

# Medfield State Hospital Redevelopment

Trinity Financial

May 18, 2022



TRINITY  
FINANCIAL

E-ICON  
ARCHITECTURE

kmdg

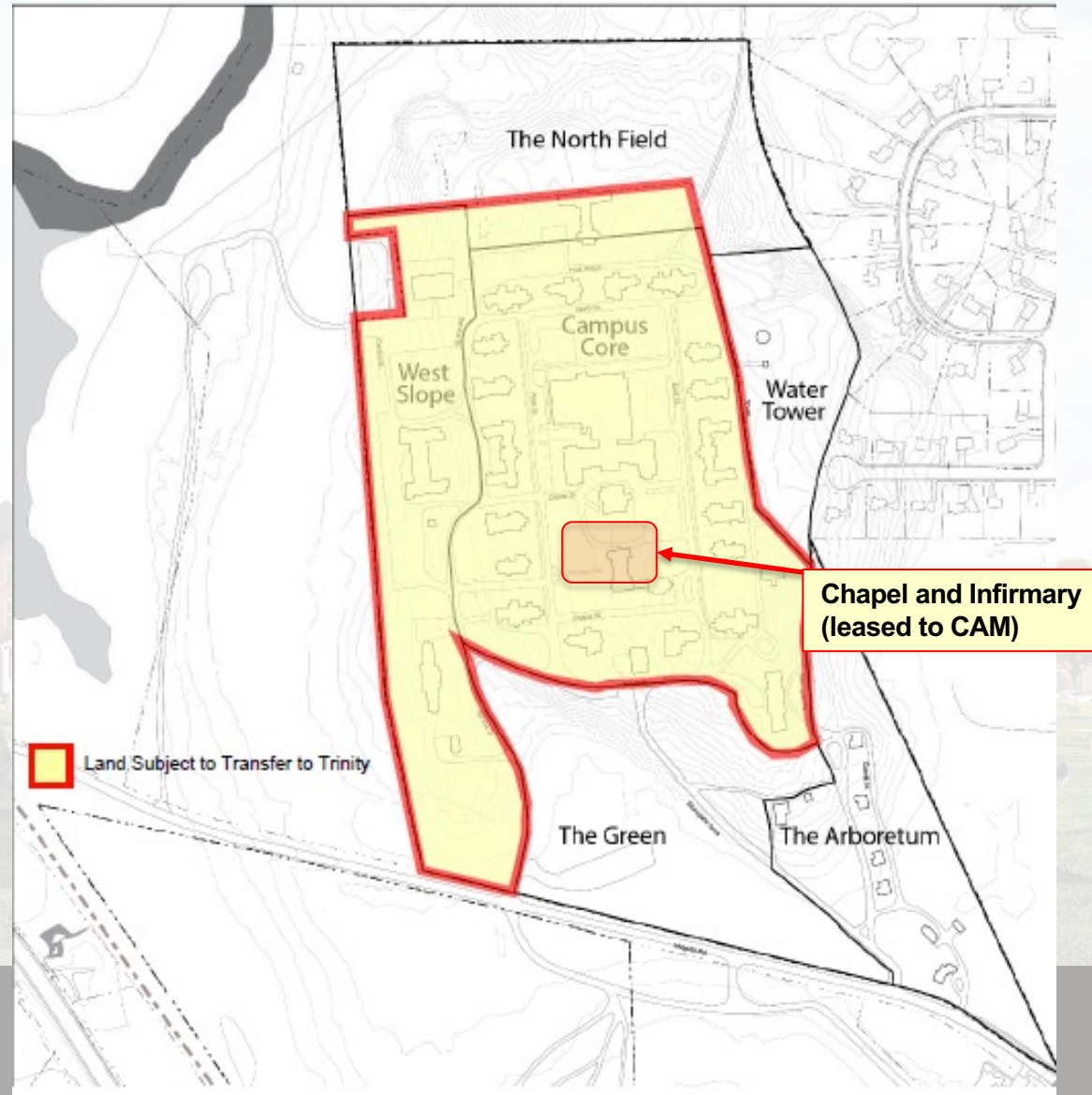
# How Did We Get Here?



- 2003: Commonwealth closes MSH (established 1892)
- 2014: Town acquires 127 acres for \$3.1million
- 2015-2018: Award-winning Master Plan developed
- 2018: MSH Development Committee formed
  - Directed to test market feasibility of Master Plan
- 2019: Rezoned as MSH District
- 2021: MSHDC issues RFP and evaluates proposals
- 2022 (March): Selectmen execute provisional agreement with Trinity to sell portion of MSH

***Any proposed sale must be approved at Special Town Meeting.***

# Proposed Disposition Acreage ~45 acres (approx. 35% of Town's MSH land)





# MSHDC Review of Trinity Proposal

- Puts MSH on the Medfield tax rolls for the first time
  - No cash outlay by the Town; costs to be included in the project
  - No tax increase for residents
  - \$2 million initial payment to Town (subject to sharing with MA)
  - Estimated annual net tax revenues \$716,000 once complete
  - Town soon recovers more than \$4.5 million spent on MSH to date
  - Trinity also reimbursing Town up to \$525,000 in dev. costs
- Resolves environmental and physical condition of buildings at no cost to Town, and removes liability
- Adds housing consistent with Town objectives
- Leaves open space open and in Town control

# MSHDC Review of Trinity Proposal



- Complementary with proposed Cultural Arts Center
  - Contributions toward construction (\$1,000,000) and programming (\$250,000)
- Generally consistent with 2018 Master Plan goals
  - Fewer housing units than alternative proposals
- Intended to comply with zoning adopted by Special Town Meeting in 2019 by more than 2/3 vote.
  - Campus setting
  - Historic preservation
  - Landscaping and improved streetscape

# Order of Discussion

- **Introduction to Project Team**
- **Proposed Redevelopment Program and Design**
- **Due Diligence Update**
- **Community Input and Vision**

# Introduction to Project Team | *TRINITY*

# Company Background

- Real estate developer specializing in affordable, mixed-income, and market rate properties
- \$3.0 billion in development
  - Developed 9,500+ units of multi-family housing
  - Manage 7,600 units of housing
- Expertise with programs including federal and state historic tax credits, infrastructure grant programs and public and private financing
- Over three decades of experiencing working with Massachusetts cities and towns on complicated community developments

TRINITY  
FINANCIAL

TRINITY  
MANAGEMENT

# Project Team

- **Developer** - Trinity Financial
- **Architect** - ICON Architects
- **Interior Designer** - Bergmeyer
- **Acoustic Consultant** –Acentech
- **Fiscal Consultant** - Mark Fougere
- **Legal** - Robinson & Cole
- **Landscape Architect** - Klopfer Martin (WBE)
- **Permitting** - Fort Point Associates
- **Sustainability Consultant** - New Ecology
- **Property Management** - Trinity Management
- **Historic Consultant** – Public Archaeology Laboratory (PAL)
- **Environmental Engineer**- McPhail
- **Hazmat** - Vertex
- **Transportation and Civil Engineer** - VHB
- **Accountant** - Cohn Reznick



