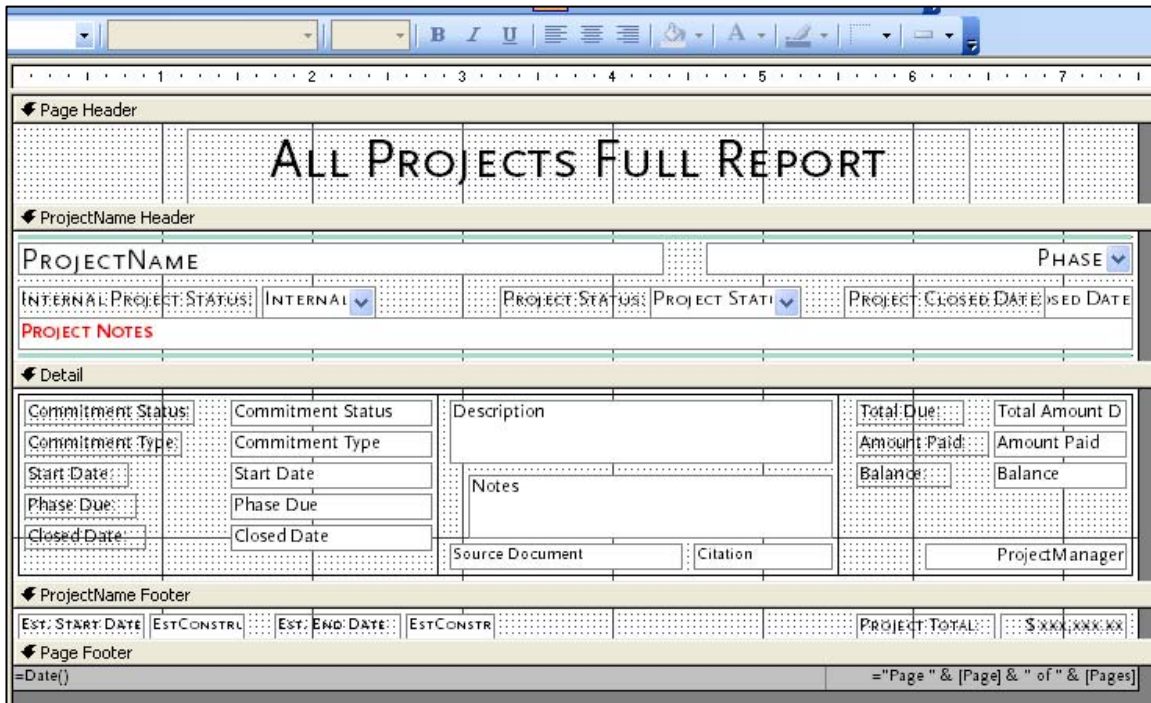
Amount Paid Label and Box:

Scala Sans, Size 9, Left Justified

Project Manager:

Scala Sans, Size 9, Right Justified





Project Name Footer:

Contains the rest of the Project Level data.

Formatting:

Est. Start Date Label and Box:

Scala Sans Caps, Size 8, Left Justified

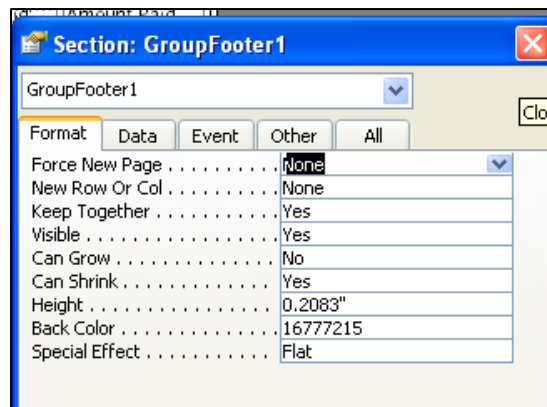
Est. End Date Label and Box:

Scala Sans Caps, Size 8, Left Justified

Project Total Label and Box:

Scala Sans Caps, Size 8; Label Left Justified,
Box Right Justified

Project Name Footer Properties:



3

USING THE SYSTEM: DATA ENTRY

Obligations

FIND AN EXISTING OBLIGATION RECORD: 1330 Boylston Street [Add] [Edit] [Delete] [Save] [X]

Project Name: 1330 Boylston Street **Project ID:** 923 **Building Permit:** 11/06/2006
Project Manager: Geoff Lewis **PM ID:** 111 **Cert. of Occupancy:** []
Project Description: Fenway/Kenmore Construction Complete Mixed Use **Board Approval:** 10/19/2006
Mixed use development consisting of approximately 215 residential units, first floor retail, approximately 88,000 square feet of space for medical and/or office uses, and below-grade parking for approximately 293 vehicles on Boylston Street near Fenway. **Coop Agreement:** 12/21/2006
Est. Construct Start: 10/01/2006
Est. Construct End: 07/01/2008

Internal Project Status: Open **Project Status:** Open **Project Closed Date:** []

Project Notes: []

Start Date: 11/31/2008	Housing Exaction: 7 equal annual installments of \$4,530.58	Amount Due: \$31,714
Due Date: 11/31/2014		Paid: \$13,592
Phase Due: Cert. of Occupancy	3 payments made, 4 remaining as of 12/8/2010.	Balance: \$18,122
Type: Linkage		Closed Date: []
Status: Continuing	DIP Agreement 12/21/2006 pg 4, par 2.2	Actively Due: <input type="checkbox"/>

Start Date: Building Permit	Jobs Exaction	Amount Due: \$6,360
Due Date: Building Permit		Paid: \$6,360
Phase Due: Building Permit	Closed per Board Memo July 17, 2008	Balance: \$0
Type: Linkage		Closed Date: 07/17/2008
Status: Closed	DIP Agreement 12/21/2006 pg 7, par 3.2	Actively Due: <input type="checkbox"/>

Record: [] 1 of 3

The Compliance Database

In this chapter, you will learn how to enter new information into the database from project documents and other sources, and update projects with new information.

The system is divided into two parts. The first is information describing the project as a whole and is contained in the light blue area. The second lists each individual commitment related to the project, which is represented in the gray area. The first half of this section will pertain to accurately entering information about the project. The second pertains to entering information about each individual commitment.

SECTION 1: ENTERING INFORMATION FOR A PROJECT

① →

Obligations

FIND AN EXISTING OBLIGATION RECORD 1330 Boylston Street Add Edit Delete Save X

Project Name 1330 Boylston Street Project ID 923 Building Permit 11/06/2006
 Project Manager Geoff Lewis PM ID 111 Cert. of Occupancy
 Project Description Fenway/Kenmore Construction Complete Mixed Use Board Approval 10/19/2006
 Mixed use development consisting of approximately 215 residential units, first floor retail, approximately 88,000 square feet of space for medical and/or office uses, and below-grade parking for approximately 293 vehicles on Boylston Street near Fenway. Coop Agreement 12/21/2006
 Est. Construct Start 10/01/2006
 Est. Construct End 07/01/2008

Internal Project Status Open Project Status Open Project Closed Date
 Project Notes

Start Date	11/31/2008	Housing Exaction: 7 equal annual installments of \$4,530.58	Amount Due	\$31,714
Due Date:	11/31/2014		Paid	\$13,592
Phase Due	Cert. of Occupan	3 payments made, 4 remaining as of 12/8/2010.	Balance	\$18,122
Type:	Linkage		Closed Date	
Status:	Continuing	DIP Agreement 12/21/2006 pg 4, par 2.2	Actively Due	<input type="checkbox"/>
Start Date	Building Permit	Jobs Exaction	Amount Due	\$6,360
Due Date:	Building Permit		Paid	\$6,360
Phase Due	Building Permit	Closed per Board Memo July 17, 2008	Balance	\$0
Type:	Linkage		Closed Date	07/17/2008
Status:	Closed	DIP Agreement 12/21/2006 pg 7, par 3.2	Actively Due	<input type="checkbox"/>

Record: 14 of 3

DEFINITION

ACTION

① ***Find an Existing Obligation Record:***

Lists all projects recorded in the database to date.

For a New Project:

New projects will not appear in this drop down menu; they must be added into the database from the Pipeline. To do this, click the Add button. Under the Project Name field, a list of projects will drop down. Select the name of the project you need from this list. If the project name does not appear, review the methods of locating the project from the Troubleshooting chapter. Once you have selected the project name, the record is active and ready to be edited. After you have completed the data entry, select the Save button.

