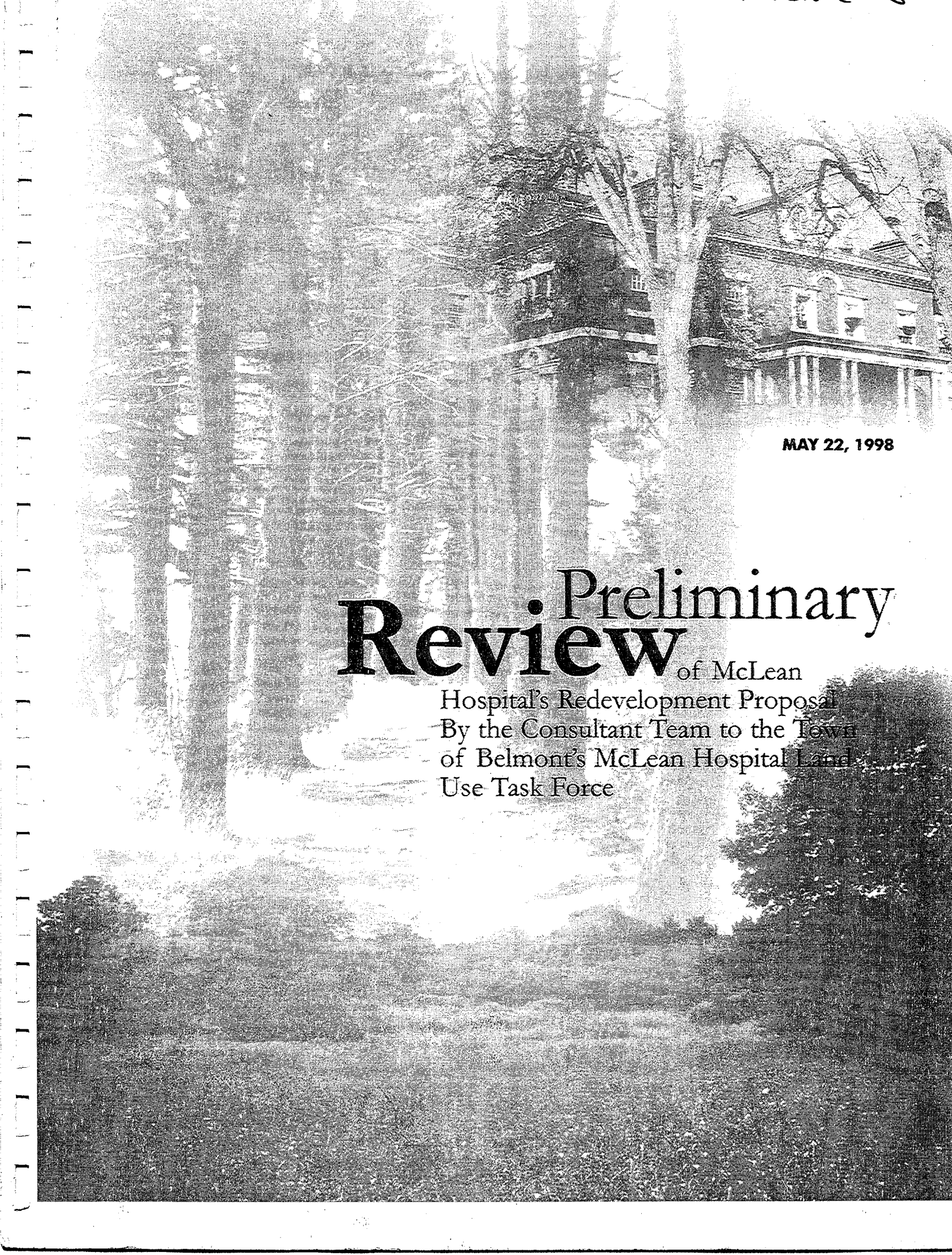

MAY 22, 1998

Preliminary Review of McLean Hospital's Redevelopment Proposal

By the Consultant Team to the Town of Belmont's McLean Hospital Land Use Task Force

PRELIMINARY REVIEW OF MCLEAN HOSPITAL'S REDEVELOPMENT PROPOSAL BY THE CONSULTANT TEAM TO THE TOWN OF BELMONT'S MCLEAN HOSPITAL LAND USE TASK FORCE

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A MESSAGE FROM THE MCLEAN HOSPITAL LAND USE TASK FORCE

I. McLean Hospital/Partners Healthcare System/The McLean Hospital Land Use Task Force

As most of you know, in 1995, in the face of major changes in the healthcare industry and because of a large capital debt at McLean Hospital, Partners Healthcare System, owner of McLean Hospital, announced plans last spring to consolidate its operations in Belmont significantly. This decision followed an internal planning effort started in 1995. During this period, Partners considered numerous options, including totally relocating McLean's operations outside of Belmont. Its present intention is to create a single integrated mental health care delivery system. Current plans call for McLean's operations at the Belmont site to be a crucial component of this system.

Having reached this decision, Partners and McLean called for major changes to be made at McLean in order to make it financially feasible for McLean to remain in the community. McLean plans to create a land use plan which would allow them to retain a 50-acre core and divest or develop the other 190 acres.

In June of 1996, the Belmont Board of Selectmen formed the McLean Hospital Land Use Task Force to represent the interests of the Town and to work cooperatively with McLean and Partners. The Task Force consists of 15 members, eight of whom are volunteer citizens appointed by the Selectmen, and seven of whom are ex officio members. The voting ex officio members include representatives from the Planning Board, Cemetery Commission, Conservation Commission and the Board of Assessors. Non-voting ex officio members are the Town Adminstrator, the Director of Community Development and the Town Planning Coordinator. These members represent a broad cross section of opinion in the Town and have been working very hard these past two years.

We especially want to recognize the contributions of C. Brendan Noonan, Vice Chairman of the Task Force who passed away this winter. He was a great asset to the Task Force, made many fine contributions and is sorely missed.

II. The Work Process

The Selectmen asked that the Task Force evaluate, among other options, the conservation of open space, municipal cemetery development and low impact private development. It was expected that we would conduct a thorough review of all information regarding the McLean Hospital property, including existing uses, physical attributes, assessed property value, infrastructure and utilities and impacts to municipal services. We were asked to review with McLean its current and future needs in order to carry out its corporate mission, to survey the needs and interests of the Town of Belmont, to consider the opinions of businesses and residents located close to the property, to solicit public opinion and ideas and to develop recommendations, with sufficient documentation and analysis for the Board of Selectmen's approval.

To assist us in our work, in 1997, the Task Force retained development consultants, including the Boston-based planning team led by the architecture and planning firm of Goody, Clancy & Associates, the real estate development firm of Spaulding & Slye, and the legal firm of Hill and Barlow. Each of these firms was selected through a competitive process. An overall budget for the year was determined, discounted fees were negotiated and each of the firms was required to agree that it would not represent any third party in connection with any development that might be proposed for the McLean site.

The Task Force created a schedule for its work with specific goals, milestones and phases which was intended to develop a strong, proactive, integrated and coordinated strategy for the Town of Belmont.

Phase I

Phase I of this work plan involved a process of education for the Task Force during which time we educated ourselves about the issues surrounding the land and the basic options and tools available to the Town of Belmont in its discussions with Partners and McLean. During Phase I, the Task Force worked to ensure that community input was received from all sectors of the Town, holding numerous public hearings and inviting 22 local and regional organizations representing the broad range of interests important to the Belmont community to address the Task Force. The meetings were arranged topically so that all issues associated with a given topic could be fully explored and understood by the Task Force. The Task Force also sponsored an educational workshop at Belmont High School with its consultants which was open to the public and which featured five key topics relevant to the site: legal and regulatory issues around land use development and open space acquisition; real estate markets; fiscal costs and benefits of different land uses; and other issues of critical concern to the McLean Task Force and the Town.

Phase II

During Phase II of the work plan, the Task Force considered a variety of uses that might occur on the property and assessed these uses with respect to their impact on the Town. The Task Force's consultants gathered relevant information about the site, including traffic capacity; environmental characteristics; the possibility of siting a new cemetery; fiscal costs and benefits of different land uses; and other issues of critical concern to the McLean Task Force and the Town. These efforts assisted the Task Force in understanding the existing and potential uses for the site, its historical and archeological qualities, ecological value, historical significance and constraints on development. The results were presented to the Town through a series of public hearings. Phase II was completed when the Task Force issued a Statement of Principles and Priorities that we believed should govern the development of the McLean land. This Statement of Principles and Priorities was unanimously adopted by the Task Force and approved by the Board of Selectmen. These principles included the following:

- Protect the natural and historic character of the McLean property, which included:
  - maximizing the amount of undisturbed, natural open space on the parcel;
  - preserving as of right certain well-known and beloved features of the parcel as well as those features which are the most environmentally sensitive; and
  - minimizing additional new development that would adversely affect the amount of open space through the creative reuse of existing buildings

- Minimize adverse impacts from new development in order to preserve quality of life, which included considerations of:

- Traffic,
- Flood control,
- Construction impacts, and
- Visual impacts

- Generate additional tax revenue for the Town of Belmont

- Consider the financial impact of development on the entire campus to ensure fairness in the estimate of total financial value to McLean

- Allow the Town of Belmont to secure land for municipal purposes, such as
  - Cemetery development, and
  - Additional municipal space

- Support private development which meets municipal and/or public needs, such as:
  - Moderate income housing, and
  - Development that might enhance Belmont's commercial centers

The Task Force also suggested some potential uses that would serve the needs of the Town of Belmont, including conservation land, open space for cemetery development and passive recreational use, soccer fields, housing and limited, low intensity office development such as an R&D facility.

Phase III

Phase III of our work plan began last summer, when McLean and Partners presented its first proposals in connection with the redevelopment of their surplus land. They proposed three development options, each including a variety of uses but focusing on a specific use – clustered housing, corporate development and a senior complex consisting of independent living units, assisted living units and a skilled nursing facility. After deliberation and analysis by the Task Force's consultants, the Task Force rejected all of McLean's proposals as being inconsistent with its Statement of Principles and Priorities. Essentially, each of the proposals contained too much development in the wrong places (meaning the previously undeveloped areas of the site).

This rejection led to a long hiatus this fall, during which time Partners and McLean attempted to construct a new proposal. In late fall, the Task Force attempted to assist them in this effort by choosing one of McLean's original proposals – the proposal emphasizing the senior community which was least offensive in terms of amount of development and offering the Town the greatest benefits – and reconstructing it in a manner that would be more consistent with our Statement of Principles and Priorities. This reconstruction was merely an illustration and not a proposal from the Task Force. We, the Task Force, feel very strongly that as a private land holder, McLean, not the Town, is responsible for setting forth redevelopment proposals.

This reconstruction included approximately 145 acres of undeveloped land that would be set aside for conservation land and open space. The Task Force emphasized to McLean that it expected to limit development in this area and that any development which took place elsewhere on the site should be constructed so as to respect the quality of the open space. The Task Force also considered traffic implications from development.

Four weeks ago, McLean approached the Task Force with another proposal which includes a mix of townhouses, senior housing and office development. McLean's request for development rights

under this proposal have been significantly scaled back. Under the proposal, nearly 60% of the McLean campus is preserved as open space. The Task Force has been studying this proposal together with their consultants.

On May 13th and 20th, McLean will make the first public presentation of its proposal. This presentation will be followed by the analysis of the proposal by the Task Force consultants highlighting our questions and concerns. The results of the consultant's analysis will be placed in the library for the public to examine.

Following McLean's presentation, the Task Force plans to hold a series of weekly public hearings and precinct meetings in order to ensure a full community input into all of the issues. These meetings will culminate in a special educational session for Town Meeting members to be held on Monday, June 15th. At this meeting, McLean and the Task Force consultants will make presentations and Town Meeting members will have the opportunity to ask questions and educate themselves about the proposal. There will be no vote taken. It is not expected that a Town Meeting will be called to vote on any proposal prior to the Fall.

Phase IV

During Phase IV of our work, a comprehensive plan will be developed after consideration of all of the options, issues and concerns.

The Board of Selectmen and the Task Force believe that the ultimate disposition of the McLean property will have a substantial impact on the future of Belmont. The decisions we make will help to shape the fiscal health of the Town, its quality of life and the level of services we can offer to our residents. They will also affect the quality of life and future choices for generations to come. These decisions are too important not to be analyzed, debated and considered.

We ask for your help and support for our work and your participation in our ongoing planning efforts.

Sincerely,

Nancy J. Kelley, Chairperson
Murray Ruben, Vice Chair
Marlene Flewelling, Citizen Member
Henry (Rocky) Joyal, Citizen Member
Walter McLaughlin, Citizen Member
Harriet Needham, Citizen Member
Ellen Stevens, Citizen Member
Angelo Borelli, Board of Assessors, Ex-Officio
John Murphy, Conservation Commission, Ex-Officio
Elissa ~~Liz~~ Norris, Planning Board, Ex-Officio
Ellen O'Brien-Cushman, Cemetery Commission, Ex-Officio
Tom Gatzunis, Ex-Officio, Non-voting Member
Mel Kleckner, Ex-Officio, Non-voting Member
Jeffrey Wheeler, Ex-Officio, Non-voting Member

ANSWERS TO FREQUENTLY ASKED QUESTIONS

ANSWERS TO FREQUENTLY ASKED QUESTIONS

Why are the Task Force consultants issuing their evaluation so soon, when public consideration of the McLean proposal is just beginning?

The McLean proposal is complicated. It contains a number of different, but inter-related, parts that can only be understood in the context of the entire proposal. The Task Force consultants are therefore issuing a preliminary evaluation of the McLean proposal at the very start of the public review in order to help inform and guide such public consideration. The preliminary evaluation does not attempt to reach conclusions, but simply to describe and evaluate the proposal objectively in light of the Task Force's prior statement of its priorities and objectives. The preliminary evaluation sets forth both what is known about the effects of the proposal and what needs further consideration.

When the Task Force rejected three McLean proposals in July 1997, it went to great lengths to articulate its reasons for doing so. Now that the Task Force has decided to forward the new McLean proposal to the Town for public review, it is appropriate to set out the reasons why this proposal seems worthy of public consideration and debate.

The Task Force has already been discussing this proposal with McLean for months. Isn't this a "done deal" between the Task Force and McLean?

The Task Force is an advisory body appointed by the Board of Selectmen. Since the McLean proposal involves a rezoning of the property, it will require a two-thirds vote of Town Meeting members. Even a vote of the Board of Selectmen can not bind the Town to an agreement with McLean regarding this proposal. Clearly the Task Force, as an advisory group, has no authority to do so.

The Task Force members have never lost sight of their advisory role. The decision to forward the new McLean proposal to the Town for public review is not an endorsement of the plan, but instead a recognition by the Task Force that further consideration of the proposal now requires public education and debate.

The Task Force has announced a schedule for public review of the McLean proposal which leads to a Special Town Meeting in the fall of 1998. Why does the process have to go so quickly?

The Task Force has been up and running for about two years now. During that time, it has heard from Town boards, public officials and Town residents on all aspects of a potential redevelopment of the McLean property. It has publicly prepared and circulated its findings from those hearings in the form of a statement of Town priorities. This next part of the process is a continuation of all of the Task Force's prior efforts.

Because the McLean proposal involves a rezoning of the property and thus a vote of Town Meeting members, the schedule for public review is intended to give Town Meeting members a reasonable opportunity to learn about the proposal and its effects on the Town and to hear the issues and concerns raised by Town residents. A Special Town Meeting will not occur before the Town Meeting members are

informed and prepared to vote on this important matter.

It is also true that the strong current real estate market provides an opportunity that should be taken advantage of. McLean's willingness to leave the substantial majority of the property undeveloped is based on the assumption that a rezoning can be accomplished in a manner which allows McLean to participate in the current real estate cycle. If that is not the case, there are no assurances that McLean will not require more development (or to return to the idea of single-family residential development, which is less subject to the market cycle) in order to achieve its financial objectives.

McLean Hospital appears to have survived the worst of the "managed care" challenge to its financial situation. Why can't McLean just continue to use the property the way it has for 100 years?

Even if McLean can continue as a mental health hospital and research center in Belmont, it will not be easy. At a time when McLean is struggling to balance its budget, it is under pressure to realize the significant value contained within the many acres of its property that now go unused. In the current health care environment, there is no reason to believe that this pressure will just go away. On the contrary, if the Town does not deal responsibly now with McLean's request for a rezoning, then the Town will force McLean to do what it has to do for financial survival under the existing single-family zoning when its next budget crisis arises. Most cities and towns would be eager to have the opportunity to participate in planning for the future that timely public consideration of McLean's proposal will provide.

Why does the Town have to agree to all the development that McLean is asking for in its proposal? Can't the Town require less development on the property?

The McLean property is approximately 240 acres of land, currently zoned for single-family residential development. Under the state statute governing property taxes for non-profit mental health facilities, McLean is required to pay property taxes on its land (but not its buildings) at its market value for the zoned use. The Town's board of assessors has therefore been making a determination of the market value of the McLean land for single-family use for many years. Their current valuation is about $36 million, which is more than a 10% reduction from four years ago and appears conservative in light of the strong real estate market.

McLean is seeking to redevelop about 190 acres of its property, leaving 50 acres as the continuing hospital campus. If the approximately 80% of the property that McLean seeks to redevelop contains approximately 80% of the total property value (it contains some wetlands and steeply sloped land, but also some of the most desirable and valuable land), then it is understandable that McLean would ask for development rights that would give the surplus acreage at least as much value as it now has for single-family use (80% of $36 million is about $29 million). It is also understandable that McLean would ask for some additional compensation if the Town is also receiving actual interests in land as a result of the proposal, including open space, a cemetery and additional land for the existing senior public housing. If there are substantial benefits to the Town that can be achieved by a voluntary, mutually beneficial redevelopment scheme, then McLean needs to be able to achieve an economic result that is at least comparable to its existing situation in order to make such a deal.

Can McLean really develop the property for single-family use? What about the limitations

contained in the special permits McLean has received from the Zoning Board of Appeals for prior hospital expansions?

There may be some subtle legal questions around the exact ability to use the property for single-family residences, but two basic issues seems compellingly clear. The first is that if McLean moves out of Belmont, then the entire 240 acres could be converted into single-family house lots. The second is that while McLean's continued use of the site may limit the number of single-family homes that could be built on the rest of the property, it is doubtful that such use prohibits residential development. Even a limited number of oversized "estate" lots along Concord Avenue, for example, would yield a substantial financial return to McLean and be very deleterious to the Town's stated objectives.

How can the Town possibly handle the new traffic that the development called for by the McLean proposal would create?

McLean is now operating at a reduced level and has generated significantly greater traffic in the past. The amount of traffic that would be produced by the proposed development adds only marginally to the volumes of the Town's frequently used intersections that would be affected by the plan. McLean has volunteered to imposed strict limits on the amount of new traffic that would be created, to pay for the Town's monitoring of those limits and to bear penalties (fines, loss of parking and others) if those limits are exceeded. McLean has also volunteered to make limited road and intersection improvements that will improve traffic efficiency and safety, but not change the existing neighborhood character of the roads and sidewalks. The Task Force and its consultants are continuing to evaluate McLean's proposal to understand the plan's traffic impacts and how they can be addressed.

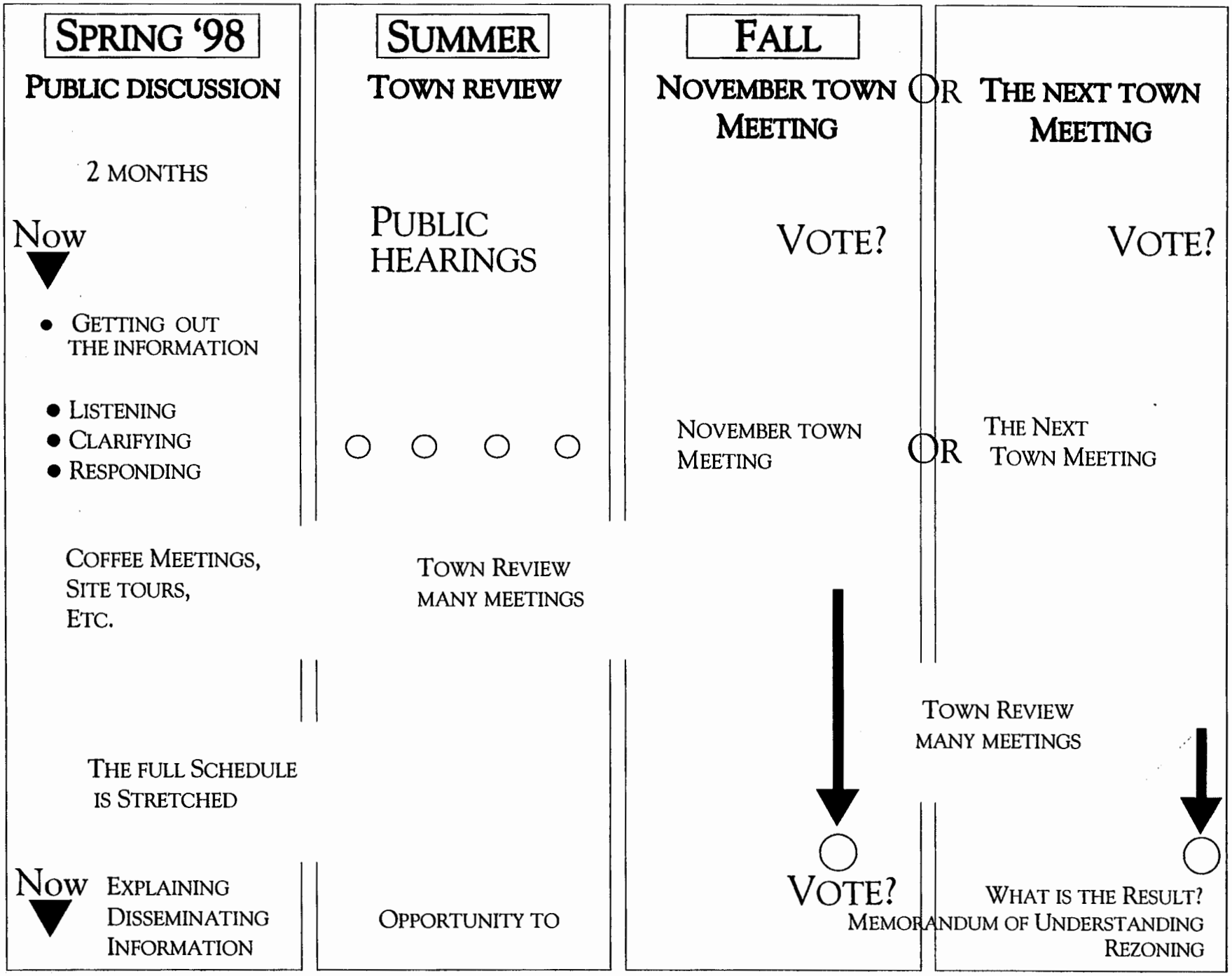
How can a Town resident understand for himself the "facts and figures" of the McLean proposal, instead of simply relying on a consultants' evaluation?

In the coming weeks and months, McLean and the Task Force will be make publicly available a considerable amount of information, including the findings and reports of their respective consultants. In each case, the information provided will not be summaries or conclusions, but will be detailed descriptions of the facts collected and the manner in which the analysis of the data was carried out. It will specifically indicate any assumptions or projections included in the analysis and the basis therefor. The preliminary evaluation of the Task Force consultants is an example of this approach. The evaluations are not simply "expert conclusions," but are objective descriptions and analysis of the various aspects of the McLean proposal designed to allow Town residents to draw their own conclusions

The upcoming public process also provides a series of opportunities for Town residents to ask questions and request further information. It is the goal of the Task Force to respond to all of these questions and requests. The Task Force will also work to ensure that McLean representatives are available for questions at the public events and that inquiries of McLean receive prompt and responsive answers.

PROCESS OF PUBLIC INPUT INTO THE PROPOSED REDEVELOPMENT OF MCLEAN HOSPITAL

PROCESS OF PUBLIC INPUT INTO THE PROPOSED REDEVLOPMENT OF MCLEAN HOSPITAL



PROPOSED MCLEAN HOSPITAL CAMPUS COMPREHENSIVE PLAN

BELMONT CITIZEN-HERALD
THURSDAY, FEBRUARY 19, 1998

Preparing McLean for a healthy future

BY BRUCE M. COHEN
SPECIAL TO THE CITIZEN-HERALD

For 101 years, McLean Hospital, the original psychiatric division of the Massachusetts General Hospital (MGH) has been a major presence in Belmont. Two years ago, the hospital renewed its commitment to the town, choosing to stay here rather than merge our services with other components of the MGH downtown. This choice was based, in part, on an understanding that our quiet setting is an important resource to the delivery of the quality mental health care for which McLean is internationally renowned.