Mattapan Heights, Mattapan, MA  
332 apartment homes  
100% Affordable  
5 phases  
Boston Public Health Commission and Mass Historic  
Commission



Appleton Mills – Lowell, MA  
130 apartment homes  
100% Affordable  
Artist Preference









# RESUMED IN THE APPLETON MILLS. LOWELL. Jan. 24.—The Appleton Company will to-morrow start 250 men idle for ten weeks and will be taken up in time for the balance

The New York Times

Published January 25, 1875



# the Location

PLAN TO OPEN LOWELL. Operators Will Make a Partial Forces Can Be Special to The New York Times, April 4.—The Lowell, April 4.—The are feeling the pulse of the view toward resumption only a partial force. The position seems strong enough to bring the masses to the old schedule of work. Just how strong a force require for starting up is the by the overseers. Superintendent of the Appleton Mills said that it seemed to him possible to plant with half a force. have not stopped sending mills for future delivery. J. J. Connell, agent of Tremont Mill, said: "The will open just as soon as the desire to return to work." mill gates would open next week from that time if a her showed a willingness to



LOWELL, Mass., March 25.—Two thousand persons were made idle, the Appleton Cotton Mills were forced to shut down, and sections of machinery in the Merrimack corporation were stopped to-day by a strike which the Industrial Workers of the World are endeavoring to extend to all of the 20,000 operatives of Lowell.

The strike was called as a protest against the new wage schedules, which provide for advances varying from 4 to 10 per cent., beginning to-day. The strikers ask for increases in wages ranging from 15 to 20 per cent.

A reinforcement of the Police Department kept the street crowds moving. During the noon hour pickets were distributed at various points, particularly in the vicinity of the Hamilton Mills, where an official attorney was made to induce the 300 employees to quit work.

Several hundred police were summoned to disperse the crowds from the gates of the Merrimack and Appleton corporations. For a time authorities thought that a repetition of the Lawrence industrial struggle was a prospect.

Many of those who left the Appleton Mills said afterward that two or three of the leaders of the strike were armed with sticks and knives and made threats on those who did not want to leave work. Whenever an operative declined to leave a machine the strike leaders rushed to the belts and threw off the power. Many of the idle operatives said they left the mills not through any pronounced dissatisfaction but because they were afraid of getting their heads broken.

The cotton mills of Lowell employ about 20,000 operatives, of whom 3,300 are employees in the Merrimack mills, 2,250 in the Appleton and 2,800 in the Massachusetts.

Most of the striking operatives are said to be members of the Industrial Workers of the World, the organization which assumed jurisdiction over the majority of Lawrence mill hands. The dis-

**Partial Forces Can Be Obtained**

Special to The New York Times

## COTTON MILL DIVIDENDS.

### Large Amounts Paid Out to New England Stockholders.

BOSTON, Dec. 1.—The protracted certainty in China and the hesitation of porters to continue shipments to that country until the situation clears do not seem to have greatly injured cotton manufacturing in New England. Many of the mills are not concerned in the China trade directly, but some have suffered on account of the troubles there. Nevertheless, a large amount of money was paid in dividends to-day at mill offices in this city. Among the corporations disbursing to-day are the following:

Nashua Mills, Nashua, N. H., \$25 per share, and an extra dividend of the same amount; Great Falls Mills, Somersworth, N. H., 10 per cent.; Jackson Mills, Nashua, N. H., 50 per cent.

## TEXTILE STRIKE IS CALLED IN LOWELL

Industrial Workers Who Directed Conflict in Lawrence Shift to Neighboring City.

ASK 20 PER CENT. ADVANCE

Two Thousand Made Idle as Protest Against New Schedule Granting 10 Per Cent.

Partial Forces

Special to The Lowell, April are feeling the pain a view toward re only a partial force look for is the app among the idle mas the union leaders at the old schedule position seems str well-balanced force

then set a invite Just requir by th of th that i plant

# appleton mills neighborhood



### APPLETON MILLS

#### ARTS

- 1 Arts League of Lowell
- 2 Brook Art Gallery
- 3 Merrimack Repertory Theatre
- 4 The Revolving Museum
- 5 Van Gogh's Gear (art supplies)
- 6 Western Avenue Studios
- 7 Whistler House Museum of Art
- 8 X/O Gallery

#### RECREATION

- 9 Boarding House Park
- 10 Canal Walks Throughout City
- 11 Lowell Memorial Auditorium
- 12 Lowell National Park Visitor Center
- 13 Tanager Center at UMass Lowell

#### MEDICAL

- 14 Saint Memorial Medical Center

#### HEALTH & RELAXATION

- 15 Inno Spa
- 16 The Club

### CIVIC

- 17 City Hall
- 18 Fire Department Headquarters
- 19 Middlesex Community College
- 20 Police Headquarters/JFK Civic Center
- 21 Pollard Memorial Library

### FOOD

- 22 Market Basket
- 23 Market Street Market
- 24 Minos Carves Butcher Shop

### RESTAURANTS & CAFES

- 25 Athenian Corner
- 26 Blue Tish
- 27 Bread & Butterings
- 28 Cafe Paradiso
- 29 Centro
- 30 Charo's Bakery & Pastry Shop
- 31 Cobblestones
- 32 Coffee Mill Emporium
- 33 Garcia Brogan's Cantina, Pub & Restaurant
- 34 La Borsche
- 35 Life Alive
- 36 Monkey's Ice Cream
- 37 Olympian Restaurant
- 38 Owl Diner
- 39 Riccardo's Cafe Tortona

### STORES & SERVICES

- 40 Anton's Cleaners
- 41 Freshies - Children's Clothing
- 42 Humpty Clothing
- 43 London Tailor

### BANKS

- 44 Eastern Bank
- 45 Enterprise Bank & Trust Co.
- 46 Jeanne D'Arc Credit Union
- 47 Lowell Cooperative
- 48 Lowell Five Cents Savings Bank
- 49 Washington Savings

### TRANSPORT TO LOGAN

- 50 Colgate Transportation Terminal (Bus and MBTA Commuter Rail)

### HISTORIC

- 51 American Textile History Museum
- 52 Boot Cotton Mills Museum
- 53 New England Quilt Museum

Photographer: Greg Marston, Lowell, MA



Boston East – East Boston., MA  
200 apartment homes – Market Rate  
6 Artist Live-Work Units + Community Art Gallery



boston | east









# Proposed Redevelopment Program | *TRINITY*

# Distinctive Features of MSH Redevelopment

- Rehabilitation of historic assets of Town of Medfield - Preserving the character of the Town
- Creation of high-quality housing that is a net financial benefit to the Town of Medfield
- Provides desired access to open spaces across the campus
- Team with experience redeveloping multi-phased historic campuses and working collaboratively with artists groups
- Pro Forma that reflects the realities of current construction environment and site challenges

