



Medfield State Hospital Development Committee

*Presentation for Warrant Committee
June 6, 2022*

<http://www.town.medfield.net/556/Medfield-State-Hospital-information>

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MSH DEVELOPMENT TIMELINE

2003-2014

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- 2003: Commonwealth closes MSH (est. 1892)
 - ▣ DCAMM retains a development consultant
 - ▣ Calls for up to 600 housing units
 - ▣ DCAMM ultimately comes up with a 440-unit proposal
- 2013: Town gets opportunity to purchase
 - ▣ Goal → Control our destiny on MSH property
- 2014: Town acquires 127 acres for \$3.1 million
 - ▣ STM ~unanimous vote <https://youtu.be/OpcBe4ft91U>
 - ▣ Redevelopment subject to legal agreements
 - ▣ Future sale or lease profits subject to sharing agreement

2015-2018

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- 2015-2018: Award-winning Master Plan developed
- Community Survey (+3,000 responses)
 - Preserve beauty and openness
 - Keep historic buildings and landscape
 - Maintain “The Green” in front
 - Reuse Lee Chapel for cultural and arts center
 - Provide for sports, recreation, and exercise
- Master Plan Issued (August, 2018)
 - “Preferred Scenario” – no more than 334 housing units

2018-2019

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- 2018: MSHDC formed and charged with advising Board of Selectmen on viability of Master Plan
 - Issued non-binding “Request for Information” to more than 30 developers
 - Interviewed 5 interested developers through early 2019
 - Identified interest and some obstacles (BI zoning)
- 2019: Rezoned as MSH District by 2/3 Yes vote of nearly 1,000 attendees at STM
 - Following STM, Selectmen authorized development and issuance of formal Request for Proposals

6 DEVELOPMENT COMMITTEE PROCESS

2020-2021

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- MSHDC develops Request for Proposals
 - ▣ Informed by Master Plan but intentionally flexible
 - ▣ Secured technical and legal assistance to ensure compliance with 30B rules (sale of municipal property)
 - ▣ Multiple rounds of public comment

- Evaluation Criteria (main categories):
 - ▣ Community Impacts/Benefits
 - ▣ Vision; Consistency with Town's Disposition Intent
 - ▣ Development Team Strength and Capacity
 - ▣ Compliance with Design Guidelines and Zoning

2020-2021

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- RFP was broadly distributed
 - ▣ Marketing Plan approved by state, ~35 key targets
 - ▣ Advertised in The Central Register and Medfield Press
 - ▣ Town's list, more than 90 downloads of RFP
- Site walk prior to deadline – 10 groups
- Ultimately 2 proposals received for entire site
 - ▣ Trinity Financial – 334 housing units
 - ▣ Pulte Homes of NE – 602 or 702 housing units

2020-2021

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- Proposals received were very different:
 - ▣ Trinity Financial – informed by Master Plan subject to market realities; investment in historic buildings
 - ▣ Pulte Homes – demolition of all existing buildings and much higher density; higher cash price to Town
- Why Not More Bids?
 - ▣ Scale and complexity of project
 - ▣ Expected tough competition (can't win)
 - ▣ Town wants historic preservation over new construction
 - ▣ Specialize in 100% market or 100% affordable housing
 - ▣ Resources committed to other projects/pipeline

2020-2021

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- MSHDC meetings August – October, 2021 to evaluate proposals
 - ▣ Reviewed and measured against published criteria
 - ▣ Developer interviews/Q&A
 - ▣ Solicitation of stakeholder comments:
 - Medfield Historical Commission and Medfield Historic District Commission
 - Cultural Alliance of Medfield
 - Medfield Energy Committee
 - ▣ Opportunity for public comment
- October, 2021 - MSHDC unanimously votes Trinity Financial as “most advantageous” proposal based on RFP criteria
- November, 2021 - Selectmen unanimously vote to proceed with Trinity Financial proposal as most advantageous

2022

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- March 2022 – Board of Selectmen executes provisional development agreement (PDA) with Trinity Financial
 - ▣ Kicks off due diligence period for additional access/study
 - ▣ Targets timing of Special Town Meeting for June 2022
- PDA to be replaced by Land Disposition Agreement prior to STM
 - ▣ In final stages of negotiation
 - ▣ Will be available to public prior to STM

