



Commonwealth of Massachusetts  
**DEPARTMENT OF HOUSING &  
COMMUNITY DEVELOPMENT**

Charles D. Baker, Governor ♦ Karyn E. Polito, Lt. Governor ♦ Chrystal Kornegay, Undersecretary

February 13, 2017

Mr. Mark L. Fisher  
Chair, Board of Selectmen  
Town of Medfield  
459 Main Street  
Medfield, Massachusetts 02052

RE: Chapter 40B Comprehensive Permit

Project Name: Cushing House  
Location: Medfield  
Number of Units: 8  
Subsidizing Agency: Department of Housing and Community Development  
Applicant: Medfield Holdings LLC

Dear Mr. Fisher:

This will serve to notify you, pursuant to 760 CMR 56.04(3)(d), that the above-named Applicant has applied to the above-named Subsidizing Agency under the Local Initiative Program for preliminary approval of the above-referenced project. The project is a rental development with a total of eight (8) units, two (2) of which are low income under 40B.

Enclosed please find a copy of the application for your review. The review period for comments ends 30 days from the date of this letter. Any comments will be considered prior to issuing a determination of Project Eligibility.

Please address comments to:

Catherine Racer, Associate Director  
Division of Housing Development  
Department of Housing and Community Development  
100 Cambridge Street, Suite 300  
Boston, Massachusetts 02114

If you have any questions regarding this letter, please feel free to call me at (617) 573-1322.

Sincerely,

  
Catherine Racer  
Associate Director

cc: Robert Borrelli, Medfield Holdings LLC

**MASSACHUSETTS**  
 Department of Housing and Community Development  
**Local Initiative Program**  
**Application for Comprehensive Permit Projects**

**INSTRUCTIONS**

Please submit three copies of the application and attachments. Note: only one set of site plan and sample elevations (attachments 11 and 12 noted on page 22) are required. An application fee, payable to the Massachusetts Department of Housing and Community Development, shall be submitted with the application. The schedule of fees is as follows:

	Project Fee	plus	Per Unit Fee
Municipality	\$1,000		\$30
Non-Profit	\$1,750		\$40
All Others	\$4,000		\$50

Mail to:

**Local Initiative Program**  
**Department of Housing & Community Development**  
**100 Cambridge Street, Suite 300**  
**Boston, MA 02114**  
**Attn: Alana Murphy, Deputy Associate Director**

To complete the application electronically, simply position your cursor on a line and type. Use the tab key to move between questions.

If you have any questions, please refer to the DHCD 40B Guidelines, specifically Section VI. For further assistance, contact Alana Murphy at 617-573-1301 or [alana.murphy@state.ma.us](mailto:alana.murphy@state.ma.us).

NOTE: For Rental Projects, to complete information on Project Feasibility (Section X), go to the One Stop Application at <http://www.mhic.com> and complete Section 3 Sources and Uses and Section 4 Operating Pro Forma. Submit the sections with the Application

Application Contents:

- |                                    |                                     |
|------------------------------------|-------------------------------------|
| I. General Information             | VIII. Surrounding Area              |
| II. Community Support              | IX. Financing                       |
| III. Municipal Contact Information | X. Project Feasibility              |
| IV. Development Team               | XI. Development Schedule            |
| V. Project Information             | XII. Marketing Outreach and Lottery |
| VI. Site Information               | XIII. Checklist of Attachments      |
| VII. Design and Construction       |                                     |

Received

January 2016

FEB 10 2017

Division of Housing Development

**MASSACHUSETTS**  
Department of Housing & Community Development  
**Local Initiative Program**  
**Application for Comprehensive Permit Projects**

**I. GENERAL INFORMATION**

Community: Town of Medfield  
Name of Development: Cushing House  
Site Address: 67 North Street, Medfield, MA 02052  
Developer: Medfield Holdings LLC

1. Type of Housing:  
 Single Family house       Rental  
 Condominium               Age Restricted

2. Project Characteristics:  
 New Construction\*    Conversion  
 Rehabilitation\*        Other  
\*Rehabilitation of an existing structure with a new addition to be added.

3. Total Acres 0.229      Density of Project (units/acre) 21.83

4. Unit Count:  
  
Total Number of Units 8  
Market Rate 6  
Affordable 2

5. Unit Prices/Rents:  
Market Rate \$1,800.00-\$2,100.00/month  
Affordable \$1,279.00-\$1,644.00/month

Required Signatures for the  
Comprehensive Permit Project Application  
Chief Executive Official  
of Municipality:

Chair, Local Housing Partnership  
(if applicable):

Signature: 

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

Print Name: MARK L. FISHER

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

Date: 1-31-2017

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

## II. COMMUNITY SUPPORT

1. Letter of Support from Municipality - Attach a letter containing a short narrative on the basics of the project, the history of the project, the ways in which the community is providing support, and how the development team has addressed any concerns the community has. The letter must be signed by the chief elected official of the community.

2. Letter of Support from Local Housing Partnership - If the community has a housing partnership, please attach a letter from them indicating their support for the project. The letter should summarize how the partnership has been working with the developer.

3. Local Contributions - Check off all that apply and provide a brief description at the end.

- Land donation (dollar value \_\_\_\_\_)
- Building donation (dollar value \_\_\_\_\_)
- Marketing assistance
- Other work by local staff
- Density increase
- Waiver of permit fees
- Other regulatory or administrative relief (specify) \_\_\_\_\_
- Local funds (cash)  
Amount \$ \_\_\_\_\_ Source: \_\_\_\_\_
- HOME funds
- Agreement by a lender to provide favorable end-loan financing (ownership projects only)
- Other (specify) \_\_\_\_\_

Briefly explain the contributions: \_\_\_\_\_

4. Municipal Actions and Local Plans - Briefly describe how the project fits with any planning the community has done (e.g. master plan, community development plan, affordable housing plan) and other local land use and regulatory actions that provide the opportunity for affordable housing (including multi-family and overlay districts, inclusionary zoning by-laws and ordinances).

The project is in compliance and promotes the ideas of the Housing Production Plan of the Town of Medfield prepared by the Community Opportunities Group, dated October 17, 2016. In particular, this project addresses the needs of local households by increasing the inventory of low- and moderate-income housing in the town. Specifically, this project will address Medfield's need for more diverse housing options suitable for households of all ages, sizes, and incomes, in a town, such as Medfield, where the demand for rental properties is high.

### III. MUNICIPAL CONTACT INFORMATION

#### Chief Executive Officer

Name Board of Selectmen: Mark Fisher, Osler L. Peterson, and Michael T. Marcucci  
Address 459 Main Street, Medfield, MA 02052  
Phone (508) 906-3012  
Email eclarke@medfield.net

#### Town Administrator/Manager

Name Michael J. Sullivan  
Address 459 Main Street, Medfield, MA 02052  
Phone (508) 906-3012  
Email msullivan@medfield.net

#### City/Town Planner (if any)

Name Sarah Raposa  
Address 459 Main Street, Medfield, MA 02052  
Phone (508) 906-3027  
Email sraposa@medfield.net

#### City/Town Counsel

Name Mark G. Cerel, Esq.  
Address 5 North Meadow's Road, Post Office Box 9, Medfield, MA 02052  
Phone (508) 359-5536  
Email mcerel@franklin.ma.us

#### Chairman, Local Housing Partnership (if any)

Name Town of Medfield Affordable Housing Committee  
Address 459 Main Street, Medfield, MA 02052  
Phone (508) 906-3011  
Email ktrierweiler@medfield.net

#### Community Contact Person for this project

Name Sarah Raposa  
Address 459 Main Street, Medfield, MA 02052  
Phone (508) 906-3027  
Email sraposa@medfield.net

**IV. DEVELOPMENT TEAM INFORMATION (include all development members)**

Name Medfield Holdings LLC  
Address PO Box 377, Medfield, MA 02052  
Phone (508) 733-3412  
Email lucas94@verizon.net  
Tax ID \_\_\_\_\_

Contractor  
Name Medfield Holdings LLC  
Address PO Box 377, Medfield, MA 02052  
Phone (508) 733-3412  
Email lucas94@verizon.net  
Tax ID \_\_\_\_\_

Architect  
Name Edward Lyons, Falcon Associates-Architects, Inc.  
Address 5 Falcon Road, Sharon, MA 02067  
Phone (781) 784-4646  
Email \_\_\_\_\_  
Tax ID \_\_\_\_\_

Engineer  
Name Robert Truax, GLM Engineering Consultants, Inc.  
Address 19 Exchange Street, Holliston, MA 01746  
Phone (508) 429-1100  
Email Robert.truax@glmengineering.com  
Tax ID \_\_\_\_\_

Attorney  
Name Law Offices of James W. Murphy  
Address PO Box 1327, Sherborn, MA 01770  
Phone (508) 653-7162  
Email jwmurf@comcast.net  
Tax ID 04-3295738

Housing Consultant  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Tax ID \_\_\_\_\_

Marketing/Lottery Agent  
Name Town of Medfield  
Address 459 Main Street, Medfield, MA 02052  
Phone (508) 359-8505  
Email ktrierweiler@medfield.net  
Tax ID \_\_\_\_\_

## TEAM EXPERIENCE – DEVELOPER/CONTRACTOR QUALIFICATIONS

Complete the charts on the following pages for all housing projects undertaken by the developer and the contractor during the past five years. Include projects currently in construction. Provide owner references for each project, including a current phone number. Alternatively, a resume outlining the experience that covers the items listed on the chart below may be submitted.

1. Developer: Medfield Holdings LLC – See attached resume

Project Summary	Project #1	Project #2	Project #3	Project #4
Project Name:				
Community Address:	67 North Street, Medfield, MA 02052			
Housing Type:	Rental			
Number of Units:	Eight (8)			
Total Development Costs:				
Subsidy Program (if applicable):				
Date Completed:				
Reference: Name and Telephone #:				

2. Contractor: Medfield Holdings LLC – See attached resume

Project Summary	Project #1	Project #2	Project #3	Project #4
Project Name:				
Community Address:				
Housing Type:				
Number of Units:				
Total Development Costs:				
Subsidy Program (if applicable):				
Date Completed:				
Reference: Name and Telephone #:				

3. Other Chapter 40B Experience

Have you or any members of your team had previous Chapter 40B experience with DHCD and/or other subsidizing agencies?  Yes  No

If yes, please explain. The Developer/Contractor does not have any Chapter 40B Experience, but has extensive construction experience in the Town of Medfield. For the specifics of this experience, please see attached resume.

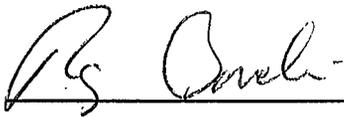
4. Bankruptcy / Foreclosure

Have you or any entities you control ever filed for bankruptcy or have had a property foreclosed?  Yes  No

If yes, please explain. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

DEVELOPER CERTIFICATION

The undersigned hereby certifies that he/she is Manager (Title) of Medfield Holdings LLC (Legal Name of Applicant) and that the information requested below for the project known as 67North (Project Name) is complete and that all information contained in this application is true and correct to the best of his/her knowledge. The undersigned Developer agrees to execute DHCD model documents, as required. If the Developer is other than a non profit corporation or public entity, the Developer hereby certifies that it shall comply with all reporting requirements described in 760 CMR 56.00 and as set forth in the LIP Guidelines.

Signature of Developer 

Date 2/6/17

**V. PROJECT INFORMATION**

1.	Type of Housing:	Total Number of Units
	Single-Family House	_____
	Condo	_____
	Rental	<u>8</u>
	Other	_____

2. Total Number of Units                      Affordable 2 Market 6

3.	Project Style:	Total Number of Units
	Detached single-family house	_____
	Rowhouse/townhouse	_____
	Duplex	_____
	Multifamily house (3+ family)	_____
	Multifamily rental building	_____
	Other (specify): <u>Rehabilitation</u>	<u>8</u>
	<u>of an existing structure with a</u>	
	<u>new addition to be added</u>	

4. Is this an age-restricted (55+) Development? Yes  No   
If yes, please submit a marketing study that demonstrates an understanding of the region's demographics, market demand and the particular strategies necessary to attract buyers to both market and affordable units.

5. Estimate the percentage of the site used for:  
Buildings 29% Parking & Paved Areas 54%  
Usable Open Space 0%                      Unusable Open Space 17%

6. Is any portion of the project designed for non-residential use? No  
If yes, explain the non-residential uses. \_\_\_\_\_

7. Sustainable Development Design and Green Building Practices

In accordance with the Sustainable Development Principles adopted by Governor Patrick's Administration in 2007, DHCD encourages housing development that is consistent with sustainable development design and green building practices. For more information, see Appendix VI.A-1 and VI.B-1 of the 40B Guidelines for a list of links to resources and opportunities related to sustainable development.

A. How will this development follow Sustainable Development Principles?  
Development to be in compliance with the Massachusetts "Stretch Code" (780 CMR Appendix 115.AA).

B. How will the project maximize energy efficiency and meet Energy Star Standards? Development to be in compliance with the Massachusetts "Stretch Code" (780 CMR Appendix 115.AA).

C. What elements of "green design" are included in the project (e.g. reduction of energy and water consumption, increasing durability and improving health)?  
Development to be in compliance with the Massachusetts "Stretch Code" (780 CMR Appendix 115.AA).

8. Project Eligibility

A. Have you ever applied for a project eligibility letter involving any portion of the site, or are you aware of any prior application for a project eligibility letter involving any portion of the site?

Yes  No If yes, explain.

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B. Has the municipality denied a permit on another proposal for this site within the last 12 months?  Yes  No

9. Outstanding Litigation

Is there any outstanding litigation relating to the site?  Yes  No  
If yes, explain.

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10. Unit Composition

Complete the chart below. Include a separate entry for each unit type according to its square foot/age and/or sales price/rent.

Type of Unit	# of Units	# of Bdrms	# of Baths	Gross Sq. Ft.	# of Parking Spaces	Sales Price/Rent	Condo Fee	Handicap Accessible
Affordable	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	<u>1</u>	<u>1</u>	<u>1</u>	<u>700</u>	<u>1.5</u>	(\$1,278.75/ month)	_____	<input type="checkbox"/> # _____
	<u>1</u>	<u>2</u>	<u>1</u>	<u>740</u>	<u>1.5</u>	(\$1,461.25/ month)	_____	<input checked="" type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
Market	<u>2</u>	<u>2</u>	<u>1</u>	<u>803</u>	<u>1.5</u>	<u>\$1800 -</u> <u>\$2100</u>	_____	<input type="checkbox"/> # _____
	<u>2</u>	<u>2</u>	<u>1</u>	<u>1037</u>	<u>1.5</u>	<u>\$1800 -</u> <u>\$2100</u>	_____	<input type="checkbox"/> # _____
	<u>1</u>	<u>2</u>	<u>1</u>	<u>740</u>	<u>1.5</u>	<u>\$1800 -</u> <u>\$2100</u>	_____	<input type="checkbox"/> # _____
	<u>1</u>	<u>2</u>	<u>1</u>	<u>924</u>	<u>1.5</u>	<u>\$1800 -</u> <u>\$2100</u>	_____	<input type="checkbox"/> # _____
Other	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____

**VI. SITE INFORMATION**

1. Total Acreage 10,005 sf Total Buildable Acreage 3,200 sf
2. Describe the current and prior uses of the subject site: Currently, the property is vacant. The property had been a bicycle shop for many years. Historically, it had commercial space on the first floor and secondary residential use on the second and third floors.

Existing buildings on site? Yes  No   
If yes, describe plans for these buildings:

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3. Current Zoning Classification:  
Residential \_\_\_\_\_ (minimum lot size) \_\_\_\_\_  
Commercial B Industrial \_\_\_\_\_ Other \_\_\_\_\_
4. Does any portion of the site contain significant topographical features such as wetlands?  
Yes  No  If yes, how many acres are wetlands? \_\_\_\_\_  
If yes, attach map of site noting wetland areas.  
Is map attached?  Yes  No
5. Is the site located within a designated flood hazard area?  
Yes  No   
If yes, please attach a map of the site with flood plain designations.  
Is map attached?  Yes  No
6. Is the site or any building located on the site listed, nominated or eligible for listing on the National Register of Historic Places? Yes  No
7. Is the site within a Historic District? Yes  No   
If yes, describe the architectural, structural and landscape features of the area:  
\_\_\_\_\_  
\_\_\_\_\_
8. In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?  
Yes  No  If yes, please explain: \_\_\_\_\_

9.  Indicate which utilities are available to the site:

Public Sewer	<input checked="" type="checkbox"/>	Private Septic	<input type="checkbox"/>	Public Streets	<input checked="" type="checkbox"/>
Public Water	<input checked="" type="checkbox"/>	Private Wells	<input type="checkbox"/>	Private Ways	<input type="checkbox"/>
Natural Gas	<input checked="" type="checkbox"/>	Electricity	<input checked="" type="checkbox"/>		
On-site Sewer Treatment Facility	<input type="checkbox"/>				
Other	<input type="checkbox"/>	Explain:	_____		

10. Describe any known or suspected hazardous waste sites on or within a 1/2 mile radius of the project site. \_\_\_\_\_

11. Has a 21E hazardous waste assessment ever been done on this site? If so, attach a summary of the filing.  Yes  No

12. What waivers will be requested under the comprehensive permit? (1) Floor Area Ratio; and (2) limit on the number of residential units from two (2) to eight (8).