Having reached this decision, we knew major changes would have to be made at McLean to make it financially feasible for us to remain in the community. One of the key changes — and the one that most obviously impacts our neighbors — is the need to generate support funds by developing a substantial portion of our 242-acre campus.

This is no small change, for either the hospital or the town, and so I believe it is incumbent upon us to make sure everyone in the community understands the context from which the need to develop more of our property arises. If we are asking you — our neighbors — to accept the alterations in the fabric of the town that this development will entail, we must provide you with a full picture of the reasons we feel such changes are necessary.

Our services and mission

As many know, McLean Hospital is a not-for profit academic hospital and the largest psychiatric teaching hospital affiliated with Harvard Medical School. As an academic center, dedicated to discovering and applying new knowledge, we face growing competition from for-profit organizations, whose costs are lower because they do not perform teaching or research as part of their work.

Over the decades, McLean has been the early training ground for many of the leading mental health care clinicians in the nation. We were also the first psychiatric hospital in the world to open research laboratories to improve our understanding and treatment of psychiatric disorders. Today, we have one of the largest and most productive programs of psychiatric teaching and research in the world.

Maintaining our mission of quality care, research and teaching presents a difficult challenge in an environment in which third-party payers and managed care organizations are reducing the services for which they will pay and are increasingly involved in deciding where, how and by whom mental health care is provided. HMOs, which cover over 44 percent of the state's population, severely restrict the coverage of inpatient and outpatient mental health care. Creating further financial pressures is the fact that federal and state governments, through changes in Medicaid and Medicare programs that cover about 75 percent of the patients we treat, are substantially reducing spending on mental health care for the most severely ill of our community.

Ironically, our fiscal challenge is exacerbated by the very thing in which we take greatest pride — our hard-earned national reputation for treating patients with the most complicated and severe mental disorders. Because of this reputation, we are called upon to treat the sickest patients, whose care is the most costly to provide. Often, the cost of care for these patients is significantly above the reimbursement we receive. As part of our commitment, we continue to treat patients, even if there is little payment for doing so. We also treat patients for whom there is no payment. In fact, the amount of free care we provide is measured in millions of dollars annually, and has not been cut back, even in our years of trouble.

Looking forward

One thing is certain in this constantly changing health care environment: we will have to keep changing ourselves to meet new challenges. Many hospitals facing these changes have closed.

We at McLean Hospital intend not only to survive, but to continue our mission and find the means to support our important work. To achieve this end, we undertook a lengthy strategic planning process with our Board of Trustees, in the end, the trustees, including businessmen, physicians, educators, and community volunteers, some of whom are Belmont residents, voted unanimously for McLean to remain in Belmont. This vote, following two years of intensive analysis, was predicated, in part, on concentrating the hospital's current activities into a core of our campus and using income generated through development of the property outside this core to retire the hospital's debt. This debt was incurred mainly through much-needed improvements made in the 1980s to update our 100-year-old buildings and provide a modern environment for care. By paying off our debt, McLean will significantly strengthen its ability to cope with the fiscal challenges that all health care institutions are facing or will face in the foreseeable future.

Another key element of the plan we adopted was to increase our research and the facilities which support it. To this end, we have begun expansions of our Mailman Research Center and Brain Imaging Center. In these facilities, McLean investigators apply the new research technologies of brain imaging and molecular, cellular and structural biology to study the brain as never before. Their work will lead to breakthroughs in our understanding and treatment of schizophrenia, major mood disorders, substance abuse, Alzheimer's disease and children's psychiatric disorders.

Many of our neighbors in Belmont and Boston have had to cope with downsizing, re-engineering, mergers and similar traumas that have become the norm in today's highly competitive world. Face with similar pressures in health care, we have had to reduce our inpatient services, decrease our overhead, and find alternative sources of funding for our research and teaching. Against this background, we are treating more patients, teaching more trainees and performing more research than ever before. We believe the plans we have initiated have put us on the right path, but our financial troubles are still not over. The development of our property will play a major role in our ability to move in to the future as a strong, financially sound institution.

We firmly believe our land can be developed in a manner that will enhance the quality of life in Belmont. Having chosen to remain here because this setting is conducive to the health of our patients, we will not agree to a development plan that destroys the very thing we all treasure. Indeed, our firm intention is that when we celebrate our 200th anniversary early next century, McLean's land will still be a resource to the citizens of Belmont, and McLean's tradition of excellence in clinical care, teaching and research will remain strong.

(Dr. Bruce Cohen is president and psychiatrist in chief at McLean Hospital.)

McLean Hospital

115 Mill Street, Belmont, Massachusetts 02178-9106
Telephone 617 855-2000, FAX 617 855-3299

Impact of Health Care Changes

Decrease in Revenues

- McLean Hospital has been dramatically affected by both the impact of managed care and the changes in Medicare and Medicaid reimbursements.
- Overall hospital clinical operating revenues have decreased more than 32% over the last five years.
- Today, 70% of McLean patients are Medicare and Medicaid patients (elderly and disabled). up from 15% in 1989. Medicare and Medicaid reimbursement to McLean has declined by approximately $5 million, or 13% over the past five years. An additional $2 million, or 6%, has been cut from this year's reimbursement.
- Inpatient length of stay has decreased 67%, from an average of 43 days in 1990 to 14 days in 1995.

Increase in Services

- From 1990 to 1995, outpatient admissions and partial hospital visits increased 250%, from 44,000 to 111,000.
- Under state law, McLean has no access to state funds for uncompensated care. The hospital has provided more than $8 million in free care over the past five years.

Difficult Changes

McLean has undertaken a number of significant initiatives to meet these challenges.

- Reorganized clinical service programs to more effectively use buildings and resources, reducing the number of buildings in use 30%, from 48 to 34.
- Contracted with external agencies to provide seven non-patient care services to save more than $1 million in operating expenses.
- Decreased number of operating beds from 302 in 1990 to 141 in 1997.
- Created partnerships to expand service to more people, such as: McLean/Franciscan Child & Adolescent Mental Health Programs, MGH Obsessive Compulsive Disorders Institute, The SleepHealth Center of McLean, McLean Treatment Center at Naukeag, and McLean/May Program for Adults with Developmental Disabilities
- Decided to expand the Mailman Research Center, further strengthening McLean's research capabilities into the next millennium.
- Decided to develop a portion of McLean's approximately 240 acre campus in order to raise funds to stabilize the hospital's operations and remain in Belmont.

McLean Hospital

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Member of the Belmont Community

History

- Founded in 1811, McLean Hospital has been a member of the Belmont community since our facility was first moved to its current campus in 1895.
- For over 100 years, McLean has carried out its education, research and clinical care missions in Belmont. We have endeavored to add to the quality of life in Belmont, as a health care provider, employer, landowner and community resource.

Employer

- McLean employs nearly 100 Belmont residents, making the hospital the largest private employer in town.

Property owner

- McLean owns approximately 240 acres of land. Approximately half of that land has been available as open space for hospital uses and, while the land is private property, it has been shared with community residents and local groups on an informal basis.
- As we consider development plans, one of our major goals is to maintain a significant amount of open space for continued use by the hospital community residents.
- McLean is one of the largest taxpayers in town and the only not-for-profit taxpaying hospital in the Commonwealth.

Community Service

- Community service has been an important part of our ongoing mission. The hospital provides free education and screening programs on learning disorders, developmental disabilities, eating disorders and mental illness, including depression, anxiety, chemical dependence, schizophrenia and many others.
- McLean facilities are available for use by a number of local support groups, such as Alcoholics Anonymous, the Manic Depressive and Depressive Association, Alzheimer's families and many others. In addition, McLean is home to a consumer mental health resource center.
- A McLean sponsored mental health in-service series for Belmont public school teachers covers topics such as depression and suicide, substance abuse, impact of divorce and other issues relevant to children and adolescents.
- In 1997, McLean Hospital was awarded the Community Outreach Award from the Watertown-Belmont Chamber of Commerce, in recognition of the hospital's outstanding record of service to the local community.

McLean Hospital

115 Mill Street, Belmont, Massachusetts 02178-9106
Telephone 617 855-2000, FAX 617 855-3299

McLean Hospital
Development Proposal

History

- McLean has occupied its current site in Belmont for over 100 years, treating patients, training new doctors and performing groundbreaking research.
- Like other health care providers, McLean has had to cope with significant changes in the last decade as a result of reductions in federal Medicare and Medicaid reimbursement and severe HMO restrictions on payments for mental health care.
- McLean has undertaken a number of significant reorganization initiatives in order to meet these challenges, and ultimately decided to develop a portion of its property. McLean is confident that with careful planning and collaboration with the town of Belmont, development can benefit both McLean and Belmont residents.

Goals of Development

- To allow McLean to remain in Belmont.
- To raise enough capital to retire a debt of nearly $45 million, which was largely incurred as a result of much-needed capital improvements made in the 1980s to preserve and modernize McLean's nearly 100-year old buildings and grounds.
- To preserve a significant amount of open space for use by patients and area residents.
- To meet a number of needs identified by the town, including: senior housing, cemetery site, open space, increased tax base, and revitalize Waverly Square.

A Collaborative Process

- To ensure that a land development plan will serve the needs of both the hospital and the town, McLean has worked closely with a town-appointed task force for more than a year. The collaborative process has thus far been extremely thoughtful, diligent and productive.
- McLean is committed to working closely with individuals and public groups throughout the town to educate them on our mission and history in Belmont, as well as discuss their concerns regarding the development process.
- McLean recognizes that it must be a good neighbor in Belmont in order to continue to deliver on its true mission of clinical care, education and research.

Commitment to Open Space

- Our campus setting is a unique component of our history and the patient care process. As an owner of approximately 8% of Belmont's total area, McLean hospital has always recognized the important resource its land is to both our patients and Belmont residents.
- For more than a century, McLean has informally allowed the public free access to the undeveloped open space on our approximately 240 acre private campus. While McLean is not reimbursed for maintaining the open space that it shares with Belmont residents, we have gladly made our land available in an effort to be a good neighbor.
- Preserving a perimeter of unspoiled acreage of open space is a high priority for any land development plan agreed to by McLean and the Town of Belmont. Current plans provide for the preservation of a significant amount of permanent, untouched open space for the hospital and community to enjoy.

Benefits to the Town of Belmont

- McLean will remain in Belmont, continuing its clinical, research and teaching mission and 100 year tradition of service to the community.
- McLean will preserve a significant amount of permanent open space for hospital use and the enjoyment of residents of Belmont and surrounding communities.
- Space has been identified for possible use as a cemetery, the first new cemetery in Belmont since the town was incorporated in 1859.
- New housing opportunities for Belmont residents will be created, including a range of housing options targeted to seniors.
- Belmont stands to gain a significant annual increase in tax revenues. Increased revenues are an important consideration for Belmont, given the multi-million dollar deficit the town will soon face. According to the Task Force, Belmont has experienced a serious reduction in its work force since 1991, including decrease of 9% in highway department staff, an 11% decrease in sworn police officers and a decrease of 13% in the Fire Department. In the School Department, reductions have been necessary to offset costs related to increased student enrollment, up 24% since 1988/1989.
- Small business and retail establishments will gain additional customers and increased business activity, both from new office workers and new local residents.

Sensitive Development

- Throughout the planning process, McLean has been committed to ensuring that any development maximizes benefits and minimizes impacts on the town of Belmont, including restricting development to a central core that will leave a large buffer of open space around the entire property.
- McLean is also committed to working with the town and residents to ensure that any traffic concerns are effectively addressed.

5/11/98

McLean Hospital Campus Comprehensive Plan

Spring 1998

McLean Hospital Analysis

The Plan

- **Zone 1** Attached Cluster Townhouses
  44 Units
- **Zone 2** Attached Cluster Townhouses
  56 Units
- **Zone 3** Senior Campus
  600 Units/ Beds
- **Zone 4** Biomedical R&D/ Office
  300,000 SF
- **Zone 5** McLean Institutional
  Core Growth
  50,000 SF

Total Public Open Space
131 Acres

- Protected by a Permanent Conservation Restriction.
- Managed by a Joint Town-McLean Trust, with Third Party Professional Management.
- 98 Acres will be Owned by the Town, Including...
  - 20 Acres for New Town Cemetery.
- 33 Acres will be Privately Owned by McLean but Publicly Accessible.

Additional Undeveloped Land 10 Acres

- 5.5 Acres of Historic Open Space on McLean Campus- "The Upham Bowl".

- 1.5 Acres for the Belmont Day School Soccer Field.

- 3 Acres of Protected Buffer Zone on McLean Campus.

Tax Revenues

- Net New Tax Revenues to Belmont: $2.5 Million

Gross Revenues	$3,900,000.
Less Service Costs	- 900,000.
Less Current McLean Payment	- 500,000.
	$2,500,000.

TOWN OF BELMONT MCLEAN HOSPITAL LAND USE TASK FORCE STATEMENT OF PRIORITIES
(FORMALLY ADOPTED AND APPROVED SEPTEMBER, 1997)

TOWN OF BELMONT MCLEAN HOSPITAL LAND USE TASK FORCE STATEMENT OF PRIORITIES
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Principles Governing the Development of "Surplus" Property at McLean Hospital

The purpose of this Statement is to set out the *initial* position of the Town of Belmont with respect to the use of the land owned by McLean Hospital in the Town of Belmont. The Town is pleased at the decision of McLean to stay in Belmont and looks forward to a second century of a warm and mutually beneficial relationship. The Town believes that the development of a portion of the land presently owned by McLean will be mutually beneficial to both the Town of Belmont and McLean. Therefore, it is important to set forth principles which will govern the development of a rezoning plan for the McLean land and any future development which may occur, on the site.

In developing these principles, the Task Force has engaged in a process of identifying and balancing different priorities of the Town, both now and in the future. It has been a difficult process of weighing the benefits and costs of different options. During this process, the Task Force has listened carefully to a variety of interested parties and weighed the arguments of each.

The Task Force does not accept the suggestion that various definitions of "Open Space" which may appear in other contexts in the Town's zoning bylaws can be used to determine the relevant calculation of open space. For the purpose of this document, which lays the foundation for the task force's work, the term "open space" encompasses the following criteria:

A. Land that is part of currently undeveloped portions of the site.
B. Land that is part of a substantial contiguous area of undeveloped land.
C. Land that is not bounded by developed areas of the site on more than one side.
D. Land that includes the key site features of ecological, scenic and open space significance.
E. The land, taken together, provides a realistic opportunity for the Town to locate its open space compatible public uses.

The Task Force has unanimously adopted the following principles for the redevelopment of McLean's surplus property:

A. Protect the Natural and Historic Character of the McLean Hospital Property.

- Maximize the amount of undisturbed, natural open space on the parcel in order to ensure the continued existence of contiguous undeveloped land and its connection to adjacent undeveloped preserved areas such as Beaver Brook/ Rock Meadow and Massachusetts Audubon/Habitat.
- Preserve, as of right, certain well-known and beloved features of the parcel as well as those features most environmentally sensitive and therefore requiring the most protection such as the meadow, the row of pines, lone tree hill, scenic vistas, vernal pools, wetlands and watersheds.

- Minimize additional new development that would adversely affect the amount of open space through the creative reuse of existing buildings and developed areas on the site.
- Respect the historic significance and integrity of the site by preserving the most significant buildings and landscapes and by considering the designation of McLean Hospital as a national historic landmark.

B. Minimize Adverse Impacts from New Development in Order to Preserve Quality of Life.

- **Traffic**
  - McLean should identify and effect traffic mitigation in order to offset adverse traffic impacts from their development activities, such as undertaking the redesign of traffic intersections, implementing traffic calming techniques, encouraging the use of public transportation and shuttle service provided by McLean.
  - Consider the impact of increased traffic flows emanating from other current and future development projects in the Town of Belmont when considering final traffic impact.
  - Consider the impact regionally, as well as locally, when considering final traffic impact.
  - Include cost of traffic mitigation in cost of development when considering sale to private developers, so as to offset financial impact of increased traffic on the Town of Belmont.
  - Include impact on pedestrians and bicyclists when determining final traffic impact.

- **Flood Control**
  - Minimize adverse consequences of flooding/storm water runoff.
  - Minimize adverse consequences of erosion.

- **Construction Period**
  - Any construction on the site should be done in a manner sensitive to the needs of abutters and other affected parties in Town.

- **Visual Impact**
  - Any construction on the site should be designed with appropriate height and design restrictions so as to minimize adverse visual impacts on adjacent properties.

C. Generate Additional Tax Revenue for the Town of Belmont.

The Town of Belmont is financially constrained by the state property tax limit referred to as Proposition 2 ½. This measure limits the Town's annual increase in the tax levy to no more than 2.5% over the prior fiscal year's levy. When state aid and other sources of revenue remain constant, overall revenue growth is actually limited to approximately 2%.

In recent years, typical operating expenses of the Town grew at a rate greater than 2% per year requiring a constant reduction in the level and quality of municipal services. For example, the Town has experienced a significant reduction in its municipal workforce since 1991, including a decrease of 9% in Highway Department staff, an 11% decrease in sworn police officers, and a decrease of 13% in the Fire Department. In the School Department, reductions have also had to offset costs related to increased student enrollment (24% since 1988/1989). The School

Department has had to forego important investments in education, such as technology, which would equip our young people with important skills in today's competitive environment.

A long-term budget projection identifies continuing revenue shortfalls, which must be resolved through expenditure reductions. In FY 2000, the revenue shortfall is projected at $2,380,000. Of equal concern is the Town's inability to finance long-term capital replacement or investment. Projections of important capital projects in FY2000 total over $3 million. With limited funding available from operating revenues, the Town may be forced to seek voter approved "tax overrides" to finance major capital projects.

The property owned by McLean represents 242 acres of 2,979 acres in the Town of Belmont. The amount of assessable land in Belmont totals approximately 2,100 acres and currently is assessed at approximately $2.5 billion. Therefore, full development of the McLean property would yield potentially $288 million of additional assessable value, which would generate approximately $4 million in additional revenue for the Town of Belmont. Partial redevelopment at the McLean site would allow the Town to realize a portion of this revenue, offset projected future operating deficits and make needed investments in education and capital improvements.

- Any development or sale of land for development on the McLean property must generate additional revenues for the Town of Belmont.
- Development or sale of land for development on the McLean property must have a positive net fiscal impact, meaning that the revenue produced from development is in excess of the cost of providing increased municipal services, both on the site and elsewhere in the Town. Revenue ratio analysis should be utilized which would take into consideration the financial impact, if any, on other parts of Town (e.g. potential of reduction in housing values from diminished quality of life).
- The tax impact is negotiable, but the fiscal impact to the Town of Belmont should be net of the loss, if any, of McLean's current tax payments to the Town.

D. Consider the Financial Impact of Development on the Entire Campus.

- Any value resulting from increased activity in the "core" McLean campus by McLean/Partners must be factored into the overall financial calculation.
- Any value resulting from locating commercial or housing development in close proximity to significant parcels of open space must also be factored into the overall financial calculation.

E. Allow the Town of Belmont to Secure Land for Municipal Purposes, Such As:

- Cemetery development;
- Additional municipal space; and
- Expansion and redesign of adjacent roadways such as Pleasant Street.

F. Support Private Development Which Meets Municipal and/or Public Needs, Such As:

- Moderate income housing; and

- Development that might enhance business in Belmont's commercial centers and facilitate commercial redevelopment along Pleasant Street.

G. Limit Development to Those Uses That Would Respect the Principles Set Forth Above and Serve the Needs of McLean Hospital/ Partners and the Town of Belmont.

Some Potential Uses That Would Serve the Needs of the Town of Belmont.

A. Definition of the "Core" McLean/Partners Campus.

McLean/Partners must define the uses on the land, which McLean will continue to own and use in the future. In the past, the zoning of the land utilized by McLean was not clearly defined. Its use was nonconforming in a residential zone and the Board of Appeals was the vehicle by which McLean obtained permission to construct new buildings. McLean enjoyed considerable autonomy in developing its core campus. Neither the Town nor McLean defined precisely the land which was required to be dedicated to support the present McLean plant. In its last major decision in 1980, the Board of Appeals conditioned a special permit on McLean's maintenance of a green belt around its campus. The decision also specifically limited the parking on the site. In any rezoning of the property, the zoning with respect to the "core" campus must become more precise.

McLean/Partners must define the land which will be devoted to hospital purposes in its "core" campus. The "core" should include land which is currently in use, land which might reasonably used for hospital purposes in the future, and a buffer zone so that the hospital can operate with the privacy and autonomy which it has enjoyed in the past.

McLean/Partners must specify the uses which it desires as permitted uses on the property in the defined "core". The Town believes that these uses should be limited to hospital use and uses incidental thereto that would be permitted as of right.

The size of the development envelope in the "core" campus should consist of the number of square feet of building which McLean/Partners has already constructed and expects to maintain on its "core" campus (including the Mailman Research Center) and the number of square feet of building which McLean/Partners wishes to develop in the future. Any new construction within the development envelope would require further site plan approval. The size of expected future development would also affect the overall capacity of the site and the development of the remaining land.

McLean/Partners should also specify the number of parking spaces it wishes to retain for its "core" campus. Under the 1980 Board of Appeals decision, on site parking is limited to 853 cars. The number of parking spaces which McLean/Partners requires for future use will have an important bearing on the development potential of the remaining land.

B. Conservation Land

As stated above, the McLean parcel is one of the few remaining open space parcels within the Route 128 corridor. The site is of regional importance in its natural resources, with sensitive wetlands and corridors of wildlife habitats formed by the proximity of large protected open spaces, all part of the greater Boston ecosystem. The property is also of historic importance. The Task Force recommends that a significant portion of the McLean site be set aside for protection as conservation land.

C. Open Space

1. Cemetery Development Compatible with the Surrounding Environment

The Belmont cemetery located on Grove Street consists of approximately 21 acres of property, much of which is actually within the confines of City of Cambridge. The Belmont cemetery has been closed to purchase of new burial plots since 1988. Currently, residents of Belmont, who have lived in Belmont all their lives, have no option to be buried here. The Town seeks 10 - 20 acres of land for phased development of a cemetery.

2. Passive Recreational Use

The McLean site includes wooded areas and meadows, rock outcroppings, vernal pools and streams that are currently enjoyed by hikers, birders and others seeking a natural environment within a highly developed, urban area. Walkers, joggers, birders, photographers and cross-country skiers enjoy the trails and old carriage roads. The Task Force recommends that a portion of the McLean site be reserved for continued recreational activities of this type.

3. Soccer Fields

Currently, Belmont Day School uses a portion of the McLean site for soccer. The School has requested that it be allowed to negotiate the purchase of this land or a long-term lease with McLean for its continued use as soccer fields. The Task Force is supportive of this request, provided that the Town be allowed to use this field for its soccer program as well. Belmont Day School has indicated its willingness to agree to this request.

D. Housing

The Task Force is supportive of the development of new private residential development (of the type described below) on the McLean site. The exact location of the development and the number of units will depend on the results of an impact analysis and the resolution of issues outlined above with respect to the "core" campus. The housing described below is designed to appeal to older Belmont residents who desire to sell their homes and remain in Belmont. In addition to satisfying an unmet housing need for older Belmont citizens, such residential developments are in keeping with the character of the Town, are likely to have less traffic impact than office or other commercial development and may produce tax revenue in excess of providing municipal services.

1. Clustered Residential Units

- High end "Empty Nester" units with some units provided for moderate income town employees and long-time residents

2. Elderly Housing (Continuum of Care)

- Independent Living (e.g. Foxhill)
- Assisted Living (e.g. Brookhaven)
- Nursing Facility

3. Expansion of the Waverly Oaks Senior Development

- Additional Units
- Additional Parking

E. Location of a Senior Center

If the recommendations of the Task Force are incorporated into a plan by McLean, the amount of facilities and activities related to the elderly on the site suggest that the site could also provide a potential location for a senior center.

F. Limited, Low-Intensity Office Development That Might Enhance Business in Belmont's Commercial Centers and Facilitate Commercial Redevelopment Along Pleasant Street

The Task Force heard from a number of merchants and business associations in Town who addressed the need for additional commercial development that might stimulate increased business for Belmont's business districts and the creation of new jobs and revitalize certain geographic areas, such as the area along Pleasant Street close to Trapelo Road. Again, the exact location and amount of development will depend on the results of an impact analysis and the resolution of issues outlined above with respect to the "core" campus. The Task Force believes that the following types of commercial development will be supportive of these goals:

1. R&D Facilities

2. Corporate Campus

Outline of Scope of Impact Analysis

1. Traffic
2. Open Space
   A. Rare and Endangered Species
   B. Ecological Inventory
   C. Landscape Features, Landmarks and Special Places
3. Wetlands (including all regulated areas)
4. Historic Preservation
5. Archaeological Resources
6. Drainage/Hydrology
7. Sewers/Utilities
8. Fiscal Impacts
9. Public Benefits Identified by Statement of Priorities (this analysis may most appropriately be done by Task Force consultants)
10. Construction Period Impacts
11. Visual Impacts

ADDITIONAL GOVERNING PRINCIPLES

as Set Forth in the *Response of the McLean Hospital Land Use Task Force to the Development Options Presented by Partners/McLean at a Public Meeting on July 29, 1997*

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I. The Task Force Will Evaluate All Development Proposals By Assessing Their Consistency with the Task Force's Statement of Priorities.

