



# Medfield State Hospital Development Committee

*Presentation for Warrant Committee*  
*June 6, 2022*

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

## 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

## 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

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

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

# “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

## 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**)



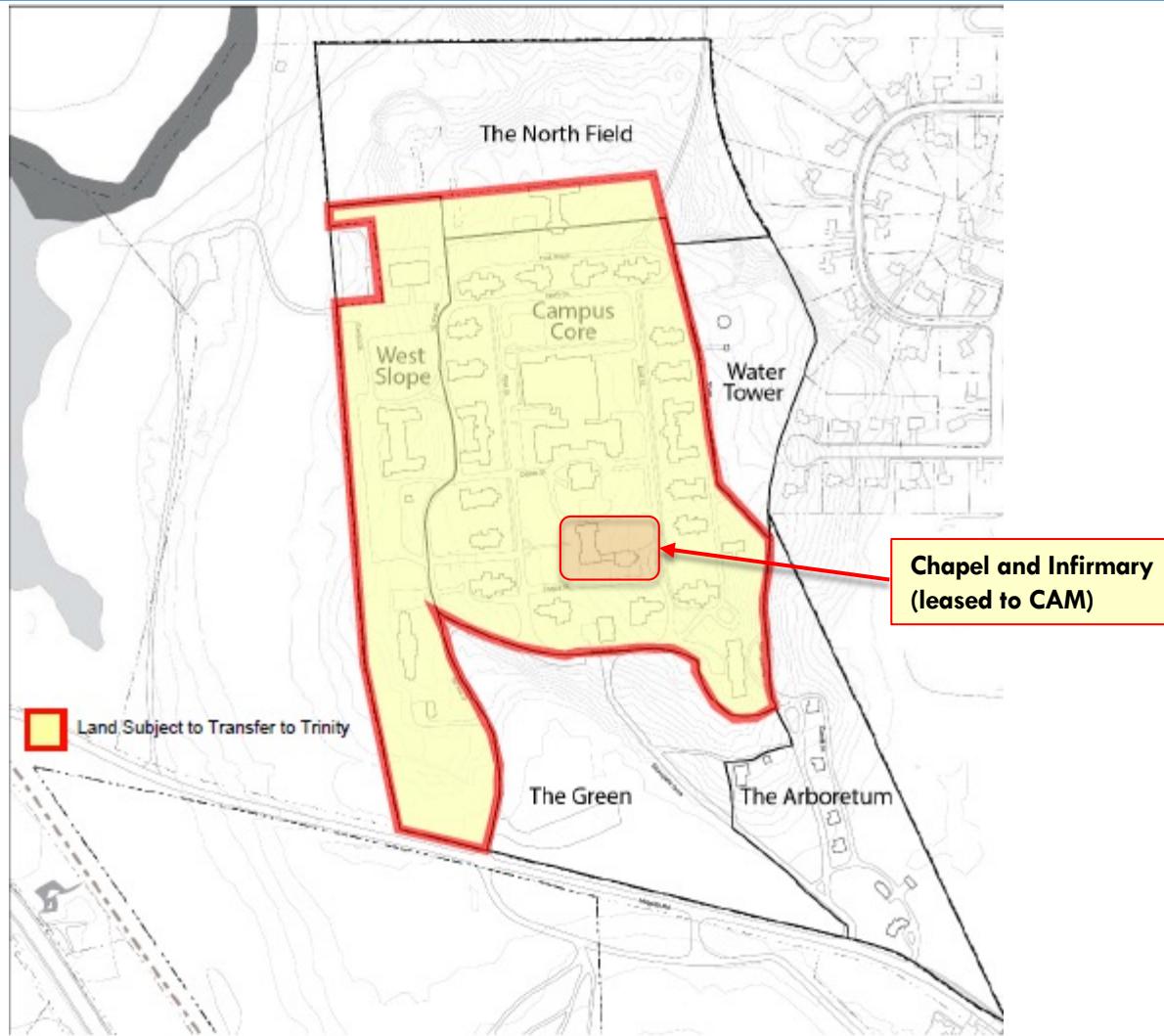
# What Is Now Proposed to be Sold?