13. Describe the current status of site control and attach copies of relevant deeds or executed agreements.

- A.  Owned by Developer \_\_\_\_\_
- B.  Under Purchase and Sale Agreement \_\_\_\_\_
- C.  Under Option \_\_\_\_\_

Seller: The Montrose Foundation Inc. c/o The Montrose School Buyer: Medfield Holdings LLC

Is there an identity of interest between the Buyer and Seller? If yes, please explain: No.

Date of Agreement \_\_\_\_\_ Expiration Date \_\_\_\_\_

Extensions granted? Yes  No  Date of Extension \_\_\_\_\_

Purchase Price \$295,000.00

## VII. DESIGN AND CONSTRUCTION

### 1. Drawings

Please submit one set of drawings.

#### Cover sheet showing written tabulation of:

- Proposed buildings by design, ownership type, and size. Identify and describe affordable units and handicapped accessible units.
- Dwelling unit distribution by floor, size, and bedroom/bath number
- Square footage breakdown of commercial, residential, community, and other usage in the buildings
- Number of parking spaces

#### Site plan showing:

- Lot lines, streets, and existing buildings
- Proposed building footprint(s), parking (auto and bicycle), and general dimensions
- Zoning restrictions (i.e. setback requirements, easements, height restrictions, etc).
- Wetlands, contours, ledge, and other environmental constraints
- Identification of affordable units
- Identification of handicapped accessible units.
- Sidewalks and recreational paths
- Site improvements, including landscaping
- Flood plain (if applicable)

#### Utilities plan showing:

- Existing and proposed locations and types of sewage, water, drainage facilities, etc.

Graphic depiction of the design showing:

- Typical building plan
- Typical unit plan for each unit type with square footage tabulation
- Typical unit plan for each accessible unit type with square footage tabulation
- Elevation, section, perspective, or photograph
- Typical wall section

2. **Construction Information**

<b><u>Foundations</u></b>	# Mkt. Units	# Aff. Units	Attic	# Mkt. Units	# Aff. Units
Slab on Grade	_____	_____	Unfinished	X	_____
Crawl Space	_____	_____	Finished	_____	_____
Full Basement	X	_____	Other	_____	_____
<b><u>Exterior Finish</u></b>	# Mkt. Units	# Aff. Units	Parking	# Mkt. Units	# Aff. Units
Wood	_____	_____	Outdoor	X	_____
Vinyl	_____	_____	Covered	_____	_____
Brick	_____	_____	Garage	_____	_____
Fiber Cement	X	_____	Bicycle	_____	_____
Other	_____	_____			

**Heating System**

Fuel:  Oil  Gas  Electric  Other

Distribution method (air, water, steam, etc.): air

**Energy Efficient Materials**

Describe any energy efficient or sustainable materials used in construction:  
Development to be in compliance with the Massachusetts "Stretch Code" (780 CMR Appendix 115.AA).

**Modular Construction**

If modular construction will be used, explain here:  
Not included.

**Amenities**

Will all features and amenities be available to market buyers also be available to affordable buyers? If not, explain the differences.  
Yes.

**VIII. SURROUNDING AREA**

1. Describe the land uses in the surrounding neighborhood: Schools, residential, and business.

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2. What is the prevailing zoning in the surrounding neighborhood?  
Business with some residential.

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3. How does the project's proposed site plan and design relate to the existing development pattern(s) of the immediately surrounding area?

The Project fits in with the existing neighborhood as complementary residential rental housing.

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4. Describe and note distances to nearby amenities and services such as shopping, schools, parks and recreation, or municipal offices.

Walking distance.

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5. Explain how developing the site contributes to smart growth development in the area (e.g. mixed use, reuse, concentrated development).

Mixed use. Will complement residential business mix in close proximity to core downtown business district including Town Offices, churches, and library.

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6. Is the site located near public transit (bus, subway, commuter rail, etc.)? If so, indicate the type, distance to the nearest stop, and frequency of service.

No.

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**IX. FINANCING**

1. Attach a letter of interest from a construction lender.

Are there any public funds to be used for this project? If yes, indicate the source, amount, use and status of funds: No.

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Describe the form of financial surety to be used to secure the completion of cost certification for this project

Letter of credit, bond, or cash account in the amount of \$25,000.00.

## X. PROJECT FEASIBILITY

The section is for developers of home ownership projects. This section is not applicable as this project is for rental units.

Developers of multi-family rental projects must use the One Stop Application at <http://www.mhic.com> and complete Section 3 Sources and Uses and Section 4 Pro Forma.

### Ownership Pro Forma

	Total Costs	Per Unit	Per Sq. Ft.	% of Total
(a) Site Acquisition	\$ _____	\$ _____	\$ _____	\$ _____
<b>Hard Costs:</b>	\$ _____	\$ _____	\$ _____	\$ _____
Earth Work	\$ _____	\$ _____	\$ _____	\$ _____
Site Utilities	\$ _____	\$ _____	\$ _____	\$ _____
Roads & Walks	\$ _____	\$ _____	\$ _____	\$ _____
Site Improvement	\$ _____	\$ _____	\$ _____	\$ _____
Lawns & Planting	\$ _____	\$ _____	\$ _____	\$ _____
Demolition	\$ _____	\$ _____	\$ _____	\$ _____
Unusual Site Conditions	\$ _____	\$ _____	\$ _____	\$ _____
(b) Total Site Work	\$ _____	\$ _____	\$ _____	\$ _____
Concrete	\$ _____	\$ _____	\$ _____	\$ _____
Masonry	\$ _____	\$ _____	\$ _____	\$ _____
Metals	\$ _____	\$ _____	\$ _____	\$ _____
Carpentry	\$ _____	\$ _____	\$ _____	\$ _____
Roofing & Insulation	\$ _____	\$ _____	\$ _____	\$ _____
Doors & Windows	\$ _____	\$ _____	\$ _____	\$ _____
Interior Finishes	\$ _____	\$ _____	\$ _____	\$ _____
Cabinets & Appliances	\$ _____	\$ _____	\$ _____	\$ _____
Plumbing & HVAC	\$ _____	\$ _____	\$ _____	\$ _____
Electrical	\$ _____	\$ _____	\$ _____	\$ _____
(c) Total Construction	\$ _____	\$ _____	\$ _____	\$ _____
(d) General Conditions	\$ _____	\$ _____	\$ _____	\$ _____
<b>(e) Subtotal Hard Costs (a+b+c+d)</b>	\$ _____	\$ _____	\$ _____	\$ _____
(f) Contingency	\$ _____	\$ _____	\$ _____	\$ _____
<b>(g) Total Hard Costs (e+f)</b>	\$ _____	\$ _____	\$ _____	\$ _____

<b>Soft Costs:</b>	\$	\$	\$	\$
Permits/Surveys	\$	\$	\$	\$
Architectural	\$	\$	\$	\$
Engineering	\$	\$	\$	\$
Legal	\$	\$	\$	\$
Bond Premium	\$	\$	\$	\$
Real Estate Taxes	\$	\$	\$	\$
Insurance	\$	\$	\$	\$
Security	\$	\$	\$	\$
Developer's Overhead	\$	\$	\$	\$
General Contractor's Overhead	\$	\$	\$	\$
Construction Manager	\$	\$	\$	\$
Property Manager	\$	\$	\$	\$
Construction Interest	\$	\$	\$	\$
Financing/Application Fees	\$	\$	\$	\$
Utilities	\$	\$	\$	\$
Maintenance (unsold units)	\$	\$	\$	\$
Accounting	\$	\$	\$	\$
Marketing	\$	\$	\$	\$
<b>(h) Subtotal Soft Costs</b>	\$	\$	\$	\$
<b>(i) Contingency</b>	\$	\$	\$	\$
<b>(j) Total Soft Costs (h+i)</b>	\$	\$	\$	\$
<b>(k) Total Development Costs (g+j)</b>	\$	\$	\$	\$

Profit Analysis (should conform to the pro forma)

Sources:

Affordable projected sales \$ \_\_\_\_\_

Market sales \$ \_\_\_\_\_

Public grants \$ \_\_\_\_\_

**(A) Total Sources** \$ \_\_\_\_\_

Uses:

Construction Contract Amount \$ \_\_\_\_\_

**(B) Total Development Costs** \$ \_\_\_\_\_

Profit:

**(C) Total Profit (A-B)** \$ \_\_\_\_\_

**(D) Percentage Profit (C/B)** \$ \_\_\_\_\_

Cost Analysis (should conform to the pro forma)

Total Gross Building Square Footage \_\_\_\_\_

Residential Construction Cost per Sq. Ft. \$ \_\_\_\_\_

Total Hard Costs per Sq. Ft. \$ \_\_\_\_\_

Total Development Costs per Sq. Ft. \$ \_\_\_\_\_

Sales per Sq. Ft. \$ \_\_\_\_\_

(do not include proceeds from public grants)

**XI. DEVELOPMENT SCHEDULE**

Complete the chart below by providing the appropriate month and year. Fill in only as many columns as there are phases. If there will be more than three phases, add columns as needed.

	Phase 1	Phase 2	Phase 3	Total
Number of affordable units	<u>2</u>	_____	_____	_____
Number of market units	<u>6</u>	_____	_____	_____
Total by phase	<u>8</u>	_____	_____	_____

Please complete the following chart with the appropriate projected dates:

	Phase 1	Phase 2	Phase 3	Total
All permits granted	<u>February 2017</u>	_____	_____	_____
Construction start	<u>March 2017</u>	_____	_____	_____
Marketing start – affordable units	<u>May 2017</u>	_____	_____	_____
Marketing start – market units	<u>May 2017</u>	_____	_____	_____
Construction completed	<u>October 2017</u>	_____	_____	_____
Initial occupancy	<u>November 2017</u>	_____	_____	_____

## **XII.    MARKETING OUTREACH AND LOTTERY**

Affirmative Fair Housing Marketing Plan:

Please submit your Affirmative Fair Housing Marketing Plan (AFHMP), prepared in accordance with Section III of the 40B Guidelines, and a description of the lottery process that will be used for this project. This shall describe:

- Information materials for applicants that will be used that provides key project information;
- Eligibility requirements;
- Lottery and resident selection procedure;
- Any preference system being used (Note: if local preference is proposed for this project, demonstration of the need for local preference must be demonstrated and accepted by DHCD);
- Measures to ensure affirmative fair marketing including outreach methods;
- Application materials that will be used; and
- Lottery Agent.

### XIII. CHECKLIST OF ATTACHMENTS

The following documentation must accompany each application:

1.  Letter of support signed by Chief Elected Officer of municipality
2.  Letter of support from local housing partnership (if applicable)
3.  Signed letter of interest from a construction lender
4.  Map of community showing location of site
5.  Check payable to DHCD
6.  Rationale for calculation of affordable purchase prices or rents (see Instructions)
7.  Copy of site control documentation (deed or Purchase & Sale or option agreement)
8.  Last arms length transaction or current appraisal under by-right zoning
9.  21E summary (if applicable)
10.  Photographs of existing building(s) and/or site
11.  Site Plan showing location of affordable units
12.  Sample floor plans and/or sample elevations
13.  Proposed marketing and lottery materials

**TEAM EXPERIENCE - DEVELOPER/CONTRACTOR QUALIFICATIONS:**

Developer/Contractor Resume of Medfield Holdings LLC and Medfield Holdings LLC  
Certificate of Organization



## **MEDFIELD HOLDINGS LLC**

*Builder -- Developer*

508-359-8711

**Robert J. Borrelli**

Box #377, Medfield MA 02052

### **PROFESSIONAL EXPERIENCE**

#### **SELF-EMPLOYED**

**MEDFIELD HOLDINGS LLC, Medfield MA**

#### **Real Estate Development & Construction Project Management**

1983 - present

- A results-driven real estate developer and construction project manager with over 31 years of expertise.
- Prolific construction manager/developer of over 200 residential homes in Medfield, Norfolk, Bellingham and Norwood Massachusetts.
- The many construction projects have included; new residential homes, custom homes, single family homes, multi-family homes, condominiums, antique restorations, commercial buildings and sewerage treatment facilities.
- Manages all aspects of home construction including; land purchases, design plan, acquiring permits, submitting bids, creating a budget, payroll, developing construction scheduling, overseeing field operations, road development and maintaining quality control.
- History of overseeing projects to successful completion through effective hiring and management of subcontracting professionals.
- Collaborate on marketing with real estate companies to make houses presentable for home showings.
- Continually strives to produce high quality homes while adhering to a tight schedule.
- Advanced understanding of client needs with diligent attention to detail results in high levels of client satisfaction.
- Active consultant on real estate land acquisitions for construction purposes.

### **SELECTED ACCOMPLISHMENTS**

- 2013. **Fairbanks/Chenery/Hale House, 34 and 77 South Street in Medfield MA.** Medfield Preservation Award for "restoration and adaptive reuse" of the 1811 Fairbanks/Chenery/Hale house.
- 2009. **The Goddard School, 90 North Meadows Rd, Medfield, MA.** Construction manager/developer for privately owned preschool following controlled construction

guidelines.

- 2006. **Medfield Town Center Condominiums, Meetinghouse Road, Norfolk MA.** Construction manager/developer for 33, over 55 Condominium Units in Phase I of a 40-B Housing Project. Included 16, over 55 units, 17 marketable units and a 30,000 gallon per day sewerage treatment facility.
- 2004. **Cantebury Lane, Norfolk MA.** Construction manager/developer for 16, residential homes and road development on what was formerly known as Sweet Land Farm.
- 1996. **Newport Lane, Medfield MA.** Construction manager/developer of 11 residential homes and road development.
- 1993. **Tubwreck Drive, Medfield MA.** Construction manager/developer of 21 residential homes and road development.

**PROFESSIONAL DEVELOPMENT/EDUCATION:**

- 1979. Needham High School Graduate
- 1968 – 1983. A second generation builder, who began this trade as a young child working under the direction of his father and two uncles. This family operation, known as the Borrelli Bros., run by Pasquale, Samuel and Paul Borrelli, built homes in Needham and surrounding towns.

**CERTIFICATIONS AND LICENSES:**

- Construction Supervisor License
- Remodeling License
- Hydraulic License
- OSHA Certified



**The Commonwealth of Massachusetts  
William Francis Galvin**

Minimum Fee: \$500.00

Secretary of the Commonwealth, Corporations Division  
One Ashburton Place, 17th floor  
Boston, MA 02108-1512  
Telephone: (617) 727-9640

**Certificate of Organization**  
(General Laws, Chapter )

Identification Number: 001199117

1. The exact name of the limited liability company is: MEDFIELD HOLDINGS LLC

2a. Location of its principal office:

No. and Street: 9 BOILING SPRING AVENUE  
City or Town: MEDFIELD State: MA Zip: 02052 Country: USA

2b. Street address of the office in the Commonwealth at which the records will be maintained:

No. and Street: 9 BOILING SPRING AVENUE  
City or Town: MEDFIELD State: MA Zip: 02052 Country: USA

3. The general character of business, and if the limited liability company is organized to render professional service, the service to be rendered:

THE COMPANY'S BUSINESS IS TO INVEST AND REINVEST IN, CONSTRUCT, PURCHASE, IMPROVE, DEVELOP, BORROW MONEY AND GRANT MORTGAGES AND OTHER LIENS WITH RESPECT TO, HOLD AND MANAGE, SELL AND LEASE (IN WHOLE OR INTERESTS IN), AND GENERALLY DEAL IN AND WITH REAL PROPERTY AND TO ENGAGE IN ANY OTHER BUSINESS OR ACTIVITIES FOR WHICH LIMITED LIABILITY COMPANIES MAY BE FORMED UNDER THE ACT.