The Task Force's Statement of Priorities is the product of extensive and diverse public input from the citizens of Belmont. The fundamental obligation of the Task Force in evaluating any development proposals by McLean is to assess the extent to which such proposal is consistent with the Statement of Priorities.

II. The Task Force Will Require Land Use Controls That Assure Consistency with the Statement of Priorities.

In its presentation of development options, Partners/McLean has suggested that the property be divided into zones, each of which would have established criteria for permitted uses, permitted densities and dimensional requirements (such as height). Partners/McLean suggested that the land within each zone might then be sold to a third-party developer, who could proceed by designing a project that met these criteria, subject only to site plan review. The Task Force believes that it is unlikely that consistency of development with the Statement of Priorities can be achieved through a regulatory approach of this type. On the contrary, the Task Force believes that consistency with the Statement of Priorities will only be achieved by comprehensive master planning of the site and the adoption of land use controls that ensure that development will proceed in accordance with such master planning. The Task Force's concern with the location of the proposed development with regard to preserving open space (as described more fully in the following section) is one compelling example of this need for comprehensive planning and regulations in order to attain consistency with the Statement of Priorities. Two approaches to zoning worth considering include:

- Any zoning district proposed for the McLean property must apply development criteria in a uniform manner. However, the entire site should not have the same use and dimensional requirements. The Planned Unit Development (PUD) is a zoning mechanism to develop large mixed-use sites in a differentiated but unified manner. While master plans are usually required in conjunction with PUD districts, the development plan is usually under the purview of the developer. In this case, this mechanism may be inappropriate, since the Town and Partners/McLean wish to reach an agreement on development scale and location prior to rezoning.

- Another option is the overlay zone. With this mechanism, a large site can be designed as a unit, while designating specific areas for different uses. Thus the development zones proposed by Partners/McLean could conceivably become development districts within an overlay zone. The value of this approach to the Town is the ability to create density and design controls for each of the districts within the overlay zone. This mechanism would give the Town the most control in designing a development agreement that respects the valued features of the site and is consistent with the Statement of priorities.

Another important distinction to consider is uses by right and special permit. By-right uses allow development without public hearings or special criteria. Consistency is required however, with all zoning and related development bylaws. Special permit uses require one or more public hearings and special development criteria are used to grant the permit. A special permit request may be denied. It might be advisable to consider assigning by-right status to the negotiated development agreement, since it will be debated and publicly approved at Town Meeting. Further, it will provide a degree of timeliness with respect to fiscal returns to the Town.

At this early stage, the most important consideration is to select a zoning technique that will produce a unified development plan while allowing for a differentiation of uses and development density. Flexibility relative to use, intensity, location and dimensional criteria should be the key feature of any zoning proposal. Assuming agreement can be reached on a comprehensive master plan, the concept presented by Partners/McLean, of creating development districts (as distinct from zoning districts), is not inconsistent with the Town's zoning interests.

III. The Location of Development is a Critical Element of Consistency with the Statement of Priorities.

In its presentation of development options, Partners/McLean suggested that identifying the permitted use of the site and identifying the permitted intensity of development are the two fundamental issues. The Task Force believes, however, that identifying the *location* of proposed development is an equally fundamental issue in evaluating the development options. Simply put, it is impossible for the Task Force to ensure that the proposed development will be consistent with the Statement of Priorities, especially with respect to open space, historic, and visual impacts, without appropriate identification of, and limitations on the location of such development.

IV. Proper Evaluation of Development Options Requires An Analysis of Open Space Consistent with the Statement of Priorities.

Although there may be no single indicator of the degree to which any particular development proposal advanced by Partners/McLean preserves the open space values of the site, the most appropriate definition of what the Task Force considers to be priority open space would be the number of acres of the site which meet the following criteria:

A. They are part of the currently undeveloped portion of the site.

B. They are not developed by the Partners/McLean proposal (that is, yards and landscaping of driveways and walkways should not be counted as Priority Open Space.)

C. They are part of a substantial contiguous area of undeveloped land.

D. They are not bounded by developed areas of the site on more than one side.

E. They are not substantially separated from their natural connections to other open space on the site or on adjacent property.

F. The acreage includes the key site features of ecological, scenic and open space significance.

G. Proposed development has been located within the previously developed portion of the site to the greatest extent feasible.

H. Partners/McLean is committed to having such land permanently legally protected as open space.

I. Partners/McLean is committed to having such land publicly accessible.

J. The acreage, taken together, provides a realistic opportunity for the Town to locate its open space compatible public uses (e.g. cemetery, soccer fields)

Consistent with the foregoing, the Task Force does not accept the division of the undeveloped portions of the site into "priority" and "non-priority" open space in the manner set forth on the Partners/McLean site plan proposals. The boundaries of the priority open space areas as shown on the map of site components and the site plans of development options cut through natural vegetative communities such as old-field growth, open meadow and forested areas, separating what are otherwise continuous environmental ecotypes into priority and non-priority open space. The Task Force does not accept the suggestion that the areas set forth as buffer zones in a prior ZBA decision define the limits of priority open space on the McLean site for the purpose of the Task Force deliberations. The Task Force also does not accept the suggestion that various definitions of "Open Space" which may appear in other contexts in the Town's zoning bylaws can be used to determine the relevant calculation of open space in the case at hand. Such suggestions are not consistent with the Task Force's statement of priorities nor with the open space analysis the Task Force has previously presented at its public meetings.

V. Proper Evaluation of Development Options Requires an Analysis of Traffic Impacts Consistent with the Statement of Priorities.

Partners/McLean's presentation of traffic impacts associated with each of the development options has suggested that the additional traffic generated by existing and proposed uses on the site can be readily accommodated through implementation of various intersection improvements. To afford a substantive review by the Task Force, the required approach to identifying, evaluating and mitigating traffic impacts of the proposed redevelopment of the McLean site must be consistent with standard engineering practice and also respond to the issues raised in the Task Force's Statement of Priorities. The traffic assessment must establish a baseline scenario against which all development options and mitigation strategies can be compared. The assessment must be based on sound engineering principles to allow a technical review as to its adequacy, yet be presented in terms understandable to the lay person. Partners/McLean has submitted a generic outline of the proposed study, and this approach is generally consistent with standard practice. Several areas must be expanded upon to allow meaningful review.

CONSULTANT REPORTS

EXECUTIVE SUMMARY

The preliminary review of the current McLean proposal by the consultant team to the Task Force yields the following observations.

Open Space Preservation

- The goal of preserving significant open space by concentrating development close to the campus has been met; in particular, no private development would occur on the northern portion of the site, which includes the open meadow and contiguous natural areas.
- Of the existing open space, over 80% would remain open and 93% would be publicly accessible.
- The publicly-accessible open space will be owned by the town (98 acres, including the cemetery) and McLean (33 acres), restored in previously disturbed areas, and managed and maintained jointly by the town and McLean.
- Scenic views and recreational resources will continue to be enjoyed by Town residents.
- An Environmental Impact Statement still needs to be produced by McLean.
- Zoning provisions and development controls need to be developed and adopted to execute these agreements.

Historic Preservation

- The boundaries of the development zones and the siting of new roads and buildings largely preserve the historically significant buildings and landscapes of the original McLean hospital grounds.
- The removal of five buildings of low to average significance does not seriously compromise the overall significance or historic character of the site. The loss of one modern building enhances the historic landscape known as the "Bowl."
- Upham House, one of the most historically significant buildings, would be restored through the incentive of development bonuses and preservation tax credits.
- The site should be nominated for the National and State Registers.
- The long-term preservation of the heart of the historic campus surrounding the "Bowl" should be ensured.
- Measures need to be provided with respect to the identification and preservation of additional historic landscape features, such as stone walls.

Ecological Impacts

- The impacts of the development on the ecological and water resources of the site are minimized. Almost all of the secondary succession open fields and adjacent forest will be preserved.
- Wetland areas and their buffer zones are protected. Rare or endangered species have not been found on the site. Potential habitats for rare or endangered species (vernal pool, wetlands) are not impacted.
- Drainage and stormwater issues need to be addressed before final approval.
- McLean will cooperate with Task Force consultants to confirm that new development does not generate significant negative ecological impacts.

Visual Impacts

- Setbacks from existing roads, height limits of new buildings and the preservation of wooded slopes will ensure that the new development will be compatible with the scale of the surrounding neighborhood and minimize adverse impacts on adjacent properties, adjacent open space and public streets.
- The cluster housing would be limited to 2 to 3 stories, with a minimum setback of 220' from Mill Street.

- The senior community would be limited to 4 to 5 stories, with a maximum of 7 stories in special cases, based on site plan review.
- The research & development buildings would be limited to 4 to 5 stories, with a minimum setback of 450' from Pleasant Street.
- Site sections and sight lines will be developed to further illustrate the building envelopes within the different development zones.

Traffic Impacts

- The reduced development intensity from previous proposals and the proposed traffic mitigation measures together help to minimize adverse impacts on local roadways and adjacent neighborhoods.
- The current McLean proposal would generate an additional 561 vehicles over current traffic levels during the afternoon peak hour. As past of the zoning requirements, McLean will be limited to a maximum number of vehicle trips to not exceed. Monitoring traffic generation and imposing penalties will ensure that the maximum level is not exceeded.
- Queuing at key intersections could be more problematic than the additional number of vehicles and this must be addressed as mitigation measures evolve.
- With appropriate mitigation, the peak hour traffic would be within acceptable limits. Mitigation measures proposed at key intersections around the site could absorb additional traffic flow and should be designed to reduce queuing as well as to be consistent with a residential community.
- Detailed mitigation measures, including costs and full funding commitment still need to be provided.
- A Travel Demand Management program should be developed to encourage alternatives to single occupancy vehicles, and promote use of an expanded McLean's shuttle service.
- Additional studies need to be performed to confirm background traffic assumptions: trips generated by other, planned development.

Fiscal Impacts

- More than the amount of development, it is the nature of the proposed land uses that would produce both initial and long-term, sustained fiscal benefits to the Town.
- The gross annual tax yield would be nearly $4 million (11-12% of current Town property tax generated revenues).
- Because the Town is largely built up, there is minimal off-site development potential to create a counter-balance to the fiscal benefits associated with the project. Thus the fiscal benefits will be long term.
- The net fiscal benefits (tax revenues minus servicing costs) to the Town from this development would be from $1.7 to $1.9 million annually.
- The tax exemption of the hospital campus would be phased in, so that no payments would be lost to the Town until tax revenues begin to accrue from the developments and the Town will be legally protected so that the developments will be taxable regardless of future ownership.
- The development will add approximately 277 million dollars to Belmont's total assessed valuation, significantly broadening the tax base.

Market Feasibility and Valuation

- There is strong demand for luxury housing in Belmont. Cluster housing at $100,000 land value per unit is a reasonable assumption given the housing's location on the site, a 3-year absorption rate, and the proximity of protected open space.
- There is a strong regional market for senior communities combining assisted-living, independent elderly housing and skilled nursing beds. The 600 units could be absorbed over a period of 4 to 5 years. The senior community at $15,000 land value per unit is a reasonable assumption. Smaller

developments would command $15,000 to $20,000/unit. Larger developments, with multi-year absorption rates limit the value of the development.

- Vacancy rates in the research & development/office market are at a 16-year low. The site is attractive and should maintain strength in weaker markets. McLean as a neighbor should attract specialized tenants. The research & development buildings, valued at $30/square foot, would fall within an existing range in the market of $25 to $40/square foot. The high cost of structured parking would limit the value of the development.

Compatibility of Proposed Uses

- The proposed new uses of luxury clustered housing, senior housing community and R&D office development, in addition to the continuation of a mental health hospital within the core campus, are consistent with the Statement of Priorities.
- These land uses were identified by the Task Force as serving the needs of the Town as well as being compatible with the community character of Belmont. They are also compatible with each other and with McLean Hospital.

Housing

- The Task Force identified the need for affordable moderate-income housing within the Town. The McLean development proposal transfers 1.34 acres of land to the Waverley Oaks public housing complex. The Task Force will continue discussions with McLean and the Town to discuss ways to further this goal.
- Several examples of housing programs and initiatives that provide moderate income housing are to be found in the metropolitan region. Three are described in the report: an Informal Congregate Housing in Winthrop, an Overlay Zoning for Independent Elderly Housing in Winchester and a similar Low to Moderate Income Housing Special Permit Requirement in Waltham.

Cemetery

- The Task Force identified as one of its priorities the need to site a cemetery in Belmont. Twenty acres of the land proposed to be ceded to the Town in the McLean redevelopment proposal is reserved for a long-needed Belmont cemetery.
- The McLean site has been studied extensively over the past decades from perspectives of geology, hydrology, land use and landscape architecture. There are two locations on the site suitable for a cemetery: the open field meadow along Concord Avenue and the wooded upland around the red maple wetland.
- The Cemetery Commission believes that the wooded upland is a better site because of the emotional and historic connection Belmont residents have with the meadow and that the upland is more removed from the expressed need for contiguous access to the open areas.

OVERVIEW OF CONSULTANTS' EVALUATION OF MCLEAN'S REDEVELOPMENT PROPOSAL

The Task Force's Statement of Priorities was the product of extensive and diverse public input from the citizens of Belmont, public officials and other interested parties. The fundamental objective of the Task Force consultants in evaluating the development proposal advanced by McLean is to assess the extent to which such proposal is consistent with the Statement of Priorities. The principles adopted by the Task Force, and the manner in which they are addressed by McLean's proposal, are as follows:

Protect the natural and historic character of the McLean Hospital site.

In broad terms, the proposal preserves the significant natural and historic features of the property and provides for public use and accessibility. Rezoning provisions will help to ensure that these objectives are met. McLean Hospital should work with the Task Force to clarify the effects of their plan on historic resources, to further reduce adverse effects if possible, and to develop mitigation measures that will help to offset adverse effects. An extended discussion of this issue is contained in the attached analysis by Hill & Barlow under the heading "**Open Space Preservation**" and in the attached analysis by Candace Jenkins, Consultant in Architectural History & Historic Preservation, under the heading "**Historic Preservation.**"

Minimize adverse impacts of new development.

With respect to traffic impacts, the proposal would not, with the implementation of modest redesign of roadway intersections, adversely affect the performance of the adjacent roadways. McLean's proposal does take into account other current and future development projects in the Town, but must be revised to include consideration of Pleasant Street redevelopment. The requirement of a site plan review process with heightened scrutiny of the special concerns relating to the site will further assure that no development will take place unless and until appropriate traffic analysis and mitigation have been put into place. In order to ensure that trip generation does not exceed the limit of 800 peak hour trips established by the Task Force's consultants, monitoring and enforcement measures will be put in place. A further discussion of traffic impacts is contained in the attached analysis prepared by Vollmer Associates under the heading "**Traffic Impacts.**"

With respect to flood control, stormwater runoff and erosion impacts, the proposal provides appropriate safeguards by (a) leaving the substantial majority of the site in its natural condition, (b) allowing no development within wetland areas or their buffer zones and (c) requiring enhanced site plan review of any new development. The Task Force should work with McLean Hospital to ensure that a stormwater management plan is put in place and that sufficient space is reserved on each parcel to ensure adequate stormwater removal. A further discussion of these impacts is contained in the attached analysis prepared by Jason M. Cortell Associates under the heading "**Ecological Impacts.**"

With respect to construction period impacts, the proposal provides appropriate safeguards by requiring enhanced site plan review of any new development. Monitoring and enforcement measures backed by

penalties for violation will be put in place in order to protect the interests of abutters as well as the Towm at large.

The Task Force wished to ensure that any redevelopment would be consistent with community character and not be obtrusive to off-site observers. With respect to visual impacts, the proposal will provide adequate safeguards by creating height and setback requirements for the development parcels which take into account the visibility of such parcels from various public vistas and by requiring enhanced site plan review of any new development. A further discussion of these impacts is contained in the attached analysis by Goody, Clancy & Associates under the heading "**Visual Impacts.**"

Generate additional tax revenue for the Town.

The proposal will yield substantial and long term positive net revenues after taking into account the cost of providing increased municipal services and the loss of McLean's current tax payments to the Town. A further discussion of these impacts is contained in the attached analysis by Connery Associates under the heading "**Fiscal Impacts.**"

Financial benefits to McLean Hospital should include financial impact of development on the entire site, including the core campus.

The proposal takes into account the value to McLean Hospital of being permitted to increase the square footage of the core campus and the value to McLean of having development parcels which are adjacent to significant parcels of protected open space. A discussion of the proposal from the perspective of market feasibility and valuation is contained in the attached analysis by Spaulding & Slye under the heading "**Market Feasibility and Valuation.**" An analysis of the financial benefits to McLean Hospital from its acquiring additional growth potential within the core needs to be done.

Ensure availability of land for municipal purposes.

In addition to the public open space described above, the proposal makes available to the Town:

- land for the establishment of a new municipal cemetery;
- land for the expansion of the Waverley Oaks low income, senior public housing adjacent to the southern end of the site (or of parking therefor); and
- land for the creation of a bikeway along Pleasant Street.

Support private development which meets public needs.

The proposal provides:

- a framework for continuing discussions regarding opportunities for moderate income housing and
- an opportunity for commercial development which might enhance existing businesses in the Town's commercial centers and facilitate commercial redevelopment along Pleasant Street.

Limit development to uses that respect the Task Force's other principles and serve the needs of the Town.

The proposal:

- allows for the continuation of the hospital use within the core campus;
- sets aside a substantial area as conservation land;
- provides opportunities for a cemetery, for passive recreational use and for a soccer field;

- creates clustered residential units, elderly housing, and research and development uses;
- includes expansion of the Waverley Oaks low income senior public housing; and
- leaves room for the possible location of a cultural center on the site

Comparison with Previous Proposals

McLean's current proposal offers substantial benefits to the Town—primarily ownership of almost 100 acres of magnificent open space together with public access to an additional 33 acres of protected open space—while largely mitigating potential negative impacts associated with related development. McLean's current proposal also offers the Town very positive fiscal benefits. The net benefits of this proposal to the Town are substantial.

McLean's current proposal represents the first time in roughly a year of discussions that the hospital has agreed to three key conditions established by the Task Force:

- McLean should provide the Town with significant public open space, including a cemetery, located in areas of particular value to the Town;
- Traffic impacts, with modest mitigation measures, should not noticeably impact the character or operations of surrounding streets; and
- McLean's development master plan should produce significant fiscal benefits to the Town—a net of new tax revenue over potential costs of at least two million dollars per year.

Initially, McLean was only willing to satisfy the third of these criteria. Until recently, the Hospital has insisted that it was unable to come anywhere close to the Task Force's open space goals or to meet traffic generation restrictions, which require that peak hour traffic generation be held to less than 800 trips. In particular, McLean insisted on development rights to a major portion of the "meadow," which the Task Force felt strongly represented very high quality open space and should be conveyed to the Town. The Hospital emphasized that this land represented the most valuable area for high value, luxury cluster housing sites, and insisted on locating a number of these sites in this area. In addition, McLean's insistence on securing the right to develop 400,000sf of office space produced traffic impacts that the Task Force and its consultants felt were excessive and manageable.

The current proposal is particularly notable because it substantially reflects the Task Force's views in all three key areas noted above. McLean has agreed to provide the Town not only with close to 100 acres of open space, but also to include the entire area north of the core campus. McLean has largely addressed traffic concerns by reducing the density of the entire development, shifting the office use to research and development, entailing lower traffic generation, and most importantly—agreeing to limit peak hour traffic generation to 800 vehicles. These traffic generation limits would include additional traffic generated by any future Hospital expansion.

The Hospital's compelling interest in bringing the site to the development community before the end of the current strong real estate market was likely the impetus that broke the stalemate. In any event, McLean has substantially agreed to the Task Force's requirements in these areas, in addition to meeting the Task Force's other goals.

It should be noted that it will be very difficult to enhance the primary benefits to the Town or produce a lower impact set of uses without reducing the return to McLean considerably below the site's assessed valuation of ***36*** million dollars. Lower values to McLean would seriously jeopardize the Hospital's willingness to provide substantial open space to the Town. It should also be noted that the Hospital's

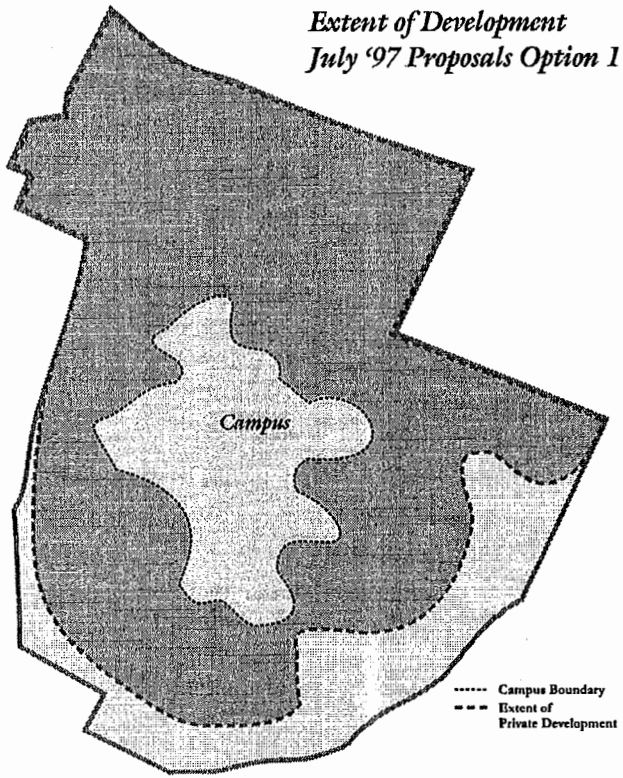
ability to provide this land with a considerably less build-out than anticipated is largely possible because of the current strong real estate market; it would not be in the Town's interests to prevent McLean from taking advantage of this market.

It is useful to compare the current proposal with McLean's earlier positions. McLean initially proposed three options to the Task Force, all of which maintained a land value of $45 million, which McLean maintained was required to retire the hospital's debt:

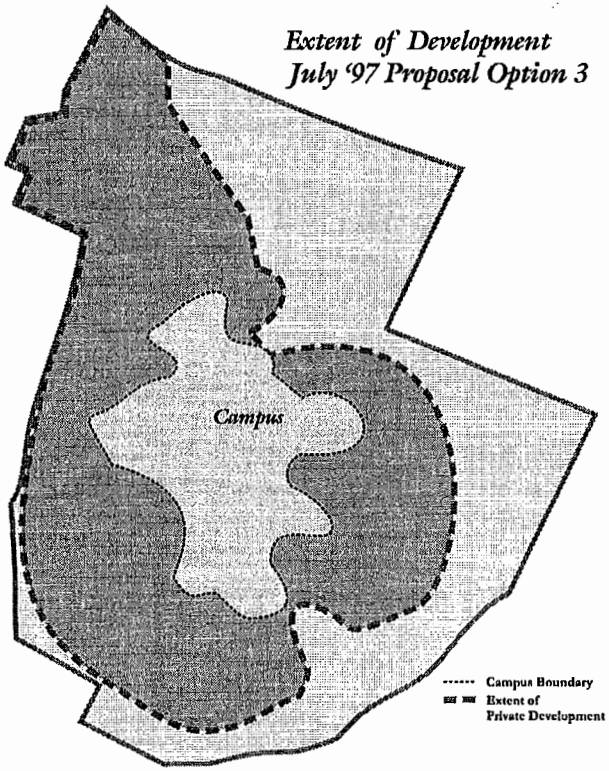
	July 1997 Proposals	May 1998 Proposal	% Change
• Site area to be developed	112 acres	50 acres	-64%
• Core Hospital area	40 acres	50 acres	+20%
• Open space			
◆ Publicly-accessible open space	0	131 acres	
◆ Additional open space	86 acres	5 acres	
Total open space	86 acres	136 acres	+58%
• Approximate building area to be developed	1,800,000 to 2,150,000sf	1,250,000sf	-30% to -43%
• McLean's estimate of value of land to be sold*	$45,000,000	$28,000,000	-38%
• Approximate afternoon peak hour traffic generation from new development	740 to 1,170 trips	561 trips	-24% to -52%
• Annual net fiscal benefits to the Town	$2,900,000 to 4,000,000	$1,700,000 to 1,900,000	-35%to -58%

*Represents McLean's estimate of prices at which they would sell the land to a developer. This figure is lower than the "retail" price land would command when sold as single house lots or for small commercial projects. This value in part reflects the fact that development will occur over time, which reduces the value of the land.