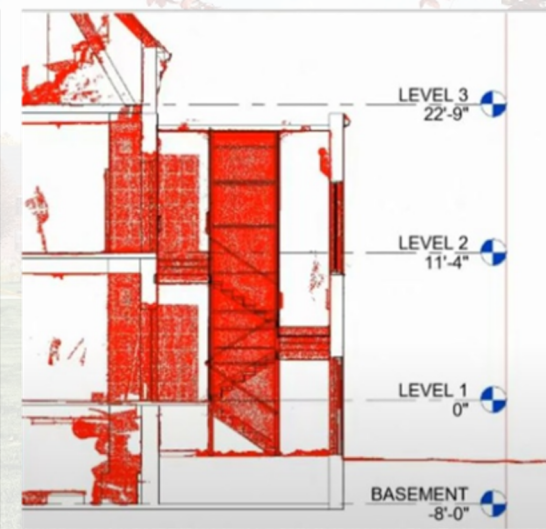
# Redevelopment Goals

- Creates 334 apartments, mix of unrestricted and affordable (up to 80% Area Median Income) available to individuals and families
- Restores all contributing historic buildings in Core Campus
- Collaboration with Cultural Alliance of Medfield for artist programming
- Campus remains accessible and programmed for public enjoyment
- Town retains Green, North Field and Arboretum



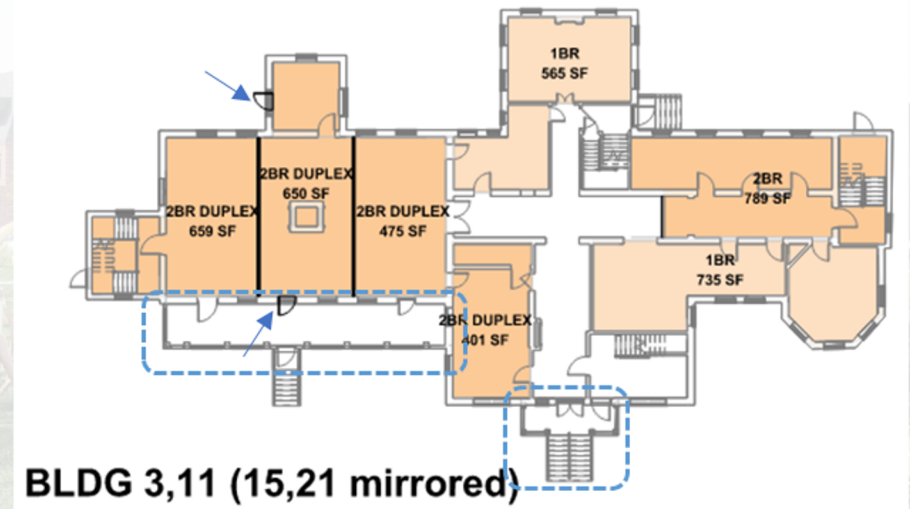
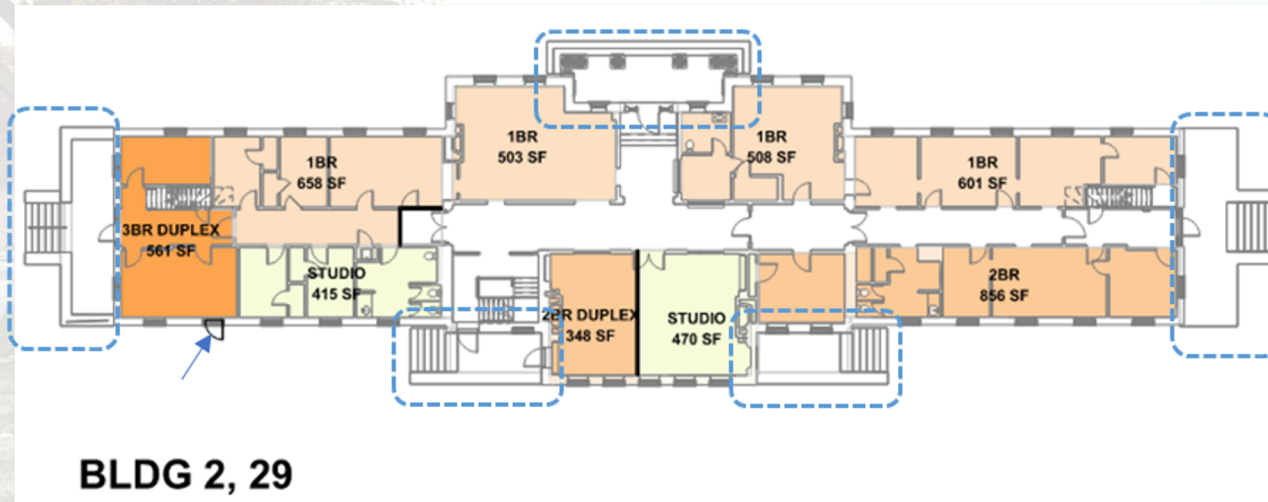
Proposed Redevelopment Design | *ICON/KDMG*





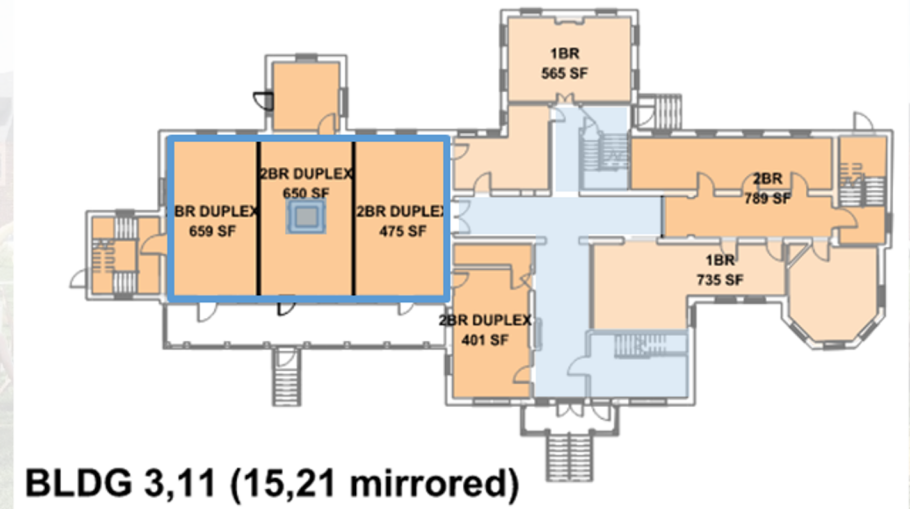
# Preservation Approach

- Preserve & restore existing historic facades and exterior details to the maximum extent possible – proposed interventions will be sensitively introduced as needed
- Preserve critical interior spaces – primary entries, central corridors & stairs, dayrooms
- Preserve character defining interior elements – doors & millwork, fireplaces