4. The latest date of dissolution, if specified:

5. Name and address of the Resident Agent:

Name: ROBERT J. BORRELLI  
No. and Street: 9 BOILING SPRING AVENUE  
City or Town: MEDFIELD State: MA Zip: 02052 Country: USA

I, ROBERT J. BORRELLI resident agent of the above limited liability company, consent to my appointment as the resident agent of the above limited liability company pursuant to G. L. Chapter 156C Section 12.

6. The name and business address of each manager, if any:

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
MANAGER	ROBERT J. BORRELLI	9 BOILING SPRING AVENUE MEDFIELD, MA 02052 USA

7. The name and business address of the person(s) in addition to the manager(s), authorized to execute documents to be filed with the Corporations Division, and at least one person shall be named if there are no managers.

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code

**8. The name and business address of the person(s) authorized to execute, acknowledge, deliver and record any recordable instrument purporting to affect an interest in real property:**

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
REAL PROPERTY	ROBERT J. BORRELLI	9 BOILING SPRING AVENUE MEDFIELD, MA 02052 USA

**9. Additional matters:**

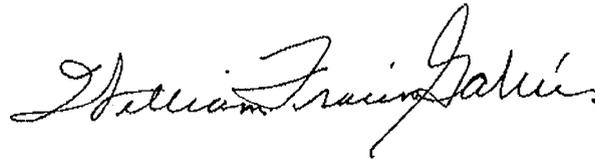
**SIGNED UNDER THE PENALTIES OF PERJURY, this 30 Day of November, 2015,**  
ROBERT J. BORRELLI  
*(The certificate must be signed by the person forming the LLC.)*

THE COMMONWEALTH OF MASSACHUSETTS

I hereby certify that, upon examination of this document, duly submitted to me, it appears that the provisions of the General Laws relative to corporations have been complied with, and I hereby approve said articles; and the filing fee having been paid, said articles are

deemed to have been filed with me on:

November 30, 2015 09:08 AM

A handwritten signature in cursive script that reads "William Francis Galvin". The signature is written in dark ink and is centered on the page.

WILLIAM FRANCIS GALVIN

*Secretary of the Commonwealth*

**Section X. PROJECT FEASIBILITY:**

One Stop Application Section 3 Sources; and Uses and  
One Stop Application Section 4 Pro Forma.

## Section 3 SOURCES AND USES OF FUNDS

### Sources of Funds

**Private Equity:**

81.	Developer's Cash Equity		\$59,000
82.	Tax Credit Equity (net amount) <small>(See line 360, Section 3, page 18.)</small>		\$
83.	Developer's Fee/Overhead, Contributed or Loaned		\$
84.	Other Source:		\$

*Optional user calculations*


**Public Equity:**

85.	HOME Funds, as Grant		\$
86.	Grant:		\$
87.	Grant:		\$
88.	<b>Total Public Equity</b>		<b>\$0</b>

**Subordinate Debt (see definition):**

		Amount	Rate	Amortiz.	Term
89.	Home Funds-DHCD, as Subordinate Debt	\$0	%	yrs.	yrs.
	Source:				
90.	Home Funds-Local, as Subordinate Debt	\$0	%	yrs.	yrs.
	Source:				
91.	Subordinate Debt	\$0	%	yrs.	yrs.
	Source:				
92.	Subordinate Debt	\$0	%	yrs.	yrs.
	Source:				
93.	Subordinate Debt	\$0	%	yrs.	yrs.
	Source:				
94.	<b>Total Subordinate Debt</b>	<b>\$0</b>			

**Permanent Debt (Senior):**

		Amount	Rate	Override	Amortiz.	Term	MIP
95.	MHFA MHFA Program 1	\$	%		yrs.	yrs.	%
96.	MHFA MHFA Program 2	\$	%		yrs.	yrs.	%
97.	MHP Fund Permanent Loan	\$	%		yrs.	yrs.	%
98.	Other Permanent Senior Mortgage		6.50%		yrs.	yrs. 1.5	%
	Source:						
99.	Other Permanent Senior Mortgage		6.50%		yrs.	yrs. 1.5	%
	Source:						
100.	<b>Total Permanent Senior Debt</b>	<b>\$1,236,000</b>					
101.	<b>Total Permanent Sources</b>	<b>\$1,295,000</b>					

**Construction Period Financing:**

		Amount	Rate	Term
102.	Construction Loan	\$1,000,000	5.50%	mos. 18
	Source: Needham Bank			
	Repaid at: (event)			
103.	Other Interim Loan	\$236,000	6.50%	mos. 18
	Source: Initial Purchase - Needham Bank			
	Repaid at: (event)			
104.	Syndication Bridge Loan	\$0	%	mos.
	Source:			
	Repaid at: (event)			

0 #VALUE! #VALUE!

Section 3. Sources and Uses of Funds

### Uses of Funds

The Contractor certifies that, to the best of their knowledge, the construction estimates, and trade-item breakdown on this page are complete and accurate.

**Direct Construction:**

105.	Who prepared the estimates?	Robert Borrelli	
		<small>Name</small>	<small>Signature</small>
106.	Basis for estimates?	Construction Experience - Needham Bank	

	DV	Trade Item	Amount	Description
107.	3	Foundation	\$50,000	
108.	4	Frame	\$200,000	
109.	5	Metals		
110.	6	Rough Carpentry		
111.	6	Finish Carpentry	\$70,000	Standard Finish & Doors
112.	7	Waterproofing		
113.	7	Insulation	\$20,000	
114.	7	Roofing	\$50,000	
115.	7	Sheet Metal and Flashing		
116.	7	Exterior Siding	\$60,000	
117.	8	Doors & Windows	\$60,000	
118.	8	Windows		
119.	8	Glass		

120.	9	Lath & Plaster	
121.	9	Drywall	\$50,000
122.	9	Tile Work	
123.	9	Acoustical	
124.	9	Finish Floors	\$30,000
125.	9	Resilient Flooring	
126.	9	Carpet	
127.	9	Interior Paint	\$20,000
128.	10	Exterior Paint	\$10,000
129.	11	Finish Grade	\$10,000
130.	11	Cabinets	\$50,000
131.	11	Appliances	\$10,000
132.	12	Finish Plumbing	\$20,000
133.	13	Finish Electric	\$20,000
134.	13	Finish Heating	\$20,000
135.	14	Elevators or Conveying Syst.	
136.	15	Plumbing & Hot Water	\$40,000
137.	15	Heat & Ventilation	\$40,000
138.	15	Sewer/Septic	\$20,000
139.	15	Water/Well	\$20,000
140.	16	Electrical	\$20,000
141.		Accessory Buildings	
142.		Other/misc	
143.		<b>Subtotal Structural</b>	<b>\$890,000</b>
144.	2	Earth Work	
145.	2	Site Utilities	
146.	2	Paving Lot	\$10,000
147.	2	Site Improvement	
148.	2	Lawns & Planting	\$30,000
149.	2	Geotechnical Conditions	
150.	2	Environmental Remediation	
151.	2	Demolition	\$50,000
152.	2	Complete Work	\$20,000
153.		<b>Subtotal Site Work</b>	<b>\$110,000</b>
154.		<b>Total Improvements</b>	<b>\$1,000,000</b>
155.	1	General Conditions	\$2,000
156.		<b>Subtotal</b>	<b>\$1,002,000</b>
157.	1	Builders Overhead	\$65,130
158.	1	Builders Profit	
159.		<b>TOTAL</b>	<b>\$1,067,130</b>

160 Total Cost/square foot:  Residential Cost/s.f.:

**Development Budget:**

	Total	Residential	Commercial	Comments
161. Acquisition: Land	\$0			
162. Acquisition: Building	\$0			
163. Acquisition Subtotal	\$0	\$0	\$0	
164. Direct Construction Budget	\$1,067,130	\$1,067,130		(from line 159)
165. Construction Contingency	\$53,357	\$53,357		5.0% of construction
166. Subtotal: Construction	\$1,120,487	\$1,120,487	\$0	

**General Development Costs:**

167. Architecture & Engineering	\$30,000	\$30,000		
168. Survey and Permits	\$30,000	\$30,000		
169. Clerk of the Works	\$0			
170. Environmental Engineer	\$0			
171. Bond Premium	\$0			
172. Legal	\$10,000	\$10,000		
173. Title and Recording	\$0			
174. Accounting & Cost Cert.	\$4,000	\$4,000		
175. Marketing and Rent Up	\$0			
176. Real Estate Taxes	\$6,000	\$6,000		
177. Insurance	\$5,000	\$5,000		
178. Relocation	\$0			
179. Appraisal	\$2,500	\$2,500		
180. Security	\$0			
181. Construction Loan Interest	\$5,500	\$5,500		
182. Inspecting Engineer	\$0			
183. Fees to:	\$0			
184. Fees to:	\$0			
185. MIP	\$0			
186. Credit Enhancement Fees	\$0			
187. Letter of Credit Fees	\$0			
188. Other Financing Fees	\$0			
189. Development Consultant	\$0			
190. Other:	\$0			
191. Other:	\$0			

192 . Soft Cost Contingency	\$60,674	\$60,674		5.0% of soft costs
193 . Subtotal: Gen. Dev.	\$153,674	\$153,674	\$0	
194 . Subtotal: Acquis., Const., and Gen. Dev.	\$1,274,161	\$1,274,161	\$0	
195 . Capitalized Reserves	\$0			
196 . Developer Overhead	\$0			
197 . Developer Fee	\$0			
198 . Total Development Cost	\$1,274,161	\$1,274,161	\$0	TDC per unit #DIV/0!
199 . TDC, Net	\$1,274,161	\$1,274,161	\$0	TDC, Net per unit #DIV/0!

Additional Detail on Development Pro-Forma:

200 . Gross Syndication Investment	
Off-Budget Costs:	
Syndication Costs:	
201 . Syndication Legal	
202 . Syndication Fees	
203 . Syndication Consultants	
204 . Bridge Financing Costs	
205 . Investor Servicing (capitalized)	
206 . Other Syndication Expenses	
207 . Total Syndication Expense	\$0
208 . Current Reserve Balance	
Reserves (capitalized):	
209 . Development Reserves	
210 . Initial Rent-Up Reserves	
211 . Operating Reserves	
212 . Net Worth Account	
213 . Other Capitalized Reserves	
214 . Subtotal: Capitalized Reserves	\$0
215 . Letter of Credit Requirements	
216 . Total of the Above	\$0

Check: Line 214 is the same as line 195.

Please Answer The Following	Dev. Reserves	Initial Rent-Up	Op. Reserves	Net Worth	Other	Letter of Credit
Who requires the reserves?						
Who administers the reserves?						
When and how are they used?						
Under what circumstances can they be released?						

Unit Sales (For Sale Projects Only):

217 . Gross Sales From Units	\$
218 . Cost of Sales (Commissions, etc.)	\$
219 . Net Receipt from Sales	\$0

Debt Service Requirements:

220 . Minimum Debt Service Coverage	
221 . Is this Project subject to HUD Subsidy Layering Review?	No

Optional user comments

## Section 4 OPERATING PRO-FORMA

Operating Income				
Rent Schedule:	Contract Rent	Utility Allowance	Total Gross Rent	No. of Units
<b>222. Low-Income (Rental Assisted):</b>				
SRO				
0 bedroom			\$0	0
1 bedroom	1,278.75		\$1,279	0
2 bedrooms	1,643.75		\$1,644	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
<b>223. Low-Income (below 50%):</b>				
SRO				
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
<b>224. Low-Income (below 60%):</b>				
SRO				
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
<b>225. Other Income (User-defined)</b>				
SRO				
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
<b>226. Market Rate (unrestricted occupancy):</b>				
SRO				
0 bedroom				0
1 bedroom	\$1,800			0
2 bedrooms	\$2,100			0
3 bedrooms				0
4 bedrooms				0
<b>Commercial Income:</b>				
227. Square Feet:	0	@	(average) /square foot =	\$0
<b>Parking Income:</b>				
228. Spaces:	0	@	(average) /month x 12 =	\$0

Section 4. Operating Pro-Forma

#VALUE!

#VALUE!

Page 15

Other Operating Income Assumptions:				
229. Laundry Income (annual):	Optional user calculations			
230. Other Income: a.				
b.				
c.				
d.				
e.				
f.				
<b>Vacancy Allowance:</b>				
231. Low-Income (Rental Assistance)				
232. Low-Income (below 50%)				
233. Low-Income (below 60%)				
234. Other Income (User-defined)				
235. Market Rate				
236. Commercial				
<b>Trending Assumptions for Rents:</b>				
237. Low-Income (Rental Assistance)	Year 2	Year 3	Years 4-5	Years 6-20
238. Low-Income (below 50%)	%	%	%	%
239. Low-Income (below 60%)	%	%	%	%
240. Other Income (User-defined)	%	%	%	%
241. Market Rate	%	%	%	%
242. Commercial Space Rental	%	%	%	%
243. Laundry Income	%	%	%	%
244. a. Other Income	%	%	%	%
b. Other Income	%	%	%	%
c. Other Income	%	%	%	%
d. Other Income	%	%	%	%
e. Other Income	%	%	%	%
f. Other Income	%	%	%	%
<b>Operating Subsidy and Capitalized Operating Reserves:</b>				
245. Subsidy Source I				
246. Subsidy Source II				
247. Capitalized Operating Reserve Amount:	\$			Source:
248. Yearly Draws on Subsidies and Reserves:	Subsidy Source I	Subsidy Source II	Draw on Oper. Reserve	

Year 1	\$	\$	\$
Year 2	\$	\$	\$
Year 3	\$	\$	\$
Year 4	\$	\$	\$
Year 5	\$	\$	\$
Year 6	\$	\$	\$
Year 7	\$	\$	\$
Year 8	\$	\$	\$
Year 9	\$	\$	\$
Year 10	\$	\$	\$
Year 11	\$	\$	\$
Year 12	\$	\$	\$
Year 13	\$	\$	\$
Year 14	\$	\$	\$
Year 15	\$	\$	\$
Year 16	\$	\$	\$
Year 17	\$	\$	\$
Year 18	\$	\$	\$
Year 19	\$	\$	\$
Year 20	\$	\$	\$
Year 21	\$	\$	\$

249. Annual Operating Income (year 1) \$0

Annual Operating Exp.:	Operating Expenses			
	Total	Residential	Commercial	Comments
250. Management Fee	\$1,700	\$1,700		5% of Total
251. Payroll, Administrative	\$0			
252. Payroll Taxes & Benefits, Admin.	\$0			
253. Legal	\$1,000	\$1,000		
254. Audit	\$1,000	\$1,000		
255. Marketing	\$1,000	\$1,000		
256. Telephone	\$0			
257. Office Supplies	\$0			
258. Accounting & Data Processing	\$0			
259. Investor Servicing	\$0			
260. DHCD Monitoring Fee	\$1,000	\$1,000		
261. Other:	\$0			
262. Other:	\$0			
263. Subtotal: Administrative	\$4,000	\$4,000	\$0	
264. Payroll, Maintenance	\$0			
265. Payroll Taxes & Benefits, Admin.	\$0			
266. Janitorial Materials	\$0			
267. Landscaping	\$0			
268. Decorating (inter. only)	\$0			
269. Repairs (inter. & ext.)	\$1,000	\$1,000		
270. Elevator Maintenance	\$0			
271. Trash Removal	\$3,000	\$3,000		
272. Snow Removal	\$5,000	\$5,000		
273. Extermination	\$500	\$500		
274. Recreation	\$0			
275. Other:	\$0			
276. Subtotal: Maintenance	\$9,500	\$9,500	\$0	
277. Resident Services	\$0			
278. Security	\$0			
279. Electricity	\$1,000	\$1,000		
280. Natural Gas	\$1,000	\$1,000		
281. Oil	\$0			
282. Water & Sewer	\$1,000	\$1,000		
283. Subtotal: Utilities	\$3,000	\$3,000	\$0	
284. Replacement Reserve	\$0			
285. Operating Reserve	\$0			
286. Real Estate Taxes	\$16,000	\$16,000		
287. Other Taxes	\$0			
288. Insurance	\$1,500	\$1,500		
289. MIP	\$0	\$0		
290. Other:	\$0			
291. Subtotal: Taxes, Insurance	\$17,500	\$17,500	\$0	
292. TOTAL EXPENSES	\$35,700	\$35,700	\$0	

Other Operating Expense Assumptions	Trending Assumptions for Expenses				
	Year 2	Year 3	Years 4-5	Years 6-20	
293. Sewer & Water	2.5%	2.5%	2.5%	2.5%	
294. Real Estate Taxes	2.5%	2.5%	2.5%	2.5%	
295. All Other Operating Expenses	5.0%	5.0%	5.0%	5.0%	

Reserve Requirements:	
296. Replacement Reserve Requirement	per unit per year
297. Operating Reserve Requirement	per unit per year

Debt Service:	
298. MHFA	MHFA Program 1
299. MHFA	MHFA Program 2

300	MHP Fund Permanent Loan	N/A
301	Other Permanent Senior Mortgage	N/A
	Source:	N/A
302	Other Permanent Senior Mortgage	N/A
	Source:	N/A
303	Total Debt Service (Annual)	\$0
304	Net Operating Income	(\$35,700) (in year one)
305	Debt Service Coverage	N/A (in year one)

**Affordability: Income Limits and Maximum Allowable Rents**

306. County  MSA

This MSA does not match the county you have chosen

307. Maximum Allowed Rents, by Income, by Unit Size: Income Limits last updated on 3/12/12

SRO	Maximum Income			Maximum Rent (calculated from HUD income data)		
	50%	60%	0%	50%	60%	0%
0 bedroom	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
1 bedroom	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
2 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
3 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
4 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!