ACTION

For an Existing Project:

To find a record for a previously recorded project, press the drop-down arrow on the right side of the field. A project list appears. To make changes, select the edit button. Once the data has been entered, select the Save button. Your data is now stored in the system.

DEFINITION

ACTION

② ***Project Name:***

The name the project is listed under in the database.

This field is not able to be edited. Project names must be chosen from the Existing Obligation Record field.

The names of the projects listed in this field are automatically generated by the names assigned in the Pipeline.

③ ***Project Manager:***

BRA staff person that oversees the project; main point of contact for project specific inquiries.

This information automatically generated by the Pipeline cannot be edited. Confirm the project manager name with the project documents.

④ ***Project ID:***

A number assigned to each project name by the database

Used for database functions only.

⑤ ***PM ID:***

A number assigned to each project manager name by the database

Used for database functions only.

Obligations

FIND AN EXISTING OBLIGATION RECORD 1330 Boylston Street

Project Name 1330 Boylston Street **Project ID** 923 **Building Permit** 11/06/2006
Project Manager Geoff Lewis **PM ID** 111 **Cert. of Occupancy**
Project Description Fenway/Kenmore **6** Construction Complete **7** Mixed Use
Mixed use development consisting of approximately 215 residential units, first floor retail, approximately 88,000 square feet of space for medical and/or office uses, and below-grade parking for approximately 293 vehicles on Boylston Street near Fenway. **Board Approval** 10/19/2006
Internal Project Status Open **Project Status** Open **Project Closed Date**
Coop Agreement 12/21/2006
Est. Construct Start 10/01/2006
Est. Construct End 07/01/2008

Project Notes

Start Date: 11/31/2008	Housing Exaction: 7 equal annual installments of \$4,530.58	Amount Due: \$31,714
Due Date: 11/31/2014		Paid: \$13,592
Phase Due: Cert. of Occupancy	3 payments made, 4 remaining as of 12/8/2010.	Balance: \$18,122
Type: Linkage		Closed Date: <input type="text"/>
Status: Continuing	DIP Agreement 12/21/2006 pg 4, par 2.2	Actively Due: <input type="checkbox"/>
Start Date: Building Permit	Jobs Exaction	Amount Due: \$6,360
Due Date: Building Permit		Paid: \$6,360
Phase Due: Building Permit	Closed per Board Memo July 17, 2008	Balance: \$0
Type: Linkage		Closed Date: 07/17/2008
Status: Closed	DIP Agreement 12/21/2006 pg 7, par 3.2	Actively Due: <input type="checkbox"/>

Record: 1 of 3

DEFINITION

ACTION

6 Neighborhood:

The project location.

For a New Project:

Enter neighborhood name into field. It can be found on the Article 80 Viewer, the Pipeline or in the Project Documents.

7 Phase:

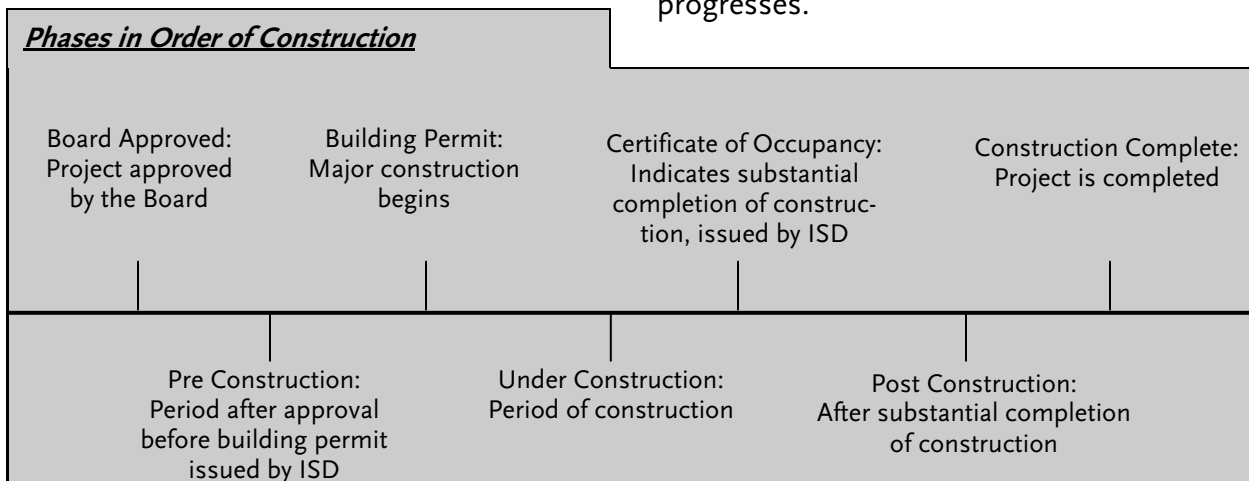
The current phase of construction, also referred to as "Project Phase."

For a New Project:

Choose the appropriate phase from the drop down menu. Locate the information about the phase from the Pipeline.

For an Existing Project:

Change to next project phase as the project progresses.



DEFINITION

- ⑧ **Project Type:**
Defined use of the project.

ACTION

Use the drop down menu to select the use that best describes the project. Information can be found on the Article 80 Viewer, the Pipeline or in the Project Documents. Use the following guide to determine the type if it is not explicitly stated.

ACTION

- ⑨ **Project Description:**
Provides basic information about the project

Information imported from the Pipeline. Use this description to match the project with the information in the Project Documents to ensure accurate data entry. This information cannot be edited by the Compliance Department.

- Commercial:** project is for commercial uses only and do not qualify for other categories
- Educational:** projects with educational uses built by a third party, i.e. an independent developer building a school
- Hotel:** project contains hotel but not residential uses. If it also contains residential, the project is mixed use
- Industrial:** project consists of industrial uses only
- Institutional:** projects completed by and for an institution
- Mixed Use:** when 2 or more uses are included within the same project
- Residential:** project consists of residential uses only and excludes all others
- Retail:** project consists of retail uses only and excludes all others

Obligations

FIND AN EXISTING OBLIGATION RECORD: 1330 Boylston Street

Buttons: Add, Edit, Delete, Save, X

Project Name: 1330 Boylston Street | **Project ID:** 923 | **Building Permit:** 11/06/2006

Project Manager: Geoff Lewis | **PM ID:** 111 | **Cert. of Occupancy:**

Project Description: Fenway/Kenmore | Construction Complete | Mixed Use

Mixed use development consisting of approximately 215 residential units, first floor retail, approximately 88,000 square feet of space for medical and/or office uses, and below-grade parking for approximately 293 vehicles on Boylston Street near Fenway.

Internal Project Status: Open (with circled '10') | **Project Status:** Open (with diamond symbol) | **Project Closed Date:** (with diamond symbol)

Project Notes:

Start Date: 11/31/2008	Housing Exaction: 7 equal annual installments of \$4,530.58	Amount Due: \$31,714
Due Date: 11/31/2014		Paid: \$13,592
Phase Due: Cert. of Occupancy	3 payments made, 4 remaining as of 12/8/2010.	Balance: \$18,122
Type: Linkage		Closed Date:
Status: Continuing	DIP Agreement 12/21/2006 pg 4, par 2.2	Actively Due: <input type="checkbox"/>

Start Date: Building Permit	Jobs Exaction	Amount Due: \$6,360
Due Date: Building Permit		Paid: \$6,360
Phase Due: Building Permit	Closed per Board Memo July 17, 2008	Balance: \$0
Type: Linkage		Closed Date: 07/17/2008
Status: Closed	DIP Agreement 12/21/2006 pg 7, par 3.2	Actively Due: <input type="checkbox"/>

Record: 1 of 3

DEFINITION

ACTION

- 10 Internal Project Status**
 Refers to the status of the project overall. A project will be “open” until all the individual commitments have been met. Internal status is determined by the Compliance Department.
- ◇ Project Status**
 Refers to the status of the project overall. Status is determined by the Project Review staff.
- ◆ Project Closed Date**
 Date the project is determined to be closed by both the Compliance Department and the Project Review staff.

- Type “Open” or “Closed” into the field.
- Type “Open” or “Closed” into the field.
- Type the date into the field. Leave blank if a date has not yet been determined.

DEFINITION

ACTION

- ① **Building Permit:**
Date building permit was issued
- ② **Certificate of Occupancy:**
Date certificate was issued
- ③ **Board Approval:**
Date Board approved the project
- ④ **Cooperation Agreement:**
Date on executed Cooperation Agreement
- ⑤ **Est. Construct Start:**
Date construction is estimated to begin
- ⑥ **Est. Construct End:**
Date construction is estimated to end

Dates are either automatically imported or manually entered. Imports come directly from the Pipeline; if manually entered, locate dates in the Project Documents or from the ISD website.