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## SITE OPEN SPACES



## EXISTING BUILDINGS



## CLUBHOUSE



## PROPOSED PERSPECTIVE



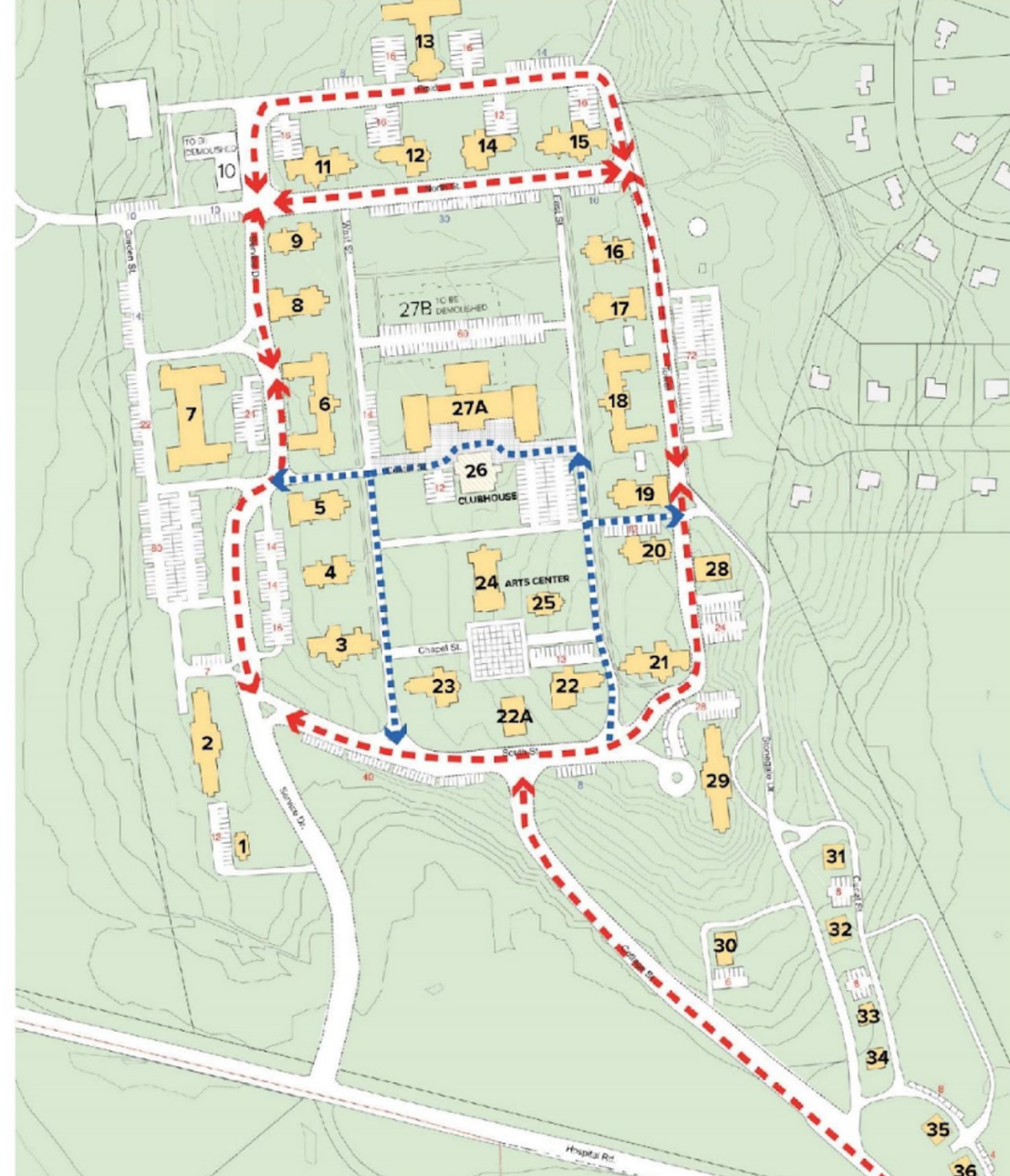
## PROPOSED PERSPECTIVE



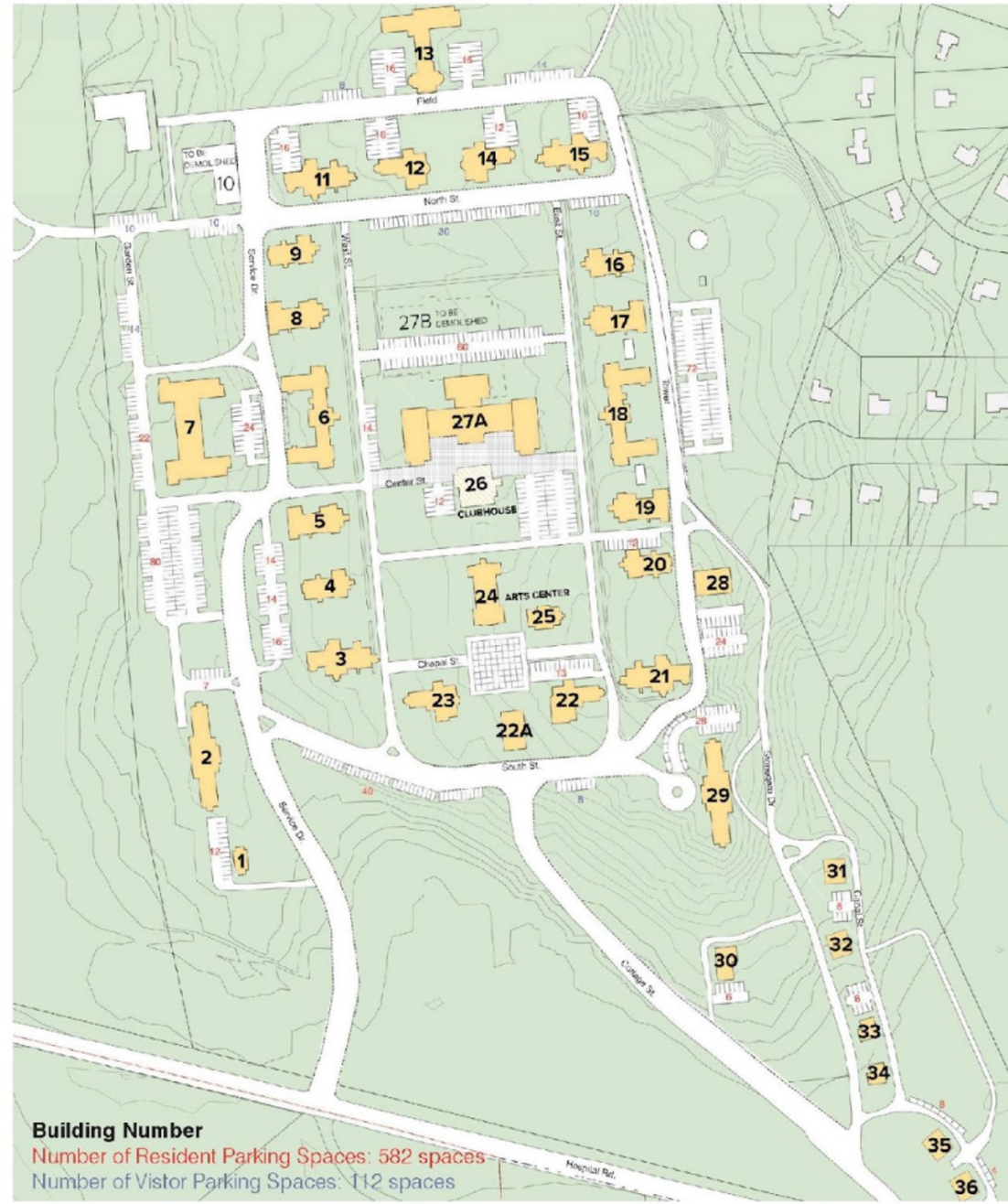
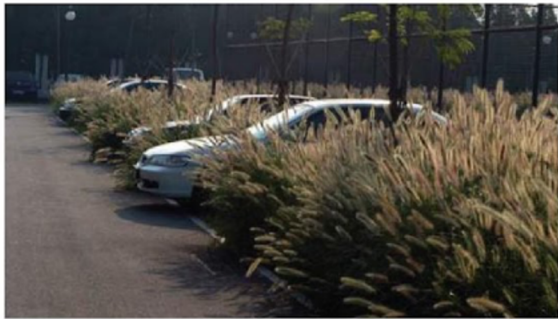
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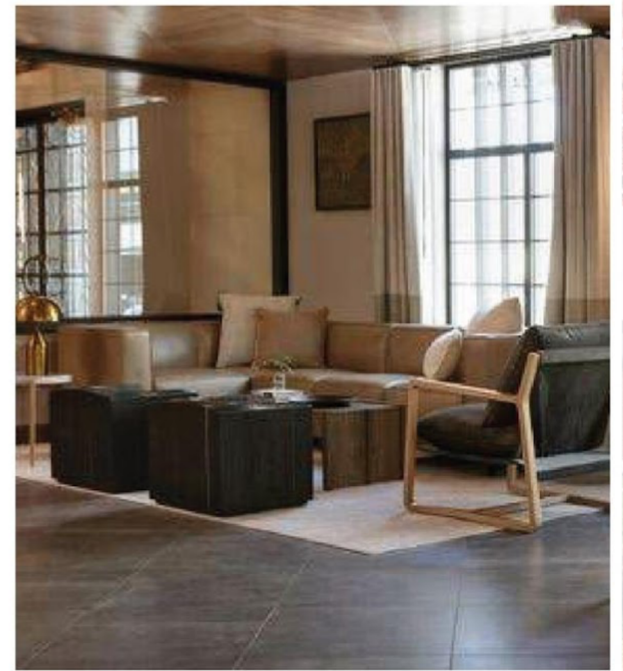
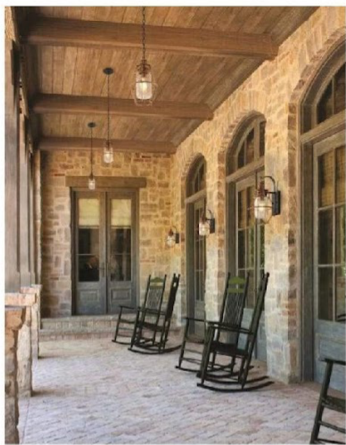