Area median income for a family of four: #VALUE!

308. H.U.D. "Fair Market Rents" (Maximum):

0 bedroom	#VALUE!
1 bedroom	#VALUE!
2 bedrooms	#VALUE!
3 bedrooms	#VALUE!
4 bedrooms	#VALUE!
5 bedrooms	#VALUE!

FMR Information last updated on 3/12/12

**Section 4. Operating Pro-Forma**

Operations before this transaction:				Operations after:			
Type	Number	Current Rent	Annualized Income	Number	Future Rents	Market Rent GPR	
309. SRO	0	0	0	0	0	0	0
310. 0 bedroom	0	0	0	0	0	0	0
311. 1 bedroom	0	0	0	0	0	0	0
312. 2 bedrooms	0	0	0	0	0	0	0
313. 3 bedrooms	0	0	0	0	0	0	0
314. 4 bedrooms	0	0	0	0	0	0	0
315. Gross Potential Rental Income			0				0
316. Vacancy		0%	0	Vacancy	%		0
317. Other Income			0	Other Income			0
318. Effective Gross Income			0	Effective Gross Income			0
Operating Expenses				Year	Reason	% Change	Year
319. Management fee			0				1,700
320. Administration			0				4,000
321. Maintenance/Operations			0				9,500
322. Resident Services			0				0
323. Security			0				0
324. Utilities			0				3,000
325. Replacement Reserve			0				0
326. Operating Reserve			0				0
327. Real Estate Taxes			0				16,000
328. Insurance			0				1,500
329. Total Expenses			0				35,700
330. Net Operating Income			0	Net Operating Income			-35,700

331. Transaction Description:

*Optional user calculations*


**Section XII: CHECKLIST OF ATTACHMENTS:**

**Attachment #1:** Letter of support signed by Medfield Board of Selectmen



# TOWN OF MEDFIELD

*Office of*

## BOARD OF SELECTMEN

TOWN HOUSE, 459 MAIN STREET  
MEDFIELD, MASSACHUSETTS 02052-0315

(508) 359-8505

MICHAEL J. SULLIVAN  
*Town Administrator*

January 31, 2017

Ms. Alana Murphy  
Department of Housing and Community Development  
100 Cambridge Street  
Boston, MA 02202

Dear Ms. Murphy,

This letter is to confirm the Medfield Board of Selectmen are in full support of the proposed eight (8) unit affordable housing rental development which was submitted to your agency by Medfield Holdings, LLC as part of the Local Initiative Program.

The Town of Medfield received approval for the Affordable Housing Production Plan in November, 2016 and is actively pursuing projects that will provide additional affordable housing opportunities for our residents. The Town has two other LIP projects, Allendale and Turtlebrook development both of which are home ownership opportunities. The Town feels this rental project provides an affordable housing alternative to home ownership. It will serve to fill a gap in our affordable housing offerings. The project also renovates a historic structure, the 1850 Jacob Cushman House, in the downtown area and will further contribute to the ongoing revitalization of our downtown.

The Town has met extensively with the developer of the project and the Town has assisted in the development of the marketing plan for the rental project. The Town has recently hired an Affordable Housing Specialist who will work with the developers in bringing this project to fruition.

Sincerely,

Mark Fisher

Chair, Medfield Board of Selectmen

**Section XII: CHECKLIST OF ATTACHMENTS:**

**Attachment #3:** Signed letter of interest from construction lender (Needham Bank)



November 15, 2016

Mr. Michael Sullivan, Town Administrator  
Town of Medfield  
Town House  
459 Main Street  
Medfield, MA 02056

Re: 67 North Street, Medfield

Dear Sir or Madame:

Pursuant to the request of Bob Borrelli, I am writing to confirm that Needham Bank would welcome a financing request from him for the purchase and development of 67 North Street in Medfield, MA

Bob is a valued customer of Needham Bank and we have known him for many years. Over that time, we have financed many residential/commercial construction projects for him and would look forward to continuing our relationship with the acquisition of this property.

Please note that any financing request would be subject to the bank's normal underwriting and lending policies as well as the requisite signatures for approval.

Should you need anything additional, do not hesitate to contact me directly at 781-474-5948.

Sincerely,

A handwritten signature in cursive script that reads "Larry Pitman".

Larry Pitman

Senior Vice President/Commercial Loan Officer

**Section XII: CHECKLIST OF ATTACHMENTS:**

**Attachment #4:** Map of community showing location of site



### **XIII. CHECKLIST OF ATTACHMENTS**

#### **#6: Rationale for calculation of affordable purchase prices or rents**

Recognizing that basic needs consume a higher fraction of income for lower income households, the federal government (HUD) uses a definition of affordability that applies specifically to households with incomes at or below 80% of the area median family income<sup>1</sup> adjusted for household size. It currently calls housing affordable if housing for that income group costs no more than 30% of the household's income.

Based upon the US Department of HUD Home Income Limits (attached):

Low income for the Boston-Cambridge-Quincy, MA area is \$51,150 for a 1 Person household  
Low income for the Boston-Cambridge-Quincy, MA area is \$58,450 for a 2 Person household  
Low income for the Boston-Cambridge-Quincy, MA area is \$65,750 for a 3 Person household  
Low income for the Boston-Cambridge-Quincy, MA area is \$73,050 for a 4 Person household

30% of \$51,150 is an annual rent of \$15,345 (\$1,278.75/month)

30% of \$58,450 is an annual rent of \$17,535 (\$1,461.25/month)

30% of \$65,750 is an annual rent of \$19,725 (\$1,643.75/month)

30% of \$73,050 is an annual rent of \$21,915 (\$1,826.25/month)

U.S. DEPARTMENT OF HUD 06/22/2016  
 STATE:MASSACHUSETTS

PROGRAM	2016 ADJUSTED HOME INCOME LIMITS							
	1 PERSON	2 PERSON	3 PERSON	4 PERSON	5 PERSON	6 PERSON	7 PERSON	8 PERSON
<b>Barnstable Town, MA MSA</b>								
30% LIMITS	17850	20400	22950	25450	27500	29550	31600	33600
VERY LOW INCOME	29750	34000	38250	42450	45850	49250	52650	56050
60% LIMITS	35700	40800	45900	50940	55020	59100	63180	67260
LOW INCOME	47550	54350	61150	67900	73350	78800	84200	89650
<b>Boston-Cambridge-Quincy, MA-NH HUD Metro FM</b>								
30% LIMITS	20650	23600	26550	29450	31850	34200	36550	38900
VERY LOW INCOME	34350	39250	44150	49050	53000	56900	60850	64750
60% LIMITS	41220	47100	52980	58860	63600	68280	73020	77700
LOW INCOME	51150	58450	65750	73050	78900	84750	90600	96450
<b>Brockton, MA HUD Metro FMR Area</b>								
30% LIMITS	18350	20950	23550	26150	28250	30350	32450	34550
VERY LOW INCOME	30500	34850	39200	43550	47050	50550	54050	57500
60% LIMITS	36600	41820	47040	52260	56460	60660	64860	69000
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
<b>Lawrence, MA-NH HUD Metro FMR Area</b>								
30% LIMITS	17700	20200	22750	25250	27300	29300	31350	33350
VERY LOW INCOME	29450	33650	37850	42050	45450	48800	52150	55550
60% LIMITS	35340	40380	45420	50460	54540	58560	62580	66660
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
<b>Lowell, MA HUD Metro FMR Area</b>								
30% LIMITS	19150	21900	24650	27350	29550	31750	33950	36150
VERY LOW INCOME	31950	36500	41050	45600	49250	52900	56550	60200
60% LIMITS	38340	43800	49260	54720	59100	63480	67860	72240
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
<b>Pittsfield, MA HUD Metro FMR Area</b>								
30% LIMITS	17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME	29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS	34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
<b>Berkshire County, MA (part) HUD Metro FMR A</b>								
30% LIMITS	17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME	29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS	34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750

PROGRAM	2016 ADJUSTED HOME INCOME LIMITS							
	1 PERSON	2 PERSON	3 PERSON	4 PERSON	5 PERSON	6 PERSON	7 PERSON	8 PERSON
Providence-Fall River, RI-MA HUD Metro FMR								
30% LIMITS	15300	17500	19700	21850	23600	25350	27100	28850
VERY LOW INCOME	25500	29150	32800	36400	39350	42250	45150	48050
60% LIMITS	30600	34980	39360	43680	47220	50700	54180	57660
LOW INCOME	40800	46600	52450	58250	62950	67600	72250	76900
Taunton-Mansfield-Norton, MA HUD Metro FMR								
30% LIMITS	17700	20200	22750	25250	27300	29300	31350	33350
VERY LOW INCOME	29500	33700	37900	42100	45500	48850	52250	55600
60% LIMITS	35400	40440	45480	50520	54600	58620	62700	66720
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
Easton-Raynham, MA HUD Metro FMR Area								
30% LIMITS	22100	25250	28400	31550	34100	36600	39150	41650
VERY LOW INCOME	36800	42050	47300	52550	56800	61000	65200	69400
60% LIMITS	44160	50460	56760	63060	68160	73200	78240	83280
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
New Bedford, MA HUD Metro FMR Area								
30% LIMITS	12400	14150	15900	17650	19100	20500	21900	23300
VERY LOW INCOME	20650	23600	26550	29450	31850	34200	36550	38900
60% LIMITS	24780	28320	31860	35340	38220	41040	43860	46680
LOW INCOME	33000	37700	42400	47100	50900	54650	58450	62200
Springfield, MA MSA								
30% LIMITS	17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME	29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS	34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750
Worcester, MA HUD Metro FMR Area								
30% LIMITS	17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME	29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS	34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME	46000	52600	59150	65700	71000	76250	81500	86750

U.S. DEPARTMENT OF HUD 06/22/2016  
 STATE:MASSACHUSETTS

		----- 2016 ADJUSTED HOME INCOME LIMITS -----							
PROGRAM		1 PERSON	2 PERSON	3 PERSON	4 PERSON	5 PERSON	6 PERSON	7 PERSON	8 PERSON
Eastern Worcester County, MA HUD Metro FMR									
30% LIMITS		22100	25250	28400	31550	34100	36600	39150	41650
VERY LOW INCOME		36800	42050	47300	52550	56800	61000	65200	69400
60% LIMITS		44160	50460	56760	63060	68160	73200	78240	83280
LOW INCOME		46000	52600	59150	65700	71000	76250	81500	86750
Fitchburg-Leominster, MA HUD Metro FMR Area									
30% LIMITS		17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME		29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS		34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME		46000	52600	59150	65700	71000	76250	81500	86750
Western Worcester County, MA HUD Metro FMR									
30% LIMITS		17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME		29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS		34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME		46000	52600	59150	65700	71000	76250	81500	86750
Dukes County, MA									
30% LIMITS		17800	20350	22900	25400	27450	29500	31500	33550
VERY LOW INCOME		29650	33850	38100	42300	45700	49100	52500	55850
60% LIMITS		35580	40620	45720	50760	54840	58920	63000	67020
LOW INCOME		46000	52600	59150	65700	71000	76250	81500	86750
Franklin County, MA									
30% LIMITS		17500	20000	22500	24950	26950	28950	30950	32950
VERY LOW INCOME		29150	33300	37450	41600	44950	48300	51600	54950
60% LIMITS		34980	39960	44940	49920	53940	57960	61920	65940
LOW INCOME		46000	52600	59150	65700	71000	76250	81500	86750
Nantucket County, MA									
30% LIMITS		19950	22800	25650	28450	30750	33050	35300	37600
VERY LOW INCOME		33250	38000	42750	47450	51250	55050	58850	62650
60% LIMITS		39900	45600	51300	56940	61500	66060	70620	75180
LOW INCOME		53100	60650	68250	75800	81900	87950	94000	100100

**Section XII: CHECKLIST OF ATTACHMENTS:**

**Attachment #7 & #8:** Copy of 67 North Street, Medfield, MA Quitclaim Deed to Medfield Holdings LLC

RECEIVED AND RECORDED  
NORFOLK COUNTY  
REGISTRY OF DEEDS  
DEDHAM, MA

CERTIFY

*William P. O'Donnell*  
WILLIAM P. O'DONNELL, REGISTER

QUITCLAIM DEED

MASSACHUSETTS STATE EXCISE TAX  
Norfolk Registry of Deeds  
Date: 01-27-2017 @ 02:32pm  
Ct1#: 1307 Doc#: 8797  
Fee: \$1,345.20 Cona: \$295,000.00

THE MONTROSE FOUNDATION, INC., a Massachusetts non-profit corporation with a principal place of business at One Beacon Street, Boston, Suffolk County, Massachusetts

for consideration paid, and in full consideration of TWO HUNDRED NINETY-FIVE THOUSAND DOLLARS (\$295,000.00) PAID

grants to MEDFIELD HOLDINGS L.L.C., a Massachusetts limited liability company

of 9 Boiling Spring Avenue, Medfield, Massachusetts 02052 with *quitclaim covenants*

That certain parcel of land with the all improvements thereon in Medfield, Norfolk County, Massachusetts shown as Lot 1A on a plan entitled, "Plan of Land Medfield, Massachusetts (Norfolk County), Scale: 1" = 20', March 23, 2016," Prepared by GLM Engineering Consultants, Inc., which plan is recorded with the Norfolk County Registry of Deeds in Plan Book 654, Page 034.

Said Lot 1A contains 10,005.47 square feet of land, more or less, according to said plan.

The Grantor reserves to the grantor and its successors and/or assigns as their interests may appear the perpetual right and easement over the area shown as "Parking Easement A" on said plan. To use said Parking Easement A in common with the Grantee and others lawfully entitled thereto, and to use said parking easement for all purposes for which parking easements are now or may hereafter be used in the Town of Medfield, including without limitation, access on foot and in motor vehicles for the purposes of access to and from, and parking within, said parking easement area. Use of Parking Easement A shall be subject to the terms and conditions of the Parking Easement Agreement signed by the Grantor and Grantee, dated May 17, 2016 and recorded with said Registry herewith.

The Grantor also grants to the Grantee and its successors and/or assigns as their interests may appear the perpetual right and easement over the area shown as "Parking Easement B" on said plan. To use said Parking Easement B in common with the Grantor and others lawfully entitled thereto, and to use said parking easement for all purposes for which parking easements are now or may hereafter be used in the Town of Medfield, including without limitation, access on foot and in motor vehicles for the purposes of access to and from, and parking within, said parking easement area. Use of Parking Easement B shall be subject to the terms and conditions of the Parking Easement Agreement signed by the Grantor and Grantee, dated May 17, 2016 and recorded with said Registry herewith.

This conveyance is made in the ordinary course of business of the grantor and does not constitute the sale of all or substantially all of the assets of the grantor within the Commonwealth of Massachusetts.

Said Lot 1A being a portion of the land conveyed to the grantor by deed recorded with said Registry in Book 22044, Page 512, and registered in the Land Registration Office of the Land Court as Document No. 1,053,566, as noted on Certificate of Title No. 169540.

{the remainder of this page has been intentionally left blank}

IN WITNESS WHEREOF, said The Montrose Foundation, Inc. has caused its seal to be hereto affixed and these presents to be signed, acknowledged and delivered in its name and behalf by John A. Flaherty, its Business Manager, hereunto duly authorized, this            day of January, 2017

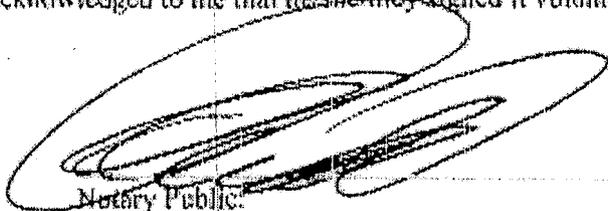
THE MONTROSE FOUNDATION, INC.