The date must be manually entered from the Project Documents, specifically from the Board Memo date, or as referenced in the Cooperation Agreement.

The date is found on the front page of the executed copy of the Cooperation Agreement.

Information is automatically imported from the Pipeline, and is an estimation by the project managers based on information provided by the developers.

SECTION 2: ENTERING INFORMATION FOR AN INDIVIDUAL COMMITMENT

Obligations

FIND AN EXISTING OBLIGATION RECORD: 1330 Boylston Street [Add] [Edit] [Delete] [Save] [X]

Project Name: 1330 Boylston Street **Project ID:** 923 **Building Permit:** 11/06/2006
Project Manager: Geoff Lewis **PM ID:** 111 **Cert. of Occupancy:** []
Project Description: Fenway/Kenmore Construction Complete Mixed Use **Board Approval:** 10/19/2006
 Mixed use development consisting of approximately 215 residential units, first floor retail, approximately 88,000 square feet of space for medical and/or office uses, and below-grade parking for approximately 293 vehicles on Boylston Street near Fenway. **Coop Agreement:** 12/21/2006
Internal Project Status: Open **Project Status:** Open **Project Closed Date:** [] **Est. Construct Start:** 10/01/2006
Project Notes: [] **Est. Construct End:** 07/01/2008

Start Date: 11/31/2008	Housing Exaction: 7 equal annual installments of \$4,530.58	Amount Due: \$31,714
Due Date: 11/31/2014		Paid: \$13,592
Phase Due: Cert. of Occupancy	3 payments made, 4 remaining as of 12/8/2010.	Balance: \$18,122
Type: Linkage		Closed Date: []
Status: Continuing	DIP Agreement 12/21/2006 pg 4, par 2.2	Actively Due: []
Start Date: Building Permit	Jobs Exaction	Amount Due: \$6,360
Due Date: Building Permit		Paid: \$6,360
Phase Due: Building Permit	Closed per Board Memo July 17, 2008	Balance: \$0
Type: Linkage		Closed Date: 07/17/2008
Status: Closed	DIP Agreement 12/21/2006 pg 7, par 3.2	Actively Due: []

Record: 1 of 3

DEFINITION

ACTION

- ① **Start Date:**
 For multi-step or phased commitments, the start date is the initial date a commitment is due.
- ② **Due Date:**
 Final due date for the commitment. For multi-stepped commitments, the Due Date is the date the last commitment is due. For single step commitments, the due date is the same as the start date.

This date is found in the Project Documents. A start date may not be given or be necessary depending on whether or not the commitment is multi-stepped.

If an initial payment is due at the issuance of the initial building permit, with subsequent payments due on the anniversary of that date for 5 years, enter "Building Permit" in the Start Date field, until the Building Permit date is established. Indicate in the notes the payment is due every year for 5 years.

This date is found in the Project Documents. However, specific due dates are not always established as many commitments are due at certain phases of the project, which don't necessarily carry an actual due date because the construction schedule has not been defined.

Obligations

FIND AN EXISTING OBLIGATION RECORD 1330 Boylston Street Add Edit Delete Save X

Project Name 1330 Boylston Street Project ID 923 Building Permit 11/06/2006
 Project Manager Geoff Lewis PM ID 111 Cert. of Occupancy
 Board Approval 10/19/2006
 Project Description Fenway/Kenmore Construction Complete Mixed Use Coop Agreement 12/21/2006
 Est. Construct Start 10/01/2006
 Est. Construct End 07/01/2008

Mixed use development consisting of approximately 215 residential units, first floor retail, approximately 88,000 square feet of space for medical and/or office uses, and below-grade parking for approximately 293 vehicles on Boylston Street near Fenway.

Internal Project Status Open Project Status Open Project Closed Date
 Project Notes

Start Date	11/31/2008	Housing Exaction: 7 equal annual installments of \$4,530.58	Amount Due	\$31,714
Due Date	11/31/2014		Paid	\$13,592
Phase Due	Cert. of Occupancy	3 payments made, 4 remaining as of 12/8/2010.	Balance	\$18,122
Type	Linkage		Closed Date	
Status	Continuing	DIP Agreement 12/21/2006 pg 4, par 2.2	Actively Due	<input type="checkbox"/>
Start Date	Building Permit	Jobs Exaction	Amount Due	\$6,360
Due Date	Building Permit		Paid	\$6,360
Phase Due	Building Permit	Closed per Board Memo July 17, 2008	Balance	\$0
Type	Linkage		Closed Date	07/17/2008
Status	Closed	DIP Agreement 12/21/2006 pg 7, par 3.2	Actively Due	<input type="checkbox"/>

Record: 1 of 3

③



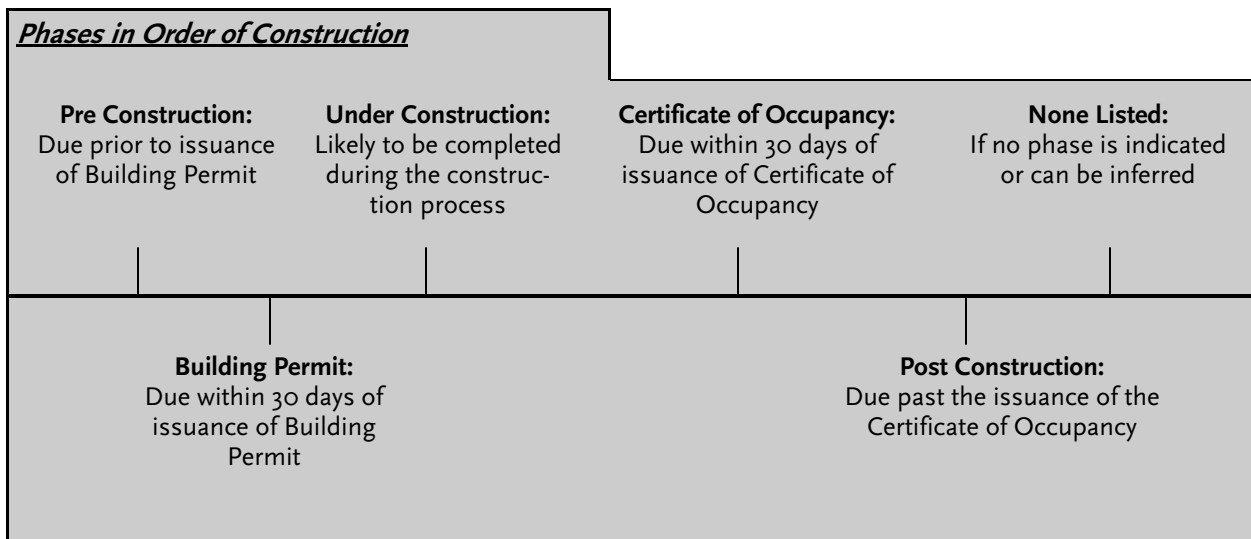
DEFINITION

ACTION

③ **Phase Due:**
 Phase of construction the commitment is due.

Information is found in the Project Documents for most commitments.

Use the guide below to select the phase due that corresponds with the phase indicated in the documents



DEFINITION

ACTION

④ **Type:**

Category of commitment.

⑤ **Status:**

Refers to the status of the commitment.

Choose the appropriate category:

Monetary: The commitment has a stated financial obligation that will be paid either to the BRA, or the BRA will serve as a conduit for the funds, or the recipient is paid directly by the Developer.

Non-Monetary: The non-cash value of a commitment, e.g. provide scholarships to the community

Linkage: For either Housing or Jobs Exactions.

IDP: Payments made to build affordable housing units

Open: Has not started, likely not yet due

Continuing: Has begun, but has not yet been completed.

Closed: Has been verified as being completed. Include verification in the notes, and mark the date in Closed Date field

Void: Has been voided by a subsequent document

On Hold: Activity suspended

In Review: Determined by Project Review staff.

DEFINITION

ACTION

- ⑥ **Description:**
Description of commitment

Data found in Project Documents.
Be concise in entering data.
- ⑦ **Notes:**
Additional information pertaining to a commitment, including further details, payment schedule and updates.

Action for Notes is the same as for Description
- ⑧ **Source Document:**
The document name

Enter the full title of the document including the execution date, for example Cooperation Agreement 9/6/2009.
- ⑨ **Citation:**
Location of the commitment within the document

Format: Page number, paragraph.