Due Diligence Summary

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- MSHDC and Trinity developed a due diligence protocol to be executed prior to STM
- The protocol includes building access, additional analysis by Trinity and its technical experts, review of this additional information by the Town, and the Town's third-party "peer review" of Trinity reports
- Reports commissioned by Trinity and the Town are posted here: <https://www.town.medfield.net/2102/7664/Trinity-Financial-Due-Diligence-Informat>

Draft MSH Due Diligence Prior to STM

Trinity Scope (through 5/1/22)	Consultant	Scope of Due Diligence Pre-STM	Town Due Diligence Activities	MSHDC Lead	Departments, Boards, and Committees	Town's Consultants
Developer	Trinity Acquisitions LLC	<ul style="list-style-type: none"> • Mutual agreement with Town on strategy for gun range • Conversations with Town and relevant state agencies (EOHED, MHC, DCAMM) regarding Project • Agreement with CAM on scope of work and program 	<ul style="list-style-type: none"> • Determine if any changes to the housing mix are necessary to be eligible for SHI • Gun range evaluation (see activities under "Noise/Gun Range" category below). • Further assess financial feasibility and developer capacity based on updated information. 	Todd Trehubenko/ Nicholas Milano/ Sarah Raposa	<ul style="list-style-type: none"> • Housing: Planning Board, Affordable Housing Trust <ul style="list-style-type: none"> ◦ PB provide comments as needed ◦ Trinity met with AHT 6/2 • Massachusetts Department of Housing and Community Development (SHI) • Additional BoS mtg on 6/14. 	<ul style="list-style-type: none"> • Financial Feasibility and Developer Capacity: Peregrine Group <p>5/20 TT to work with Peregrine regarding peer review.</p>
Fiscal Analysis	Fougere	<ul style="list-style-type: none"> • Updated fiscal impact report • Preliminary Infrastructure maintenance costs and snow removal 	<ul style="list-style-type: none"> • Town departments to work with Fougere to finalize data for the fiscal impact report • Schools to review and comment on • Town to calculate current and recent costs to maintain the hospital (landscaping, buildings, public safety etc.) and revenue generation by leasing out the site 	Johnny Martinez/ Nicholas Milano	<ul style="list-style-type: none"> • Property taxes: Assessors • Schools: School administration and School Committee <ul style="list-style-type: none"> ◦ Attend SC Meeting 6/8 • Water / Sewer costs: DPW / Board of Water and Sewerage <ul style="list-style-type: none"> ◦ Attend WS Meeting 6/7 • Police and Fire call volume • Council on Aging: services • Public Works: road infrastructure / snow and ice • Warrant Committee 	<ul style="list-style-type: none"> • Fiscal Impact: Peregrine Group / Karl Seidman <ul style="list-style-type: none"> ◦ 5/19 review commenced • Water and Sewer: Environmental Partners <ul style="list-style-type: none"> ◦ received
Market Study	Byrne McKinney	<ul style="list-style-type: none"> • Rental market study 	<ul style="list-style-type: none"> • Review rental market study 	Committee/ Sarah Raposa	<ul style="list-style-type: none"> • Affordable Housing Trust <ul style="list-style-type: none"> ◦ 6/2 with Trinity to attend 	N/A
Noise/Gun Range	Acentech	<ul style="list-style-type: none"> • Feasible plan for gun range mitigation 	<ul style="list-style-type: none"> • Feasible plan for gun range mitigation • Coordination with the Commonwealth necessary because the range is state property 	Gus Murby/Todd Trehubenko/ Nicholas Milano	<ul style="list-style-type: none"> • Police • Commonwealth of Massachusetts: Executive Office of Public Safety and Security / DCAMM / Department of Mental Health 	N/A
Hazardous Materials Scan	Vertex	<ul style="list-style-type: none"> • Test 4 buildings for lead paint, asbestos, hazardous materials 	<ul style="list-style-type: none"> • Review report 	Committee		N/A
Environmental	McPhail Associates	<ul style="list-style-type: none"> • Environmental assessment report 	<ul style="list-style-type: none"> • Review report 	Committee		N/A
Existing Conditions	Existing Conditions	<ul style="list-style-type: none"> • As built survey for all major buildings 	<ul style="list-style-type: none"> • Review as built survey 	Committee/ Nicholas Milano		N/A
Design	ICON	<ul style="list-style-type: none"> • Schematic plans 	<ul style="list-style-type: none"> • Review design with MHDC 	Johnny Martinez/ Sarah Raposa	<ul style="list-style-type: none"> • Medfield Historic District Commission and Medfield Historical Commission <ul style="list-style-type: none"> ◦ 6/2 with Trinity 	N/A
Utilities, Access, Easements,	VHB	<ul style="list-style-type: none"> • Updated traffic study • Preliminary updated water and sewer capacity study 	<ul style="list-style-type: none"> • Town to peer review VHB's studies and work product 	Chris McMahon/ Sarah Raposa/ Nicholas Milano	<ul style="list-style-type: none"> • Land Use Boards Meeting 6/7 • DPW / Board of Water and Sewerage: water and sewer usage / impact 	<ul style="list-style-type: none"> • Traffic / parking: BETA Group <ul style="list-style-type: none"> ◦ received