— Two Way  
— One Way









Due Diligence Update | *TRINITY*

# Due Diligence Update

DISCIPLINE	CONSULTANT	SCOPE OF TRINITY DUE DILIGENCE SERVICES
Developer	Trinity Acquisitions LLC	<ul style="list-style-type: none"> <li>• Mutual agreement with Town on strategy for gun range</li> <li>• Conversations with Town and relevant state agencies (EOHED, MHC, DCAM) regarding Project</li> <li>• Agreement with CAM on scope of work and program</li> </ul>
Fiscal Analysis	Fougere	• Updated fiscal impact report
Market Study	Kenilworth Market Advisors	• Rental market study
Noise/Gun Range	Acentech	• Feasible plan for gun range mitigation
Hazardous Materials Scan	Vertex	• Test 4 buildings for lead paint, asbestos, hazardous materials
Environmental	McPhail Associates	• Environmental assessment report
Existing Conditions	Existing Conditions	• As built survey for all major buildings
Design	ICON	• Schematic plans
Utilities, Access, Easements, Flood Zone, Traffic	VHB	• Updated traffic study, Updated water and sewer capacity study
Permitting	Fort Point	• Review of existing permitting documents, Updated list of all required federal, state and local permits
Historic	PAL	• Coordinate with Town officials on compliance with MOA and preserving building eligibility for credits, MHC and NPS Part I submission and approval
Legal & Title	Robinson & Cole	• PDA, Term Sheet, LDA, title report

# Community Input and Vision

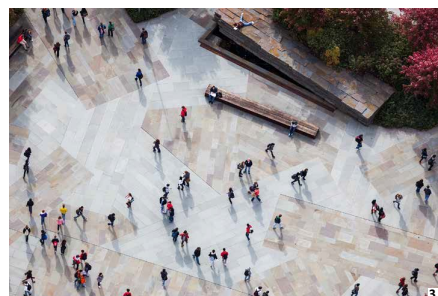
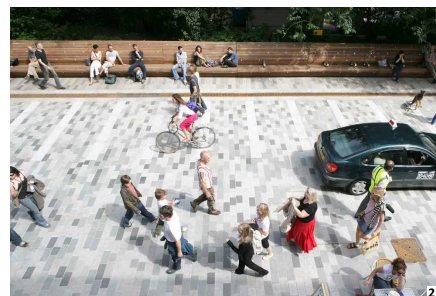
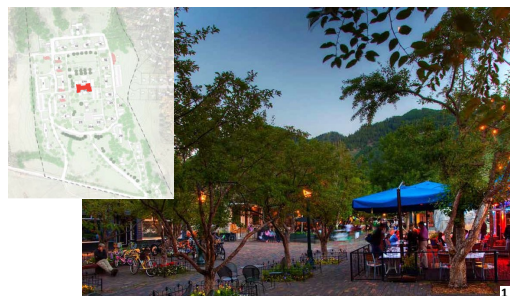


**What places are important to you?**

**What places are important to Medfield?**

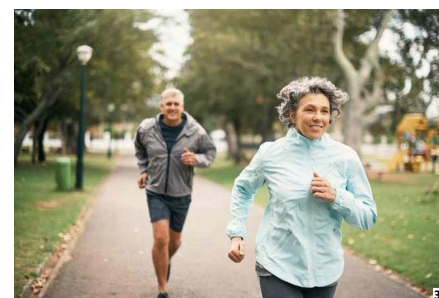


## ACTIVITY PLAZAS



## CENTRAL GREEN

## PLAY

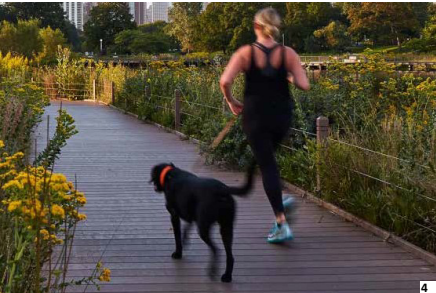
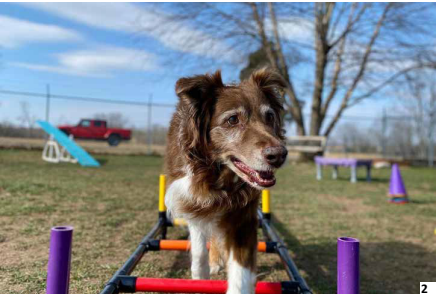