DEFINITION

ACTION

① **Amount Due:**
Total amount obligated

For monetary commitments:
Enter total amount due.

For non-monetary commitments:
If a value has been established, enter the amount as if it were a monetary obligation.

② **Paid:**
Any payments made toward the Amount Due.

Apply any payment to this field.
Evidence of payment includes copies of: checks, notes in emails between the Deputy Director of Compliance and BRA Staff, letters from the Developer’s attorneys or other verified sources. Indicate in the Notes section the document date.
If the amount paid is equal to the amount due, the commitment is considered complete. Enter document date that verifies completion in the Closed Date field, and change the status to “Closed”. Indicate the balance due as zero.

Obligations

FIND AN EXISTING OBLIGATION RECORD: Chestnut Hill Waterworks [Add] [Edit] [Delete] [Save] [X]

Project Name: Chestnut Hill Waterworks | **Project ID:** 956 | **Building Permit:** []
Project Manager: Lance Campbell | **PM ID:** 133 | **Cert. of Occupancy:** []
Project Description: Allston/Brighton | Construction Complete | Mixed Use | **Board Approval:** 06/30/2005
 RFP seeks mixed-use project Residential, Commercial and Museum/Cultural. DCAM will be selecting a developer by the end of April. PM and Urban Designer - TBD. | **Coop Agreement:** 08/16/2005
 | **Est. Construct Start:** 01/01/2005
 | **Est. Construct End:** 07/01/2007

Internal Project Status: Open | **Project Status:** Open | **Project Closed Date:** []

Project Notes: []

Start Date: Cert. of Occupancy	To BRA for development of master plan for Chestnut Hill Reservoir	Amount Due: \$100,000
Due Date: Cert. of Occupancy		Paid: \$25,000 (3)
Phase Due: Cert. of Occupancy	\$25,000 paid to Dept of Conservation and Recreation for landscaping	Balance: \$75,000 (4)
Type: Monetary	Cooperation Agreement 8/16/05 pg 7, par B9	Closed Date: 05/06/2010
Status: Continuing		Actively Due: []
Start Date: Cert. of Occupancy	Revitalization of Cleveland Circle and surrounding area. To BRA, \$75,000 of which to be spent on street light improvements per TAPA	Amount Due: \$200,000
Due Date: Cert. of Occupancy		Paid: \$167,138
Phase Due: Cert. of Occupancy	Check received 02/07/2007.	Balance: \$32,862
Type: Monetary	Cooperation Agreement 8/16/05 pg 7, par B10	Closed Date: 05/06/2010
Status: Continuing		Actively Due: []

Record: 1 of 8

DEFINITION

ACTION

③ **Balance:**
Difference between Amount Due and Paid.

The system will not automatically calculate the difference, so check the math manually to ensure the correct balance.

④ **Closed Date:**
Date the commitment is fully paid, verified as being complete or otherwise indicated as being closed.

A commitment is considered closed when it has been verified as being complete, as per the description under “Status”.
The following is a guide for different document types:

Checks: The date on the check that pays off the total amount due.

Emails: The date on the final email that confirms completion.

Letters: The date on the letter that confirms completion.

Obligations

FIND AN EXISTING OBLIGATION RECORD Channel Center (Midway) - Phase **Add** **Edit** **Delete** **Save** **X**

Project Name Channel Center (Midway) - Phase 1, Parcel 5 **Project ID** 963 **Building Permit** 12/31/2002
Project Manager Heather Campisano **PM ID** 38
Project Description Neighborhood Construction Complete

Internal Project Status Open **Project Status** Open **Project Closed Date**

Project Notes

Start Date: Not specified	To the BRA for the purpose of addressing social and economic impacts of the project. To BRA for Social service providers for capital use Amount to be paid on a pro-rata basis due at the C/O of each phase. Cooperation Agreement 1/31/03 pg 5, par 4(A)(ii)	Amount Due: \$1,200,000
Due Date: Not specified		Paid: \$331,973
Phase Due: Cert. of Occupan		Balance: \$868,027
Type: Monetary		Closed Date:
Status: Continuing		Actively Due: <input checked="" type="checkbox"/> ⑤
* Start Date: Not "Specified"	Commitment	Amount Due: \$0
Due Date: Not "Specified"		Paid: \$0
Phase Due: None Listed	Notes	Balance: \$0
Type:		Closed Date:
Status: Open	Source Document	Actively Due: <input type="checkbox"/>
	Citation	

Record: 1 of 1

DEFINITION

ACTION

⑤ **Actively Due:**

Indicates if a commitment is actively due, and establishes an indication of urgency to ensure completion.

To determine if a commitment is actively due, use the guide below:

<u>If Phase Due is:</u>	<i>and</i>	<u>Project Phase is:</u>
Board Approved		During Construction
Board Approved		Construction Complete
Building Permit		During Construction
Building Permit		Construction Complete
During Construction		Construction Complete
Under Construction		Construction Complete
Pre Cert. of Occupancy		Construction Complete

4 USING THE SYSTEM: RUNNING REPORTS

OPEN PROJECTS REPORT			
125 B STREET		CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open
		PROJECT CLOSED DATE:	
Commitment Status:	Closed	IDP Payment	Total Due: \$7,488.00
Commitment Type:	IDP		Amount Paid: \$7,488.00
Start Date:	Not specified		Balance: \$0.00
Phase Due:	None Listed		
Closed Date:	3/31/2009		Rodney Sinclair
1330 BOYLSTON STREET		CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open
		PROJECT CLOSED DATE:	
Commitment Status:	Closed	Off-site affordable housing contribution	Total Due: \$3,104,000.00
Commitment Type:	Monetary		Amount Paid: \$3,104,000.00
Start Date:		Closed per Board Memo July 17, 2008	Balance: \$0.00
Phase Due:	Post Construction		
Closed Date:	7/17/2008	Cooperation Agreement 12/21/2 pg 5, par 7	Geoff Lewis
Commitment Status:	Closed	Jobs Exaction	Total Due: \$6,360.48
Commitment Type:	Linkage		Amount Paid: \$6,360.48
Start Date:	Building Permit	Closed per Board Memo July 17, 2008	Balance: \$0.00
Phase Due:	Building Permit		
Closed Date:	7/17/2008	DIP Agreement 12/21/2006 pg 7, par 3-2	Geoff Lewis
Commitment Status:	Continuing	Housing Exaction: 7 equal annual installments of \$4,530.58	Total Due: \$31,714.06
Commitment Type:	Linkage		Amount Paid: \$13,591.74
Start Date:	11/31/2008	3 payments made, 4 remaining as of 12/8/2010.	Balance: \$18,122.00
Phase Due:	Cert. of Occupancy		
Closed Date:		DIP Agreement 12/21/2006 pg 4, par 2.2	Geoff Lewis
1486 TREMONT STREET		BOARD APPROVED	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open
		PROJECT CLOSED DATE:	
Commitment Status:	Open	1 affordable unit	Total Due: \$0.00
Commitment Type:	Non-Monetary		Amount Paid: \$0.00
Start Date:	Not specified		Balance: \$0.00
Phase Due:	None Listed		
Closed Date:		Board Memo April 24, 2007 pg 3	Erico Lopez

In this section, you will learn what reports have been created in the Compliance Database, how to generate the reports, the purpose of each report, as well as how to do basic spot checks to ensure the accuracy of the data.

All information in the reports is automatically generated from the data entered into the system. Therefore, it is imperative to enter information completely and accurately. Further, the data cannot be edited in the report itself. If an error is found, it must be corrected in the data entry area only.