Flood Zone, Traffic		<ul style="list-style-type: none"> Stormwater impact / mitigation Public access and easements to / across disposition areas 	<ul style="list-style-type: none"> Peer review water and sewer capacity study. Discuss with DPW and Board of Water and Sewerage 		<ul style="list-style-type: none"> Stormwater: under purview of various committees, including Board of Health Medfield Energy Committee Conservation Commission 	<ul style="list-style-type: none"> Stormwater: Environmental Partners <ul style="list-style-type: none"> o received Water and Sewer: Environmental Partners <ul style="list-style-type: none"> o received Legal Counsel (as needed)
Permitting	Fort Point	<ul style="list-style-type: none"> Review of existing permitting documents Updated list of all required federal, state and local permits, including MEPA 	<ul style="list-style-type: none"> Review permitting requirements and permitting strategy/timeline Zoning compliance 	Chris McMahon/ Sarah Raposa	<ul style="list-style-type: none"> Land Use Boards Meeting 6/7 Planning Board, Zoning Board of Appeals, Building Commissioner, Conservation Commission, Medfield Energy Committee Mass. Department of Environmental Protection / EOEAA 	<ul style="list-style-type: none"> Legal Counsel (as needed)
Historic	PAL	<ul style="list-style-type: none"> Coordinate with Town officials on compliance with MOA and preserving building eligibility for credits MHC and NPS Part I submission and approval 		Johnny Martinez/ Nicholas Milano	<ul style="list-style-type: none"> Medfield Historic District Commission and Medfield Historical Commission Met with Trinity 6/2 	<ul style="list-style-type: none"> Peregrine Group Epsilon (as needed)
Legal & Title	Robinson & Cole	<ul style="list-style-type: none"> PDA, LDA, title report, compliance with LDA between Medfield and Commonwealth 		Todd Trehubenko/ Nicholas Milano/ Lisa Mead	<ul style="list-style-type: none"> Board of Selectmen 	<ul style="list-style-type: none"> Mead Talerman Costa
Public Outreach and Information	Trinity Acquisitions LLC	<ul style="list-style-type: none"> Participate in and attend public forums, public information sessions as requested 	<ul style="list-style-type: none"> Design and implement public outreach and information campaign 	Committee/ Nicholas Milano/ Sarah Raposa	<ul style="list-style-type: none"> MSHDC ONGOING 	

“Hot Button” Issues – Continued Study

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- Impact on Town water and sewer
 - ▣ 4 studies by 3 firms since 2019 indicate sufficient capacity
 - ▣ 0 studies indicate insufficient capacity
 - ▣ Pending additional input from Water & Sewerage
- Impact on Schools
 - ▣ Fiscal Impact Analysis aligned with Town estimates
 - ▣ Pending additional input from School Committee
- Traffic impact
 - ▣ Potential mitigation through intersection improvements

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WHAT IS PROPOSED FOR SALE?

What Does the Town Own?