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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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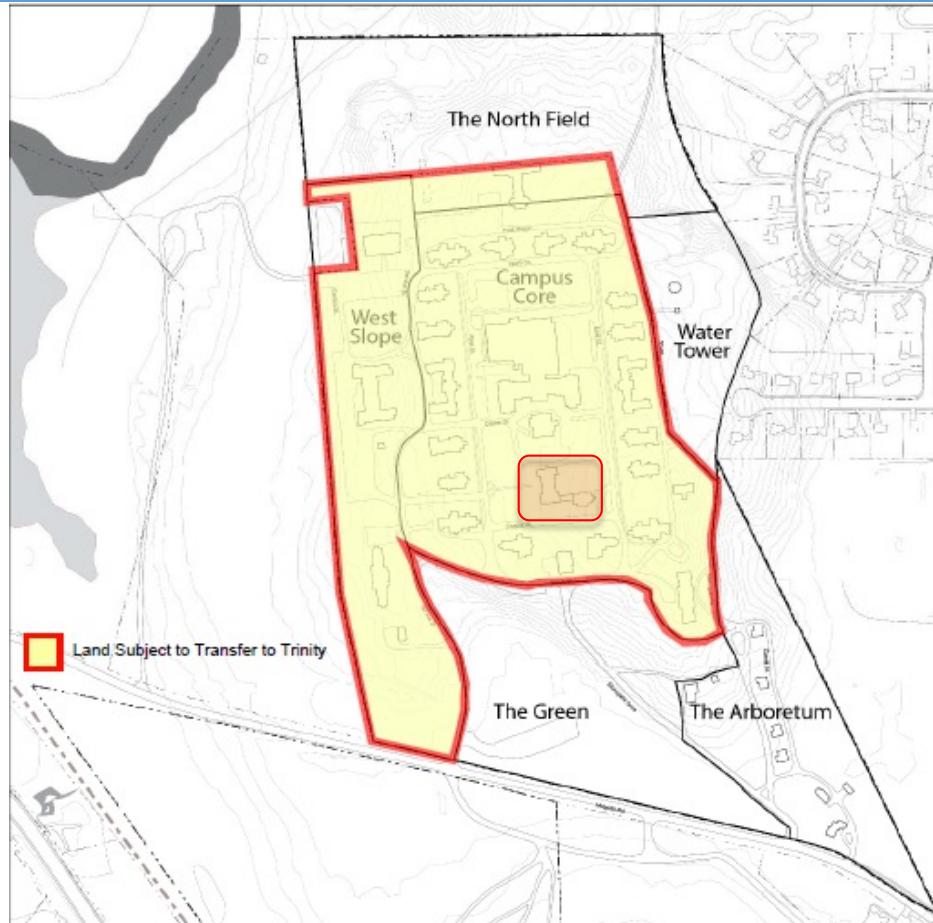
# What Does Town Retain?

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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

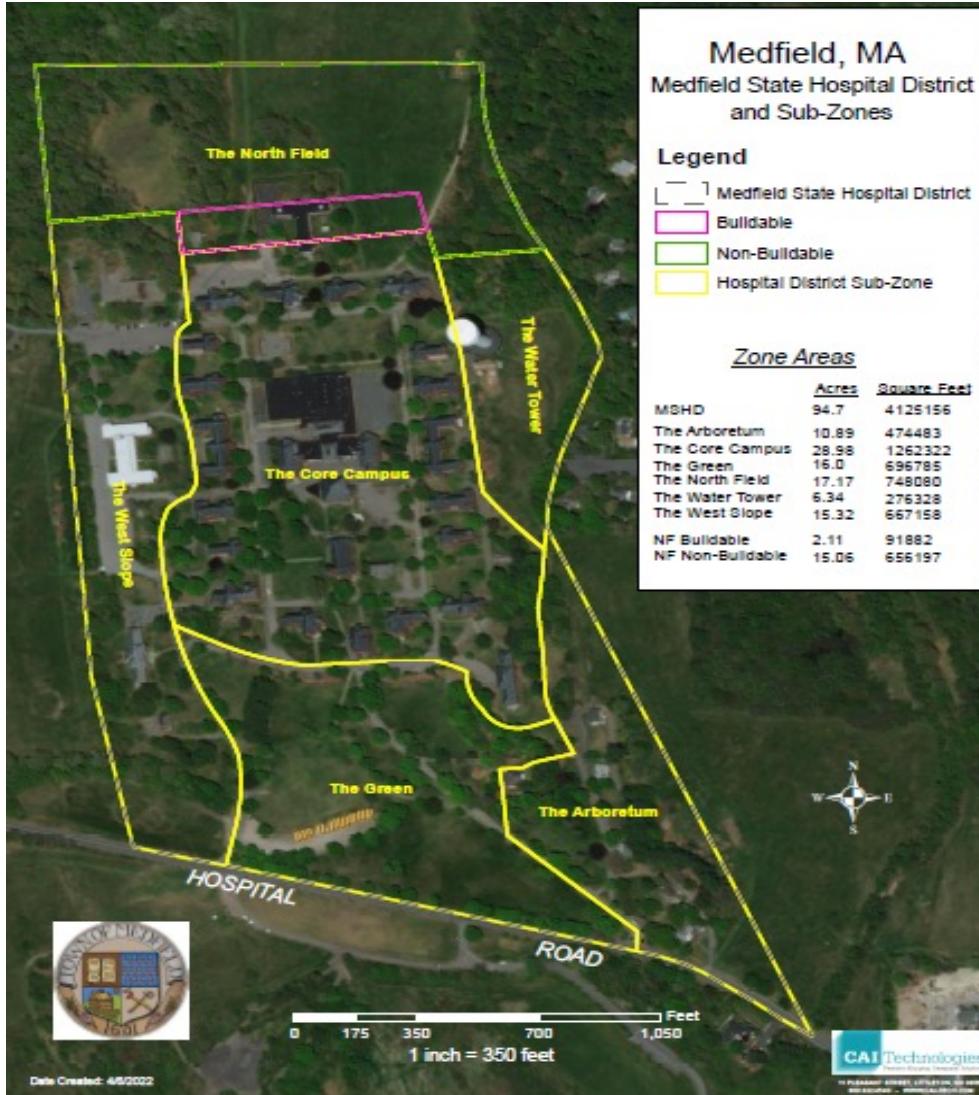
# Sale Area = 35% of Town MSH Parcels

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# Medfield State Hospital District SubZones

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## TRINITY FINANCIAL PROPOSAL (8/2/21)

# 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

# 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

## 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](mailto: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>