SECTION 1: ANATOMY

OPEN PROJECTS REPORT

PROJECT NAME → 368 CONGRESS STREET **PROJECT PHASE** ← BOARD APPROVED

INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Open	DESCRIPTION Crossroads Initiative to complete streetscape improvements to Congress Street along Project Site. NOTES See detailed payment options. SOURCE DOCUMENT CITATION	Total Due:	\$100,451.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Cert. of Occupancy		Balance:	\$100,451.00
Phase Due:	Cert. of Occupancy		PROJECT MANAGER	
Closed Date:				
Commitment Status:	Open	Jobs Exaction	Total Due:	\$780.07
Commitment Type:	Linkage		Amount Paid:	\$0.00
Start Date:	Building Permit	One payment	Balance:	\$780.07
Phase Due:	Building Permit			
Closed Date:		Development Impact Agreement	Jay Rourke	
Commitment Status:	Open	Housing Exaction	Total Due:	\$3,549.37
Commitment Type:	Linkage		Amount Paid:	\$0.00
Start Date:	Building Permit	One payment	Balance:	\$3,549.37
Phase Due:	Building Permit			
Closed Date:		Development Impact Agreement	Jay Rourke	
Commitment Status:	Open	Additional Community Benefit Package: To BRA to determine a use for the funds in the vicinity of the Project Site. Cooperation Agreement 5/21/08 pg 5, par 7(b)	Total Due:	\$25,000.00
Commitment Type:	Monetary		Amount Paid:	\$0.00
Start Date:	Building Permit		Balance:	\$25,000.00
Phase Due:	Building Permit			
Closed Date:			Jay Rourke	

PROJECT NOTES → 41 WESTLAND AVENUE **PROJECT PHASE** ← BOARD APPROVED

INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

CREATION OF 48 MOD-PRICED OWNERSHIP UNITS

Commitment Status:	Open	Streetscape improvements to Burbank St. and Westland Ave. Board Memo May 12, 2011 pg 4	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Not Specified		Balance:	\$0.00
Phase Due:	None Listed			
Closed Date:			John Fitzgerald	

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Some of the data entered via the data entry portal is displayed on the report, but does not carry identifying labels. In order to clarify the reports, this illustration provides the detail on these specific items.

SECTION 2: REPORT TYPES

OPEN PROJECTS REPORT		
125 B STREET		CONSTRUCTION COMPLETE
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status: Closed	IDP Payment	Total Due: \$7,488.00
Commitment Type: IDP		Amount Paid: \$7,488.00
Start Date: Not specified		Balance: \$0.00
Phase Due: None Listed		
Closed Date: 3/31/2009		Rodney Sinclair
1330 BOYLSTON STREET		CONSTRUCTION COMPLETE
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status: Closed	Off-site affordable housing contribution	Total Due: \$3,104,000.00
Commitment Type: Monetary		Amount Paid: \$3,104,000.00
Start Date:	Closed per Board Memo July 17, 2008	Balance: \$0.00
Phase Due: Post Construction		
Closed Date: 7/17/2008	Cooperation Agreement 12/21/2 pg 5, par 7	Geoff Lewis
Commitment Status: Closed	Jobs Exaction	Total Due: \$6,360.48
Commitment Type: Linkage		Amount Paid: \$6,360.48
Start Date: Building Permit	Closed per Board Memo July 17, 2008	Balance: \$0.00
Phase Due: Building Permit		
Closed Date: 7/17/2008	DIP Agreement 12/21/2006 pg 7, par 3.2	Geoff Lewis
Commitment Status: Continuing	Housing Exaction: 7 equal annual installments of \$4,530.58	Total Due: \$31,714.06
Commitment Type: Linkage		Amount Paid: \$13,591.74
Start Date: 11/31/2008	3 payments made, 4 remaining as of 12/8/2010.	Balance: \$18,122.00
Phase Due: Cert. of Occupancy		
Closed Date:	DIP Agreement 12/21/2006 pg 4, par 2.2	Geoff Lewis
1486 TREMONT STREET		BOARD APPROVED
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status: Open	1 affordable unit	Total Due: \$0.00
Commitment Type: Non-Monetary		Amount Paid: \$0.00
Start Date: Not specified		Balance: \$0.00
Phase Due: None Listed		
Closed Date:	Board Memo April 24, 2007 pg 3	Erico Lopez

There are currently 12 reports in the Developer Compliance Database:

- All Projects Full Report Internal
- All Projects Full Report Public
- Open Projects Report
- Closed Projects Report
- Open Commitments
- Open Monetary Commitments
- Open Non-Monetary Commitments
- Open Linkage Commitments
- Open IDP Commitments
- Actively Due Commitments
- Closed Commitments
- Project Manager Full Report

Each report type was created to present a specific view of the data based on common inquiries. Reports are automatically generated from the data in the system. Filters are applied to the data to include and exclude certain data types and to isolate information. The following pages contain a guide that details what filters are applied to each report. Use this guide to help determine which report best applies to the specific inquiry.

ALL PROJECTS FULL REPORT

1 BEACON STREET			CONSTRUCTION COMPLETE
INTERNAL PROJECT STATUS	CLOSED	PROJECT STATUS: OPEN	PROJECT CLOSED DATE: 4/4/4444
Commitment Status:	Closed	To the BRA for funding public improvement projects in and around 1 Beacon Street	Total Due: \$1,000,000.00
Commitment Type:	Monetary		Amount Paid: \$1,000,000.00
Start Date:	Not Specified	2 payments of \$500,000	Balance: \$0.00
Phase Due:	None Listed		
Closed Date:	3/31/2010	Cooperation Agreement pg 2, par 1	John Fitzgerald
EST. START DATE	EST. END DATE		PROJECT TOTAL: \$ xxx,xxx.xx
1 WESTINGHOUSE PLAZA			CONSTRUCTION COMPLETE
INTERNAL PROJECT STATUS	CLOSED	PROJECT STATUS: OPEN	PROJECT CLOSED DATE:
Commitment Status:	Closed	\$20,000 to BRA for Hyde Park for arts community	Total Due: \$40,000.00
Commitment Type:	Monetary		Amount Paid: \$40,000.00
Start Date:	Cert. of Occupancy	An additional \$20,000 included in Second Amendment to Cooperation Agreement	Balance: \$0.00
Phase Due:	Cert. of Occupancy		
Closed Date:	9/9/2010	Cooperation Agreement 3/20/08 pg 5, par 6	Rodney Sinclair
EST. START DATE	EST. END DATE		PROJECT TOTAL: \$ xxx,xxx.xx
100 ARLINGTON STREET			BOARD APPROVED
INTERNAL PROJECT STATUS	OPEN	PROJECT STATUS: OPEN	PROJECT CLOSED DATE:
SCOPING DETERMINATION APPROVED 11/17/2010. NO ARTICLE 80 DOCUMENTS YET GENERATED.			
Commitment Status:	Open		Total Due: \$0.00
Commitment Type:	None		Amount Paid: \$0.00
Start Date:	o		Balance: \$0.00
Phase Due:	None		
Closed Date:			Geoff Lewis
EST. START DATE	EST. END DATE		PROJECT TOTAL: \$ xxx,xxx.xx
100 CAMBRIDGE STREET (SALTONSTALL BLDG)			CONSTRUCTION COMPLETE
INTERNAL PROJECT STATUS	OPEN	PROJECT STATUS: OPEN	PROJECT CLOSED DATE:
Commitment Status:	Closed	Housing Exaction	Total Due: \$613,500.00
Commitment Type:	Linkage		Amount Paid: \$613,500.00
Start Date:	Cert. of Occupancy	5 equal annual installments of \$122,700.	Balance: \$0.00
Phase Due:	Cert. of Occupancy		
Closed Date:	7/17/2009	Cooperation Agreement 02/12/0 Pg 14, par 14b	Heather Campisano
EST. START DATE	EST. END DATE		PROJECT TOTAL: \$ xxx,xxx.xx

PURPOSE:

The All Projects Full Report Internal Report is the most comprehensive report in the DCD. It includes all commitments regardless of type or status.

This report is the most comprehensive collection of data available in the DCD and is used to display the database in its entirety.

ALL PROJECTS FULL REPORT

1 BEACON STREET **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE: 4/4/4444

Commitment Status:	Closed	To the BRA for funding public improvement projects in and around 1 Beacon Street	Total Due:	\$1,000,000.00
Commitment Type:	Monetary		Amount Paid:	\$1,000,000.00
Start Date:	Not Specified	2 payments of \$500,000	Balance:	\$0.00
Phase Due:	None Listed			
Closed Date:	3/31/2010	Cooperation Agreement pg 2, par 1		

EST. START DATE EST. END DATE PROJECT TOTAL: \$ xxx,xxx.xx

1 WESTINGHOUSE PLAZA **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Closed	\$20,000 to BRA for Hyde Park for arts community	Total Due:	\$40,000.00
Commitment Type:	Monetary		Amount Paid:	\$40,000.00
Start Date:	Cert. of Occupancy	An additional \$20,000 included in Second Amendment to Cooperation Agreement	Balance:	\$0.00
Phase Due:	Cert. of Occupancy			
Closed Date:	9/9/2010	Cooperation Agreement 3/20/08 pg 5, par 6		

EST. START DATE EST. END DATE PROJECT TOTAL: \$ xxx,xxx.xx

100 ARLINGTON STREET **BOARD APPROVED**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

SCOPING DETERMINATION APPROVED 11/17/2010. NO ARTICLE 80 DOCUMENTS YET GENERATED.