By: *John A. Flaherty*  
John A. Flaherty, Business Manager  
Hereunto Duly Authorized

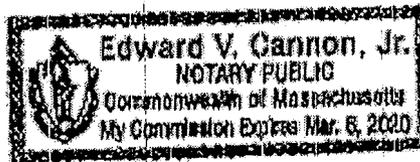
*The Commonwealth of Massachusetts*

Norfolk, ss.

On this 27<sup>th</sup> day of January, 2017, before me, the undersigned notary public, personally appeared John A. Flaherty, Business Manager as aforesaid, proved to me through satisfactory evidence of identification, which was his/her/their Driver's License, to be the person(s) whose name is signed on the preceding or attached document, and acknowledged to me that he/she/they signed it voluntarily for its stated purpose.

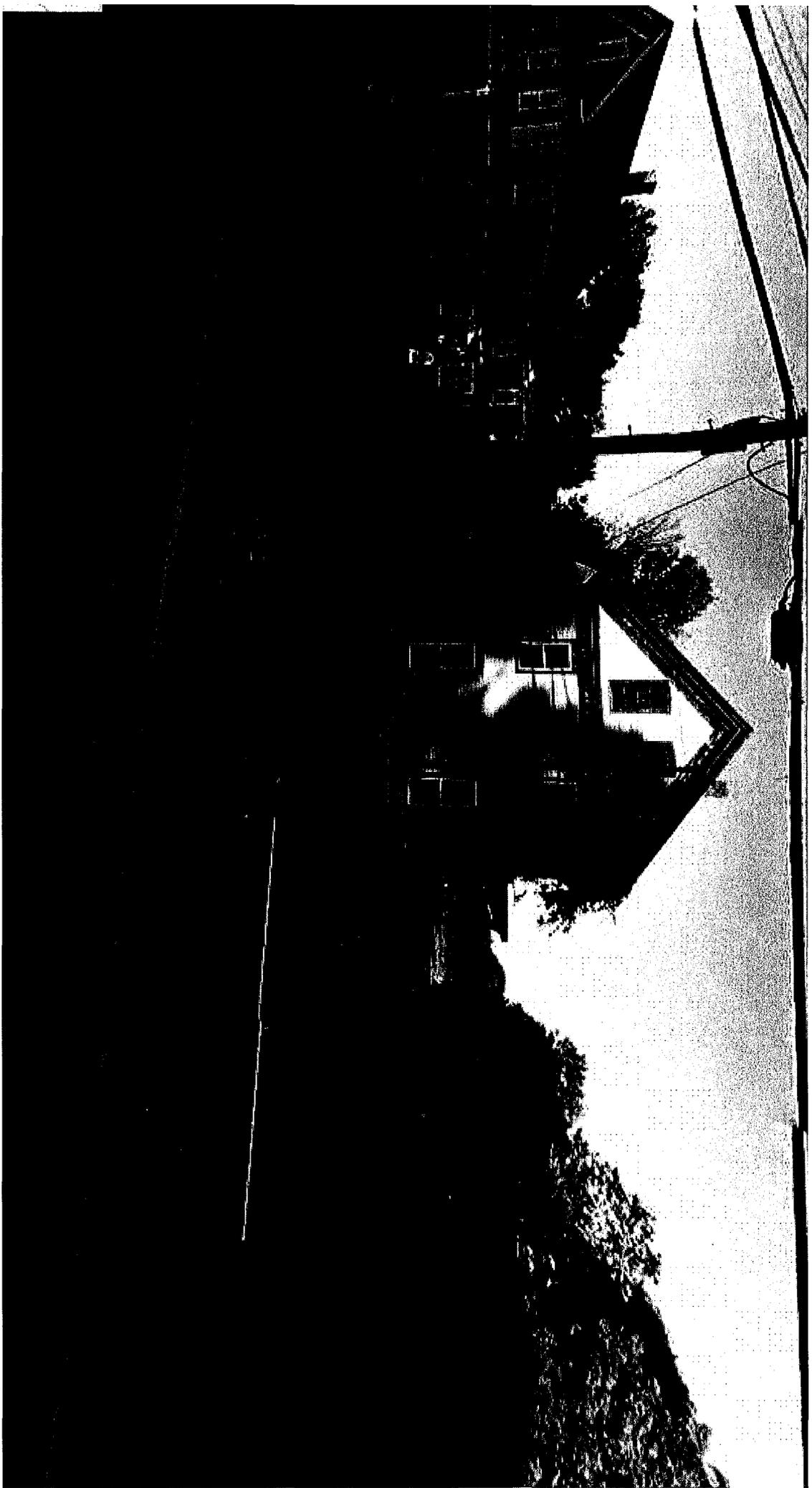


Notary Public:  
My Comm. Exp.:



**Section XII: CHECKLIST OF ATTACHMENTS:**

**Attachment #10:** Photographs of existing building/site



**Section XII: CHECKLIST OF ATTACHMENTS:**

**Attachment #11:** Site Plan showing location of affordable units

Plan Entitled: Site Plan of Land "67 North Street" in Medfield, Massachusetts dated July 6, 2016  
and prepared by GLM Engineering Consultants, Inc., 19 Exchange Street, Holliston,  
Massachusetts 01746

**Attachment #12:** Sample floor plans

Plan Entitled: Additions and Alterations to: 67 North Street in Medfield, MA dated January 7,  
2017 and prepared by Falcon Associates Architects, Inc., 5 Falcon Road, Sharon, MA 02067

## Section VII. DESIGN AND CONSTRUCTION

### Plans Cover Sheet:

#### 1. Description of affordable units and handicapped accessible units:

See the included plan, entitled “Additions and Alterations to: 67 North Street in Medfield, MA dated January 7, 2017 and prepared by Falcon Associates Architects, Inc., 5 Falcon Road, Sharon, MA 02067”).

#### Affordable Units:

Affordable Unit #1: First floor, two bedrooms, one bathroom, 740 square feet.

Affordable Unit #2: Third floor, one bedroom, one bathroom, 700 square feet.

#### Handicapped accessible units:

All first floor units meet Group 1 Standard per 521 CMR Section 9.3.

Handicapped Accessible Unit #1: First floor, two bedrooms, one bathroom, 803 square feet.

Handicapped Accessible Unit #2: First floor, two bedrooms, one bathroom, 740 square feet.

Handicapped Accessible Unit #3: First floor, two bedrooms, one bathroom, 1,037 square feet.

#### 2. Dwelling unit distribution by floor, size, and bedroom/bath number:

##### First Floor: 2,761 square feet total

Unit #1: First floor, two bedrooms, one bathroom, 803 square feet.

Unit #2: First floor, two bedrooms, one bathroom, 740 square feet.

Unit #3: First floor, two bedrooms, one bathroom, 1,037 square feet.

##### Second Floor: 2,761 square feet total

Unit #1: Second floor, two bedrooms, one bathroom, 803 square feet.

Unit #2: Second floor, two bedrooms, one bathroom, 740 square feet.

Unit #3: Second floor, two bedrooms, one bathroom, 1,037 square feet.

##### Third Floor: 1,573 square feet total

Unit #1: Third floor, two bedrooms, one bathroom, 924 square feet.

Unit #2: Third floor, one bedroom, one bathroom, 700 square feet.

3. Square footage breakdown of commercial, residential, community, and other usage in the buildings:

Residential: 7,095 square feet

Storage: 1,433 square feet

Total: 8,528 square feet

4. Number of parking spaces:

See the included site plan, entitled "Site Plan of Land '67 North Street' in Medfield, Massachusetts dated July 6, 2016 and prepared by GLM Engineering Consultants, Inc., 19 Exchange Street, Holliston, Massachusetts 01746"

Parking Spaces: 44 Spaces

# SITE PLAN OF LAND "67 NORTH STREET" IN MEDFIELD, MASSACHUSETTS

DATE: JULY 6, 2016

REVISED: SEPTEMBER 7, 2016

NOVEMBER 11, 2016

APPROVED BY:  
MEDFIELD PLANNING BOARD:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
ENDORSED BY: \_\_\_\_\_

**ASSESSOR'S REFERENCE:**  
MAP 43, PARCEL 29

**DEED REFERENCE:**  
NORFOLK COUNTY DEEDS  
Bk. 22044, Pg. 217

**PLAN REFERENCE:**  
PLAN No. 852 OF 1958, Bk. 3556, Pg. 184

**OWNER OF RECORD:**  
THE MONTROSE FOUNDATION INC.  
C/O THE MONTROSE SCHOOL  
29 NORTH STREET  
MEDFIELD, MA 02052

**ZONING CLASSIFICATION:**

- BUSINESS (B)  
- DOWNTOWN PARKING DISTRICT

**MIN. AREA:**  
Business use: 0 -  
Residential use: 10,000 S.F.

**FRONTAGE:** See Show\*

\*Width of Building plus 24 ft. unless  
it is noted that access can be otherwise  
gained by means of a public way.

**ZONING TABLE:**

**LOT AREA:**  
Required Business Use - 0 -  
Required Residential Use 10,000 s.f.  
Area Provided: 10,000 s.f.

**LOT WIDTH:**

Required: \*Width of Building plus 24 ft. unless R is  
noted that access can be otherwise gained by means  
of a public way.

Existing Building Width: 44 ft.  
Proposed Building Width: 40 ft.  
Provided Lot Width: 70.44 ft.

**FLOOR AREA RATIO (FAR):**

First Floor: 2,882 s.f.  
Second Floor: 2,882 s.f.  
Third Floor: 1,553 s.f.  
Total Area: 7,317 s.f.  
Lot Area: 10,005.47 s.f.  
Floor Area Ratio (FAR) = 0.74

**PARKING SCHEDULE:**

**FIRST FLOOR:**  
OFFICE/RETAIL: 1576 S.F.  
OFFICE/RETAIL: 904 S.F.

**SECOND FLOOR:**  
OFFICE/RETAIL: 1576 S.F.  
OFFICE/RETAIL: 904 S.F.

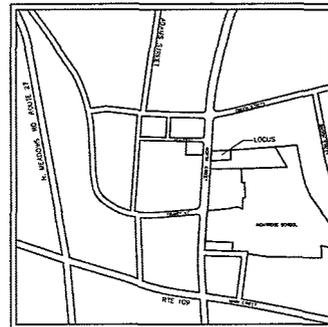
**THIRD FLOOR:**  
1 - 1 BEDROOM APARTMENT  
1 - 2 BEDROOM APARTMENT

**PARKING REQUIRED:**

OFFICE/RETAIL BUILDING: (1 Spaces/120 s.f.)  
TOTAL OFFICE/RETAIL: 4960 S.F.  
(4960 SF / 120 Per sf) = 41 Spaces Required

RESIDENTIAL APARTMENTS: (2 Spaces per unit)  
TOTAL 2-UNITS  
2 x 2 per unit = 4 Spaces Required

TOTAL PARKING REQUIRED: 45 SPACES  
TOTAL PARKING PROVIDED:  
44 SPACES



LOCUS MAP  
1"=400'

I CERTIFY THAT THIS PLAN CONFORMS TO THE  
RULES & REGULATIONS OF THE REGISTER OF DEEDS.  
THIS PLAN WAS PREPARED IN ACCORDANCE WITH  
THE PROCEDURAL AND TECHNICAL STANDARDS FOR  
THE PRACTICE OF LAND SURVEYING IN THE  
COMMONWEALTH OF MASSACHUSETTS.

JOYCE E. HASTINGS P.L.S. \_\_\_\_\_ DATE \_\_\_\_\_

JOSEPH M. NIBBELL P.E. \_\_\_\_\_ DATE \_\_\_\_\_

Prepared By:  
**GLM ENGINEERING**  
CONSULTANTS, INC.  
19 EXCHANGE STREET  
HOLLISTON, MASSACHUSETTS 01746  
(508)429-1100 fax:(508)429-7160

**Applicant:**  
Medfield Holdings LLC  
P.O. BOX 377  
MEDFIELD, MASSACHUSETTS 02052

**Owner:**  
The Montrose Foundation Inc.  
C/O THE MONTROSE SCHOOL  
29 NORTH STREET  
MEDFIELD, MASSACHUSETTS

SHEET INDEX

- |   |                             |
|---|-----------------------------|
| 1 | COVER                       |
| 2 | EXIST. CONDITIONS           |
| 3 | GRADING & LAYOUT            |
| 4 | EROSION & CONSTRUCTION PLAN |
| 5 | LANDSCAPE                   |
| 6 | DETAILS                     |

JOB No.	15723
SCALE:	AS NOTED
DATE:	JULY 6, 2016
SHEET No.	1 of 5

APPROVED BY  
MEDFIELD PLANNING BOARD:

\_\_\_\_\_

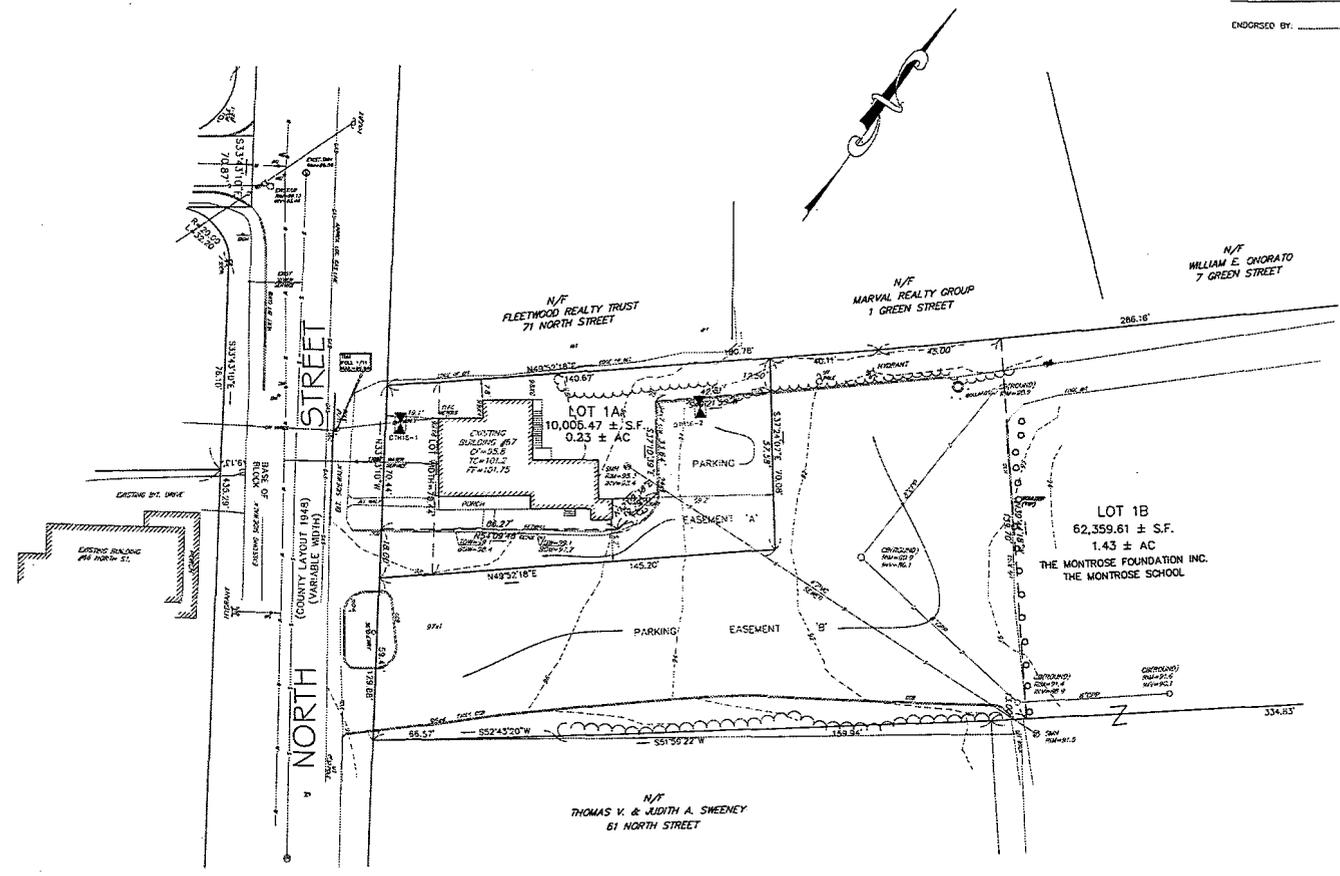
\_\_\_\_\_

\_\_\_\_\_

ENDORSED BY: \_\_\_\_\_

**LEGEND:**

- 100 --- EXISTING CONTOUR
- 162.2 EXISTING SPOT ELEVATION
- ~ EXISTING WATER GATE
- ~ EXISTING TREE LINE
- EXISTING GAS LINE
- EXISTING SEWER LINE
- EXISTING WATER LINE
- EXISTING DRAIN LINE
- PROPOSED CONTOUR
- 94.5 PROPOSED SPOT ELEVATION
- PROPOSED VERT. GRANITE CURB
- PROPOSED VERT CONC. CURB



NOTE: IT SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR TO VERIFY LOCATIONS AND ELEVATIONS OF EXISTING UTILITIES PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION. DCSAFE IS TO BE NOTIFIED 72 WORKING HOURS IN ADVANCE OF CONSTRUCTION. DCSAFE 1-888-344-7233

EXISTING CONDITIONS

REVISIONS	DATE	DESCRIPTION
1	10/1/18	PLANNING BOARD COMMENTS
2	11/11/18	PLANNING BOARD COMMENTS

JOYCE E. HASTINGS P.L.C.