## FITNESS

MULTI-USE TRAILS



COMMUNITY EVENTS

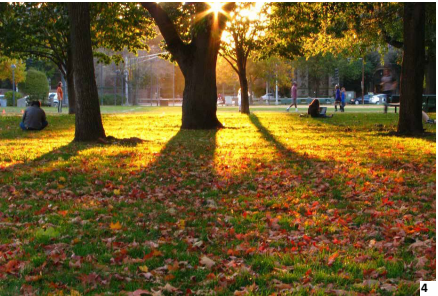


DOG PARK

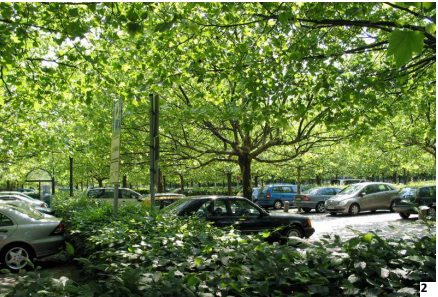


SPORT COURTS

COMMUNITY GARDEN



CANOPY TREES



MEADOWS

PARKING AND DRIVE COURTS



The background is a soft, painterly illustration of a university campus. In the foreground, a man sits on a stool painting a landscape on an easel. To his right, a group of people sits on a picnic blanket. Further back, a woman sits in a lawn chair, and a man lies on a lounge chair. A large tree with autumn-colored leaves is on the right. In the background, there are several large, multi-story brick buildings with gabled roofs and a central tower. The sky is light blue with a few birds flying.

We want to hear from you...

# QUESTIONS or COMMENTS?

# Appendix

# Bellforge Arts Center



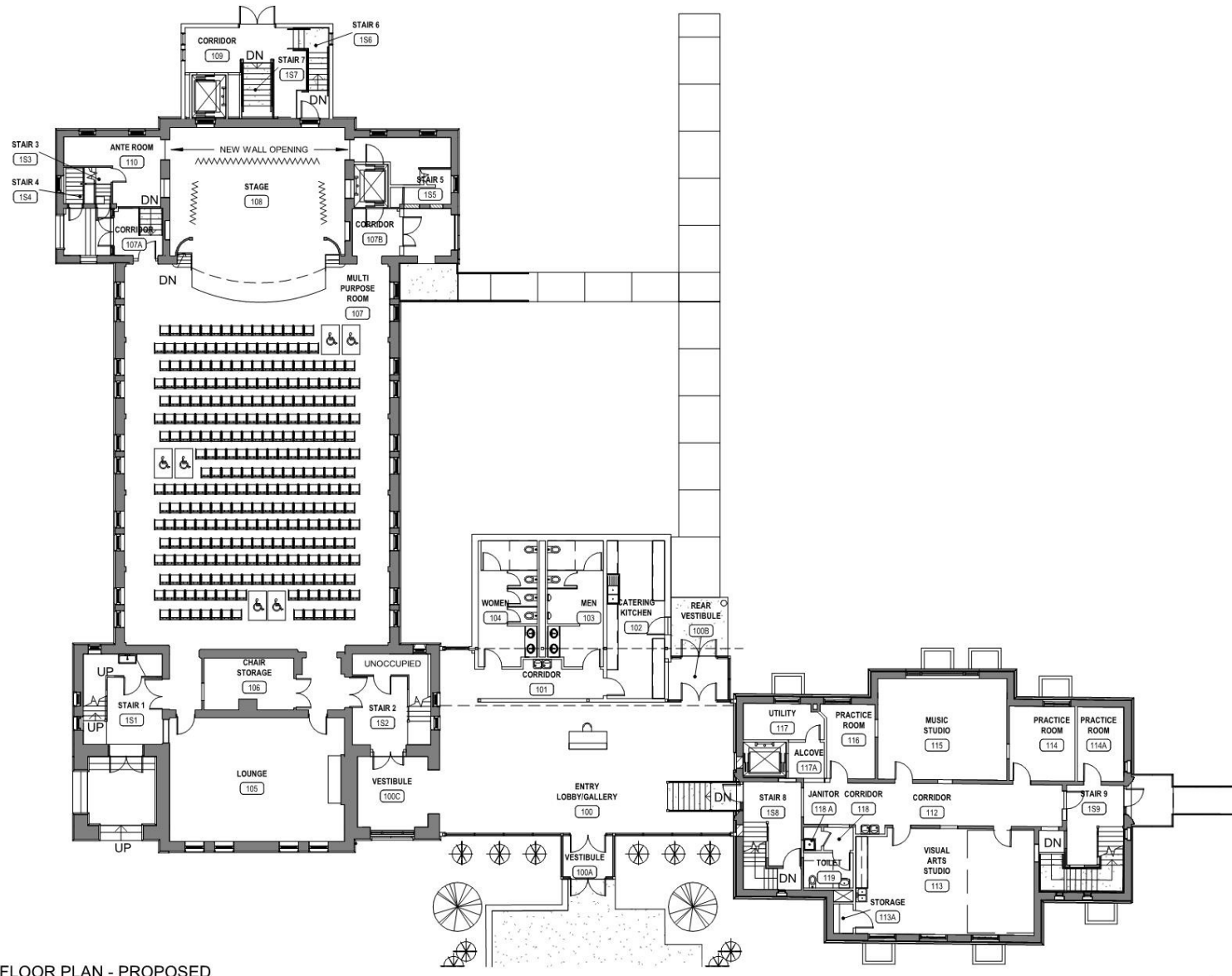
TRINITY  
FINANCIAL

May 18, 2022

DBVW  
ARCHITECTS

# Bellforge

## Arts Center



1 FIRST FLOOR PLAN - PROPOSED  
1/16" = 1'-0"



# Proposal Program-RFP Response

Income Category	Number of Units
Market	249
Affordable at 80% AMI*	85

Income Category	Studio Rent	1 BR Rent	2 BR Rent	3 BR Rent
Market	\$1,875	\$1,989	\$2,595	\$3,102
Affordable at 80% AMI*	\$1,782	\$1,901	\$2,265	\$2,612

Income Category	Studio	1 BR	2 BR	3 BR	Total
Market	9	138	94	8	249
Affordable at 80% AMI*	4	46	32	3	85
Total	13	184	126	11	334

\*\*Affordable Rents cited from HUD Boston MSA 2021 Rents with plug utility allowance deduction

# Proposal Program-Updated May 2022

Income Category	Number of Units
Market	249
Affordable at 80% AMI*	85

Income Category	Studio Rent	1 BR Rent	2 BR Rent	3 BR Rent
Market	\$1,950	\$2,450	\$2,950	\$3,800
Affordable at 80% AMI*	\$1,782	\$1,901	\$2,265	\$2,612