Commitment Status:	Open		Total Due:	\$0.00
Commitment Type:	None		Amount Paid:	\$0.00
Start Date:	o		Balance:	\$0.00
Phase Due:	None			
Closed Date:				

EST. START DATE EST. END DATE PROJECT TOTAL: \$ xxx,xxx.xx

100 CAMBRIDGE STREET (SALTONSTALL BLDG) **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Closed	Design and construction of Garden of Peace	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Not Specified	Due @ substantial completion, payment made directly to design consultant and contractor	Balance:	\$0.00
Phase Due:	Post Construction			
Closed Date:	7/17/2009	Cooperation Agreement 02/12/0 pg 16, par 18		

PURPOSE:

The All Projects Full Report Public Report contains the same data as the Internal Report but excludes the project manager's name.

This report is equally as comprehensive as the Internal Report, however, the exclusion of the Project Managers' names makes this report more suited for public distribution

OPEN PROJECTS REPORT

100 ARLINGTON STREET

BOARD APPROVED

INTERNAL PROJECT STATUS: Open

PROJECT STATUS: Open

PROJECT CLOSED DATE:

SCOPING DETERMINATION APPROVED 11/17/2010. NO ARTICLE 80 DOCUMENTS YET GENERATED.

Commitment Status: Open	Total Due: \$0.00
Commitment Type: None	Amount Paid: \$0.00
Start Date: o	Balance: \$0.00
Phase Due: None	
Closed Date:	Geoff Lewis

100 CAMBRIDGE STREET (SALTONSTALL BLDG)

CONSTRUCTION COMPLETE

INTERNAL PROJECT STATUS: Open

PROJECT STATUS: Open

PROJECT CLOSED DATE:

Commitment Status: Closed	Closing of Garage Entrance at Bowdon Street	Total Due: \$0.00
Commitment Type: Non-Monetary		Amount Paid: \$0.00
Start Date: Not Specified		Balance: \$0.00
Phase Due: Construction Complete		
Closed Date: 7/17/2009	Cooperation Agreement 02/12/0 Pg 7, par. 9.2	Heather Campisano
Commitment Status: Closed	Donate four computers to Nazarro Center and Hill House, value at \$1,500	Total Due: \$6,000.00
Commitment Type: Non-Monetary		Amount Paid: \$6,000.00
Start Date: 06/25/2001	W/in 30 days of construction commencement	Balance: \$0.00
Phase Due: Building Permit		
Closed Date: 11/25/2002	Cooperation Agreement 02/12/0 pg 17, par 19	Heather Campisano
Commitment Status: Closed	Design and construction of Garden of Peace	Total Due: \$0.00
Commitment Type: Non-Monetary		Amount Paid: \$0.00
Start Date: Not Specified	Due @ substantial completion, payment made directly to design consultant and contractor	Balance: \$0.00
Phase Due: Post Construction		
Closed Date: 7/17/2009	Cooperation Agreement 02/12/0 pg 16, par 18	Heather Campisano
Commitment Status: Closed	Jobs Exaction	Total Due: \$100,000.00
Commitment Type: Linkage		Amount Paid: \$100,000.00
Start Date: Cert. of Occupancy	5 equal annual installments of \$20,000.	Balance: \$0.00
Phase Due: Cert. of Occupancy		
Closed Date: 7/17/2009	Cooperation Agreement 02/12/0 pg 15, par 16	Heather Campisano
Commitment Status: Closed	Housing Exaction	Total Due: \$613,500.00
Commitment Type: Linkage		Amount Paid: \$613,500.00
Start Date: Cert. of Occupancy	5 equal annual installments of \$122,700.	Balance: \$0.00
Phase Due: Cert. of Occupancy		
Closed Date: 7/17/2009	Cooperation Agreement 02/12/0 Pg 14, par 14b	Heather Campisano

PURPOSE:

The Open Projects Report contains all Open Projects, designated on the “Internal Project Status” field.

This report is best suited for inquiries into “active” projects and may have a mix of commitment statuses.

CLOSED PROJECTS REPORT

1 BEACON STREET **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE: 4/4/4444

Commitment Status: Closed	To the BRA for funding public improvement projects in and around 1 Beacon Street	Total Due: \$1,000,000.00
Commitment Type: Monetary		Amount Paid: \$1,000,000.00
Start Date: Not Specified	2 payments of \$500,000	Balance: \$0.00
Phase Due: None Listed		
Closed Date: 3/31/2010	Cooperation Agreement pg 2, par 1	John Fitzgerald

1 WESTINGHOUSE PLAZA **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status: Closed	\$20,000 to BRA for Hyde Park for arts community	Total Due: \$40,000.00
Commitment Type: Monetary		Amount Paid: \$40,000.00
Start Date: Cert. of Occupancy	An additional \$20,000 included in Second Amendment to Cooperation Agreement	Balance: \$0.00
Phase Due: Cert. of Occupancy		
Closed Date: 9/9/2010	Cooperation Agreement 3/20/08 pg 5, par 6	Rodney Sinclair

1047 COMMONWEALTH AVENUE **BOARD APPROVED**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE:

NO OBLIGATIONS.

Commitment Status: Closed	Total Due: \$0.00
Commitment Type: None	Amount Paid: \$0.00
Start Date:	Balance: \$0.00
Phase Due:	
Closed Date: 7/2/2009	John Fitzgerald

12 HUMPHREY STREET **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE:

NO OBLIGATIONS.

Commitment Status: Closed	Total Due: \$0.00
Commitment Type: None	Amount Paid: \$0.00
Start Date:	Balance: \$0.00
Phase Due:	
Closed Date: 7/2/2009	Lance Campbell

PURPOSE:

The Closed Projects Report contains all Closed Projects, designated on the “Internal Project Status” field.

This report is best suited for inquiries into closed projects. It is mainly used to serve as a record for completed projects.

OPEN COMMITMENTS REPORT

100 ARLINGTON STREET **BOARD APPROVED**

INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

SCOPING DETERMINATION APPROVED 11/17/2010. NO ARTICLE 80 DOCUMENTS YET GENERATED.

Commitment Status: Open	Total Due: \$0.00	
Commitment Type: None	Amount Paid: \$0.00	
Start Date: o	Balance: \$0.00	
Phase Due: None		
Closed Date:		Geoff Lewis

1000 WASHINGTON STREET **UNDER CONSTRUCTION**

INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status: Open	Jobs Exaction	Total Due: \$4,394.43	
Commitment Type: Linkage		Amount Paid: \$0.00	
Start Date: Building Permit	2 equal annual installments of \$2,197	Balance: \$4,394.43	
Phase Due: Building Permit			
Closed Date:	DIP Agreement 2010 pg 6, par 3.1		John Fitzgerald

Commitment Status: Open	Housing Exaction: 7 equal annual installments of \$3,146.88	Total Due: \$22,028.13	
Commitment Type: Linkage		Amount Paid: \$0.00	
Start Date: 11/31/2011		Balance: \$22,028.13	
Phase Due: Building Permit			
Closed Date:	DIP Agreement 2010 pg 4, par 2.2		John Fitzgerald

120 KINGSTON STREET **BOARD APPROVED**

INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status: Open	Amount includes: \$1,085,000 Monetary Contribution; \$3,635,000 Land Contribution	Total Due: \$4,720,000.00	
Commitment Type: IDP		Amount Paid: \$0.00	
Start Date: Building Permit	Monetary 2 equal payments: \$542,500 1st due before BP, 2nd within 30 days CO.	Balance: \$4,720,000.00	
Phase Due: Cert. of Occupancy			
Closed Date:	Board Memo 10.12.2010 pg 5		Kristin Kara

120 MOUNTFORT STREET **CONSTRUCTION COMPLETE**

INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status: Open	Total Due: \$0.00	
Commitment Type: None	Amount Paid: \$0.00	
Start Date: o	Balance: \$0.00	
Phase Due: None		
Closed Date:		Tai Lim

PURPOSE:

The Open Commitments Report contains all open commitments, regardless of commitment type.

This report is best suited for inquiries into active commitments.