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- Town acquired Parcels A and B in 2014 (~127 acres in red)
- State agencies own adjacent parcels (~106 acres in yellow)



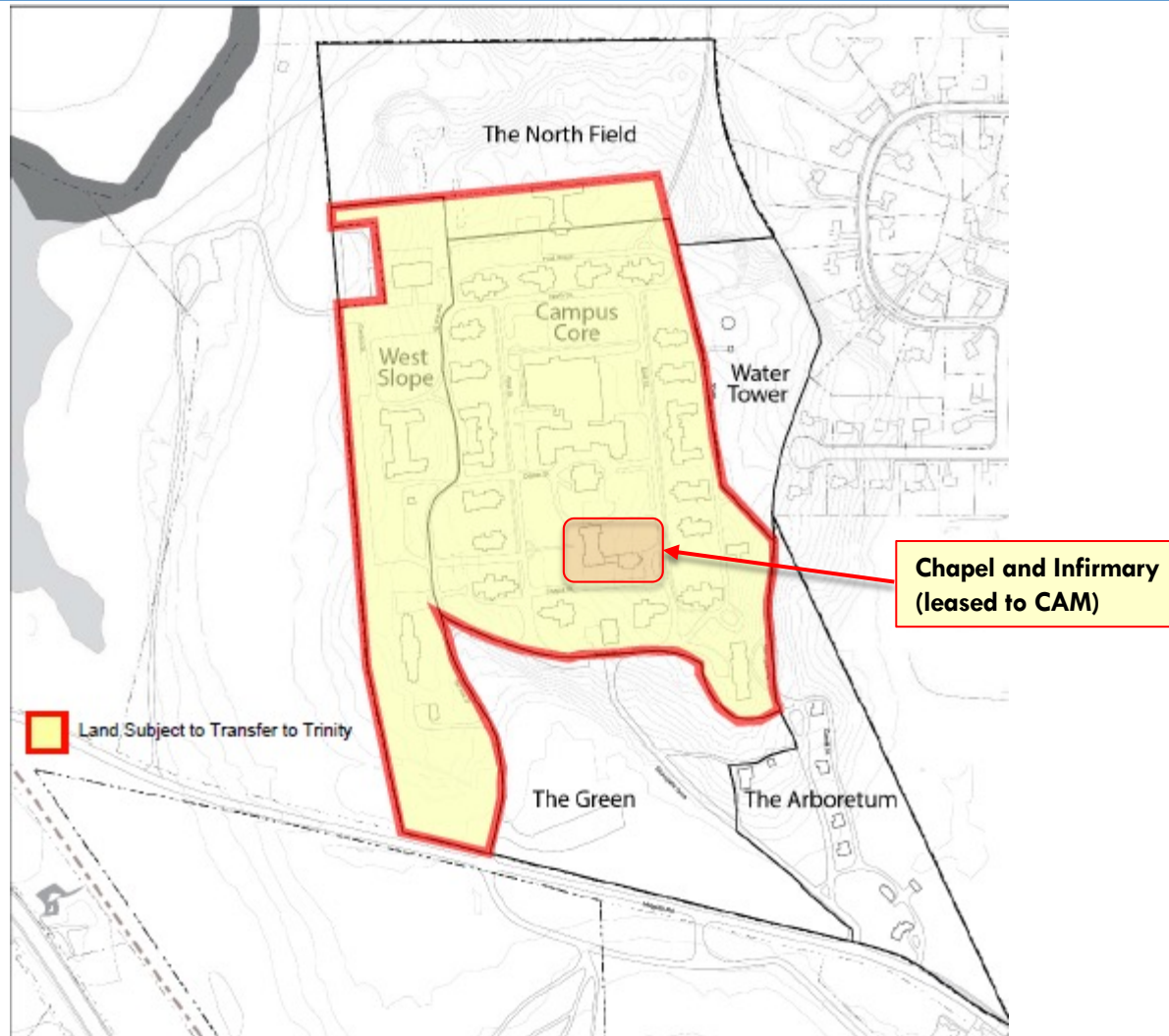
What Is Now Proposed to be Sold?

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- Trinity would acquire approximately 45 acres of land north of Hospital Road in the Core Campus, West Slope, and Buildable North Field subzones.
- These areas are characterized by 31 historic red brick buildings.
 - Within the purchase area, Trinity would not acquire the 2 buildings leased to the Cultural Alliance of Medfield, land, green or parking areas associated with the CAM lease.
 - Trinity proposes to demolish 2 “non-contributing” buildings.
 - Net expected to be 27 buildings historically rehabilitated to National Park Service and MA Historical Commission standards.