JOSEPH M. SHELL P.E.

**SITE PLAN OF LAND  
67 NORTH STREET  
MEDFIELD, MASSACHUSETTS**

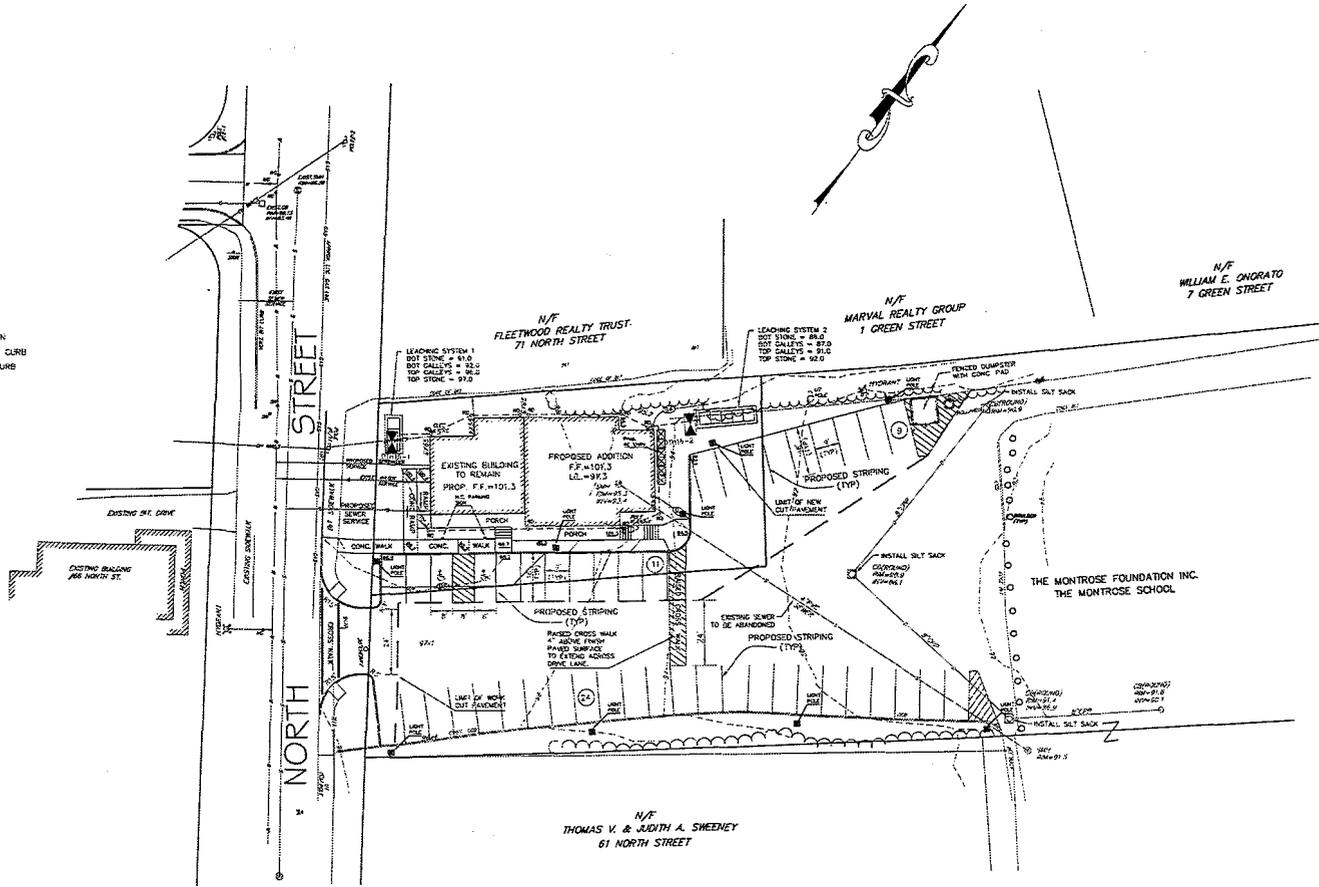
APPLICANT:  
MEDFIELD HOLDINGS LLC  
P.O. BOX 377  
MEDFIELD, MASSACHUSETTS 02052

**GLM** Engineering Inc.  
19 EXCHANGE STREET  
HOLLISTON, MA 01746  
P: 508-429-1100  
F: 508-429-7160  
www.GLMengineering.com

JOB No.	15,723
DATE:	JULY 6, 2016
SCALE:	1" = 20'
SHEET:	2 of 5
PLAN #:	27,059

**LEGEND:**

- 16.6 --- EXISTING CONTOUR
- 16.562 EXISTING SPOT ELEVATION
- EXISTING WATER GATE
- EXISTING TREE LINE
- EXISTING GAS LINE
- EXISTING SEWER LINE
- EXISTING WATER LINE
- EXISTING DRAIN LINE
- 54.5 --- PROPOSED CONTOUR
- PROPOSED SPOT ELEVATION
- PROPOSED VERT GRANITE CURB
- PROPOSED VERT CONC. CURB
- INSTALL SALT SACK
- PROPOSED ROOF DRAIN
- PROPOSED CLEANOUT
- PROPOSED AREA DRAIN



**DEEP OBSERVATION HOLE LOGS**

DEEP HOLE - DTH 16-1			DEEP HOLE - DTH 16-2		
DEPTH	DEPTH	DEPTH	DEPTH	DEPTH	DEPTH
0'	0'	0'	0'	0'	0'
1.0	1.0	1.0	1.0	1.0	1.0
2.0	2.0	2.0	2.0	2.0	2.0
3.0	3.0	3.0	3.0	3.0	3.0
4.0	4.0	4.0	4.0	4.0	4.0
5.0	5.0	5.0	5.0	5.0	5.0
6.0	6.0	6.0	6.0	6.0	6.0
7.0	7.0	7.0	7.0	7.0	7.0
8.0	8.0	8.0	8.0	8.0	8.0
9.0	9.0	9.0	9.0	9.0	9.0
10.0	10.0	10.0	10.0	10.0	10.0
11.0	11.0	11.0	11.0	11.0	11.0
12.0	12.0	12.0	12.0	12.0	12.0
13.0	13.0	13.0	13.0	13.0	13.0
14.0	14.0	14.0	14.0	14.0	14.0
15.0	15.0	15.0	15.0	15.0	15.0
16.0	16.0	16.0	16.0	16.0	16.0



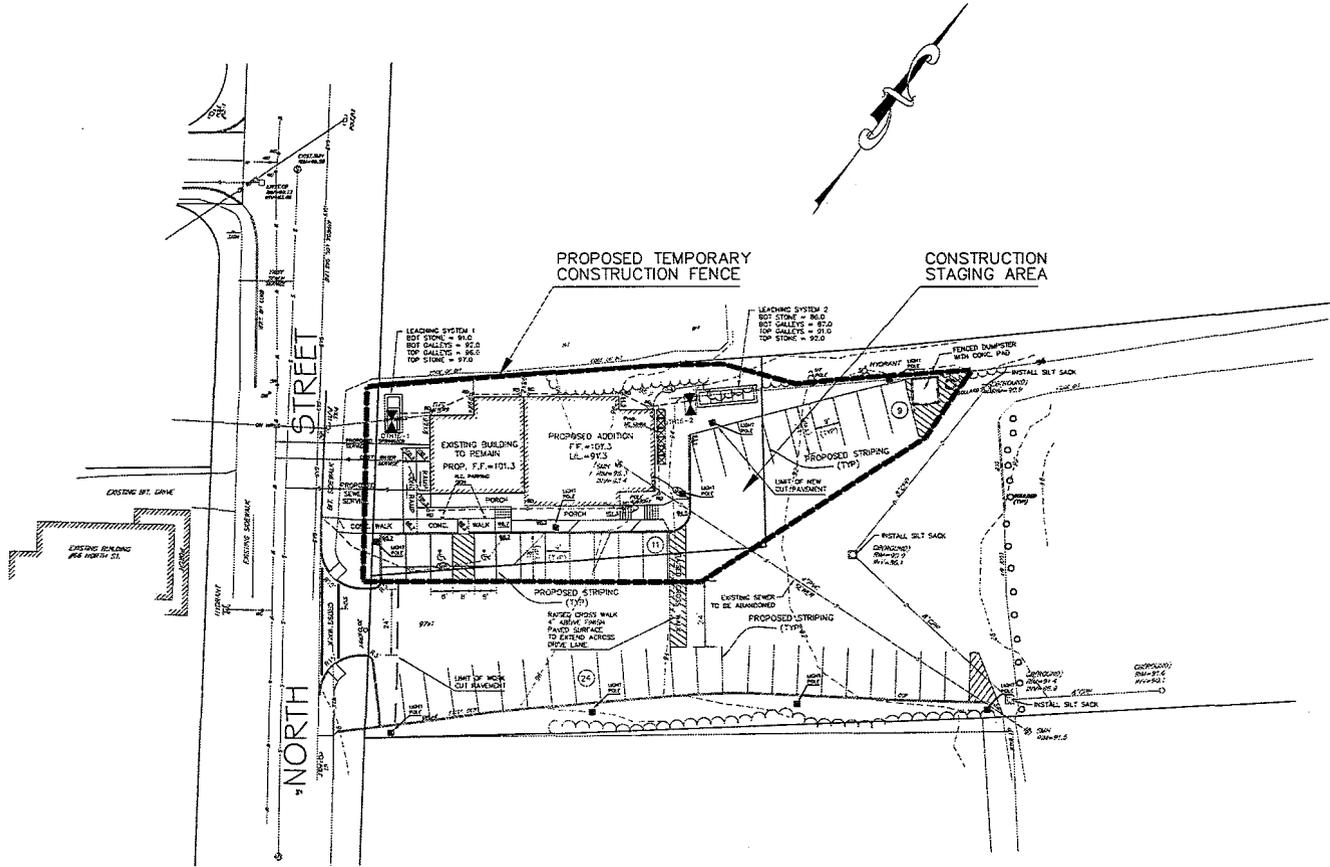
NOTE: IT SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR TO VERIFY LOCATIONS AND ELEVATIONS OF EXISTING UTILITIES PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION. DCSAFE IS TO BE NOTIFIED 72 WORKING HOURS IN ADVANCE OF CONSTRUCTION. DCSAFE 1-888-344-7233

<p>REVISIONS</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 5%;">NO.</th> <th style="width: 15%;">DATE</th> <th style="width: 60%;">DESCRIPTION</th> </tr> <tr> <td>1</td> <td>11/11/18</td> <td>PLANNING BOARD COMMENTS</td> </tr> <tr> <td>2</td> <td></td> <td></td> </tr> </table>	NO.	DATE	DESCRIPTION	1	11/11/18	PLANNING BOARD COMMENTS	2			<p>JOYCE E. HASTINGS P.L.S.</p> <p>JOSEPH M. NIEL P.E.</p> <p><b>SITE PLAN OF LAND</b>  <b>67 NORTH STREET</b>  <b>MEDFIELD, MASSACHUSETTS</b></p> <p>APPLICANT:          MEDFIELD HOLDINGS LLC          P.O. BOX 377          MEDFIELD, MASSACHUSETTS 02052</p> <p><b>GLM</b> Engineering Consultants, Inc.          19 EXCHANGE STREET          HOLLISTON, MA 01746          P: 508-428-1100          F: 508-428-7160          www.GLMengineering.com</p> <p>JOB No. 15,723          DATE: JULY 6, 2018          SCALE: 1" = 20'          SHEET: 3 of 5          PLAN #: 27,059</p>
NO.	DATE	DESCRIPTION								
1	11/11/18	PLANNING BOARD COMMENTS								
2										

**GRADING & LAYOUT**

**LEGEND:**

- 198.5 --- EXISTING CONTOUR
- 163.2 EXISTING SPOT ELEVATION
- M --- EXISTING WATER GATE
- EXISTING TREE LINE
- EXISTING GAS LINE
- EXISTING SEWER LINE
- EXISTING WATER LINE
- EXISTING DRAIN LINE
- 94.5 --- PROPOSED CONTOUR
- PROPOSED SPOT ELEVATION
- PROPOSED VERT. GRANITE CURB
- PROPOSED VERT. CONC. CURB
- INSTALL SILT SACK
- PROPOSED ROOF DRAIN
- PROPOSED CLEANOUT
- PROPOSED AREA DRAIN



**CONSTRUCTION MANAGEMENT PLAN:**

CONSTRUCTION ACCESS SHALL BE VIA NORTH STREET. THE ACCESS SHALL BE PAVED WITH BINDER COARSE WHEN OLD ENTRANCE IS REMOVED.

THE SITE SHALL BE FENCED WITH TEMPORARY SIX (6) FOOT HIGH CHAINLINK FENCE ALONG THE PROPERTY BOUNDARIES IN ALL AREAS WHERE NO EXISTING FENCE EXISTS.

THE REAR PARKING AREA SHALL BE UTILIZED FOR MATERIALS STAGING.

HOURS OF CONSTRUCTION: 7:00am thru 6:00pm Monday-Saturday

**CONSTRUCTION SEQUENCE:**

1. INSTALL TEMPORARY FENCE AND EROSION BARRIER.
2. DEMO EXISTING STRUCTURES, CLEAR AND GRUB SITE.
3. EXCAVATE AND INSTALL FOUNDATION
4. INSTALL UTILITIES INCLUDING DRAINAGE SYSTEM.
5. CONSTRUCTION REAR PARKING AREA.
6. CONSTRUCT BUILDING
7. COMPLETE SITE CONSTRUCTION, IE FINISH PAVEMENT, WALKS, LANDSCAPE, ETC.

**EMERGENCY CONTACT INFORMATION:**

ROBERT BORRELLI  
508-359-2711  
P.O. BOX 377  
MEDFIELD, MA

**EROSION & SEDIMENT CONTROL NOTES:**

1. PRIOR TO COMMENCEMENT OF ANY WORK ALL SILTATION AND EROSION CONTROLS AS SPECIFIED ON THE PLANS SHALL BE EMPLOYED.
2. EROSION CONTROL MEASURES SHALL BE MONITORED ON A DAILY BASIS, OR AS NEEDED, AND BE REINFORCED, REPAIRED, OR REPLACED WHEN NEEDED, PER JUDGEMENT OF THE SITE FOREMAN AND/OR TOWN OF MEDFIELD PLANNING BOARD REPRESENTATIVE.
3. NORTH STREET SHALL BE KEPT CLEAN OF ALL DEBRIS. AT THE END OF EACH WORK DAY THE ROADWAY SHALL BE INSPECTED AND/OR SWEPT IF NEEDED.



SILT SACK CATCH BASIN INLET  
NOT TO SCALE

**EROSION CONTROL & CONSTRUCTION MANAGEMENT**

REVISIONS		DESCRIPTION
1	DATE	PLANNING BOARD COMMENTS
2	TITLE	PLANNING BOARD COMMENTS

JOYCE E. HASTINGS P.L.S.  
  
JOSEPH M. APRILL P.E.