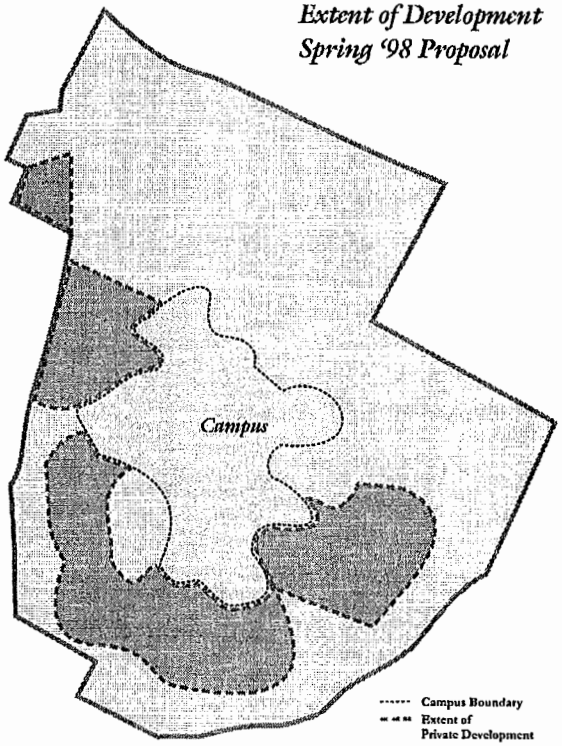
Extent of Development
July '97 Proposals Option 1



Extent of Development
July '97 Proposal Option 3



Extent of Development
Spring '98 Proposal



Scope Of Impact Analysis

The Task Force's consultants and McLean are carrying out the following impact analysis. The Task Force consultants are closely monitoring, and will review, work prepared by McLean consultants.

Open Space: Rare and Endangered Species
Ecological Inventory
Landscape Features, Landmarks and Special Places

Historic Preservation/ Archaeological Resources

Traffic Impacts

Ecological: Wetlands (including all regulated areas)
Drainage/Hydrology
Sewers/Utilities

Visual Impacts

Fiscal Impacts

Construction Period Impacts

1. OPEN SPACE PRESERVATION

Gregory P. Bialecki, Esq., Hill & Barlow

Overview

The McLean proposal preserves and enhances the significant natural open spaces on the site in five important respects:

(1) the land left as open space is more than 50% of the site and more than 80% of the previously undeveloped portion of the site;

(2) the land left as open space contains the most significant ecological, recreational and scenic features of the site and maintains the existing connections to adjacent open space holdings;

(3) the proposal calls for the permanent protection of over 110 acres of the open space by legally binding restrictions;

(4) the proposal calls for permanent public access to over 110 acres of the open space through legally binding agreements; and

(5) the proposal calls for an innovative public-private partnership to improve, manage and maintain the open space.

The McLean proposal includes approximately 141 acres of open space of various kinds:

- land which would be publicly owned, permanently protected by a conservation restriction and used for passive recreation (approx. 78 acres);
- land which would be privately owned, permanently protected by a conservation restriction and open for public passive recreation (approx. 33 acres);
- land which would be publicly owned and used as a cemetery (approx. 20 acres);
- land which would be privately owned as a soccer field and available for Town use (approx. 1.5 acres);
- land which would be privately owned but preserved as an historically significant landscape open space (approx. 5.5 acres); and
- land which would be privately owned but preserved as a buffer zone for the continuing core hospital campus (approx. 3 acres).

Consistency with Statement of Priorities

As can be seen, the proposal advances the principles which the Task Force has previously established for open space at the site. In its initial Statement of Priorities, the Task Force determined that the following principles were paramount:

- Maximize the amount of undisturbed, natural open space on the parcel in order to ensure the continued existence of contiguous undeveloped land and its connection to adjacent

undeveloped preserved areas such as Beaver Brook/Rock Meadow and Massachusetts Audubon/Habitat.

- Preserve as of right, certain well-known and beloved features of the parcel as well as those features most environmentally sensitive and therefore requiring the most protection, such as the meadow, the row of pines, lone-tree hill, scenic vistas, vernal pools, wetlands and watersheds.

- Minimize additional new development that would adversely affect the amount of open space through the creative reuse of existing buildings and developed areas on the site.

- Respect the historical significance and integrity of the site by preserving the most significant buildings and landscapes and by considering the designation of McLean Hospital as a national historic landmark.

In its Response to McLean's initial development options, the Task Force further defined its objectives:

- The open space lands comprise a substantial contiguous area of previously undeveloped land.

- They are not being landscaped or altered so as to be integrated in the proposed development, nor are they otherwise surrounded by or encroached upon by development in a manner having an adverse effect.

- They are not substantially separated from their natural connections to other open space on the site or on adjacent property.

- The acreage includes the key site features of ecological, scenic and open space significance.

- Proposed development has been located within the previously developed portion of the site to the greatest extent feasible.

- Substantially all of the open space will be permanently legally protected as open space.

- Substantially all of the open space will be publicly accessible.

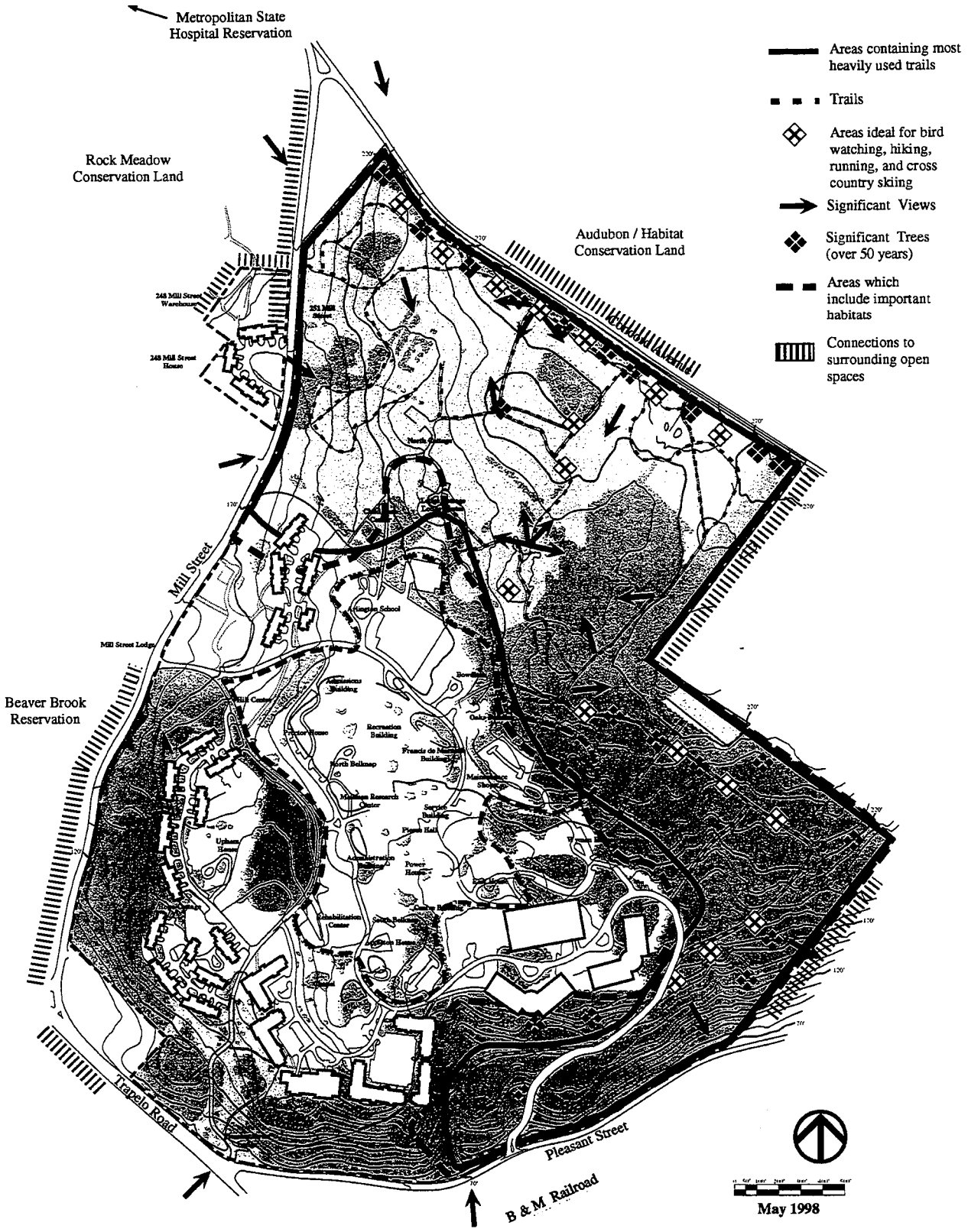
- The acreage, taken together, provides a realistic opportunity for the Town to locate its open space compatible public uses (e.g. cemetery, soccer fields).

Christine McVay, an open space planning consultant to the Task Force, last year made a preliminary identification of the portions of the site which were of greatest significance with respect to these conservation values (ecological, recreational, scenic, and connections to surrounding open space). McLean's proposal preserves all of the acreage identified as having significant ecological (habitat) value according to that preliminary review, except for a proposed encroachment in the research and development zone on the eastern side of the property and one in the cluster housing zone along Mill Street. The proposal preserves all of the acreage identified as having significant recreational value, again with the exception of a proposed encroachment in the cluster housing zone along Mill Street. The proposal preserves all of the acreage identified as having a scenic value or value due to its connections to surrounding open space. As noted below, further investigation is being undertaken to determine whether these noted encroachments will adversely affect the conservation values of those portions of the site.

In total, the McLean proposal would redevelop for non-hospital purposes about 20 acres of the existing developed areas and would newly develop approximately 30 acres of the site which has not previously been developed. Less than 10% of this newly developed land (less than three acres) potentially encroaches on areas preliminarily identified as having significant conservation value. The remainder would occur in wooded and open areas of the site not identified as having significant ecological, recreational, scenic or "connection" values.

Remaining Issues

McLean will still be required to produce an environmental impact analysis, to be reviewed and approved by the Task Force's consultants, demonstrating that the encroachments of new development on previously undeveloped areas on the site (including access roads, storm detention basins and the like) will not adversely affect the ecological features of the property.



Ecological, Scenic and Recreational Open Space Resources

McLean Proposal Over Analysis Maps

2. HISTORIC PRESERVATION

Candace Jenkins, Candace Jenkins Associates

Overview

McLean Hospital's Belmont campus results from a 19th century vision to treat patients with psychiatric illnesses in an ideal therapeutic environment of specially-designed buildings and landscapes. As a whole, the campus possesses national historical significance. Recognizing these facts, the McLean Task Force has cited protection of historic character through creative reuse of existing buildings and developed areas, through preservation of the most important buildings and landscapes, and through possible designation of McLean Hospital as a National Historic Landmark, as one of several guiding principles.

Previous efforts on behalf of the Task Force have identified and evaluated historic buildings and landscapes. A summary of the results including building evaluation criteria, a summary building information and evaluation table, and a list of historic landscape areas and features is attached to this memorandum. The table distinguishes between buildings that will remain part of the McLean core campus and those that will not, as I currently understand it based on maps provided by McLean.

Within the context of prior research, identification, and evaluation efforts, and the stated goals of the Task Force, the current McLean Hospital Reuse Master Plan appears to preserve most important historic resources. Additional detail is required in several areas (noted in this report) to fully evaluate effects to historic resources.

- It preserves all important historic landscape areas identified by the Task Force by siting new construction within or immediately adjacent to existing developed areas; it does not provide detail on specific landscape features such as stone walls, nor does it discuss vistas.

- It encourages preservation of historic buildings in the residential and elderly zones by offering development bonuses of increased density. Caps of ten units in the former and six units in the latter have been proposed. Upham House is the only building assured of preservation.

- It appears to propose demolition of six historic buildings of low to average significance to clear the way for new construction. Preservation of these buildings is preferable, but their loss will not seriously compromise the overall historic significance and character of McLean Hospital. Loss of some other buildings that may be demolished would have more serious effects.

- It appears to propose demolition of one modern building, the Hall Mercer Center. This is considered a benefit to the historic character of the campus due to the building's incompatible scale, massing, details, and materials, and its encroachment on the historic landscape known as the "Bowl."

- It allows rehabilitation of existing buildings, and development of an additional 50,000 square feet within the core campus (zone 5) subject to design and site plan review.

Recommendations

It is recommended that McLean consultants continue to work with the Task Force to clarify the effects of their plan on historic resources, to further reduce adverse effects if possible, and to develop mitigation measures that will help to offset adverse effects. Large-scale development projects are commonly

approved subject to stipulations designed to mitigate negative effects. The following recommendations have successfully been used in the redevelopment of other historic properties in Massachusetts. Examples include redevelopment of the Watertown Arsenal in Watertown, and new construction and building reuse on the campuses of Newton-Wellesley Hospital in Newton and Phillips Academy in Andover.

- **Nominate the McLean Hospital Campus to the National and State Registers of Historic Places.** This is a key Task Force goal stated in the *Principles Governing the Development of Surplus Property at McLean Hospital.* This action is required to make federal tax incentives available for the redevelopment of buildings put into income producing use. The campus clearly meets the National Register criteria for evaluation.

- **Advocate for reuse of historic buildings as a requirement for redevelopment.** The current plan encourages reuse through development bonuses that increase density. Another approach that would not affect density is to require reuse of specific buildings as a condition of development. This could follow the model of Watertown Arsenal which is currently being developed according to a Memorandum of Agreement (MOA). The MOA established a marketing plan with provisions to delete the building reuse requirement if no acceptable proposals were forthcoming. Watertown attracted strong interest and is currently finalizing plans with a developer who has committed to preserving all significant historic buildings and landscapes. New construction is limited to parking facilities. To ensure that outcome, the Arsenal is being transferred subject to preservation restrictions.

- **Ensure long-term preservation of the heart of the historic McLean campus.** The open landscape area known as the "Bowl", is surrounded by the six most significant buildings on the McLean campus: Proctor, North Belknap, Administration, South Belknap, Appleton, and Upham. Together, these resources form the heart of the historic McLean campus, and constitute one of the most important groupings of historic psychiatric buildings and landscapes in the nation. A preservation restriction on this remarkable group would ensure its long-term survival. Establishment of a local historic district under State Ch. 40C would serve the same purpose. Inclusion of additional highly significant buildings and site/landscape features should be considered as well.

- **Specify which landscape areas and features and vistas will be preserved.** The historic resources analysis prepared for the Task Force in June 1996 identified many important historic landscape areas and features. This work should be refined, and the town should receive assurances that these elements will be preserved. The assurances might take the form of a preservation restriction. Preservation of the historic landscape, like the historic buildings, should be incorporated as part of the conditions of development.

- **Require recordation of all historic buildings and landscapes prior to demolition or rehabilitation.** Recordation is the most common mitigation for loss or alteration of historic resources. It typically consists of written text, and professional photographs of both current and historic views.

Issues and Concerns

The current McLean plan considers historic resources in a broad-brush fashion that provides little in the way of detail. Specific issues that require further clarification include:

- **Design and site plan review.** Rezoning of the campus will require that new construction be subject to a determination of no adverse effect on historic resources. This review should be extended to demolition as well. The statement should also be amplified by defining the terms historic resources and adverse effects, by establishing a process for dispute resolution, and by establishment of penalties/mitigations, etc. 950 CMR 71.00: Protection of Properties Included in the State Register of Historic Places provides a tested and workable model for fleshing out such a statement.

- **Historic buildings in redevelopment zones.** Decide whether to require rehabilitation of specific buildings as a condition of development, or to accept McLean's proposal to encourage rehabilitation by offering an incentive of additional density. The bonus caps are currently set at ten units for the residential zones and six units for the elderly zone.A combined approach may work as well. It should be kept in mind that federal rehabilitation tax credits already offer a substantial economic incentive for rehabilitation (20% tax credit or rebate for the substantial rehabilitation of historic buildings used for income-producing purposes).

- **Historic buildings not in redevelopment zones and not in core campus.** North and Ledge Cottages, and an unnamed cottage on Mill Street opposite the Rock Meadow entrance appear to be left as orphans in the large open space area at the north end of the campus. It has been suggested that one might serve as an interpretative center. Another may be a potential candidate for a cemetery office. Pleasant Street Lodge is in the southern open space zone. Their fate should be discussed.

- **Rehabilitation of historic buildings.** This should be undertaken in accordance with the Secretary of the Interior's Standards and Guidelines for Rehabilitation. These commonly accepted national standards are required for federal historic tax credit certification.

- **Design guidelines for new construction.** Design guidelines should be developed that respect the historic building and landscape character of the McLean campus. Consider relating them to the Secretary of the Interior's Standards and Guidelines for Rehabilitation.

- **Interim protection for vacant buildings.** Development will occur over an extended period of time. Interim protection of vacant buildings should be ensured through proper mothballing techniques.

- **Historic landscape features in redevelopment and open space zones.** The historic landscape areas of the campus include specific features like stone walls and building foundations. The current document does not specify what will happen to such features.

- If Hall-Mercer is demolished, its site should be restored and reincorporated into the "Bowl."

- **Archaeological sites in redevelopment zones.** McLean hired the Public Archaeology Laboratory, Inc. to conduct an archaeological survey of the campus. Their recommendations for additional survey and/or site preservation should be reviewed, approved, and incorporated into the development plan. The most common strategy for site preservation is avoidance, assured through preservation restrictions.

- **On-site circulation.** The existing road and footpath system makes a significant contribution to the historic significance and character of the campus. Modifications to accommodate the proposed new development and the cemetery and their associated traffic should be monitored.

- **Confirm nature of off-site traffic mitigations to protect historic McLean campus character.** The McLean campus is surrounded by stone walls that contribute to its historic character and significance. In addition, gates and gatehouses are found at the Mill and Pleasant Street entrances. In the event of road widening or other changes, these and other features should be protected.

- **Confirm nature of off-site traffic mitigations to protect community character.**

Building-specific Information

The Master Plan site plan shows the locations and footprints of proposed new buildings. Existing buildings are shown in white with the exception of the Stable which is integrated into the Residential Zone 1 development. Several existing buildings do not appear at all, and will presumably be demolished.

Buildings to be Preserved

A development incentive of increased density has been proposed to encourage rehabilitation of existing historic buildings in Residential Zones 1 and 2, and in Elderly Zone 3. Work on Preservation of Upham House, according to the Secretary of the Interior's Standards and Guidelines for Rehabilitation, has been guaranteed. These standards should apply to rehabilitation all historic buildings.

Buildings that Appear to be Proposed for Demolition

(See attached summary buildings information and evaluation table for additional information.)
Seven existing buildings do not appear on the current site plan. Six fell into the low to average significance categories based on the evaluation matrix of 6/27/97 (see attached). One is the modern Hall-Mercer building. Demolition of Hall-Mercer is considered a benefit to the historic character of the campus due to the building's incompatible scale, massing, details, and materials, and its encroachment on the historic landscape known as the Bowl.

- Codman House received a total score of 17, which placed it at the top of the *average* significance category. It ranked as #19 of 35 total historic buildings.
- South Cottage received a total score of 17, which placed it at the top of the *average* significance category. It ranked as #20 of 35 total historic buildings.
- West Cottage received a total score of 17, which placed it at the top of the *average* significance category. It ranked as #21 of 35 total historic buildings.
- Higginson House received a total score of 14, which placed it at the low end of the *average* significance category. It ranked as #26 of 35 total historic buildings.
- The Farmhouse received a total score of 12, which placed it in the *low* significance category. It ranked #32 of 35 total historic buildings.
- Greenhouses received a total score of 11, which placed it at the bottom of the *low* significance category. It ranked as #35 of 35 total historic buildings.
- Hall-Mercer Building was built in 1973. It has no historical significance.

Buildings in the Development and Open Spaces (Zones 1-4) that Do Not Appear to Be Proposed for Demolition

- Mill and Pleasant Street Lodges received total scores of 20, placing them in the middle of the "high significance" category. They ranked #11 and 12 of 35 total historic buildings. They are especially important due to their high public visibility.
- Hope Cottage received a total score of 19, which places it in the middle of the "high significance" category. It ranked #14 of 35 total historic buildings.
- Samuel Eliot Memorial Chapel received a total score of 19, which places it in the middle of the "high significance" category. It ranked #15 of 35 total historic buildings.
- Superintendent Residence (Office Building) received a total score of 18, which places it at the bottom of the "high significance" category. It ranked #16 of 35 total historic buildings.
- Stable (Garage) received a total score of 18, which places it at the bottom of the "high significance" category. It ranked #17 of 35 total historic buildings.
- Waverly House received a total score of 16, which places it in the middle of the "average significance" category. It ranked #23 of 35 total historic buildings.
- Brick Barn received a total score of 15, which places it in the middle of the "average significance" category. It ranked #25 of 35 total historic buildings.
- North Cottage received a total score of 14, which places it in the middle of the "average significance" category. It ranked #27 of 35 total historic buildings.
- Ledge Cottage received a total score of 14, which places it in the middle of the "average significance" category. It ranked #28 of 35 total historic buildings.
- Unnamed Cottage (opposite Rock Meadow entrance) received a total score of 12, which places it in the "low significance" category. It ranked #33 of 35 total historic buildings.

McLean Hospital Summary Building Information and Evaluation Table

The attached table remains essentially the same as the draft dated June 27, 1997. The building scores and their rank order remain the same. The primary change is to the scores assigned to each significance category. The previous draft broke the categories down arbitrarily by units of five. Under this system, no buildings were assigned to the low category, when in fact there were buildings within the evaluation of low historical value. This did not provide enough refinement for evaluation of a real world proposal. Thus, to distribute buildings among all four categories, the scores assigned to each category have been changed as follows:

Point System

	Previous (Jun 97)	**Current (May 98)**
Very High Historical Significance	20-25	23-25
High Historical Significance	15-19	18-22
Average Historical Significance	10-14	14-17
Low Historical Significance	below 10	below 13
Non-Contributing	Post-1950 buildings	Post-1950 buildings

Historic Building Evaluation Criteria

A. Function/Importance to Campus/Historical Associations
5 pts. Main patient residence/patient care; therapy, etc.
4 pts. Patient cottage/administration
3 pts. Employee/gate lodge
2 pts. Main support
1 pt. Minor support

B. Quality of Architecture
5 pts. Very High
4 pts. High
3 pts. Average
2 pts. Low
1 pt. No Value

C. Integrity to Period of Significance (post-1950 changes)
5 pts. No important additions or losses
4 pts. Minor additions or losses
3 pts. Important additions or losses to rear or other low visibility elevation; changes to window sash; changes to materials
2 pts. Important additions or losses to side elevations; changes to fenestration pattern
1 pt. Important additions or losses to main façade

D. Prominence/Importance of Site
5 pts. Main group facing "Bowl" green space (1, 2, 10, 13, 17)
4 pts. Main drive and approaches (7, 9, 11, 18, 30)
3 pts. Secondary drives; support group (4, 8, 12, 14, 15, 21, 23, 24, 26, 32)
2 pts. Tertiary drives (3, 5, 6, 25, 27, 31, 35)
1 pt. Periphery (16, 19, 22, 28, 29)

E. Date of Construction

5 pts. 1892-1897 (Initial period of construction)
4 pts. 1898-1919
3 pts. 1920-1929
2 pts. 1930-1949
1 pt. After 1949 (less than 50-year National Register cut-off date)

McLean Hospital
Summary Building Information and Evaluation Table
May 8, 1998

Bldg. #	Bldg. Name	Date	Architect	Style	Original Function	A	B	C	D	E	Total
Very High Significance (23-25)											
2	*Appleton House*	1892-95	Fehmer & Page	Colonial Revival	Women's residence (suites)	5	5	4	5	5	24
10	*(North) Belknap House*	1892-95	Sheply, Rutan & Coolidge	Tudor Revival	Men's residence	5	5	4	5	5	24
13	*Proctor House*	1894-95	Shaw & Hunnewell	Jacobethan Revival	Intermediate men's residence	5	5	4	5	5	24
17	*(South) Belknap House*	1892-94	Fehmer & Page	Jacobethan Revival	Women's residence	5	5	4	5	5	24
1	*Administration*	1893-95	Shepley, Rutan & Coolidge	Colonial Revival	Primary admin.; staff residence	4	5	4	5	5	23
18	Upham Memorial Building	1892-94	William Y. Peters	Colonial Revival	Men's residence (suites)	5	5	4	4	5	23
High Significance (18-22)											
14	*Gymnasium*	1895-97	Wheelwright & Haven	Tudor Revival	Men's gymnasium	5	5	4	3	5	22
3	*Bowditch House*	1894-95	Shaw & Hunnewell	Colonial Revival	Men's residence	5	5	4	2	5	21
6	*East House*	1893-95	Fehmer & Page	Jacobethan Revival	Intermediate women's residence	5	5	4	2	5	21
4	*Gymnasium (Center Bldg.)*	1895-97	Shaw & Hunnewell	Tudor Revival	Women's gymnasium	5	4	3	3	5	20
9	**Mill Street Lodge**	1893-95	Fehmer & Page	Colonial Revival	Gate lodge	3	4	4	4	5	20
11	**Pleasant Street Lodge**	1893-95	Fehmer & Page	Colonial Revival	Gate Lodge	3	4	4	4	5	20
19	*Wyman House*	1894-95	Shaw & Hunnewell	Colonial Revival	Disturbed women's residence	5	5	4	1	5	20