Proposed Disposition Acreage ~45 acres

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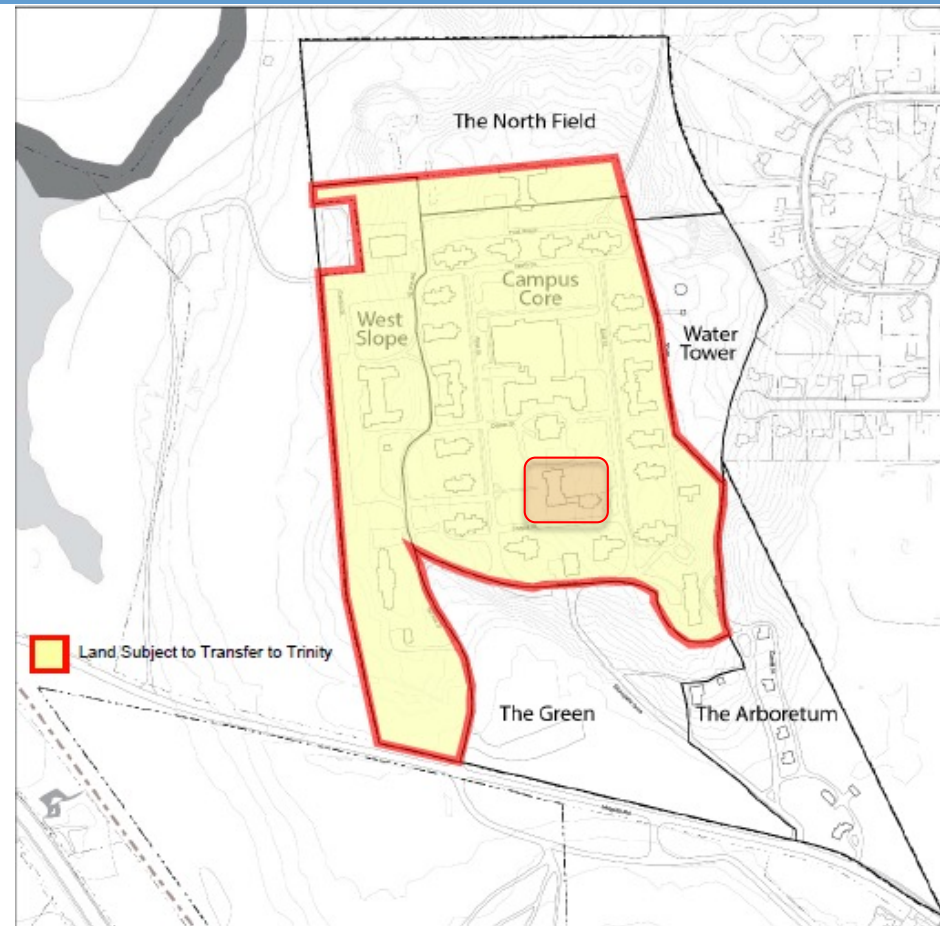
What Does Town Retain?

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- Town retains all remaining land of the 127 acres it acquired in 2014, including:
 - The Green (Open Space) – 16 acres
 - The North Field (unimproved portion) -- +15 acres
 - zoned for Open Space, Agriculture, Floriculture, Horticulture
 - The Arboretum – 11 acres characterized by 7 wood cottages
 - Zoned for Residential, Senior Housing, Arboretum, Open Space
 - Water Tower parcel – 6.34 acres
 - All 40 acres acquired south of Hospital Road
 - Easements and access rights through Trinity parcels

Sale Area = 35% of Town MSH Parcels

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Medfield State Hospital District SubZones

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Trinity Proposal (main points)

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- Restore all but 2 buildings using Historic Tax Credits
- Create up to 334 rental apartments
 - ▣ 75% market, 25% affordable (Town Inclusionary Zoning bylaw)
 - ▣ Within the existing footprint – no new construction
 - ▣ Sustainability and green measures
 - ▣ As rentals, the Town should get SHI credit for 334 units
- Absorb infrastructure and environmental remediation costs in the project
 - ▣ \$0 Town cash contribution
 - ▣ Indemnify Town and assume key obligations

Trinity Proposal (main points)

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FINANCIAL PROPOSAL TO TOWN	
\$2,000,000	Purchase Price - subject to due diligence (confirmed before STM)
\$ 500,000	Contribution to Town to cover town incurred redevelopment/project management costs
\$ 25,000	Reimbursement of costs associated with the RFP process