**SITE PLAN OF LAND  
67 NORTH STREET  
MEDFIELD, MASSACHUSETTS**  
APPLICANT:  
MEDFIELD HOLDINGS LLC  
P.O. BOX 377  
MEDFIELD, MASSACHUSETTS 02052

**GLM** Engineering  
Consultants, Inc.  
19 CHICHESTER STREET  
HOLLISTON, MA 01746  
P: 508-425-1100  
F: 508-425-7160  
www.GLMengineering.com

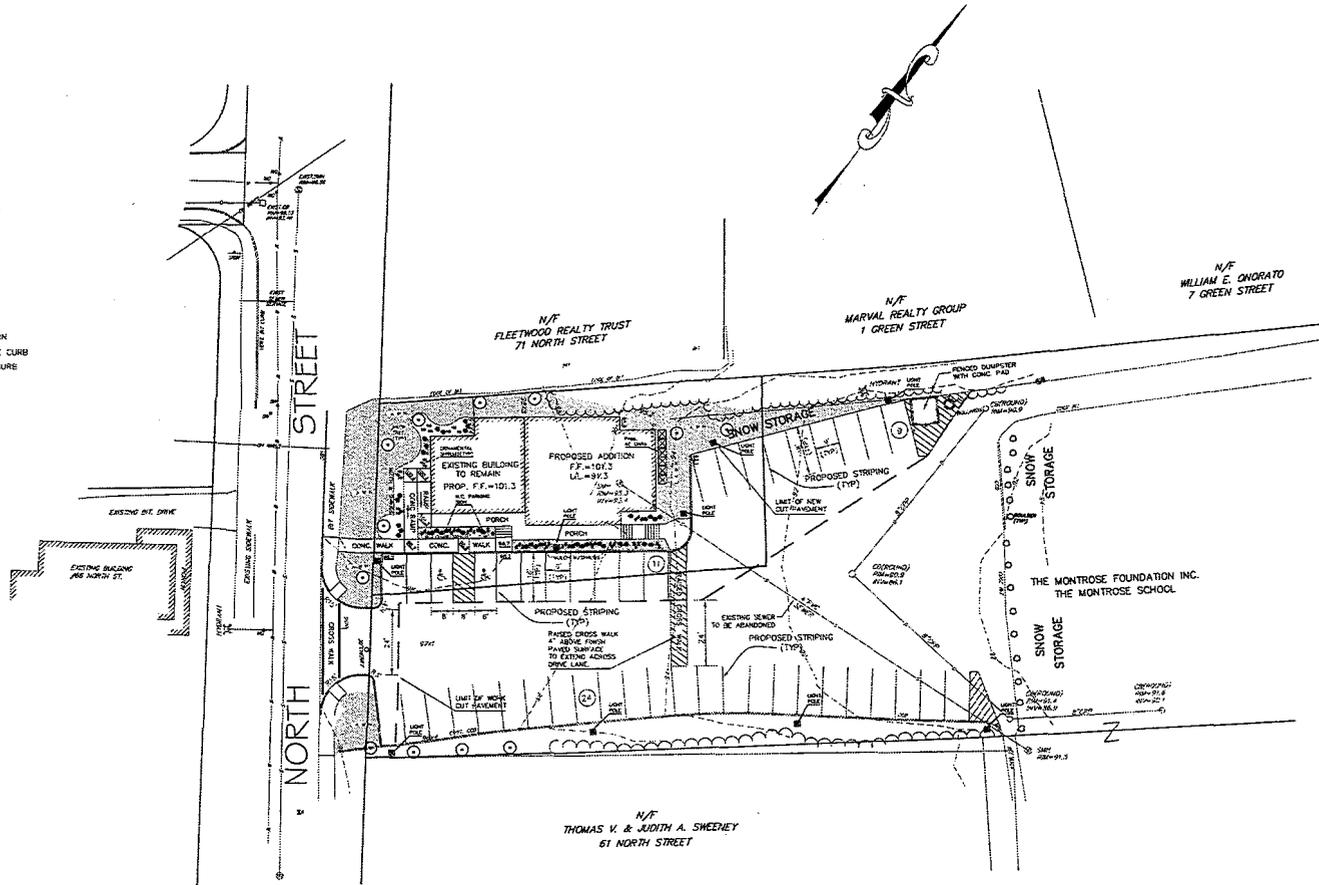
JOB No.	15,723
DATE	JULY 6, 2016
SCALE	1" = 20'
SHEET	4 of 5
PLAN #:	27,059



NOTE: IT SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR TO VERIFY LOCATIONS AND ELEVATIONS OF EXISTING UTILITIES PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION. DISUSE IS TO BE NOTIFIED 72 WORKING HOURS IN ADVANCE OF CONSTRUCTION. DGS/SAFE 1-888-344-7233

**LEGEND:**

- 102--- EXISTING CONTOUR
- 16.2x2 EXISTING SPOT ELEVATION
- EXISTING WATER GATE
- EXISTING TREE LINE
- EXISTING GAS LINE
- EXISTING SEWER LINE
- EXISTING WATER LINE
- EXISTING DRAIN LINE
- PROPOSED CONTOUR
- 24.5 EXISTING SPOT ELEVATION
- PROPOSED VERT. GRANITE CURB
- PROPOSED VERT. CONC. CURB



**HANDICAP ACCESS RAMPS:**

1. ALL RAMPS WITH A RISE GREATER THAN 6 INCHES SHALL HAVE HANDRAILS ON BOTH SIDES.
2. ALL HANDICAP ACCESS RAMPS SHALL COMPLY WITH 521 CMR 24 ARCHITECTURAL ACCESS BOARD.
3. ALL ACCESS WAYS LABELED "RAMPS" SHALL BE EQUIPPED WITH RAILINGS PER 521 CMR 24.
3. LANDINGS SHALL HAVE A SLOPE NOT STEEPER THAN 1:48 (2% SLOPE) IN ANY DIRECTION.

**TREE PLANTING SPECIFICATIONS:**

- TREES SHALL HAVE A CALIPER OF 1 1/2 INCHES TO 2 INCHES.
- PROPOSED TYPE OF TREES SHALL BE PER THE PLANNING BOARD SUBSTITUTION RULES AND REGULATIONS AND APPROVED BY THE TREE WARDEN.



NOTE: IT SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR TO VERIFY LOCATIONS AND ELEVATIONS OF EXISTING UTILITIES PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION. DIGSAFE IS TO BE NOTIFIED 72 WORKING HOURS IN ADVANCE OF CONSTRUCTION. DIGSAFE 1-888-344-7233

**LANDSCAPE PLAN**

REVISIONS	
NO.	DATE
1	11/11/18
2	11/11/18

DESCRIPTION  
 PLANNING BOARD COMMENTS  
 PLANNING BOARD COMMENTS

JOYCE C. HASTINGS P.L.S.

JOSEPH M. NHILL P.E.

**SITE PLAN OF LAND**  
**67 NORTH STREET**  
**MEDFIELD, MASSACHUSETTS**

APPLICANT:  
 MEDFIELD HOLDINGS LLC  
 P.O. BOX 377  
 MEDFIELD, MASSACHUSETTS 02052

**GLM** Engineering Consultants, Inc.  
 18 EXCHANGE STREET  
 HOLLISTON, MA 01746  
 P: 508-429-1100  
 F: 508-429-7160  
 www.GLMengineering.com

JOB No. 15.723  
 DATE: JULY 6, 2018  
 SCALE: 1"= 20'  
 SHEET: 5 of 6  
 PLAN #: 27,059



# ADDITION AND ALTERATIONS TO: 67 North Street MEDFIELD, MA

PROGRESS NOT FOR CONSTRUCTION  
January 7, 2017

SUMMARY OF SPACES  
SEVEN 2 BEDROOM RESIDENTIAL UNITS  
ONE 1 BEDROOM RESIDENTIAL UNIT  
1,433 S.F. STORAGE (BASEMENT)

Handicap Accessibility  
All first floor units meet Group 1 Standards per  
521 CMR Section 9.3.

## Code Review for 67 North Street Medfield, MA

### Applicable Codes

- Mass State Building Code 8th Edition
- Based upon IBC 2009 with amendments
- Plumbing 248 CMR
- Mechanical 2009 IMC
- Accessibility 521 CMR / ADA Federal Guidelines

### Building Areas and Uses

- First floor - (R-2) Residential 2,761 sq. ft.
- Second Floor - (R-2) Residential 2,761 sq. ft.
- Third Floor - (R-2) Residential 1,573 sq. ft.
- Basement - (S) Storage 1,433 sq. ft.

### Occupancy

Table 1004.1.1 Maximum Floor Area per Occupant

- R-2 (Residential) = 200 s.f. per occupant
- First Floor 2,761/200 = 14 occupants
- Second Floor 2,761/200 = 14 occupants
- Third Floor 1,573/200 = 8 occupants

**36 occupants total building**

### Egress

Section 1005 Egress Width

- .3" per occupant for stairs = 36 occupants X .3" = 10.8" total width (36" provided)

Section 1009.1 Allows 36" wide stair with occupant load of less than 50 (Comply)

- .2" per occupant for door and hallways = 36 occupant X .2" = 7.2" total required. (Comply)

Table 1021.2 Stories with one exit

- 4 Dwelling units and 125 maximum travel distance allowed (Comply)
- Emergency escape windows provided
- Automatic Sprinkler system provided
- Actual maximum travel distance less than 50'

Table 1016.1 Exit Access Travel Distance

- R-2 = max. 250' with sprinklers - (max. 50' provided)

1018.2 Corridor Width

36" Required when occupant load is less than 50.

Fire Ratings Section 420.2

- R-2 = 1 Hour required between each unit

Table 1018.1 Corridors

- (R) Residential ½ Hour required for occupant load greater than 10 and sprinklers

Section 1022 Exit Enclosures

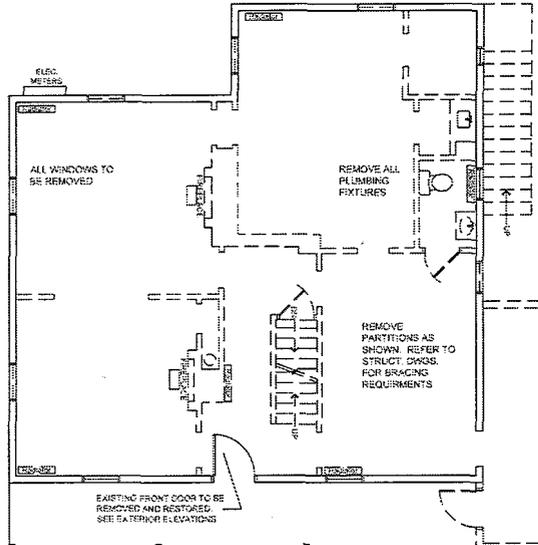
2 Hour rating required for stair (serves more than 4 stories)


**FALCON ASSOCIATES ARCHITECTS, INC.**  
 5 FALCON ROAD SHARON, MA 02067  
 PHONE 781 784-6646 FAX 781 784-4673

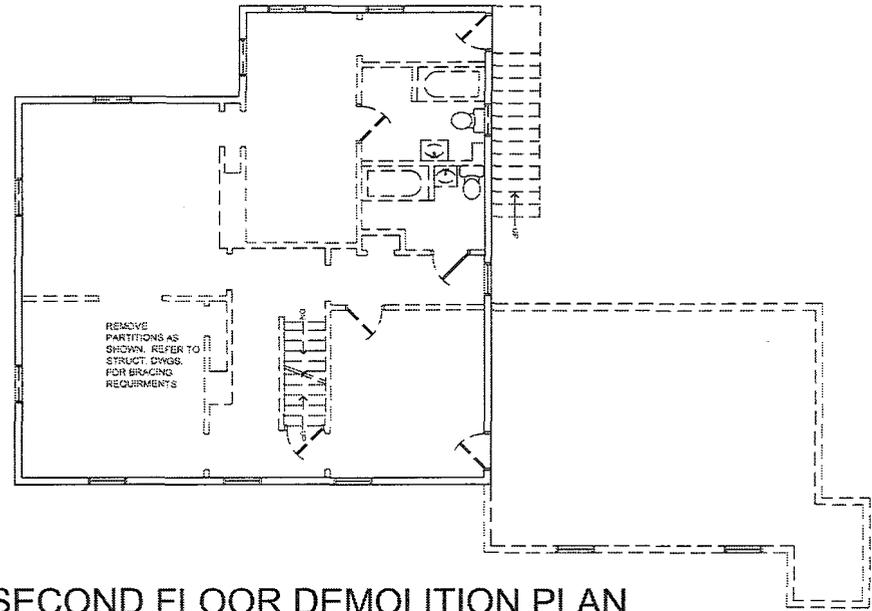
ADDITION AND ALTERATIONS TO:  
**67 North Street**  
MEDFIELD, MA