Bldg. #	Bldg. Name	Date	Architect	Style	Original Function	A	B	C	D	E	Total
21	Hope Cottage	1895-96	Wheelwright & Haven	Colonial Revival	Private, single patient cottage	4	3	4	3	5	19
23	Samuel Eliot Memorial Chapel	1906	Wheelwright & Haven	Gothic Revival	Chapel	4	4	4	3	4	19
5	Superintendent Residence	1895	Fehmer & Page	Tudor Revival	Superintendent's house	3	4	4	2	5	18
7	Stable (Garage)	1893-95	Fehmer & Page	Mixed; Craftsman	Stable	2	3	4	4	5	18
25	*Arlington House (School)*	1916	Peabody & Stearns	Jacobethan Revival	Private, two-patient cottage	4	4	4	2	4	18
Average Significance (14-17)											
22	**Codman House**	1906	Phillip B. Howard	Utilitarian	Women's residence	5	3	4	1	4	17
24	**South Cottage**	1912	Charles K. Cummings	Craftsman	Private, single-patient cottage	4	2	4	3	4	17
26	**West Cottage**	1919	H. L. Blake	Colonial Revival	Private, single patient cottage	4	2	4	3	4	17
15	*Service Building*	1893-95	Shepley, Rutan & Coolidge	Colonial Revival	Kitchen, lab, staff residence, auditorium	3	2	3	3	5	16
35	Waverley House--house/lot purchase ca. 1900	ca. 1890	Unknown	Colonial Revival	Post-1910 doctor residence	3	2	4	3	4	16
12	*Power House*	1893	Marshall M. Tidd, C.E.	Utilitarian	Boiler, generator, pump house	2	2	3	3	5	16
n/a	Brick Barn	1890-95	Unknown	No style	Cow barn	2	4	4	1	4	15
27	**Higginson House**	1924	Bigelow & Woodsworth	Elements of Colonial Revival	Nurses' residence	3	2	4	2	3	14
28	North Cottage	1927	H. L. Blake	Colonial Revival	Private, single patient cottage	4	2	4	1	3	14
29	Ledge Cottage	1927	H. L. Blake	Colonial Revival	Private, single-patient cottage	4	2	4	1	3	14

Bldg. #	Bldg. Name	Date	Architect	Style	Original Function	A	B	C	D	E	Total
30	*Hill Cottage*	1930	Eugene T. Nolte	Colonial Revival	Physicians' residence	3	2	2	4	2	13
31	*Oakes Building*	1932	Woodworth, Hubbard & Smith	Elements of Colonial Revival	Male nurses' residence	3	2	4	2	2	13
Low Significance (below 13)											
8	*Laundry*	1893-95	Shepley, Rutan & Coolidge	Utilitarian	Laundry/drying yard	1	1	3	2	5	12
n/a	**Farmhouse**	1890-95	Unknown	No Style	Farmhouse	3	1	3	1	4	12
n/a	Cottage	1890-95	Unknown	Second Empire	Staff housing	3	2	2	1	4	12
16	*Shops*	1895	Unknown	Utilitarian	Carpentry, blacksmith; workmen's residence	1	1	3	1	5	11
20	**Greenhouse group (greenhouse gone)**	1895	John Butt	Utilitarian	Greenhouse, etc.	1	1	1	3	5	11
Post-1950 Non-Contributing											
32	*(Mailman) Research Building*	1945, 1959, 1975-77	Coolidge, Shepley, Bulfinch & Abbott	International Style	Research laboratory						
33	*Rehabilitation Building*	ca. 1970	Shepley, Bulfinch, Richardson & Abbott	Colonial Revival	Rehabilitation center						
34	**Hall Mercer**	1973	Perry, Dean & Stewart	Brutalist	Children's unit						
	Francis de Marneffe Bldg.	Post-1981									
	Admissions Bldg.	Post-1981									
	Child Care Center										

Buildings which are italicized are those which appear to fall within the core as currently defined by the McLean proposal.
Buildings which are in bold are those which appear to be proposed for demolition.

3. ECOLOGICAL IMPACTS

Carlton Noyes, Jason M. Cortell Associates

Preliminary review comments on the ecological impacts of the McLean Redevelopment Proposal.

Rare or Endangered Species

There are no rare or endangered species known to exist on the McLean Hospital site. In addition, the proposed Master Plan avoids directly impacting known potential habitat areas for rare or endangered species, such as vernal pools and wetlands.

Wetlands

The proposed Master Plan appears to respect all wetland areas including their buffer zones. However, the Master Plan does not show stormwater control features, nor does it identify how conformance with the stormwater requirements of the Massachusetts Wetlands Protection Act will be achieved.

Drainage and Hydrology

The proposed Master Plan does not identify stormwater conveyance or control structures. These matters must be addressed in the site plan review process or elsewhere in the regulatory requirements.

Ecological Integrity

Overall, the level of environmental impact is low. The most notable impact would be that the ecotone between the existing campus and the adjacent woodlands and open fields would be pushed further into the natural areas. However, in contrast to the previous proposals, the vast majority of the McLean site, including almost all of the secondary succession open fields and adjacent forest, will be preserved.

Construction of maintained areas notwithstanding, there are trees of substantial size, age and significance in the main campus. The site planning should take these into consideration by surveying their locations and planning around them as much aspossible.

The ecological inventory (flora and fauna) which was conducted last year will be continued. However, the inventory will now be more centered on the areas of proposed development, including the cemetery. Bird inventories will be conducted and specific attention will be given to nesting activity. The list of plant and animal species will be expanded as sightings are made.

In terms of impact to natural and man-made environmental features, the proposed Master Plan will preserve much of the existing natural areas. Starting at the northwest corner at the old farm site and proceeding in a counterclockwise direction, the Master Plan shows the following:

- The proposed construction of the attached cluster townhouses on the old farm in Zone 1 will take place in mixed hardwood and open field vegetative communities. The townhouses will be situated more in the forested area and further from the Rock Meadow Conservation Land in order to protect the link between Rock Meadow and the open space of the McLean site. This development will occupy approximately 1.6 acres of the mixed hardwood forest and 1.0 acres of open field.

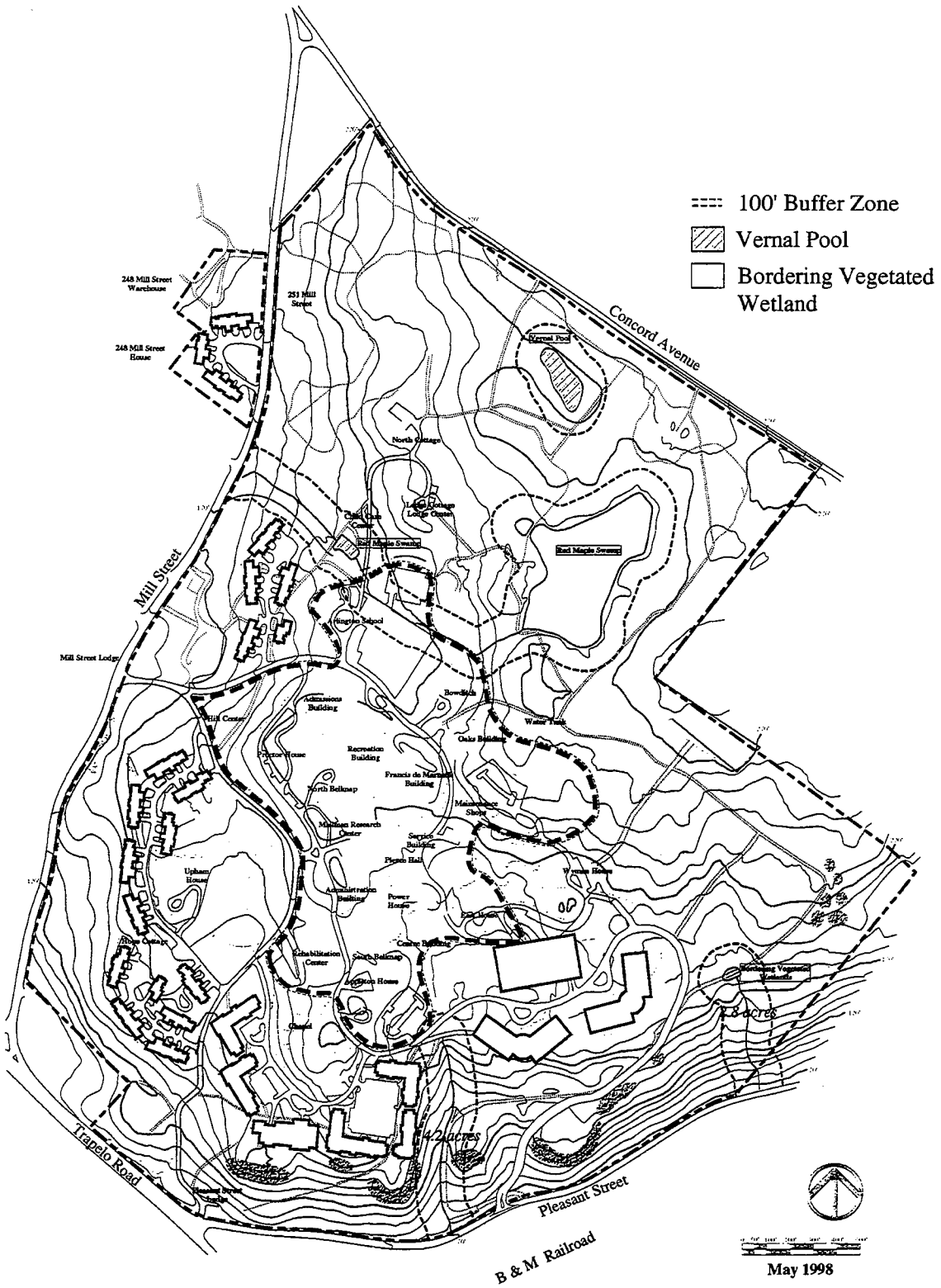
- The proposed single family houses in Zone 1 along Mill Street would be constructed in an open field of 1.2 acres and an already maintained plant community of less than one acre.

- The proposed attached cluster townhouse development also in Zone 1 and north of the main entrance on Mill Street will take place in an area with mixed hardwood forest, old-field and maintained grass vegetative communities. This construction will be in approximately .7 acres of the mixed hardwood forest and 2.1 acres of maintained grass.

- The proposed attached cluster townhouse development in Zone 2 along the southwest side of the campus would be located, for the most part, in approximately 5.5 acres of the maintained grass area and approximately 3.6 acres of the adjacent mixed conifer hardwood forest which parallels Mill Street.

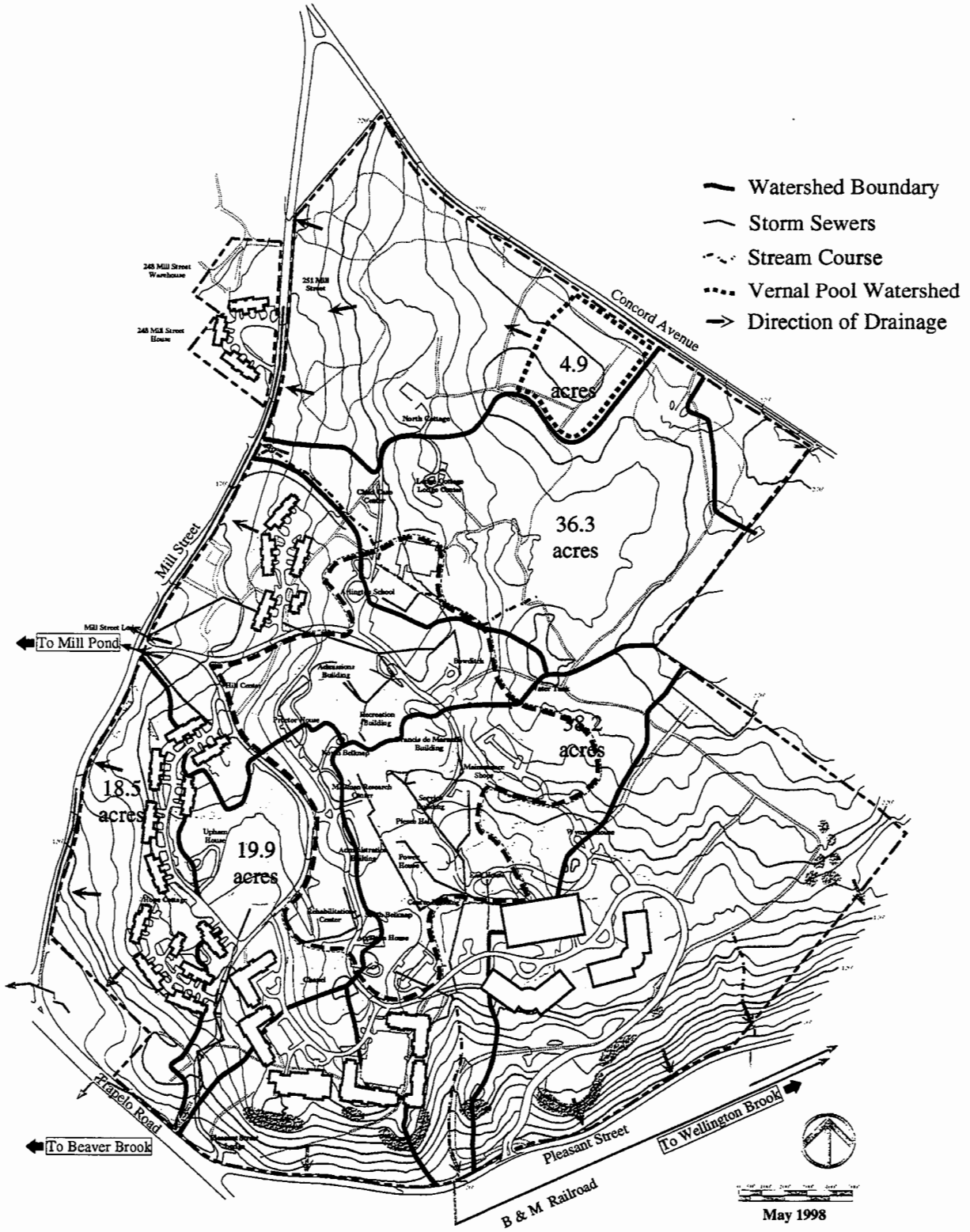
- The proposed senior center in Zone 3 along the south side of the site would be constructed in approximately 3.7 acres of the adjacent oak-hickory forest and 1.7 acres of the maintained campus environment.

- The proposed R&D/Office complex would be constructed in the general area that is presently occupied by the Higginson House and Codman House. This construction would include approximately 3.4 acres of mixed hardwood forest, 4.0 acres of mixed hardwood within the campus and some maintained grass and parking areas. The new access road to the R&D/Office complex would partially follow the old coal road and part would be cut through approximately .5 acres of the mixed hardwood forest.



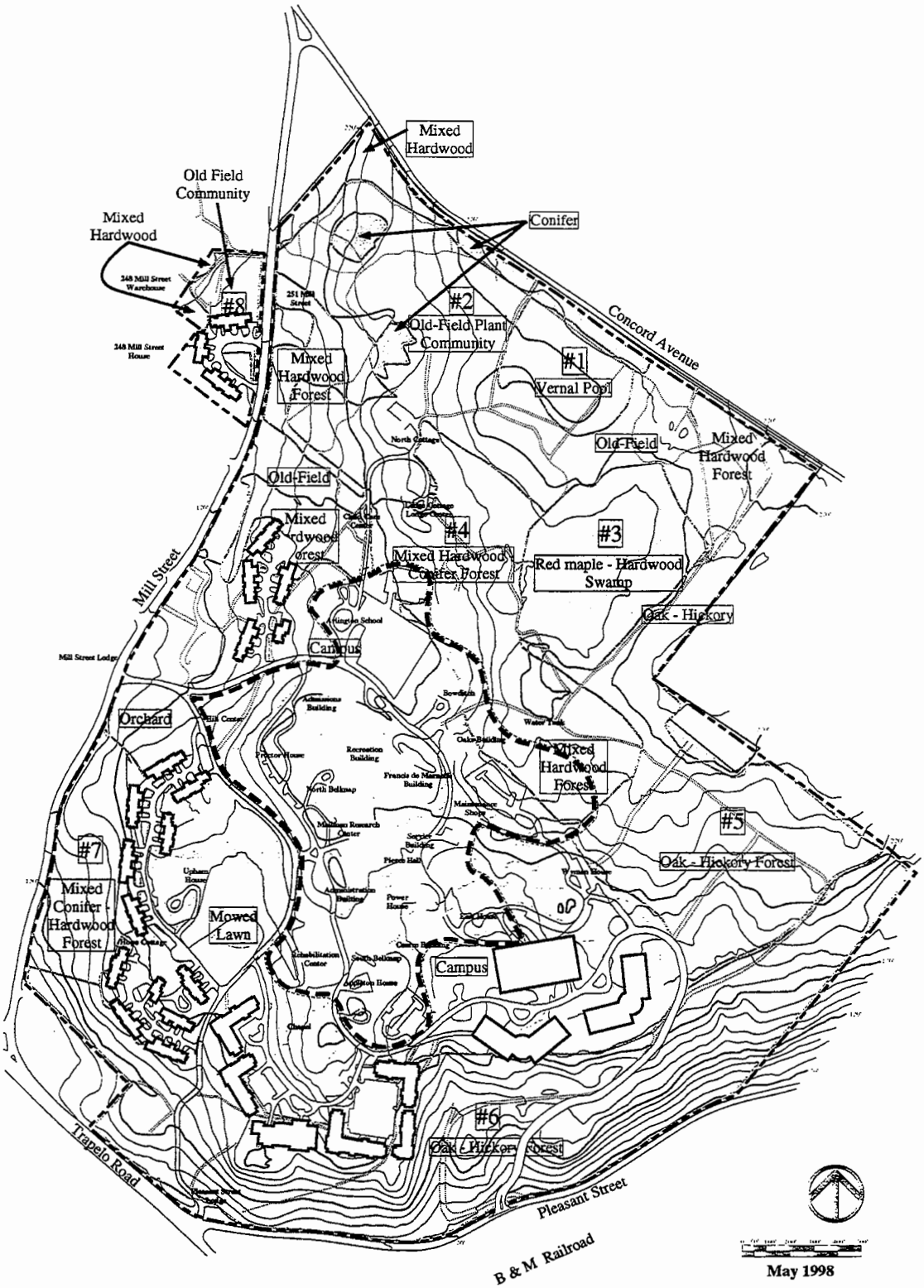
Wetland Resources

McLean Proposal Over Analysis Maps



Watersheds and Drainage

McLean Proposal Over Analysis Maps



Plant Communities of Land Areas Surveyed

McLean Proposal Over Analysis Maps

4. Visual Impacts

David Dixon, Goody, Clancy & Associates

The Task Force has been concerned with the quality and character of views of new development from surrounding public streets and other areas of the Town and from new public open space or publicly accessible open space. Because all of the development will be set back at considerable distances from public streets or abutters, the Task Force has focused on setting acceptable height limits for each of the uses. As a basic starting point, all development will be held to heights lower that the prevailing tree heights in wooded portions of the site. In addition, the Task Force has expressed concern that new development not overwhelm historically significant buildings on the site.

The luxury townhouses will be visible from Mill Street and houses located along Mill Street. Although these clustered townhouses will be set behind a buffer of existing landscaping and natural growth varying in width from between 220' and 350', the Task Force has asked, and McLean has agreed, to limit heights to a mix of two and three story buildings.

The two proposed office buildings and related parking structure will be set back 450' and 550' from Pleasant Street, but will be visible during winter months to those who look up into the site from Pleasant Street and the vicinity of the Star Market. The Task Force has asked, and McLean has agreed, to limit the height of these buildings to four stories—a conventional height for suburban office buildings and one that would hold buildings below the tree line.

The proposed senior campus will locate larger buildings closer to a public street than either of the other two uses. While McLean has indicated a desire to allow these buildings to generally rise to seven stories, a height that works well operationally, the consultant team has recommended, and McLean has agreed, that these buildings be primarily limited to a mix of four- and five-story buildings. One or more exceptions could be allowed for buildings whose siting effectively masks this height from public view. The Task Force has also been very concerned that these buildings not overwhelm the adjacent publicly accessible open space, which further suggests limiting heights to five floors. The senior campus should be set back from the nearby Chapel and Office Building, which represent the nearest buildings of historic significance.

5. TRAFFIC IMPACTS

Mindy MacNeill, Vollmer Associates LLP

Summary

This report summarizes our preliminary findings and recommendations of a traffic assessment for the redevelopment of McLean Hospital in Belmont. The impact of traffic to be generated by the development of the McLean site is probably the most controversial issue involved in that development. A conclusion with respect to those impacts requires a set of baseline judgmental assumptions about the level of traffic which McLean should be permitted to generate in relation to those owning property in Belmont and those who are not residents of the Town and presently use its streets. The debate should center on what that number should be and what McLean can do to minimize the impact of any increased traffic on the streets of Belmont. With or without the McLean development, the general level of traffic in Belmont is likely to increase, as will congestion.

Over the past year, an ongoing dialogue regarding the potential traffic impacts of redevelopment of the McLean property and the process to be employed to evaluate these impacts has occurred between the various stakeholders: the Town of Belmont, through the McLean Land Use Task Force and the general public, and McLean Hospital. Vollmer Associates' effort has focused on assisting the Task Force in understanding technical analyses and in establishing a transportation planning context for evaluating development proposals. A traffic generation limit of 800 peak hour trips was previously established as a maximum for proposals to be measured against. This limit was based on review of traffic volume and operating conditions with and without the development, and reflects the volume of additional traffic which could be accommodated by area roadways and intersections without implementation of major changes and without significant changes in operating conditions.

Our preliminary findings and recommendations with regard to McLean's current proposal are summarized below, and detailed within this report. A technical review of the traffic analyses to date has been conducted, and areas which require clarification or further examination are identified.

- Proposed mixed-use development results in lower traffic volumes than previous proposals
- Multiple access points reduce impact on any one roadway
- Traffic impacts have been identified and mitigation proposed
- Proposed mitigation is compatible with residential community
- Significant details concerning the level of permissible peak period trips, sanctions which will be imposed to enforce that level and precise mitigation measures remain to be negotiated.

Objectives

The objectives of the traffic assessment are to evaluate the development proposal in terms of its impact on safety and traffic operations, identify where impacts currently exist and are worsened or incurred by the development, and identify traffic mitigation measures which correct or offset these impacts and are compatible with the community environment.

Conclusion

From a traffic perspective, the mix of land uses, the actual uses themselves, and location and number of access points work well in terms of mitigating traffic impacts. The residential uses are the lowest trip generators, and will share access with the Hospital use off of Mill Street. The R&D component, which generates approximately the same traffic as the current hospital use, will have a separate access off of Pleasant Street. Recreation and cemetery uses will have access off of Concord Avenue. The majority of the uses have entering and exiting trip patterns opposite the typical commuter pattern for a residential area, allowing them to be more readily absorbed into the traffic flow. The net result is the new site traffic is distributed over two primary access points, and in a roughly equal manner, which minimizes traffic volumes added to any one roadway and allows physical mitigation measures to be smaller in scale.

Traffic impacts have been identified and assessed in accordance with standard engineering practice and in a manner which is consistent with the Task Force's statement of priorities. While there is still work to be undertaken, the traffic assessment has responded to the ongoing input of the Task Force over the past year, and essentially addresses the basic concern of the ability of the Town's transportation infrastructure (roads and transit) to accommodate development of the McLean site without substantially compromising the residential character of the community.

Mitigation measures recommended by Partner's consultants have attempted to maintain or improve operating conditions and safety on study area roadways, without constructing major widenings or erecting traffic signals in residential areas. As the review process progresses, mitigation measures may need to be more substantial to correct existing deficiencies and completely offset the combined effect of McLean's and other development, or the increases in delay and queue length be considered as trade-offs for maintaining Belmont's residential character.

Recommendations

We recommend that McLean's consultants continue to work with the Task Force in providing additional detail on the physical construction which is required to offset traffic impacts, developing and implementing measures such as traffic calming to enhance safety and preserve the residential environment, conducting additional analyses to demonstrate that Trapelo Road and Pleasant Street corridor improvements will be successful in offsetting impacts of the development and committing to a monitoring program or mechanism which limits the number of vehicle trips to the site.

Outstanding Issues

The issues of roadway capacity and maintaining or enhancing quality of life have been adequately addressed, for the most part. Major issues which remain include the development of a post-development monitoring and enforcement program to ensure site-generated traffic does not exceed approved levels, and a commitment by McLean to allocate funding for needed improvements. The monitoring program will protect the Town in the event that a higher traffic generator is located on-site.