Income Category	Studio	1 BR	2 BR	3 BR	Total
Market	34	116	74	25	249
Affordable at 80% AMI*	11	39	26	9	85
Total	45	155	100	34	334

\*\*Affordable Rents cited from HUD Boston MSA 2021 Rents with plug utility allowance deduction

# Parking Cont.

## Initial Estimate

- 586 total parking spaces for residents – 1.75 parking space per residential unit ratio
- 112 additional parking spaces for campus visitors

## Updated Estimate-Under Review

- 680 Total Parking spaces for Residents
  - Studios-1 parking space
  - 1 BR – 1 parking space
  - 2 BR – 2 parking spaces
  - 3 BR- 2 parking spaces
- 112 additional parking spaces for Campus Visitors

# Traffic Study

- Study Intersections:
  - N. Meadows Road (Route 27) at Hospital Road
  - Hospital Road at Service Drive/McCarthy Park Driveway
  - Hospital Road at Stonegate Drive
  - Hospital Road at Harding Street
  - Harding Street at West Mill Street
  - Harding Street at West Street
  - Harding Street at North Street
- New traffic generated by Project will not significantly impact traffic operations in the study area

# Budget-RFP Response

Uses	Amount
Acquisition	\$2,000,000
Hard Costs	\$126,000,000
Soft Costs	\$26,000,000
<b>Total Costs</b>	<b>\$154,000,000</b>

Sources	Amount
Private Equity	\$24,000,000
MassHousing Workforce*	\$9,000,000
MassWorks	\$19,000,000
Historic Tax Credits	\$30,000,000
Debt	\$72,000,000
<b>Total Sources</b>	<b>\$154,000,000</b>

# Budget Assumptions

- \$300 per square foot hard cost construction estimate
- Construction debt – interest only at 3.5%
- Permanent debt – 1.20 DSCR, 4% interest, 30-year amort
- Federal HTC - - \$0.85 credit pricing
- State HTC - \$0.92 credit pricing
- Rent trending – 3%
- Expense trending – 2%
- Operating expenses - \$11,000 per unit annually

# Annual Fiscal Impact to Town-RFP Response

Revenues	Amount
Property Taxes	\$1,041,1802
Vehicle Excise Taxes	\$160,800
<b>Total Revenues</b>	<b>\$1,201,980</b>
Expenses	Amount
School	-\$281,400
Police	-\$91,800
Fire	-\$60,247
Outreach & Council on Aging	-\$18,828
Other General Fund Impacts	-\$33,400
<b>Total Expenses</b>	<b>-\$485,675</b>
<b>Net Annual Tax Revenue</b>	<b>\$716,305</b>

# Annual Fiscal Impact to Town

## RFP Response vs. Updated Educational Costs

### RFP RESPONSE UNIT MIX

ESTIMATED SCHOOL CHILDREN 47-67

COST PER CHILD \$3,700- \$4,200

**TOTAL COST TO TOWN \$197,400 - \$281,400**

### UPDATED UNIT MIX

ESTIMATED SCHOOL CHILDREN 61-66

SPECIAL EDUCATION COSTS: \$153,840

ADDITIONAL TEACHER COSTS: \$342,000

ADDITIONAL BUS ROUTE: \$40,000

**TOTAL COST TO TOWN: \$332,640 to \$535,000**

# Project Schedule

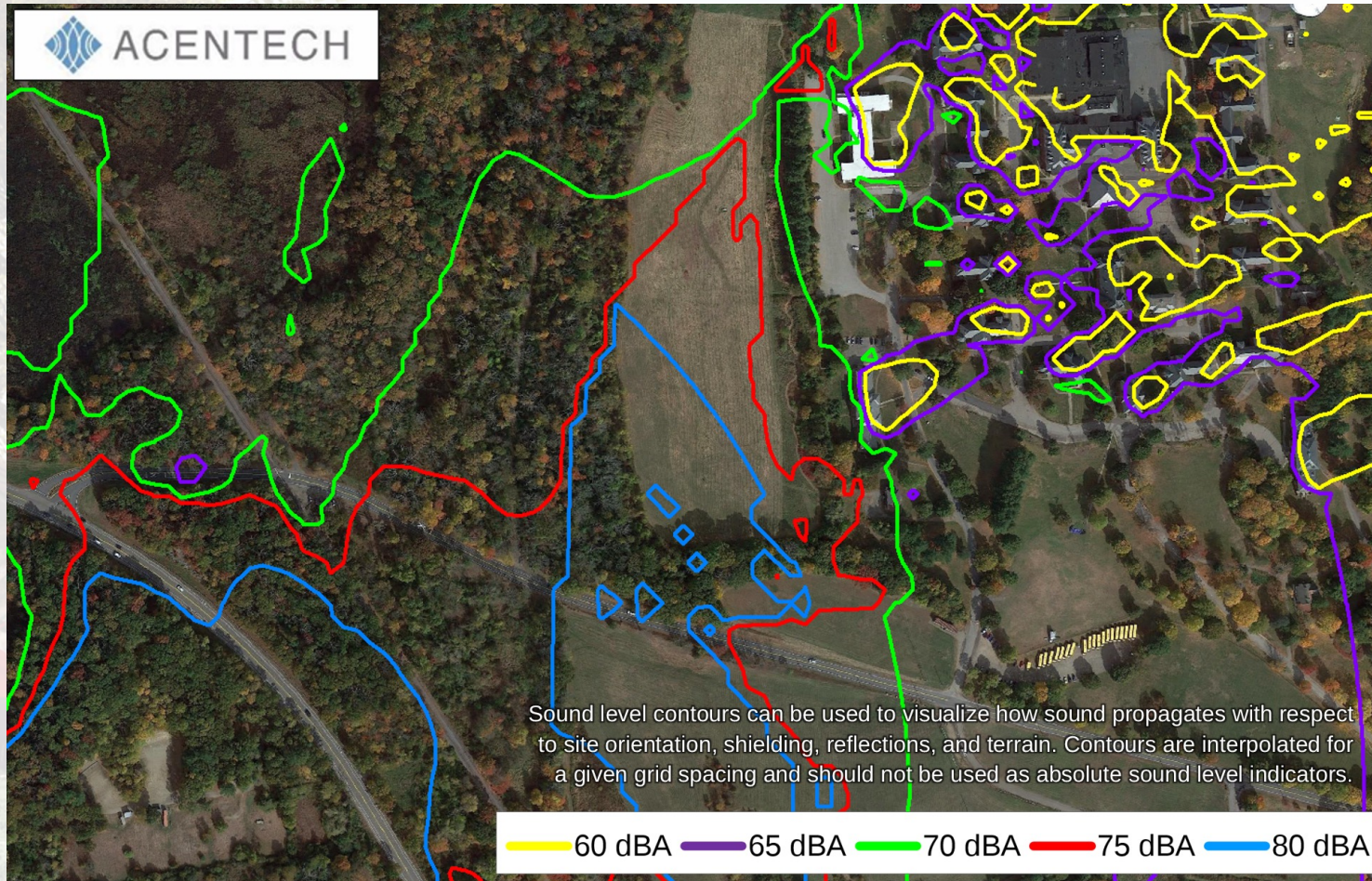
Date	Milestone
November 2021	Developer Designation
December 2021- May 2022	Due Diligence
June 2022	Special Town Meeting Vote
July 2022 – November 2022	Community Outreach and Design Development
August 2022 – June 2023	Major Permitting and Financing Secured
March 2024	Construction Commences
December 2026	Construction Completes