OPEN MONETARY COMMITMENTS REPORT

179 LINCOLN STREET **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Continuing	Project Place: Make contribution to BRA in five equal installments of \$10,000 each, each on the anniversary of the initial BP Remitted by BRA to Project Place. Check rec'd 4/08 \$10,000. Cooperation Agreement 9/4/07 pg 7, par 8	Total Due:	\$50,000.00
Commitment Type:	Monetary		Amount Paid:	\$20,000.00
Start Date:	12/17/2008		Balance:	\$30,000.00
Phase Due:	Building Permit			
Closed Date:				
			Rodney Sinclair	

285 COLUMBUS AVE **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Continuing	To BRA for community benefits - no specifics Cooperation Agreement 12/07/0 pg 5, par.10b	Total Due:	\$150,000.00
Commitment Type:	Monetary		Amount Paid:	\$150,000.00
Start Date:			Balance:	\$0.00
Phase Due:	Building Permit			
Closed Date:	7/9/2007			
			Heather Campisano	

319 A STREET REAR **BOARD APPROVED**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Open	Fair share payment for public realm enhancements Amended and Restated Memo 1/	Total Due:	\$2,084,052.00
Commitment Type:	Monetary		Amount Paid:	\$0.00
Start Date:	Certificate of Occupancy		Balance:	\$2,084,052.00
Phase Due:	Cert. of Occupancy			
Closed Date:				
			Kristin Kara	

368 CONGRESS STREET **BOARD APPROVED**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Open	Additional Community Benefit Package: To BRA to determine a use for the funds in the vicinity of the Project Site Cooperation Agreement 5/21/08 pg 5, par 7(b)	Total Due:	\$25,000.00
Commitment Type:	Monetary		Amount Paid:	\$0.00
Start Date:	Building Permit		Balance:	\$25,000.00
Phase Due:	Building Permit			
Closed Date:				
			Jay Rourke	

PURPOSE:

The Open Monetary Commitments Report contains only open monetary commitments.

This report is best suited for inquiries into active monetary commitments.

OPEN NON-MONETARY COMMITMENTS REPORT				
212 STUART STREET		BOARD APPROVED		
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open	
		PROJECT CLOSED DATE:		
Commitment Status:	Open	Streetscape improvements on Stuart and Shawmut Streets, and in pedestrian plaza at Church Street	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:			Balance:	\$0.00
Phase Due:	Post Construction			
Closed Date:			Board Memo 9/25/08	pg 7
263-265 NORTHAMPTON ST.		BOARD APPROVED		
INTERNAL PROJECT STATUS:	Closed	PROJECT STATUS:	Open	
		PROJECT CLOSED DATE:		
Commitment Status:	Open	Open space improvements	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Not Specified		Balance:	\$0.00
Phase Due:	None Listed			
Closed Date:			Board Memo 5/18/2010	pg 1
Commitment Status:	Open	30 parking spaces	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Not Specified		Balance:	\$0.00
Phase Due:	None Listed			
Closed Date:			Board Memo 5/18/2010	pg 1
Commitment Status:	Open	Art gallery	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Not Specified		Balance:	\$0.00
Phase Due:	None Listed			
Closed Date:			Board Memo 5/18/2010	pg 1
346-354 CONGRESS STREET		CONSTRUCTION COMPLETE		
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open	
		PROJECT CLOSED DATE:		
Commitment Status:	Continuing	Contribution of \$50,000 to be paid over the course of five years	Total Due:	\$250,000.00
Commitment Type:	Non-Monetary		Amount Paid:	\$50,000.00
Start Date:	Not specified		Balance:	\$200,000.00
Phase Due:	None Listed		Payment to Wharf Park at the Boston Children's Museum. First payment made per IR 7/17/09.	
Closed Date:			Cooperation Agreement 11/9/06	pg 7, par 11c
Monday, April 11, 2011		Page 1 of 4		

PURPOSE:

The Open Non-Monetary Commitments Report contains only open non-monetary commitments.

This report is best suited for inquiries into active non-monetary commitments.

OPEN LINKAGE COMMITMENTS

1000 WASHINGTON STREET			UNDER CONSTRUCTION	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open	PROJECT CLOSED DATE:
Commitment Status:	Open	Jobs Exaction	Total Due:	\$4,394.43
Commitment Type:	Linkage		Amount Paid:	\$0.00
Start Date:	Building Permit	2 equal annual installments of \$2,197	Balance:	\$4,394.43
Phase Due:	Building Permit			
Closed Date:		DIP Agreement 2010 pg 6, par 3.1		John Fitzgerald
Commitment Status:	Open	Housing Exaction: 7 equal annual installments of \$3,146.88	Total Due:	\$22,028.13
Commitment Type:	Linkage		Amount Paid:	\$0.00
Start Date:	11/31/2011		Balance:	\$22,028.13
Phase Due:	Building Permit			
Closed Date:		DIP Agreement 2010 pg 4, par 2.2		John Fitzgerald
1330 BOYLSTON STREET			CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open	PROJECT CLOSED DATE: 4/4/4444
Commitment Status:	Continuing	Housing Exaction: 7 equal annual installments of \$4,530.58	Total Due:	\$31,714.06
Commitment Type:	Linkage		Amount Paid:	\$13,591.74
Start Date:	11/31/2008	3 payments made, 4 remaining as of 12/8/2010.	Balance:	\$18,122.00
Phase Due:	Cert. of Occupancy			
Closed Date:		DIP Agreement 12/21/2006 pg 4, par 2.2		Geoff Lewis
179 LINCOLN STREET			CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open	PROJECT CLOSED DATE:
Commitment Status:	Continuing	Housing Exaction: 7 total installments of \$131,878.71.	Total Due:	\$923,151.00
Commitment Type:	Linkage		Amount Paid:	\$395,636.13
Start Date:	12/31/2008	3 payments made, 4 remaining, 12/10/2010.	Balance:	\$527,515.00
Phase Due:	Building Permit			
Closed Date:		Cooperation Agreement 9/4/07 pg 6, par 5		Rodney Sinclair
226 CAUSEWAY STREET			CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS:	Open	PROJECT CLOSED DATE:
Commitment Status:	Open	Jobs Exaction	Total Due:	\$106,050.46
Commitment Type:	Linkage		Amount Paid:	\$0.00
Start Date:	Cert. of Occupancy		Balance:	\$106,050.46
Phase Due:	None			
Closed Date:		Cooperation Agreement 5/21/01 pg 8, par 24		Heather Campisano

Monday, April 11, 2011

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URPOSE:

The Open Linkage Commitments Report contains only open linkage commitments.

This report is best suited for inquiries into active linkage commitments.

OPEN IDP COMMITMENTS

120 KINGSTON STREET			BOARD APPROVED
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status:	Open	Amount includes: \$1,085,000 Monetary Contribution; \$3,635,000 Land Contribution	Total Due: \$4,720,000.00
Commitment Type:	IDP		Amount Paid: \$0.00
Start Date:	Building Permit	Monetary 2 equal payments: \$542,500 1st due before BP, 2nd within 30 days CO.	Balance: \$4,720,000.00
Phase Due:	Cert. of Occupancy		
Closed Date:		Board Memo 10.12.2010 pg 5	Kristin Kara
296 CAMBRIDGE STREET			BOARD APPROVED
INTERNAL PROJECT STATUS:	Closed	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status:	Continuing	IDP Payment	Total Due: \$31,200.00
Commitment Type:	IDP		Amount Paid: \$28,000.00
Start Date:			Balance: \$3,200.00
Phase Due:	None Listed		
Closed Date:		Source Document Citation	Heather Campisano
45 PROVINCE STREET			CONSTRUCTION COMPLETE
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status:	Continuing	IDP	Total Due: \$2,373,000.00
Commitment Type:	IDP		Amount Paid: \$1,677,350.00
Start Date:	Building Permit	Check for \$403,200 paid 6/24/09	Balance: \$695,650.00
Phase Due:	Building Permit		
Closed Date:		Cooperation Agreement 11/21/0 pg 6, par di	Jay Rourke
9-23 GRIGGS STREET			BOARD APPROVED
INTERNAL PROJECT STATUS:	Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:
Commitment Status:	Continuing	IDP Payment	Total Due: \$48,500.00
Commitment Type:	IDP		Amount Paid: \$24,250.00
Start Date:			Balance: \$24,250.00
Phase Due:	None Listed		
Closed Date:			Jay Rourke

PURPOSE:

The Open IDP Commitments Report contains only open IDP commitments.

This report is best suited for inquiries into active IDP commitments.