There are several areas which require further study or clarification by McLean, including:

- Access and safety of pedestrians and bicyclists.
- Queueing analysis for study area intersections for existing, no build and build conditions.

- Analysis of proposed signal coordination along Trapelo Road.
- Capping of peak hour trips and commitment to a post-development monitoring program.
- Mitigating measures for all study area roadways and intersections which have been cited as deficient must be identified and evaluated.
- Inclusion of Pleasant Street Development under Future Conditions and the effect this development will have on proposed mitigation.
- Provisions for alternate modes (pedestrian, bicycles) on- and off-site.
- Accident statistics should be studied for roadways and intersections.
- Travel Demand Management programs and incentives to minimize single occupant vehicle (SOV) use.
- Cost estimates and funding commitment for required mitigation.
- Construction period impacts as part of site plan review.

Analysis of Traffic Impacts

Trip Generation Benchmarks

There are several trip generation benchmarks which McLean's proposal can be compared against. From a technical traffic operations standpoint, a traffic generation limit of 800 additional peak hour trips was previously established as a maximum for proposals to be measured against. This limit was based on review of traffic volume and operating conditions with and without the development. This limit reflects the volume of additional traffic which could be accommodated by area roadways and intersections without implementation of major changes and without significant changes in operating conditions. Historically, the site generated approximately 600 trips during AM peak hour and 500 trips during the PM peak hour. Today peak hour traffic volumes from the McLean site are approximately 300 trips in each of the peak hours.

Study Area

In response to concerns expressed over the potentially far-reaching effects, the study area was expanded and an extensive traffic counting program was undertaken by McLean's consultants. A total of 28 intersections surrounding the McLean site were included for detailed analysis under existing conditions, and future conditions both with and without further development on the McLean site. These intersections are for the most part within the Town of Belmont, although locations in Waltham and Lexington have been included. The limits are as follows:

- Trapelo Road – Wyman Street in Waltham to Belmont Street in Belmont
- Winter Street between Route 2 and Concord Avenue, inclusive
- Concord Avenue between Marsh Street and Brighton/Blanchard
- Pleasant Street between Route 2 and Trapelo Road
- Mill Street between Concord Avenue and Trapelo Road

The focus of this review is on the peak period traffic operations at intersections which will be substantially impacted by the McLean development, namely:

- The existing McLean Site Drive and Mill Street
- The proposed McLean Site Drive on Pleasant Street
- Mill Street and Concord Avenue
- Mill Street and Trapelo Road
- Trapelo/Waverley Oaks Road
- Pleasant Street and Trapelo Road
- Pleasant Street and Concord Avenue

While other intersections farther away from the site will be impacted to a lesser extent and should be studied and coordinated with mitigation measures at the principal intersections, traffic mitigation measures should be focused on the intersections where the McLean development will have its greatest impact.

Existing PM peak hour traffic volumes for six critical intersections in close proximity to the McLean site are illustrated in Figure 1.

Study Methodology

McLean's approach to identifying, evaluating and mitigating traffic impacts follows standard practice for preparing such studies at the state level of environmental review. Traffic congestion and maximum trip generation occur during weekday morning (AM) and afternoon (PM) peak hours and these critical peak periods were evaluated. Baseline conditions for the study area include both existing conditions and future "No Build" conditions with traffic generated by other on-line area developments (Metropolitan State, Mormon Temple, etc.). The Pleasant Street development was not considered by McLean but has been included in Vollmer's analysis. An annual growth factor was applied to existing volumes to account for traffic associated with non-specific development. Future "Build" conditions include the McLean development. The results of the PM peak hour analysis are summarized in the attached tables.

The analysis results support field observations and indicate that twelve of the study area intersections exhibit peak period operational deficiencies under existing or future No Build conditions (without the proposed development by McLean). These deficiencies are typically attributable to a combination of insufficient traffic control and high traffic volumes. As shown in the attached tables, traffic congestion will increase with or without the McLean development.

Trip Generation and Distribution

Trip generation rates for each land use, with the exception of the existing Hospital use, are consistent with those published by the Institute of Transportation Engineers (ITE). The existing McLean campus generates approximately 300 trips in each peak hour. The current proposal could result in approximately 520-550 additional peak hour trips for uses proposed by McLean, well below the initial development proposals which were advanced last year. Other uses identified on-site (e.g., cemetery, soccer field, open space, cultural center) also generate additional trips. Table 1 provides trip generation information for each types of land use currently proposed.

Table 1. Trip Generation by Land Use

Land Use	Development Size	Trips per Unit/KSF/Beds/Acres			Number of Vehicle Trips		
		AM Peak	PM Peak	Daily	AM Peak	PM Peak	Daily
Luxury Townhouse	100 Units	0.54	0.55	5.9	54	55	590
Elder Housing	600 Units	0.07	0.10	3.5	42	60	2100
Research and Development	300 KSF	1.24	1.08	8.11	372	324	2433
McLean Growth	50 KSF	1.64	1.60	9.3	82	80	462
Senior Center	-	-	-	-	6	8	34
Cemetery	20 Acres	-	-	-	3	17	95
Soccer Field	1.5 Acres	-	-	-	0	17	36
TOTAL		-	-	-	559	561	5750

The residential use has a predominantly "outbound" flow in the AM and inbound in the PM, while the employment-based uses have the reverse pattern. This represents an advantage in terms of making use of available capacity as new trips are added opposite the predominant flow of traffic.

The distribution of these trips on the adjacent roadway network involved a detailed review of travel patterns for employees and visitors to the existing McLean facility via traffic counts at the site drive; a license plate matching survey; employee residence data; demographic and journey to work data available from the US Census on where people who live in Belmont work and where people who work in Belmont live; knowledge of the local roadway network; and proposed access/egress drives. The net result is 43 percent of site traffic will be served by the Pleasant Street driveway; 57 percent will be served by the Mill Street driveway. More than half of drivers traveling to and from the site are oriented toward Trapelo Road. The additional PM peak hour trips are shown in Figure 3.

Impacts of Development

Additional peak hour traffic volumes generated by the current proposal were superimposed over the NoBuild condition and re-analyzed. Without mitigation, peak hour operations are expected to deteriorate, especially at those locations which are exhibiting constrained operations already. Additional intersections, for a total of thirteen locations, would exhibit operational deficiencies during peak periods with McLean development without any mitigation.. (See attached table.)

Proposed Mitigation

Thirteen intersections are expected to exhibit operational deficiencies, post-development. Many of these locations are experiencing delays and congestion under existing and No Build conditions, which are exacerbated by additional traffic generated by McLean. Traffic mitigation has been developed for these locations; is consistent with the Principle of preserving quality of life; has intentionally employed a minimalist approach to avoid building in unneeded capacity; prevents induced growth or shifts in latent demand; and at the same time preserves the residential character of Belmont.

Travel Demand Management and Enforcement

Without control of the level of peak period vehicle trips to be generated by a completed McLean development, the Town is left to speculate about the traffic impact of that development. A model based upon X number of trips is useless of the development generates X plus 300 trips at a peak period. Therefore, any approval of a development of this magnitude must be tied to an enforceable limit on peak period trips.

Fortunately, the traffic which presently exists at McLean and that which will be generated by the development must enter the property through either the Mill Street entrance or the proposed Pleasant Street entrance.

Technology exists for the Town of Belmont, at no cost to the Town, to monitor on a continuing real time basis the number of vehicle trips generated at peak period and at any other time by McLean at those two entrances.

The Town is also fortunate that those two entrances will be controlled by a few large institutions, McLean at the Mill Street entrance, and the large tenants of the R&D/Office facility at the proposed Pleasant Street entrance. Those institutions have the capacity to keep the number of peak period vehicle trips within prescribed limits. Failure to comply will result in sanctions such as loss of parking spaces or fines, which will bring about compliance quickly.

Therefore, it is possible to tie future development at McLean to an enforceable limit on peak period vehicle trips. That limit should be one which, as a result of the mitigation measures discussed below, will ensure a level of traffic at impacted intersections which is acceptable to the Town.

Physical Improvements

For the seven critical locations, the mitigation package proposes a range of actions which included installation of traffic signals (confined to the site drives and Trapelo Road intersections) and realignment and minor widenings at some unsignalized locations to better organize traffic flow and enhance safety. Traffic operations were evaluated for future traffic volume conditions with mitigation and the analysis indicates that with these measures in place, traffic operations will be maintained at existing levels or, in many cases, improved. However, there are differences between the mitigation identified by McLean and that recommended by Vollmer Associates, which reflect different assumptions regarding future development other than on the McLean site. Specifically, the proposed Pleasant Street redevelopment, which will have a localized impact on Pleasant Street and Trapelo Road, has not been considered by McLean in its analysis of future traffic operations or in the development of mitigation.

Concord Avenue/Mill Street

Mitigation proposed at this location involves a minor realignment to the Mill Street northbound approach to form a more conventional "tee" intersection with Concord Avenue. Channelization islands to guide vehicles through the intersection and provide shorter pedestrian crossings are proposed. Traffic control will consist of a stop sign for Mill Street northbound; no traffic signals are proposed.

Mill Street/McLean Hospital Site Drive

A separate left turn storage lane on Mill Street southbound and a separate right turn lane on Mill Street northbound are proposed as mitigation at this intersection. Minor widening may be needed to accommodate these storage lanes, and use of narrower lane widths would further limit any needed widening.

Mill Street/Trapelo Road

The Mill Street southbound approach to this intersection is proposed to function as a dual left turn lane as part of the mitigation for this intersection. (Some drivers on this approach currently use it as a dual left turn.) This would require pavement markings to delineate the dual approach, and "elephant tracks" pavement markings through the intersection to ensure drivers stay in their lane. There are currently two lanes on Trapelo Road eastbound to accept the dual left turn, which quickly transitions to a single lane at Pleasant Street. Signal timing and phasing improvements are recommended, including provision of an advance green phase on Trapelo Road eastbound, to provide a more balanced volume by lane, and smooth out traffic flow.

Trapelo Road/Waverley Oaks Road

Signal system improvements in the form of changes to the phasing and timing are proposed along the Trapelo Road corridor. No physical improvements are proposed for this location.

Trapelo Road/Pleasant Street

Installation of traffic signal at this location is proposed. Strip widening on the Pleasant Street approaches are proposed to allow separate left and right turn lanes. No widening on Trapelo Road is proposed by McLean.

Pleasant Street/Concord Avenue

Modifications to the signal timing and phasing at this location are proposed to provide a protected advance phase for Concord Avenue WB. A separate left turn lane is also proposed to be delineated within the existing pavement width on the Concord Avenue WB approach.

Pleasant Street/R&D Site Drive

The proposed site drive will form a "tee" intersection with Pleasant Street. A traffic signal is proposed to be located at the intersection. A left turn storage lane is proposed on Pleasant Street northbound, and a right turn deceleration lane is proposed on Pleasant Street soutbound.

Conclusions

The proposed development of the McLean Hospital site will have an impact on traffic operations in the vicinity of the site and traffic mitigation in the form of management techniques and infrastructure improvements have been identified. Sixteen of the 28 locations studied have or will have deficiencies such as long delays and queueing. To offset these impacts, and to correct existing deficiencies, mitigation measures are required and have been identified at seven critical locations and others within the study area. The physical mitigation measures at intersections are predicated on the trip generation as described. Travel Demand Management strategies to limit the number of peak period trips are required.

With these measures in place, the additional traffic generated by the redeveloped McLean site can be accommodated at these intersections. Further study is required to develop mitigation for the other locations cited as deficient and to incorporate the Pleasant Street redevelopment into the proposed mitigation. While McLean is not responsible for traffic impacts which currently exist or are caused by other planned projects, such as the proposed Pleasant Street redevelopment, they are responsible for remedies to address a worsening traffic operations at existing trouble spots caused by their own development. The effect these other developments have on the type and extent of mitigation required must be considered when evaluating the overall transportation plan.

Level of Service

As identified in the 1994 Highway Capacity Manual (HCM), level of service is a qualitative measure that characterizes the operational conditions within a traffic stream and their perception by motorists and passengers. The descriptions of individual levels of service characterize these conditions in terms of such factors as speed and travel time, freedom to maneuver, traffic interruptions, and comfort and convenience.

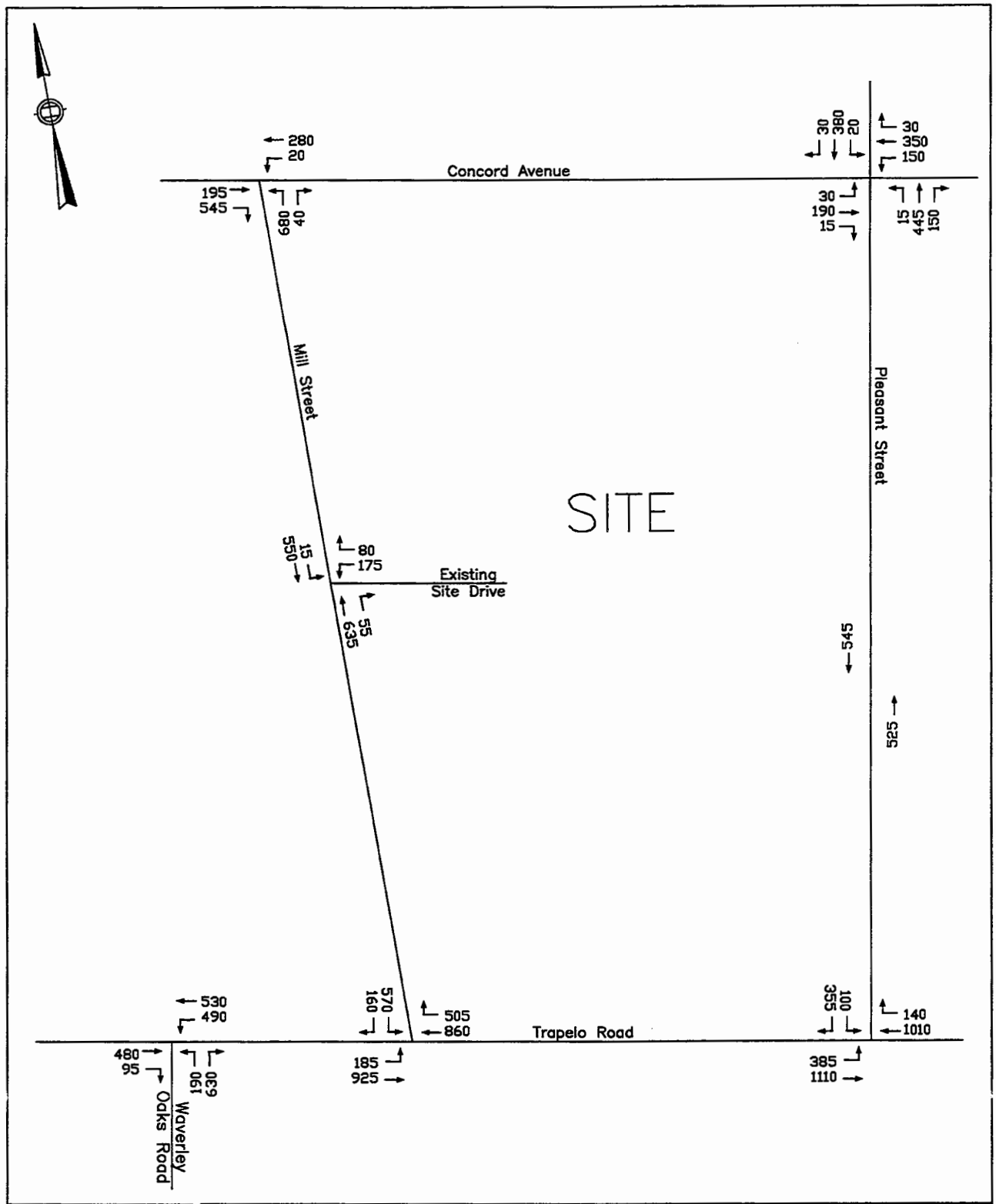
Six levels of service, ranging from A to F, are defined with Level of Service (LOS) A representing the best operating conditions and LOS F representing the worst operating conditions. The level of service for signalized intersections is based on the average delay per vehicle for each movement through the intersection. For unsignalized intersections, the level of service is based on delays to the "minor" movements; that is, those which must yield the right of way. The criteria for each level of service for signalized intersections are shown in the following tables:

Level of Service Definitions for Signalized Intersections

Level of Service	Average Stopped Delay
A	5 seconds
B	>5 and 15 seconds
C	>15 and 25 seconds
D	>25 and 40 seconds
E	>40 and 60 seconds
F	>60 seconds

Level of Service Definitions for Unsignalized Intersections

Level of Service	Average Total Delay
A	5 seconds
B	>5 and 10 seconds
C	>10 and 20 seconds
D	>20 and 30 seconds
E	>30 and 45 seconds
F	>45 seconds



VOLLMER ASSOCIATES LLP
ENGINEERS•LANDSCAPE ARCHITECTS•PLANNERS

Existing Conditions

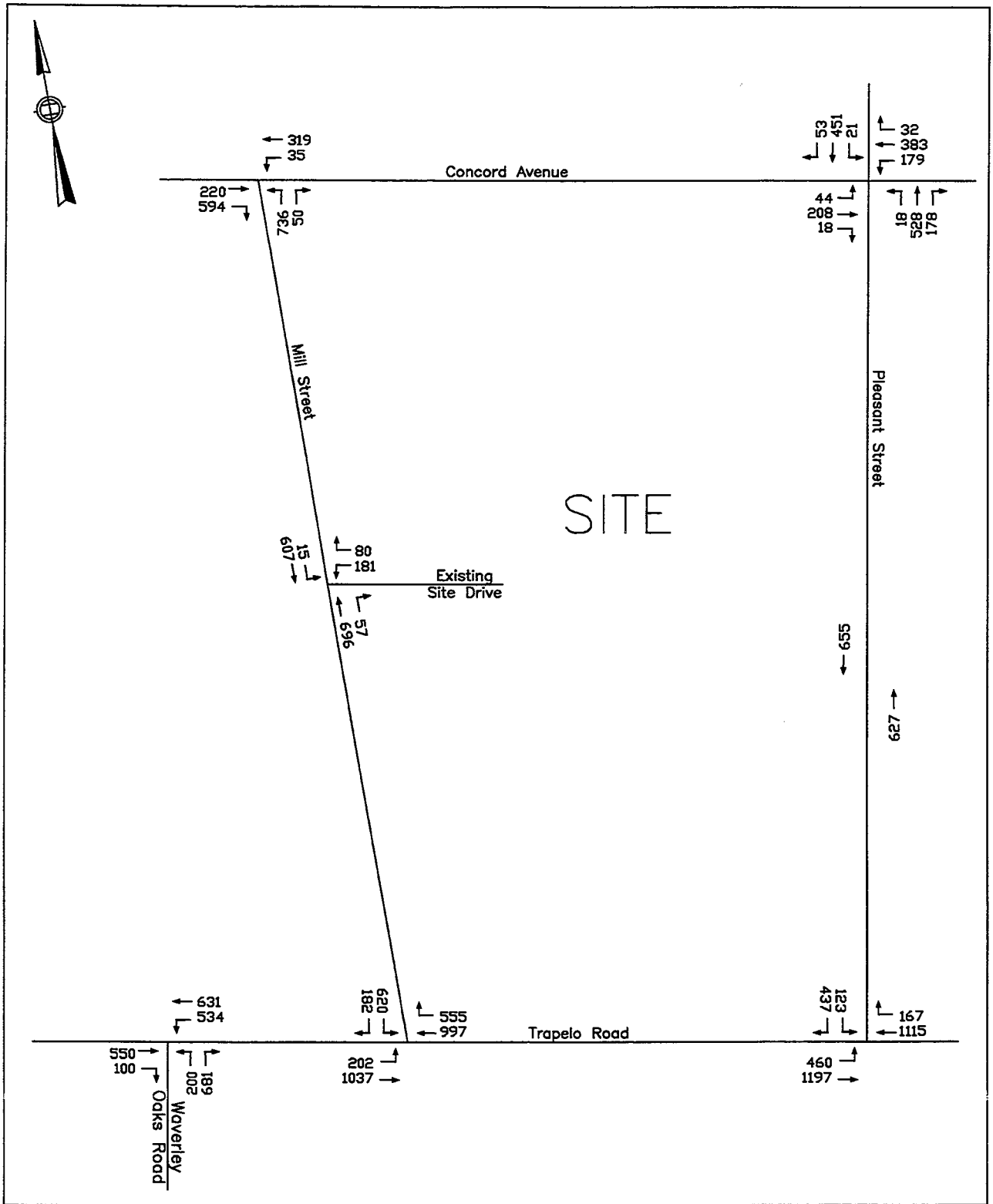
McLean Hospital Reuse Master Plan - P.M. Peak Hour Traffic Assessment

Location: Belmont, MA

Date: 5/19/98

Scale: Schematic Diagram / Not to Scale

1



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No Build Conditions

McLean Hospital Reuse Master Plan - P.M. Peak Hour Traffic Assessment

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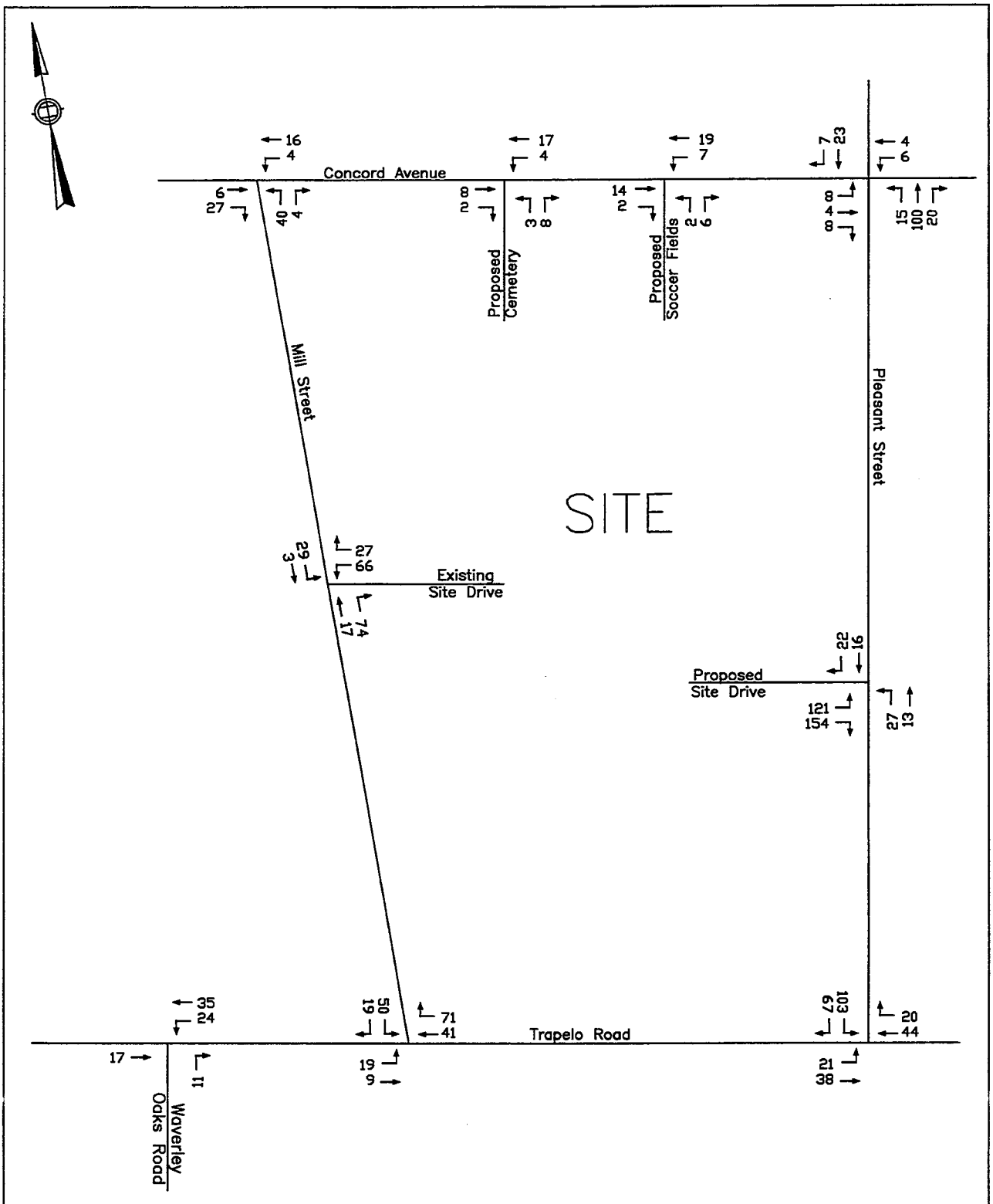