# Permitting

Agency	Permit/Approval
<b>Federal</b>	
<b>Environmental Protection Agency (EPA)</b>	NPDES Construction General Permit for Stormwater Discharge
<b>State</b>	
<b>Massachusetts Environmental Policy Act (MEPA)</b>	<ul style="list-style-type: none"> <li>• Notice of Project Change</li> <li>• Single Environmental Impact Report</li> </ul>
<b>Department of Environmental Protection (DEP)</b>	<ul style="list-style-type: none"> <li>• Notice of Construction</li> <li>• Notice of Demolition</li> </ul>
<b>Department of Public Safety</b>	<ul style="list-style-type: none"> <li>• Approval of Elevator Inspectors</li> </ul>
<b>Massachusetts Historical Commission (MHC)</b>	<ul style="list-style-type: none"> <li>• Design Review (Finding of No Adverse Effect)</li> <li>• Approval of Historic Tax Credits</li> </ul>
<b>Local</b>	
<b>Medfield Planning Board</b>	<ul style="list-style-type: none"> <li>• Plan Approval</li> </ul>
<b>Medfield Historic District Commission</b>	<ul style="list-style-type: none"> <li>• Demolition Delay</li> <li>• Certificate of Appropriateness</li> </ul>
<b>Medfield Building Department</b>	<ul style="list-style-type: none"> <li>• Demolition Permit Application</li> <li>• Medfield Building Permit Application - Commercial &amp; Multi-Family</li> <li>• Application to Alter an Existing Building Permit <ul style="list-style-type: none"> <li>○ Debris Affidavit</li> <li>○ MA State Final Construction Control Affidavit</li> <li>○ MA State Initial Construction Control Affidavit</li> </ul> </li> <li>• Contractor Control Form</li> <li>• Certificate of Occupancy</li> </ul>
<b>Medfield Highway Department</b>	<ul style="list-style-type: none"> <li>• Medfield Street Opening Permit</li> <li>• Medfield Trench Permit</li> </ul>
<b>Office of Water and Sewer Board</b>	<ul style="list-style-type: none"> <li>• License to Install Water</li> <li>• Sewer Installation and Inspection Permit</li> </ul>
<b>Water and Sewer Department</b>	<ul style="list-style-type: none"> <li>• Sewer Connection Application Permit</li> <li>• Water Connection Application Permit</li> </ul>

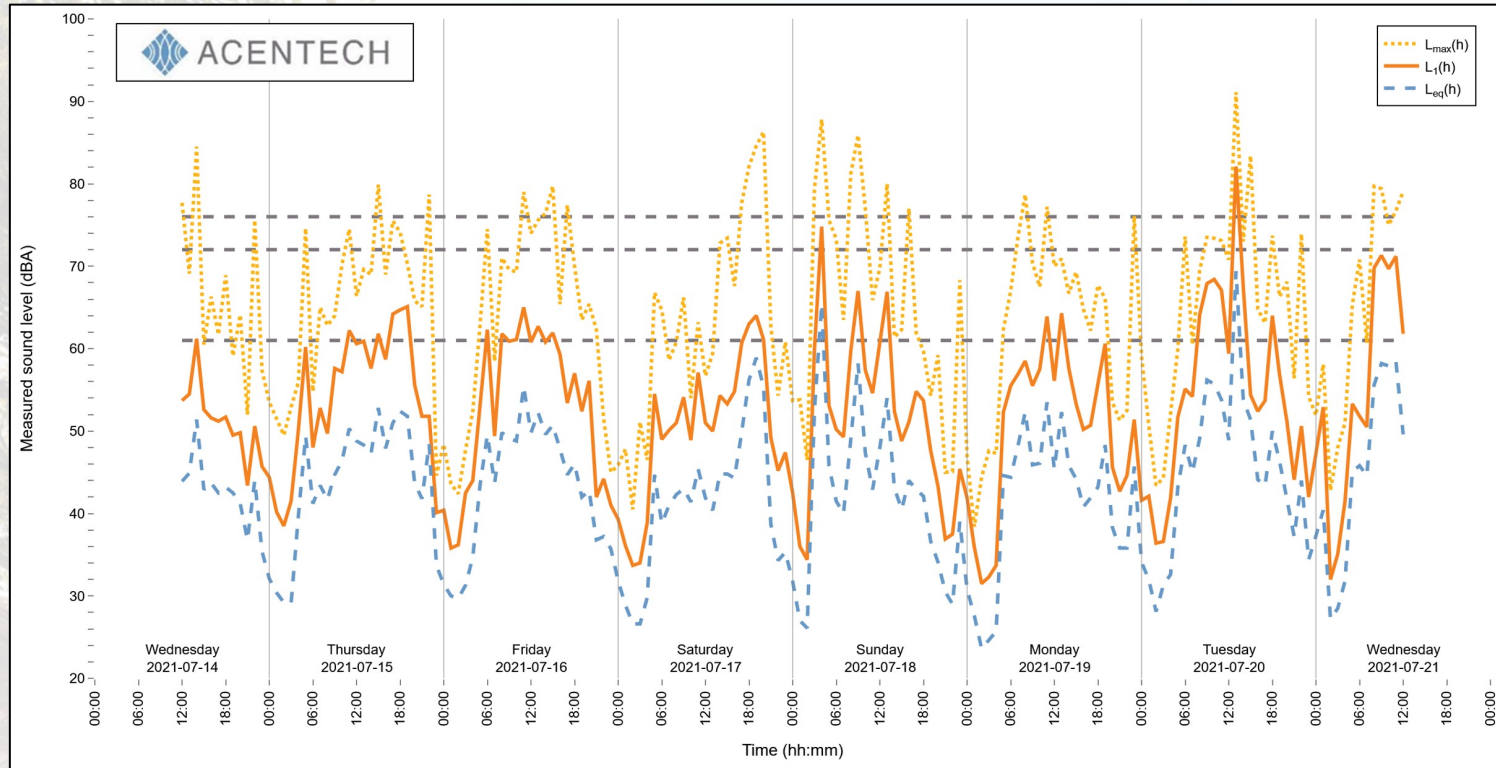
# Sound Study

## Acoustic propagation model



- Modeled effect of mitigation alternatives
- Preliminary recommendations:
  1. Underground firing range
  2. Indoor firing range
- Sound barrier wall not recommended – likely ineffective for these sources

# Sound Study



- Firing range gunshot sounds audible when facility is active
- 60 decibels or louder 390 times per active hour
  - 71+ decibels 40 times per hour
  - 76+ decibels 8 times per hour
  - Up to 90 decibels infrequently