ACTIVELY DUE COMMITMENTS

44 PRINCE STREET		CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:	
Commitment Status: Continuing	To BRA: Escrow: To form NECDC	Total Due: \$10,000.00	
Commitment Type: Monetary		Amount Paid: \$0.00	
Start Date: Not specified		Balance: \$10,000.00	
Phase Due: None Listed			
Closed Date:	Cooperation Agreement 12/06/2 pg 8, par 5c		Heather Campisano
AVENIR PARCEL 1A (BY TRINITY)		CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:	
Commitment Status: Open	Install ground monitoring well at project site on behalf of Boston Groundwater Trust (Value @ \$10,000)	Total Due: \$10,000.00	
Commitment Type: Non-Monetary		Amount Paid: \$0.00	
Start Date: Not specified		Balance: \$10,000.00	
Phase Due: None Listed			
Closed Date:	Cooperation Agreement 5/31/20 pg 5, par 6		Heather Campisano
BIO SQUARE I - PARCEL D - DEV. PLAN		CONSTRUCTION COMPLETE	
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:	
Commitment Status: Open	Provide for the development of a daycare facility within Property	Total Due: \$0.00	
Commitment Type: Non-Monetary		Amount Paid: \$0.00	
Start Date: Not specified		Balance: \$0.00	
Phase Due: None Listed			
Closed Date:	Land Disposition Agreement 12/ pg 31, sect 902		Sonal Gandhi
Commitment Status: Open	Replace fence and gate at Stoughton St and Harrison Ave	Total Due: \$0.00	
Commitment Type: Non-Monetary		Amount Paid: \$0.00	
Start Date: Not specified		Balance: \$0.00	
Phase Due: None Listed			
Closed Date:	Cooperation Agreement 9/26/91 pg 19, par g		Sonal Gandhi
Commitment Status: Open	Develop affirmative action hiring plan for local Community	Total Due: \$0.00	
Commitment Type: Non-Monetary		Amount Paid: \$0.00	
Start Date: Not specified		Balance: \$0.00	
Phase Due: None Listed			
Closed Date:	Cooperation Agreement 9/26/91 pg 19, par i		Sonal Gandhi

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URPOSE:

The Actively Due Commitments Report contains all actively due commitments, regardless of commitment type.

This report is best suited for inquiries into all Actively Due commitments, which is a special designation (established on page 47)

CLOSED COMMITMENTS REPORT

1 BEACON STREET **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE: 4/4/4444

Commitment Status:	Closed	To the BRA for funding public improvement projects in and around 1 Beacon Street	Total Due:	\$1,000,000.00
Commitment Type:	Monetary		Amount Paid:	\$1,000,000.00
Start Date:	Not Specified	2 payments of \$500,000	Balance:	\$0.00
Phase Due:	None Listed			
Closed Date:	3/31/2010	Cooperation Agreement pg 2, par 1		John Fitzgerald

1 WESTINGHOUSE PLAZA **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Closed PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Closed	\$20,000 to BRA for Hyde Park for arts community	Total Due:	\$40,000.00
Commitment Type:	Monetary		Amount Paid:	\$40,000.00
Start Date:	Cert. of Occupancy	An additional \$20,000 included in Second Amendment to Cooperation Agreement	Balance:	\$0.00
Phase Due:	Cert. of Occupancy			
Closed Date:	9/9/2010	Cooperation Agreement 3/20/08 pg 5, par 6		Rodney Sinclair

100 CAMBRIDGE STREET (SALTONSTALL BLDG) **CONSTRUCTION COMPLETE**
 INTERNAL PROJECT STATUS: Open PROJECT STATUS: Open PROJECT CLOSED DATE:

Commitment Status:	Closed	Donate four computers to Nazarro Center and Hill House, value at \$1,500	Total Due:	\$6,000.00
Commitment Type:	Non-Monetary		Amount Paid:	\$6,000.00
Start Date:	06/25/2001	W/in 30 days of construction commencement	Balance:	\$0.00
Phase Due:	Building Permit			
Closed Date:	11/25/2002	Cooperation Agreement 02/12/0 pg 17, par 19		Heather Campisano

Commitment Status:	Closed	Thru BRA to BTD for traffic camera.	Total Due:	\$20,000.00
Commitment Type:	Monetary		Amount Paid:	\$20,000.00
Start Date:	06/25/2001	Camera was installed rather than cash payment made.	Balance:	\$0.00
Phase Due:	Building Permit			
Closed Date:	11/21/2002	Cooperation Agreement 02/12/0 pg 7, par 9.3		Heather Campisano

Commitment Status:	Closed	Provide brick sidewalks along Cambridge and Bowdoin Street	Total Due:	\$0.00
Commitment Type:	Non-Monetary		Amount Paid:	\$0.00
Start Date:	Not Specified		Balance:	\$0.00
Phase Due:	Construction Complete			
Closed Date:	7/17/2009	Cooperation Agreement 02/12/0 Pg 11, par 9.6		Heather Campisano

PURPOSE:

The Closed Commitments Report contains all closed commitments, regardless of commitment type.

This report is best suited for inquiries into closed commitments. It is mainly used to serve as a record for completed commitments.

DEVELOPER COMPLIANCE DATABASE SUMMARY REPORT

	<u>AMOUNT OWED</u>	<u>AMOUNT PAID</u>	<u>AMOUNT DUE</u>
MONETARY	\$88,714,099.50	\$57,676,107.14	\$30,677,992.36
NON-MONETARY	\$62,596,173.00	\$11,434,892.00	\$51,269,773.00
TOTAL	\$151,310,272.50	\$69,110,999.14	\$81,947,765.36

	<u>AMOUNT OWED</u>	<u>AMOUNT PAID</u>	<u>AMOUNT DUE</u>
IDP	\$33,892,348.00	\$16,173,248.00	\$17,708,700.00
LINKAGE	\$140,548,860.25	\$13,252,252.47	\$127,296,607.36
MONETARY	\$88,714,099.50	\$57,676,107.14	\$30,677,992.36
NON-MONETARY	\$62,596,173.00	\$11,434,892.00	\$51,269,773.00
TOTAL	\$325,631,080.75	\$99,056,499.61	\$226,953,072.72

PURPOSE:

The Developer Compliance Database Summary Report contains aggregated amounts for each commitment type.

This report is used to display the “dashboard” of the Developer Compliance Database. It automatically updates as the numbers change, and is the most up-to-date accounting record generated by the Compliance Department.

PROJECT MANAGER FULL REPORT			
1486 TREMONT STREET		BOARD APPROVED	
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:	
Commitment Status: Open	1 affordable unit	Total Due: \$0.00	
Commitment Type: Non-Monetary		Amount Paid: \$0.00	
Start Date: Not specified		Balance: \$0.00	
Phase Due: None Listed		Erico Lopez	
Closed Date:	Board Memo April 24, 2007 pg 3		
EST. START DATE 10/1/2006	EST. END DATE 10/1/2007		
800 HUNTINGTON AVENUE		BOARD APPROVED	
INTERNAL PROJECT STATUS: Open	PROJECT STATUS:	PROJECT CLOSED DATE:	
NO OBLIGATIONS.			
Commitment Status:		Total Due:	
Commitment Type:		Amount Paid:	
Start Date:		Balance:	
Phase Due:		Erico Lopez	
Closed Date:			
EST. START DATE	EST. END DATE		
CASTLE SQUARE		UNDER CONSTRUCTION	
INTERNAL PROJECT STATUS: Open	PROJECT STATUS: Open	PROJECT CLOSED DATE:	
NO OBLIGATIONS.			
Commitment Status: Open		Total Due: \$0.00	
Commitment Type: None		Amount Paid: \$0.00	
Start Date:		Balance: \$0.00	
Phase Due: None		Erico Lopez	
Closed Date:			
EST. START DATE	EST. END DATE		
EXCEL ACADEMY		BOARD APPROVED	
INTERNAL PROJECT STATUS: Closed	PROJECT STATUS: Open	PROJECT CLOSED DATE:	
ARTICLE 80 DOCUMENTS NOT YET GENERATED.			
Commitment Status: Open		Total Due:	
Commitment Type: None		Amount Paid:	
Start Date:		Balance:	
Phase Due: None		Erico Lopez	
Closed Date:			
EST. START DATE	EST. END DATE		

PURPOSE:

This report is Project Manager specific. It isolates all of the projects and commitments, regardless of type or status, associated with each project manager to the exclusion of all other Project Managers.

Each Project Manager has a report dedicated to them. This report is used to perform periodic reviews of the commitments with them individually.

5

SYSTEM MAINTENANCE

SECTION 1: WHAT CONSTITUTES A COMMUNITY BENEFIT

SECTION 2: USING THE COMPLIANCE DEPARTMENT INVENTORY

SECTION 3: PROCESS FOR CLOSING A PROJECT