1/7/17

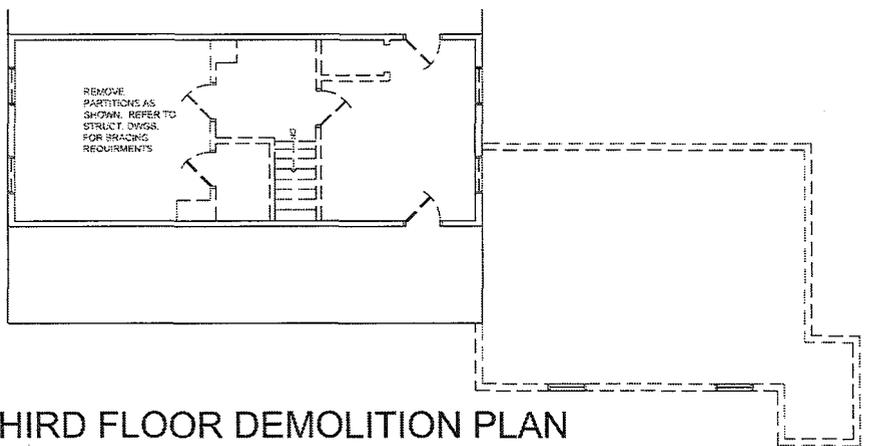
T1



FIRST FLOOR DEMOLITION PLAN



SECOND FLOOR DEMOLITION PLAN



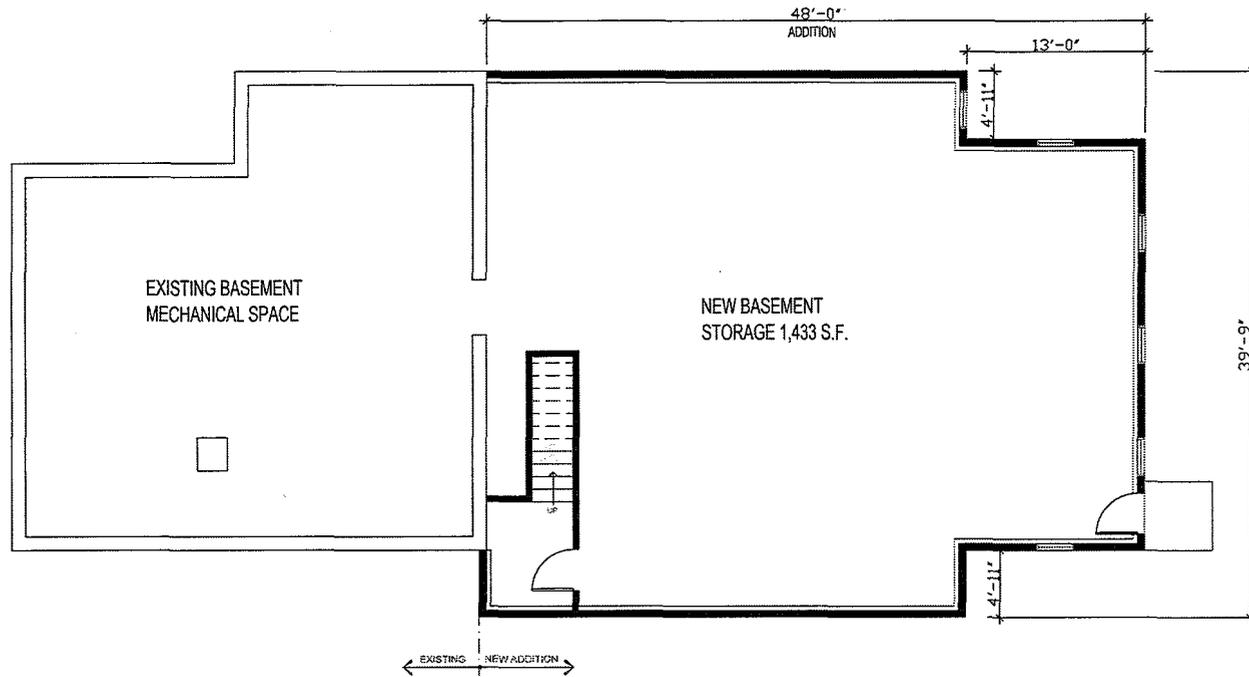
THIRD FLOOR DEMOLITION PLAN

FALCON ASSOCIATES ARCHITECTS, INC.  
  5 FALCON ROAD SHARON, MA 02067  
  PHONE 781 784-4646 FAX 781 784-4673

ADDITION AND ALTERATIONS TO:  
**67 North Street**  
 MEDFIELD, MA

1/7/17

**D1**



## BASEMENT PLAN

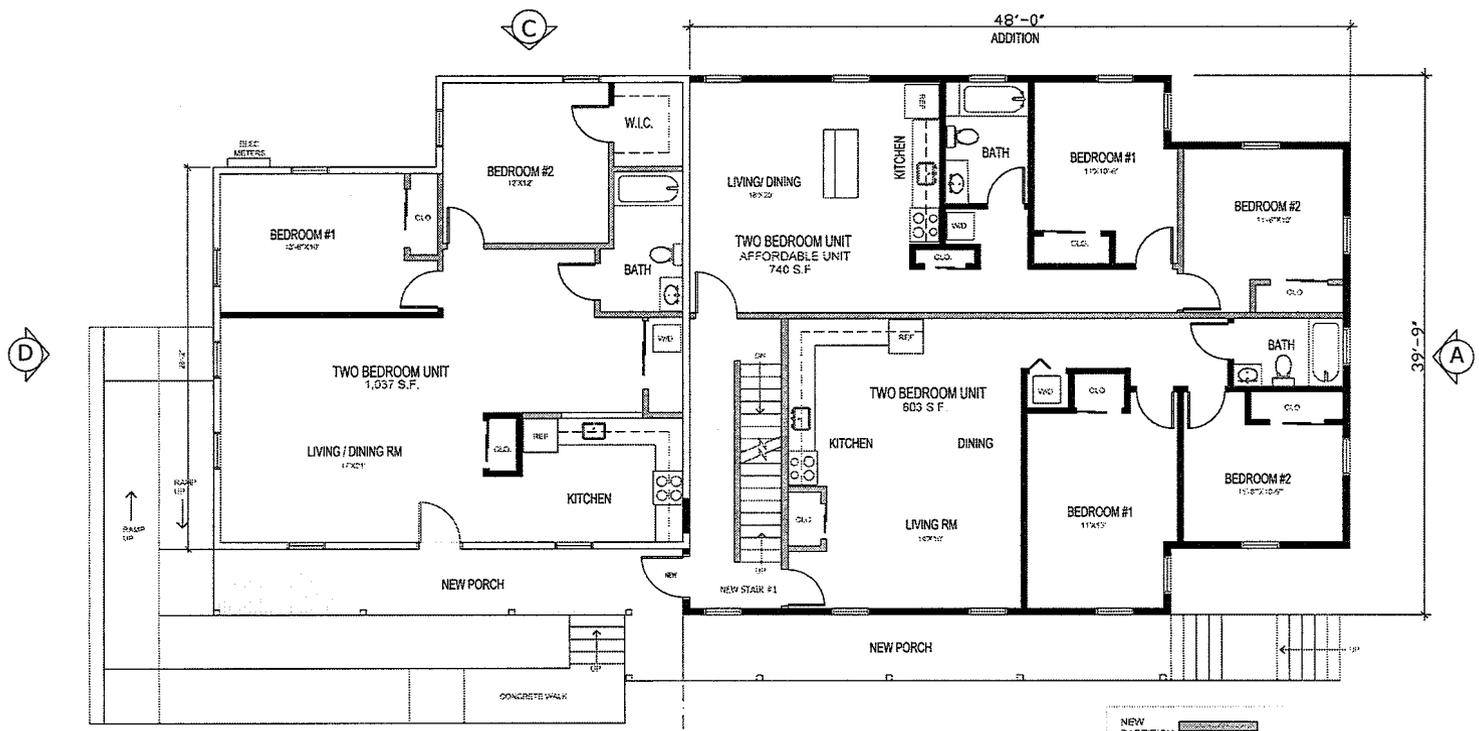


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 5 FALCON ROAD SHARON, MA 02067  
 PHONE 781 784-4646 FAX 781 784-4673

ADDITION AND ALTERATIONS TO:  
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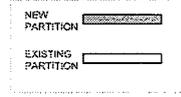
1/7/17

**A1**



- NOTE:  
 1) LAYOUT AS SHOWN ASSUMES A FULLY SPRINKLED BUILDING FOR BOTH NEW AND EXISTING AREAS  
 2) MUST PROVIDE FIRE SEPARATION BETWEEN UNITS

# FIRST FLOOR PLAN

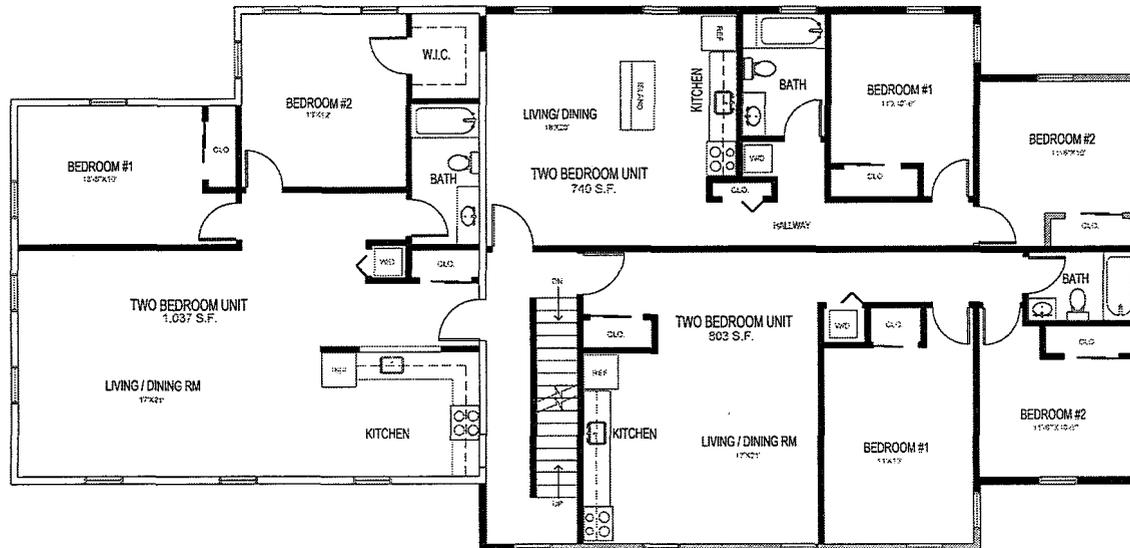


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 5 FALCON ROAD SHARON, MA 02067  
 PHONE 781 784-4646 FAX 781 784-4673

ADDITION AND ALTERATIONS TO:  
**67 North Street**  
 MEDFIELD, MA

1/7/17

**A2**



## SECOND FLOOR PLAN

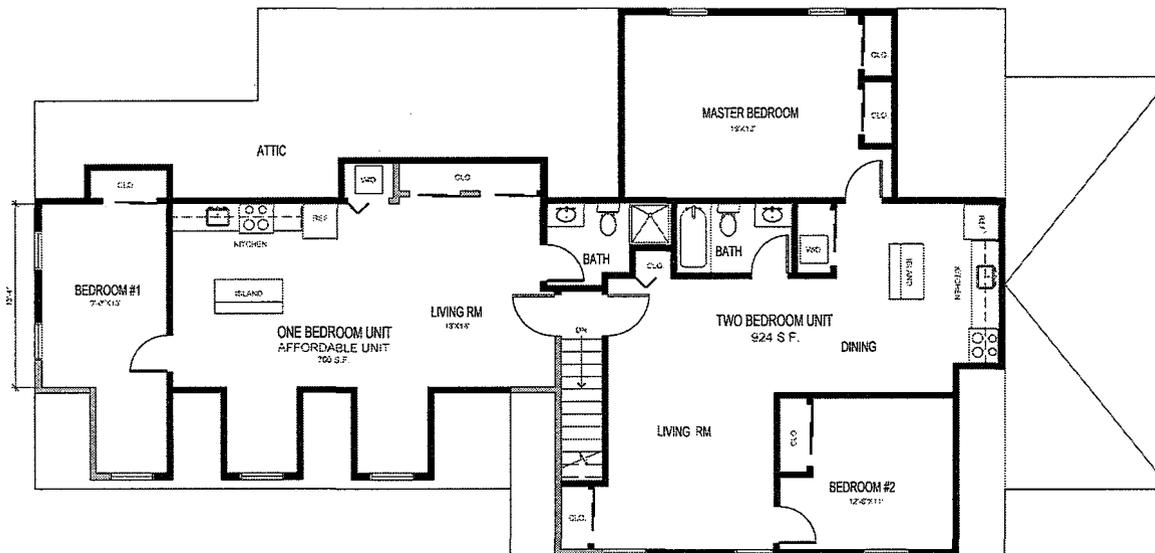


FALCON ASSOCIATES ARCHITECTS, INC.  
 5 FALCON ROAD SHARON, MA 02067  
 PHONE 781 784-4646 FAX 781 784-4673

ADDITION AND ALTERATIONS TO:  
**67 North Street**  
 MEDFIELD, MA

1/7/17

**A3**



THIRD FLOOR PLAN

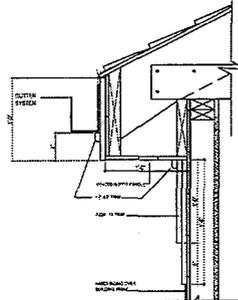


FALCON ASSOCIATES ARCHITECTS, INC,  
 5 FALCON ROAD SHARON, MA 02067  
 PHONE 781 784-4646 FAX 781 784-4573

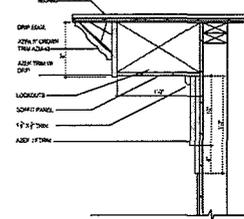
ADDITION AND ALTERATIONS TO:  
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 MEDFIELD, MA

1/7/17

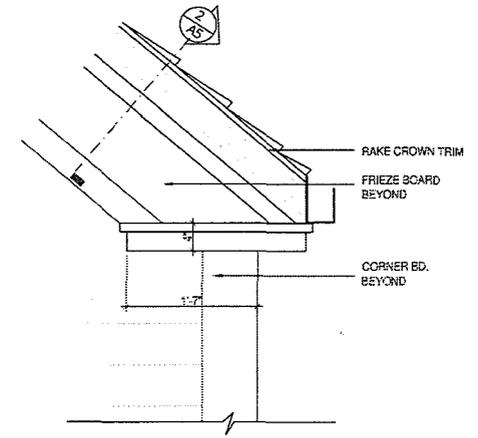
**A4**



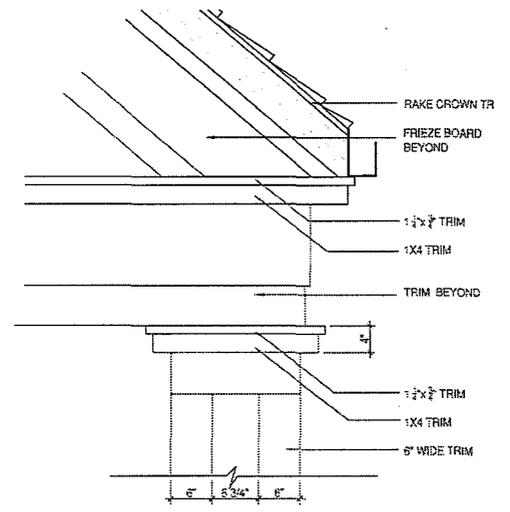
1 SOFFIT DETAIL  
SCALE: 1"=1'-0"



2 RAKE BOARD SECTION  
SCALE: 1"=1'-0"



3 RAKE DETAIL



4 FASCIA / CORNER BD. DETAIL  
SCALE: 1"=1'-0"



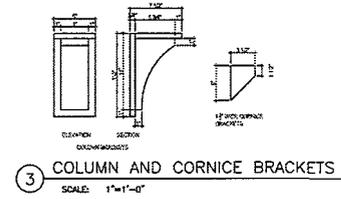
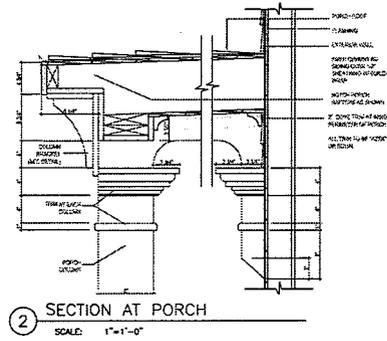
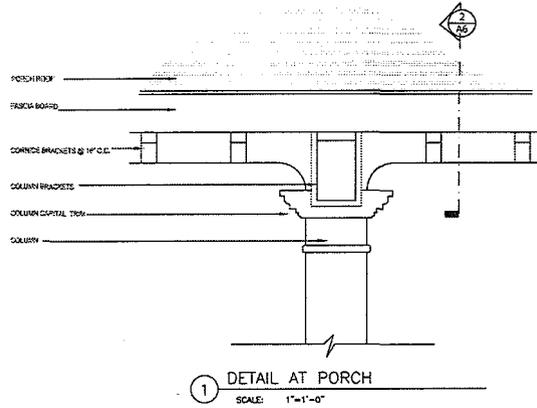
C SIDE ELEVATION  
SCALE: 1/8"=1'-0"

FALCON ASSOCIATES ARCHITECTS, INC.  
5 FALCON ROAD SHARON, MA 02067  
PHONE 781 784-4646 FAX 781 784-4673

ADDITION AND ALTERATIONS TO:  
67 North Street  
MEDFIELD, MA

1/7/17

A5

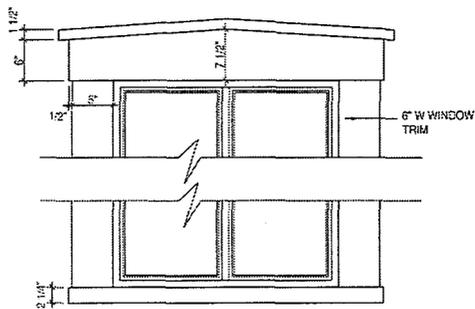


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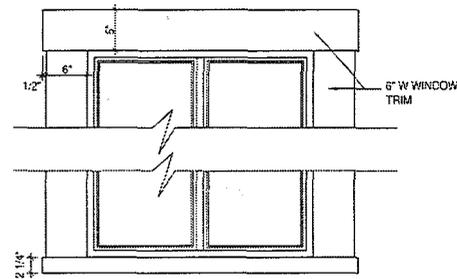
ADDITION AND ALTERATIONS TO:  
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1/7/17

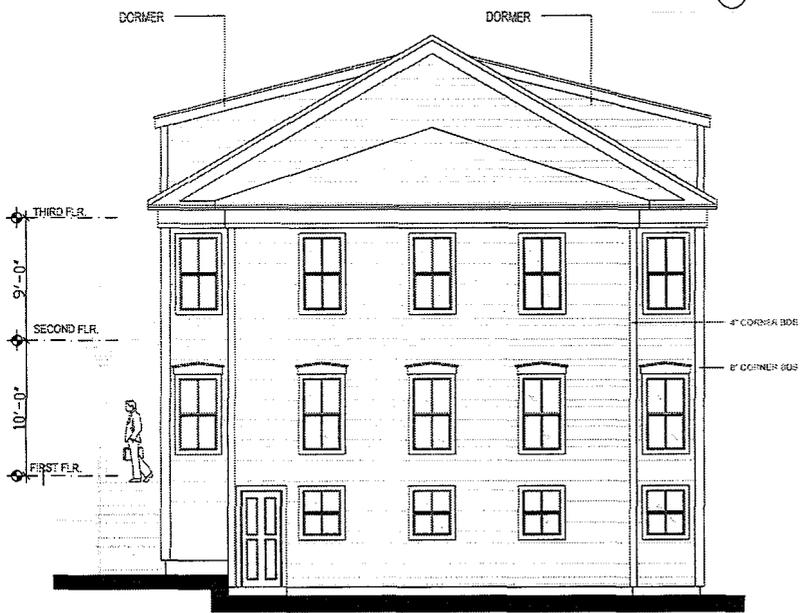
**A6**



**A** TYPICAL FIRST FLOOR WINDOW



**R** TYPICAL UPPER FLOOR WINDOW



**A** ADDITION  
REAR ELEVATION



**D** FACING NORTH STREET  
FRONT ELEVATION  
SCALE: 1/8"=1'-0"

RELOCATED EXISTING  
FRONT DOOR TO BE  
RESTORED AND REUSED



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ADDITION AND ALTERATIONS TO:  
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MEDFIELD, MA

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**A7**