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Assigned Development Trips

McLean Hospital Reuse Master Plan - P.M. Peak Hour Traffic Assessment

Location: Belmont, MA

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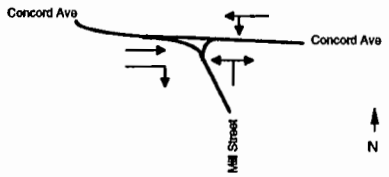
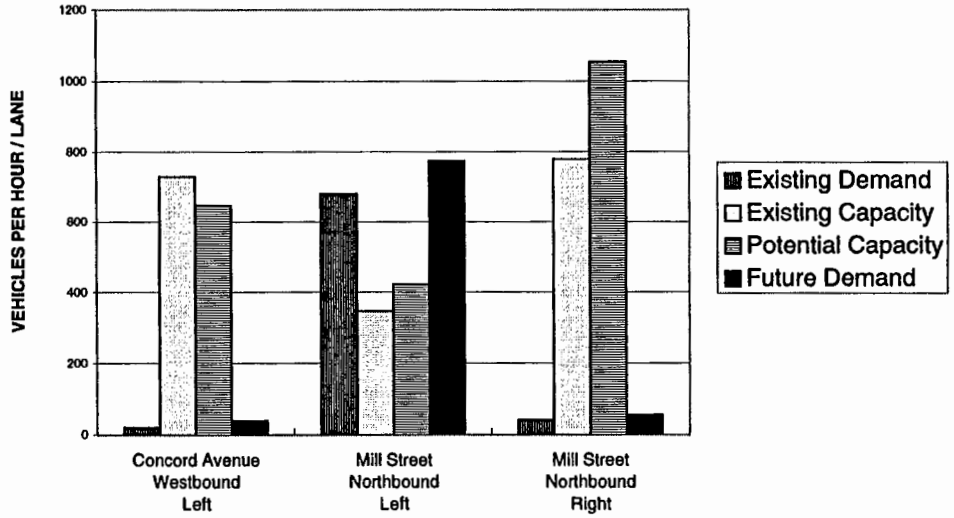
Scale: Schematic Diagram / Not to Scale

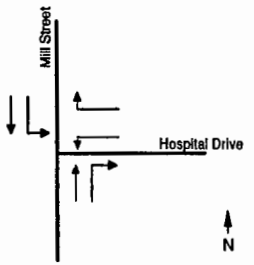
3

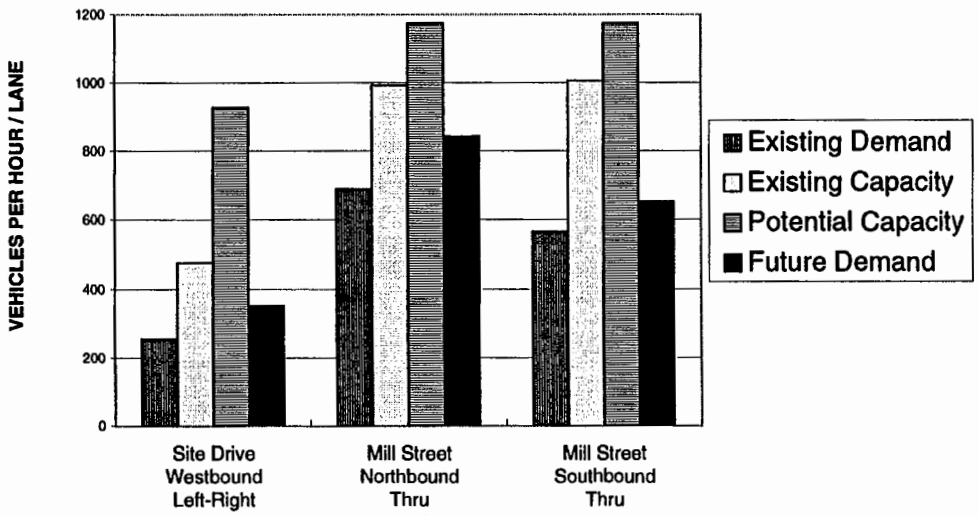
Mill Street @ Concord Avenue
Demand vs. Capacity
P.M. Peak Hour





Mill Street @ Site Drive
Demand vs. Capacity
P.M. Peak Hour

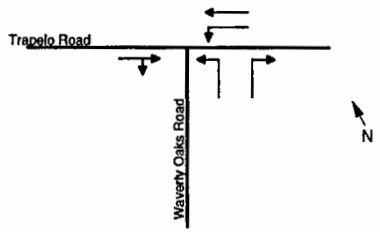


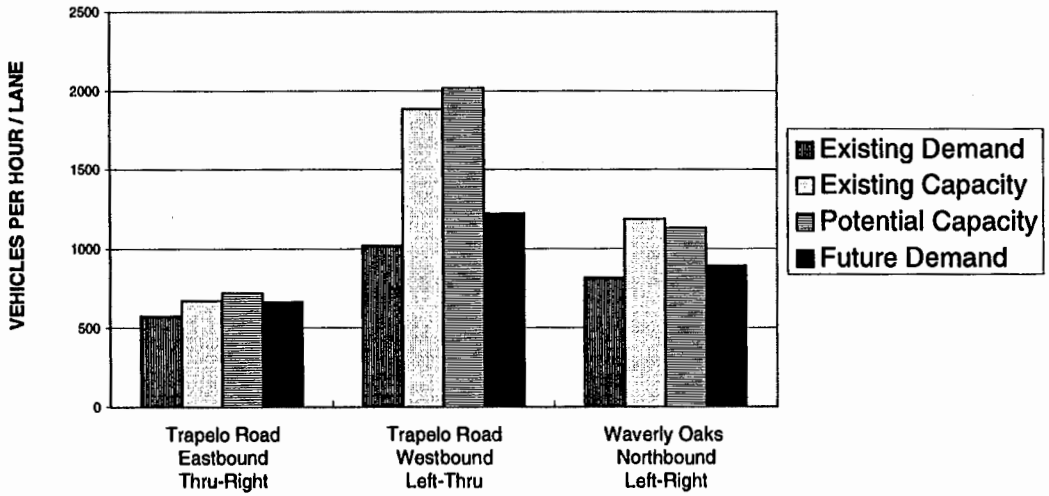


Trapelo Road @ Waverly Oaks Road

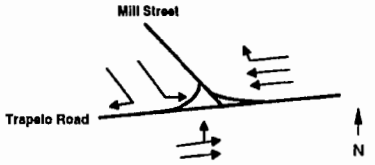
Demand vs. Capacity

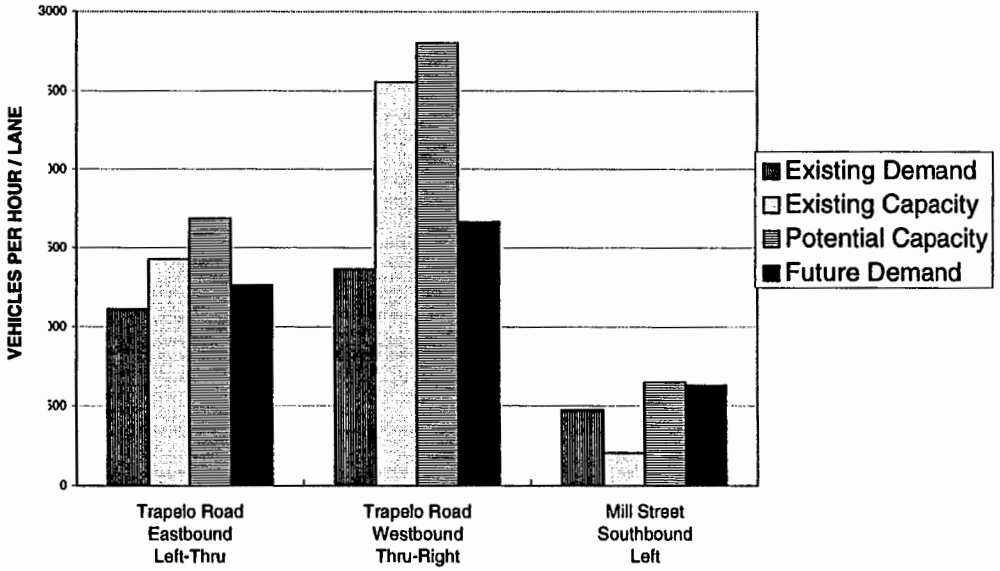
P.M. Peak Hour



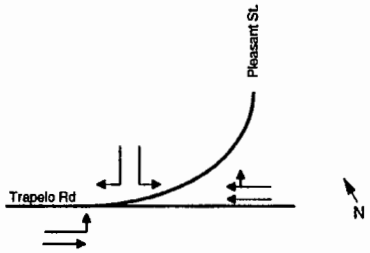


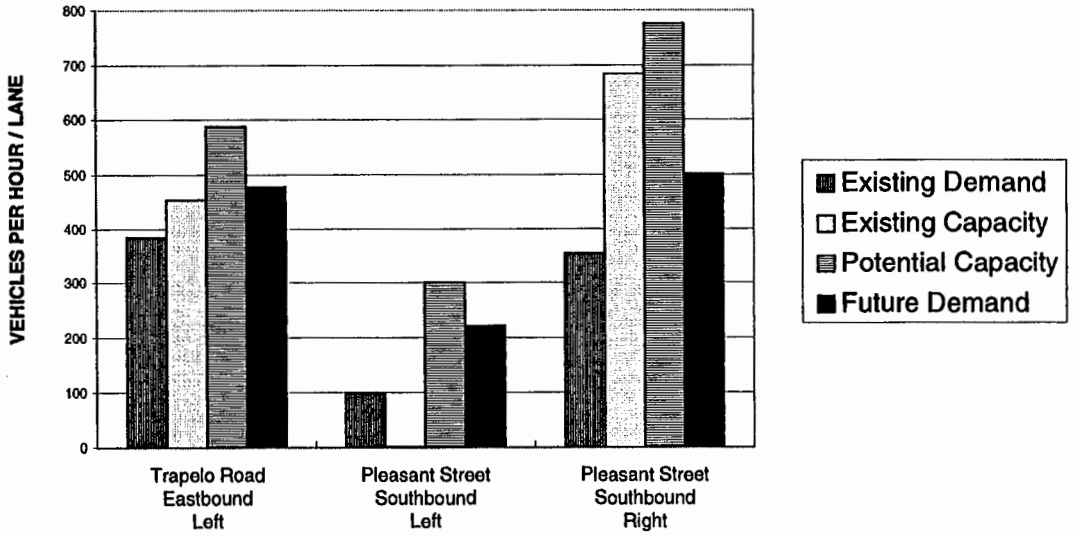
Mill Street @ Trapelo Road
Demand vs. Capacity
P.M. Peak Hour





Pleasant Street @ Trapelo Road
Demand vs. Capacity
P.M. Peak Hour

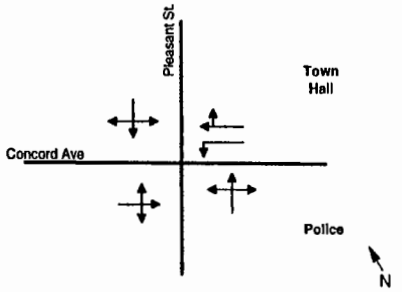


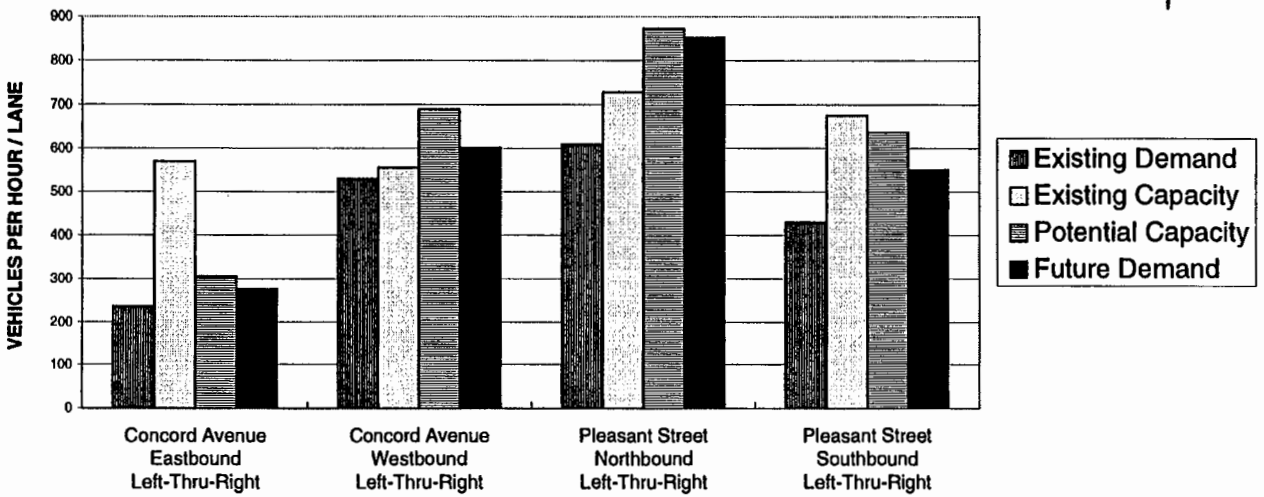


Pleasant Street @ Concord Avenue

Demand vs. Capacity

P.M. Peak Hour





6. FISCAL IMPACTS

John Connery, Connery Associates

Objective: Generate additional tax revenue for the Town

(1) **LAND USE TYPE:** The decision of the McLean Task Force to focus on land uses that create positive net revenues provides the foundation for a strong positive fiscal outcome. Specifically, the proposed research and development, high end residential, and assisted elderly living uses comprise a reuse scenario that produces initial and sustained fiscal advantages for the Town.

(2) **TAX YIELD:** At project completion, the gross annual tax revenue will be nearly 4 million dollars. Most importantly, after assigning "worst case" municipal service cost estimates, the net annual revenue accruing to Belmont will be nearly 2 million dollars. This revenue represents the dollar amount flowing into the local treasury after the costs of providing municipal services and the current tax assessment have been deducted from gross tax revenues. See Figure 1. The gross projected annual tax revenues are equivalent to 11% to 12% of the current town wide tax revenues collected from real property. Further, this projected net annual revenue represents approximately 4.5% of the Town's current annual budget.

(3) **LONG TERM BENEFIT:** The essentially built out and established character of Belmont creates the framework for a long term fiscal benefit. As a mature community, there is no reason to anticipate large scale and rapid residential development elsewhere in Town. There is relatively minimal off-site development potential to create a counter balance to the fiscal benefits associated with the project. Thus, the gains in net revenue will become a long term feature of the Town's fiscal future.

(4) **TOTAL ASSESSED VALUATION:** The proposed uses will add approximately 277 million dollars to Belmont's total assessed valuation. This large increase will significantly expand the community's tax base and provide considerable flexibility in fiscal and budgetary planning.

Conclusion: Assuming worst case municipal service costs, the resulting net fiscal impact remains strongly positive, very substantial, and long term.

GLOSSARY OF TERMS

(1) **Net Fiscal Impact.** The cost or benefit to the town after the cost of municipal services has been deducted from the taxes generated by a land use.
(2) **Gross Annual Tax Revenue.** The amount of taxes generated by a land use in a given year.
(3) **Net Annual Revenue.** The amount of revenue remaining, if any, that has been generated by a land use, after the cost of municipal services has been deducted.
(4) **Total Assessed Valuation.** The total assessed value of all real estate in the community.

FIGURE 1. PROJECTED ANNUAL NET NEW FISCAL REVENUES

Use	Assessed Value per Unit	Assessed Value	Revenues	Estimated[1] Service Costs per Use	Total Estimated Service Costs	Net Revenue to Town
Cluster Townhouses (56 units)	$750,000	$42,000,000	$593,880	$5,920	$331,520	$262,360
Cluster Housing (44 units)	$500,000	$22,000,000	$311,080	$4,640	$204,160	$106,920
Senior Community (600 elderly units)	$250,000	$150,000,000	$2,121,000	$900	$540,000	$1,581,000
Office (300,000 sq. ft.)	$175	$52,500,000	$742,350	$1/sq.ft	$300,000	$442,350
Research and Development (300,000 sq. ft.)	$125	$37,500,000	$529,125	$0.80/sq.ft	$240,000	$289,125
Total with office		$266,500,000	$3,768,310		$1,375,680	$2,392,630
Total with R & D		$251,500,000	$3,555,085		$1,315,680	$2,239,405

Estimated Annual Net Revenue: Deducting the $500,000 current tax payment, the range of net revenues (depending on the office or R&D mix) will be between 1.7 and 1.9 million dollars. As a comparison, development option #3 submitted by McLean had a net fiscal return of approximately 3.9 million dollars.

[1]The service costs represent the high end of the range for municipal service costs. For example, the costs for luxury townhouse assumes 80% of the education costs normally assigned to single family houses. Traditional educational assignments for similar housing are in the 30% to 40% range. Further, no deductions have been provided for private school attendance. Office costs at $1 per sq. ft. are 63% higher than the 61 cents per sq. ft. used in McLean's analysis. The task force cost estimate represents the high end of the municipal cost range for office use. Similarly, the R & D cost estimate is approximately 60% higher than the median municipal cost associated with R & D.

We have used the high end costs to establish a worst case scenario. If more median values are experienced, annual net revenue will increase by approximately $300,000 to $400,000.

Technical Review—Measuring Fiscal Impacts—McLean Hospital

INTRODUCTION

To assist the McLean Hospital Task Force (Task Force) in understanding the most likely fiscal impacts associated with various development scenarios, we selected an approach to estimate fiscal impact that most suited the issue at hand. In this instance, we have a mixed use development scenario and most likely, a moderate duration build out time frame. It is conceivable that prior to buildout, assessed values will fluctuate and business activities in the same building could change (either to more or less intense in terms of employees or trips generated). Therefore, our objective was to determine the most likely fiscal impacts and the range of municipal costs associated with the proposed land uses. To that end we selected the proportional valuation fiscal impact method. It is an average costing approach used to project the impact of development on local costs and revenues. Given that we do not have a list of the actual office space or research and development tenants, nor can we be sure of the exact buildout time frame for the residential components, this approach is the most appropriate method to estimate the fiscal impacts of a generally defined development program. A basic assumption of this method is that municipal costs increase with the intensity of land use, and change in real property value is a reasonable substitute for change in intensity of use. Another assumption is that the aggregate impacts of various office and R&D buildings on municipal services are sufficiently similar to group into single cost categories. Finally, it is assumed that non residential development primarily affects municipal functions rather than school costs, which may be ignored. For the residential uses we again used a proportional cost method but added a proportional factor for school costs consistent with the residential use type.

The analysis employs Belmont's current tax rate, current assessed value per square foot for development type, costs of municipal services based on recent departmental budgets, and assumes that redevelopment of the site will be treated as new development for tax purposes. The analysis also assumes that any development will be accomplished by taxable entities. While municipal revenues derived from any development scenario can be altered by changes in construction schedule and general economic conditions, we have assumed that the relative fiscal value of various land uses will remains constant over the long term.

For the analysis, we used existing departmental budgets associated with the delivery of government services in Belmont. **However, our estimates of the cost of servicing various development types is conservative.** For example, we employed the high end of the cost range associated with office development. Where McLean used a service cost of 61 cents per square foot for traditional office space, we used 1 dollar per square foot. The higher cost reflects the small possibility that, over time, office use could experience an increase in the number employees per square foot, thus increasing traffic impacts and associated costs. To be conservative, we did not estimate costs if office employment decreases per square foot. Similarly, our costs for town house development represents another "worst case" scenario, because it includes more school costs than what usually occurs with this type of housing. Essentially, we treated town house development like traditional single family housing, and only allowed for a 20% reduction in school costs, when in almost all cases, it creates school costs no more than half of what is produced by single family housing. Cluster housing was assigned school costs essentially double what is normal for conventional attached housing. Further, for both housing types we did not include a factor for private school attendance; we made the conservative assumption that all pupils generated would attend public schools. The costs associated with the elderly housing campus reflects a regional average, and we found no compelling reason to increase these costs for Belmont. This form of housing will be attractive to approximately 25% of the population over 70 years of age, but a much smaller percentage will actually be able to afford private elderly housing. It is important to note that the scale of the elderly facility makes it a regional facility. As is the case, as in similar facilities, future occupants will come from the surrounding

communities as well as Belmont. As such, the elderly housing component will primarily serve as an addition to the local housing stock, and minimally as a replacement for other housing types.

Since the site can be classified as "new land," we realized early into the process there exists a high probability of a strong and positive fiscal impact. Our approach was intended not only to estimate overall fiscal impact, but also to provide the community with an understanding that estimating fiscal impact is an effort to understand the range of potential outcomes. To that end, we believe it is important to estimate the low end of fiscal return. However, in this instance, even the "worst case" scenario yields a very strong positive fiscal advantage for the Town. In addition, if more median municipal costs are experienced, the community will gain at least another 300,000 dollars in annual net revenues.

McLean Hospital currently pays approximately $498,000 per year in property taxes. This roughly equates to an assessed value of 35 million dollars. This assessment is based on the land value for single family home development consistent with the Single Family D zoning. Assuming an agreement of some type is eventually approved, the taxes on the buildings and land of the core hospital campus will most likely be removed after a period of time. While it is premature to discuss the features of such an agreement before a development program has been approved, it is most likely that the town will require that any removal of tax liability, on the core campus, be accomplished without negatively impacting annual tax revenue. This desired outcome may result in a gradual removal of the current tax assessment. Our analysis of net fiscal impact assumes the removal of the current tax assessment at the time of project buildout.

It is important to note, that while the cost of municipal services expressed in our analysis reflects an average cost over time, costs and fiscal impact can and do vary from year to year. While not a part of our analysis, the most easily understood example of this phenomenon is single family housing. It is generally recognized that the largest portion of municipal cost for single family homes is the education of children. While true, not all single family homes have children in public schools at all times. Over a 40 year occupancy cycle, a single family house may send children to the public school system for a 20 year period. However, a 20 year period of sending no children to public school is also common occurrence; as is sending children to private schools. In Belmont, the 3,400 students in the school system represent approximately 0.4 school aged children per household and 0.65 school aged children per family. Similarly, we are all familiar with commercial buildings whose tenants change over time. Each occupant may or may not create the same demands on Town services. However, over time we can ascertain an average impact related to the building in question. The values and ratios presented below represent the long term view, an average fiscal impact over time.

REVENUE RATIO

To express the long term fiscal value of land use types we created a numerical device; a revenue ratio. It is intended to assist in fiscal analysis, and provides a simplified comparative device for the McLean Task Force and the community. The revenue ratio is expressed as a number with "1.0" being revenue neutral; below 1.0 is a negative fiscal impact; above 1.0 is a positive impact.

The revenue ratio is most easily understood as the percent of municipal service costs covered by the taxes derived from a particular property. Thus, a 0.56 revenue ratio covers only 56% of annual municipal service costs. A 1.56 ratio will return 56 cents to the Town treasury for every dollar of service cost expended. It is important to note, that any fiscal impact associated with McLean Hospital is more than the immediate gain or loss in annual taxes. As "new growth", the assessed value of the new development is added to the town's total assessed valuation; and the total assessed valuation can be compounded at a rate of up to 2.5% annually. In dollar terms, a million dollars of new growth has a tax yield of $141,100, at the current tax rate of $14.11. Obviously, it is through the mechanism of adding new growth that

community services are maintained or expanded over time. For comparison purposes, in the 1980's the rate of new growth in Belmont was approximately $300,000 per year. In the 1990's the amount of new growth has increased significantly and is now approximately 1 million dollars per year. The estimated value of the new growth associated with the proposed scenario is 277 million dollars over a five to six year period. Annualized, that amounts to 46 million dollars of new growth per year.

EXAMPLE REVENUE RATIOS

The following are examples of revenue ratios using tax and assessment values consistent with current Belmont practices. In each instance the derived ratios represent the average for each use described. While not a consideration in this study we have included a single family example as a comparison to non residential uses.

Cost Assumptions for Single Family Dwellings*

Current median single family home assessed value	$350,000
Number of public school children per dwelling	.65
COSTS:	
School costs	3900
Cost of general government service	570
Cost of public safety (police & fire)	700
Cost of public service (roads, water, sewer, etc.)	900
Cost of cultural/recreational resources	160
Cost of human services	40
State and city charges	190
Debt	240
Total estimated cost of services per year	$6,700

REVENUE RATIOS OF VARIOUS SINGLE FAMILY HOUSE VALUES

Home Value	Costs	Taxes	Revenue Ratio (taxes÷costs)
350,000*(median)*	6,700	4,950	0.74
500,000	6,700	7,070	1.05
750,000	6,700	10,605	1.58
1,000,000**	6,700	14,140	2.11

***assumes same rate of public school participation, although public school participation rates generally decrease as family income increases.*

As single family house values increase, they reach a point where they can (as a group) create a net fiscal gain.