OTHER TRINITY CONTRIBUTIONS – “COMMUNITY BENEFITS”	
\$1,000,000	Direct contribution toward historic rehabilitation of Chapel and Infirmary (Cultural Arts Center)
\$ 250,000	Future donation to Cultural Arts Center for programming

MSHDC REVIEW CONCLUSIONS

MSHDC Review Conclusions

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- Proposal resolves liability and shifts substantial Town costs:
 - ▣ Buildings to be sold are deteriorating and include hazardous materials
 - ▣ Current remediation estimate for buildings to be sold is \$20 million
 - ▣ New infrastructure costs paid by project not by Town, estimated at ~\$28 million (2018)
 - ▣ Remediation and infrastructures costs are Trinity costs in addition to sales price paid to the Town
- Town retains extensive open space, recreational land, and access to the entire campus – 2/3 of what we bought in 2014

MSHDC Review Conclusions

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- The transaction is financially beneficial for the Town
 - ▣ No cash outlay by the Town/taxpayers
 - ▣ Town receives funds from purchase and shifts future costs
 - ▣ Annual tax revenue exceeds costs of Town services
 - Current estimate is up to ~\$768,000 of net benefit annually
- Adds housing consistent with Town objectives
 - ▣ Puts Town over 40B threshold for foreseeable future
- Complementary with proposed Cultural Arts Center
- Consistent with Master Plan and 2019 Zoning change

Consistency with Town Goals

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- Community Survey (+3,000 responses)
 - ✓ Preserve beauty and openness
 - ✓ Keep historic buildings and landscape
 - ✓ Maintain “The Green” in front
 - ✓ Reuse Lee Chapel for cultural and arts center
 - ✓ Provide for sports, recreation, and exercise
 - ✓ Master Plan “Preferred Scenario” – max 334 units

Still Under Review Prior to STM

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- Trinity: updated assessments
 - ▣ fiscal impact
 - ▣ traffic impact
 - ▣ water/sewer/storm water sufficiency
 - ▣ permitting requirements and plan
- Trinity: conducting real estate due diligence
 - ▣ title, buildings, environmental, etc.
- Trinity: ongoing discussions with regulating agencies and funders; state officials overseeing gun range
- See due diligence matrix posted to webpage

Still Under Review Prior to STM

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- Town: review of Trinity updates/reports
 - ▣ including peer reviews and consultant reports
 - ▣ funded by ATM allocations and MassDevelopment
- Town: Board and Committee review as applicable
 - ▣ MSHDC outreach to solicit feedback, answer questions
 - ▣ Public meetings
- Town: draft proposed Land Disposition Agreement
 - ▣ Establishes sale terms and timeframes for permitting, construction, and actual transfer of property to developer
 - ▣ Town will review permit applications, construction activity

June 2022 Special Town Meeting Vote

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□ Town Meeting Vote will:

- ▣ Authorize the Board of Selectmen to sell the property in accordance with the Land Disposition Agreement with Trinity
 - Agreement will be negotiated by Board of Selectmen prior to Town Meeting
 - Agreement will include terms and conditions to be met before any property is transferred

□ Town Meeting Vote will:

- ▣ Not allow the Board of Selectmen to sell the campus to a different developer
- ▣ Not allow Trinity to sell the property to a different developer
- ▣ Not allow Trinity to increase the number of housing units above 334 (would require a return to Town Meeting)
- ▣ Not result in an immediate transfer of land to Trinity

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TIMELINE AND NEXT STEPS

Timeline and Next Steps

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- April – June: public meetings and information sessions
- If the sale/land disposition authorization request is approved at the June STM, anticipate:
 - July, 2022 – December, 2023 - completion of permitting, regulatory, financing approvals
 - December, 2023 – sale closing and transfer to Trinity
 - January, 2024 - start of construction
 - December, 2025 - completion of construction (24 months)
- Time extensions available as merited



Learn More / Public Comment

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- Learn more:
 - ▣ Visit the Town website for additional information
 - ▣ <http://www.town.medfield.net/556/Medfield-State-Hospital-information>
- To submit public comments / questions / concerns:
 - ▣ Google Form available on the Town website
 - ▣ Email: MSHDevelopmentCommittee@medfield.net
- Additional public meetings will be posted on the Town website and social media pages



<http://www.town.medfield.net/556/Medfield-State-Hospital-information>