REVENUE RATIO – RETAIL USE

ASSUMPTIONS

1. All new retail will be first class development.
2. Assessed value per square foot is $200.00
3. Municipal cost at $1.35 per SF.

EXAMPLE: 25,000 sq. ft. retail center @ 200 sq. ft. = $5,000,000 assessed value: tax rate @ 14.11 yields annual taxes of $70,550.

Retail centers generate the most traffic per square foot of development and, and require more than average policing consideration. As such, the service cost per square foot is usually the highest of any commercial use. For our example, we have selected the high end of the traditional cost range, i.e. $1.35

Retail Size	Cost	Taxes	Revenue Ratio	Net Revenue
25,000 SF.	$33,750	$70,550	2.09	$36,800

In addition to the annual positive net revenues, in our example 5 million dollars in new growth will be added to the total assessed valuation. This additional fiscal benefit holds for all new developments.

REVENUE RATIO – OFFICE USE

ASSUMPTIONS

1. Assessed value for first class office space is $175.
2. Traffic generated per SF. is three times less than retail.
3. Municipal cost at $1.00 per SF.

Office Size	Cost	Taxes	Revenue Ratio	Net Revenue
300,000 SF.	$300,000	$742,350	2.47	$442,350

REVENUE RATIO – RESEARCH AND DEVELOPMENT

ASSUMPTIONS

1. Assessed value $125 per sq. ft.
2. Service costs 20% less than office costs (less traffic and employee generation)
3. All buildings are new construction

R & D Size	Cost	Taxes	Revenue Ratio	Net Revenue
300,000 SF.	$240,000	$529,125	2.20	$289,125

REVENUE RATIO -- MULTI-FAMILY

A. CONVENTIONAL APARTMENTS

ASSUMPTIONS

1. 1,300 sq. ft. apartment valued at $250,000.
2. $3,900 per student school cost; .15 students per unit.
3. Total municipal service costs at $1,600 per year per apartment.

Apartment	Cost	Taxes	Revenue Ratio	Net Revenue
100 units	$160,000	$353,500	2.20	$193,500

B. LUXURY CLUSTER HOUSING

ASSUMPTIONS

1. Same as single family, except that assessed value is $750,000.
2. Education costs are 20% less per unit than single family homes.

Lux. Cluster	Cost	Taxes	Revenue Ratio	Net Revenue
100 units	$592,000	$1,060,500	1.79	$468,500

C. ASSISTED ELDERLY HOUSING

ASSUMPTIONS

1. Service cost per unit is $900 per year.
2. No school costs
3. Market value at $250,000 per unit

Assisted Living	Cost	Taxes	Revenue Ratio	Net Revenue
600 units	$540,000	$2,121,000	2.36	$1,581,000

SUMMARY OF EXAMPLE REVENUE RATIOS

Single Family	
$350,000	0.74
$500,000	1.05
$750,000	1.58
$1,000,000	2.11
Conventional Apartments	2.20
Luxury Cluster Housing	1.79
Assisted Living	2.36
Retail	2.09
Office	2.47
Research & Development	2.20

7. MARKET FEASIBILITY AND VALUATION

David Vickery, Spaulding & Slye

Overview

The McLean Hospital Proposed Reuse Plan includes three uses: luxury clustered housing; research and development; and a senior community. Spaulding and Slye's review of these proposed uses it to evaluate the market and value of each of the product types.

The real estate market for all three uses is at an absolute peak in both demand and value. We believe this market will remain strong for the next 12 to 18 months and after that period could experience a slow down or reach a plateau of values due to a change in the economy and an overbuilding in certain product lines, such as research & development and office space.

Luxury Clustered Housing

Belmont is an affluent community which will support luxury clustered housing—especially in the Belmont Hill section of Town. There is probable demand for empty nester housing. Given the size of the overall site, the value of home sites will vary according to location. The prime areas for housing would be along Concord Avenue and Beaver Brook/Rock Meadow. However, McLean has proposed housing along Mill Street which addresses the Task Force's priority of open space in the Concord Avenue and Rock Meadow areas. Therefore we believe the units will sell in the $500,000 to $750,000 range, which would generate a land value per unit in the $100,000 to $150,000 range.

This value assumes the developer will pay for all site improvement costs such as roads, utilities, demolition, and landscaping. The development of approximately 100 units would most likely be phased over a three year period, thus the land value is reflective of the developer having to carry the excess land for a couple of years prior to a complete sellout of the project.

Research and Development

The research and development market is very healthy at the current time. The suburban market of Route 128/Mass Pike, in which Belmont is included, has a current vacancy rate of 4.3 percent for the first quarter of 1998. The office market for the same area has a current vacancy rate of 2.8 percent. This vacancy represents a 16 year low. While the low vacancy rates point to a healthy economy and real estate market, it has also triggered the start of a wave of new construction activity. Currently, there are over 11 million square feet of new office/R&D construction started or proposed over the next 18 to 24 months. This potential new supply will compete directly with any new research and development space at the McLean Hospital site.

The demand by users for large blocks of space that would be interested in this site would be driven by the beautiful campus setting that can be achieved, as well as the adjacent research hospital. A number of biotech firms that are currently in the market for this type of space would consider the McLean site.

The value of land for a research and development use on a per square foot basis would be in the range of $25 to $40. These value ranges depend on location and site conditions. Given the requirement of site improvement such as a new road access from Pleasant Street and a requirement to provide all parking in a structure versus on-grade (Task Force priority to minimize site impact) the land value is supportable at $30 per square foot of development.

Senior Community

Belmont is a prime community for senior housing. It is appealing to developers since it is affluent and the median age of its population is higher than the state's overall median age. A senior community in Belmont would likely draw from a market which includes not only Belmont, but Cambridge, Lexington and Arlington.

Retail land prices for a senior community would range from $15,000 to $20,000 per unit. However, on a large scale development, land prices would be discounted to reflect the amount of time it will take to absorb the housing units as well as the return a developer would require to undertaker the risk of development.

We have valued the land based on McLean's proposed development of 600 units. We have assumed that it would take four to five years to absorb the units. Given these factors, we concur the land value would be $15,000 per unit.

Conclusion

McLean Hospital has included reasonable land values for its proposal. The housing land value of $100,000 is reasonable given the Task Force priority of leaving the prime residential areas along Concord Avenue and the meadow as publicly accessible open space. The research and development land value of $30 per square foot is reasonable for a campus setting and users may desire the adjacency of a teaching hospital. Given the projected development of this type of space in this market in the near term, it is necessary for McLean to move quickly to sustain this value. Finally, while the senior community land value of $15,000/unit is reasonable, this scale of development has no track record in the greater Boston area and may require a further discounted value.

As stated previously, the current real estate market is at an all time high in both demand and value. This condition presents an opportunity to the Town of Belmont, if decisions are made expeditiously, to achieve Town priorities (open space, cemetery, etc.) at no cost by agreeing with a limited development that has comparable values to the site being sold as single family residences. In a period of hisotircally high land values, the Town has the opportunity to minimize development for a given value, versus a down market where more development density is needed to achieve the same given value.

8. COMPATIBILITY OF PROPOSED USES

David Dixon, Goody, Clancy & Associates

Overview

McLean has proposed four uses for the site. The first is the formalization of the existing mental hospital use through the rezoning of 47 acres within the core of the site and allowing not more than 668,000 sf of mental/medical hospital space—compared to about 618,000 sf current existing. An additional 23 acres are proposed to support 100 units of luxury, cluster residences. Twelve acres are proposed for a senior community of 600 units/beds. Fifteen acres are proposed for 300,000 sf of biomedical R&D/office use.

On-site benefits the community gains from allowing these proposed uses include permanently preserved open space, a soccer field, a municipal cemetery, a cultural center (if the Town desires it) and expansion potential for the Waverley Oaks public housing complex.

Consistency with Statement of Priorities

The McLean Hospital Land Use Task Force outlined a variety of uses that would serve the needs of the Town of Belmont as well as be of a type consistent with the community character. The uses proposed by McLean Hospital for this site are consistent with the Task Force's Statement of Priorities.

Mental Hospital Use

- McLean Hospital, because of its long tenure in the Town and history as a good neighbor, is a compatible use within the community.
- The task force identified that it is important for the Town and McLean to define the zoning within the "core" campus. This proposal defines the core campus area, the total square footage of existing building and allows for no more than 50,000 additional square feet of building over the existing 618,000 sf of hospital buildings.

Clustered Residential Units

- The Task Force is supportive of the development of high-end, "empty-nester" luxury townhouse units which attract buyers with few, if any, children and which have low traffic generation, low municipal costs, and consume little land (100 units on 23 acres).

Senior Community

- The Task Force identified a need for additional senior housing options within the community. If an elderly Belmont resident no longer wishes to take care of his/her own home and yard there are few alternatives within the Town. McLean has proposed the development of 600 units within a senior community. A development of this size would attract elderly residents from throughout the Boston metropolitan area. The task force believes that this type of development is consistent with the character of the Town, is likely to have less traffic impacts than office or other commercial development, and will produce significant tax revenue in excess of providing municipal services.

Biomedical R&D/Office Space

- The Task Force identified that limited, low-intensity R&D office development might significantly enhance business in Belmont's commercial centers and facilitate commercial redevelopment along Pleasant Street. McLean's proposed siting of a 300,000 R&D/office facility on the east portion of the site with access from Pleasant Street will increase the likelihood of this development supporting new businesses along Pleasant Street. In fact, this development may prompt reinvestment in new businesses along Pleasant Street that would support the R&D operations and its employees.

On-Site Benefits

- Open Space: The task force identified conservation land, a municipal cemetery, and open space for passive recreational use as compatible uses for the land. McLean's proposal includes these uses on 133 acres.

- Soccer Field: The Task Force identified a need for additional soccer field space for municipal use. Currently, the Belmont Day School pays McLean for the right to use a soccer field located on the McLean land but abutting the Day School. McLean proposes to sell the soccer field to the Belmont Day School with the condition that the Day School allow the Town to share in the use of the field without any cost to the Town.

- Municipal Cemetery: The Task Force identified a need for additional municipal cemetery space. McLean's proposal outlines 20 acres (10 developable) for this use.

- Senior/Cultural Center: The Task Force identified that the McLean site might be appropriate for the siting of a Senior or Cultural Center for the Town. McLean has proposed to give the Town a building that could be used for this purpose should the Town desire it.

- Affordable Housing: The Task Force identified a need for expansion of the Waverley Oaks Public Housing Development. McLean proposes to transfer 1.34 acres of land for the addition of housing units and resident parking.

Outstanding Issues

- Need to better understand the mix of senior units within the senior community (independent living, assisted living, nursing home, etc.)

- Ongoing analysis to assess whether the scale of these proposed uses is compatible with the community remains to be completed. Preliminary analysis as outlined throughout this report suggests that the proposed scale of these building types are consistent with community character and have manageable impacts that are countered by significant public benefits.

9. HOUSING

The McLean Hospital Task Force identified a need for additional affordable moderate-income housing within the Town. McLean has proposed to transfer 1.34 acres to add to the existing Waverley Oaks public housing complex. The Task Force will continue discussions with McLean and the Town to discuss ways to further advance this goal.

Examples of Housing Programs and Initiatives that Address Moderate Income Housing

Winthrop: Informal Congregate Housing

The Town of Winthrop is the fourth most densely populated community in the Commonwealth: it has been essentially built out since the 1920s. Twenty three percent (23%) of the population is over the age of 65 and approximately seven percent (7%) of the population has mental or physical disabilities requiring specialized services or housing. Building new housing, subsidized housing, or elderly or disabled housing is extremely difficult. The Town's response has been to use existing structures to accommodate the strong demand for moderately priced elderly housing.

The Community Development Office has funded a senior citizen service coordinator at the housing authority. One of the responsibilities of this office is to match residents willing to share their homes with other elders seeking housing. Essentially, Winthrop's local initiative has created an effective but informal congregate housing program. The role of home care services is also critical to the success of their efforts. To support the efforts of home care providers, the community development office has provided assistance in securing state grants for expanded operations such as food deliveries. The program has allowed many moderate income elderly to remain in their own homes and not live alone. From the community perspective it has reduced some of the demand for traditional elderly housing and has served as an alternative to high end assisted living facilities.

In essence, Winthrop has addressed the moderate income housing issue by focusing on what they perceive as the most important aspect of the moderate income need—elderly housing. By designating local funds and grant money to provide the administrative and management support the effort has become a integral part of their overall housing program.

Winchester: Overlay Zoning for Independent Elderly Housing

The Town of Winchester has created a floating zone "Independent Elderly Housing" that can be applied to all residential zoning districts once special permit criteria are met. As part of the special permit requirement, the applicant must address the issue of affordable housing. To protect the original independent housing development from a narrow application of a special permit requirement and to address the range of issues associated with affordable housing, Winchester has introduced choice into the concept of special permit requirements. The applicant is allowed to choose how to meet the affordable housing requirement. Specifically, the applicant can provide a fee in lieu of providing dwelling units, (e.g., 10 percent of the construction value of the additional units allowed by special permit). This fee is paid into a housing trust fund established and controlled by the town. Or, the applicant can choose to build equivalent value housing in another location and turn the units over to the local housing authority.

The third choice is to purchase existing units and, if necessary, improve their interior and exterior condition and sell as affordable units.

Essentially, Winchester has established a special permit requirement linking assisted elderly housing with local affordable housing objectives. This process has resulted in the development of the "Gables" a 125-unit mixed, assisted and independent elderly project off Route 3. Currently, a large surplus religious property is under consideration for another assisted living project.

Waltham

The City of Waltham has a low to moderate income housing special permit requirement very similar to that of Winchester. However, Waltham has taken the same concept and also applied it to certain special permits for commercial development. Thus, the developers of the recently redeveloped site of the former Grover Cronin Department Store were required to address moderate income housing needs. Similar to Winchester, choice was provided to assist the developer in meeting the special permit requirement. Aside from linking affordable housing concerns to certain commercial developments, the major difference between Winchester and Waltham is that the fee in lieu of providing dwelling units has been set at five percent, and these funds may be eventually channeled into private nonprofit organizations.

Concluding Remarks

The examples summarized above indicate a link between local housing initiatives and the traditional development or redevelopment process. By carefully using local special permit authority, by purposely introducing choice and flexibility, and by calibrating requirements that are mindful of economic reality, these communities have established long term hosing initiatives that are not susceptible to the vagaries of state and federal funding. If it chooses, Belmont may incorporate some of the ideas outlined above into its zoning agreement, or use the existing examples to fashion a response more appropriate to the case at hand. Whatever the course selected by Belmont, providing regulatory flexibility and ensuring economic viability are critical facets.

10. LOCATIONS APPROPRIATE FOR CEMETERY DEVELOPMENT

ROBERT P. GARDINER
Superintendent

Town of Belmont

BELMONT CEMETERY
121 GROVE STREET
BELMONT, MASSACHUSETTS 02178
489-8287

Report of the Belmont Board of Cemetery Commissioners
Qualitative Analysis of McLean Proposal

The Board of Cemetery Commissioners has reviewed the siting of the new Belmont Cemetery as shown on the May 1998 McLean/Partners proposal. A full technical analysis of the site from a geologic, land form and land use perspective is being performed by Peter J. Smith & Company, a consultant to the task force. The Board would like to offer commentary regarding the need for a new cemetery and our search for a new site as well as clarify our design preferences regarding the type of cemetery we would like to see at McLean.

Current Situation
Belmont's existing cemetery, located on Grove Street, covers nearly twenty acres, much of it actually within the city limits of Cambridge. It was opened in 1859, shortly after the incorporation of the Town and serves Belmont's residents. In 1988, the last cemetery plot for traditional interment was sold though interments in existing plots continues. Since 1988, Belmont residents in need of new burial plots have been turned away.

Beginning in 1988, residents had two choices outside of Belmont for traditional interments: other municipal cemeteries that would sell to non-residents and private cemeteries, such as Mount Auburn, Sharon Memorial Park or Catholic Archdiocese cemeteries. Most municipalities are now limiting sale of plots to residents. A price comparison reveals that although plots at Belmont for 4 traditional interments was $ 450 (when last sold in 1988) the private cemeteries range from $ 2,000 to $ 21,000 . The death of a loved one is upsetting enough, but to deal with this extra financial burden and the realization that the interment will occur outside one's home town is devastating.

Search Summary
Since 1941, the Cemetery Commission has tried to solve the need for additional space by formulating an overall plan. From 1941 to 1966, the cemetery was enlarged by the piecemeal acquisition of adjacent residences, growing by six acres at a cost of $205,670.

In 1966, the Town purchased property from McLean on Mill Street, now called Rock Meadow. Originally, there was land for a cemetery included, but extracted before the Town Meeting vote. The list of properties investigated and pursued by the Cemetery Commission since 1966 is long and varied: McLean Hospital, Rock Meadow Conservation Area, Woodfall Road Conservation Area, Kendall School site, Pequossette Playground, Grove Street Playground, Metropolitan State Hospital, and the incinerator site. Each of these sites was studied and discarded for wetland, geologic or compatibility reasons, with the exception of the McLean land.

Program Need
The cemetery expansion requires 10 acres of land usable to a depth of 9 feet to permit double depth burials. This does not include land required for roadways and utilities. The land must also be dry, of low to moderate slope and not boulder-ridden. It is more efficient and preferable for the land to be contiguous from a design and use perspective. We believe this land would serve Belmont for the next 75 to 100 years. If depth to bedrock is shallow or water exists, the usable acreage must be increased from 10 acres to fulfill the same capacity need. The McLean proposal shows 20 acres for exactly this reason, shallow bedrock prohibiting double depth burial.

Design Preferences

The following statement reflects the consensus opinion of the members of Cemetery Commission. It is included here to facilitate comment, not to declare a position. We look forward to fully embracing the comments derived from the public hearing processes, now and in the future.

It should be noted that the Cemetery Commission has long stated its interest in having a cemetery that encourages the living to celebrate life and commemorate the dead in a park-like atmosphere of trails and passive recreation opportunities. We have called this an "ecotery" . We have, for more than two decades, asserted our preference that the headstones and memorialization be flat, natural and unobtrusive to fit into the environment. Industry watchers have long predicted that there would be a significant shift away from traditional interments toward cremation and that traditional interments would be the rarity by the year 2000. Though we in Belmont have not seen this dramatic shift, cremation, which uses less land per interment, is certainly on the rise. The Cemetery Commission would like to encourage this shift at McLean as well as offer the traditional interments. We intend to offer commemoration gardens, urn gardens and scattering gardens in addition to the traditional interment groves. Our vision is more in line with the Swedish cemetery, Woodland, though compatible with its natural surroundings. One of the reasons we believe McLean to be such a spectacular site for the cemetery is its natural beauty and the sense of sanctuary it offers. As such, it is our view that the landscape architecture of the new cemetery should be designed by selective subtraction to reveal the natural elements, not clear-cutting to produce a completely manicured effect. We believe that the many existing trails encourage access and use by the neighborhood that has become so accustomed to this availability.

For the past four years we have recommended that the site of the new cemetery be developed in stages. A surveyed site must be deeded for the cemetery and an overall infrastructure must be established but the actual development and use of the property should only happen in two acre chunks, leaving the remainder of the site in a relatively natural state until needed in the future. This gives us flexibility to ensure that cemetery capacity exists in all forms for the future but that the shift toward cremation can be accommodated when in happens.

McLean Property

Over the past three decades, the McLean property has been studied extensively from many perspectives, including geologic, land use, landscape architecture and compatibility. The two sites on the McLean property which satisfy our program need are along Concord Avenue, known as the "meadow" and the wooded upland. The Cemetery Commission believes that the better alternative is the wooded upland because of the emotional and historic connection the people of the Town have with "the meadow" and that the upland is more removed from the expressed need for contiguous access to the open areas. Though this upland represents a more challenging site for cemetery use, we believe it can be thoughtfully designed and utilized.

The Cemetery Commission looks forward to the upcoming public hearings regarding the cemetery siting and design and welcomes all comments. Contact information follows for your convenience.

Respectfully submitted,

Belmont Board of Cemetery Commissioners

Ellen O'Brien Cushman, Chairman	484-4817	
Alexander E. Corbett III	484-3087	
Charles R. Johnson	484-8839	
Belmont Cemetery Superintendent	489-8287	Robert Gardiner

PRELIMINARY BUDGET AND PLAN FOR THE MAINTENANCE OF PROTECTED OPEN SPACE

(The attached document has been prepared by the Trustees of Reservations at the request of the Task Force. The Trustees of Reservations wishes to emphasize that this document does not represent a proposal by the Trustees to manage the proposed open space. The Trustees and the Massachusetts Audubon Society are currently working together towards understanding the restoration and management issues presented by the property. The Trustees look forward to continuing to work cooperatively with the Massachusetts Audubon Society and others on this important project.)

The Trustees of Reservations

Conserving the Massachusetts Landscape Since 1891

MEMORANDUM

TO: Gregory P. Bialecki, Esq., Hill & Barlow
Nancy Kelley, Chairman, McLean Hospital Land Use Task Force

FROM: Wesley T. Ward, Director of Land Conservation

DATE: March 22, 1998

SUBJECT: Notes on Property Management for the McLean Hospital Open Space (Revised)

Background

In response to your request, I am pleased to provide this preliminary estimate of management and start-up costs for approximately 100 acres of open space at the McLean Hospital property in Belmont, together with a very preliminary and tentative statement of management intent that staff members of The Trustees of Reservations ("The Trustees") believe would be appropriate for the proposed McLean Hospital. These notes assume that the open space is to be owned by the Town of Belmont and managed by a non-profit conservation organization like The Trustees.

These notes are not intended as a proposal for management of the McLean open space, though (for the sake of realism) they were prepared as if The Trustees were to undertake such management. In response to your request, we employed the same procedures we use on a case-by-case basis when investigating potential properties for management by The Trustees.

The Trustees would not make such a proposal without having consulted fully with Massachusetts Audubon Society and with the McLean Open Space Alliance to address their concerns and interests. In any event, such a proposal would require specific authorization by our governing board after very careful consideration.

In fact, The Trustees strongly encourages the Town of Belmont to invite a proposal for management of the open space from Massachusetts Audubon Society. The Audubon properties abutting the McLean property are important open space resources for

Belmont and surrounding communities; unified management would benefit the McLean open space as well as the two Audubon sanctuaries. The Trustees would, of course, be pleased to assist Audubon in the preparation of such a proposal.

The budget estimates are preliminary and very rough, based upon our experience in managing a wide range of properties; however, we have not had the opportunity to examine the McLean property closely or to gather sufficient information from the community.

Management Approach (Preliminary Statement)

Including grasslands, wetlands, and forested habitats, the McLean open space is a diverse landscape of high quality and significant ecological interest and value. Although a botanical inventory is not yet available, we understand from our colleagues at Audubon that at least one "watch list" species and several interesting native grasses have been found. The diverse habitats should be managed professionally and sensitively, according to a well-researched management plan, to ensure that the property's scenic, recreational, wildlife and other open space benefits will be enhanced for present-day visitors and preserved for future generations.

An appropriate management approach would be to undertake a sensitive, restrained, long-term ecologically-informed restoration of the property's various landscapes to provide maximum open space benefits without turning it into a landscaped park. For instance, we would recommend restoring the large, rolling grassland area with native grasses to the extent practical and mowing it annually late in the growing season. This would enhance "Lone Tree Hill," the most familiar focal point on the property, provide good breeding and nesting area for grassland birds, but would not create a "Central Park" or "Public Garden" feeling. Similarly, in the mature woodlands in the area between Concord Avenue and Pleasant Street, we would perform modest trail clearing, improvements to the trail itself, and trimming of vegetation bordering the trails. The objective would be to make the trails safe and attractive for walkers and to create interesting views through the trees, but we would not attempt to change the basic character of the woods or to clear the woods of ground cover or underbrush.

We believe that, once the property is owned by the Town and made available to the public, the number of visitors will increase substantially, especially on weekends. Therefore, an ongoing management presence on the property will clearly be required. At a minimum, beginning when the property is officially open to the public, a full-time Property Superintendent (who would actually be on the property a majority of his/her time) should be assigned. Part-time and summer season staff should be provided to assist the Superintendent. Under The Trustees' standard practice, staff would be in uniform and would be charged with working with visitors to encourage appreciation and appropriate use of the property, keeping an eye out for unauthorized uses or conflicts of uses, and maintaining trails, natural amenities, trail markers, and the property entrances.

Management Planning

A long-term landscape management plan or "Master Plan" is essential to guide stewardship of the property and to ensure that limited resources will be devoted to the most important needs. While the Task Force has obtained much good information on the property's scenic, historic, and ecological features, our knowledge must be deepened and enriched as a basis for professional management. Such a plan should be prepared in cooperation with Audubon, with representatives of the surrounding neighborhood as well as with the McLean Open Space Alliance and representatives of the Town of Belmont. Our usual practice is to carry out reconnaissance level surveys of a prospective property and to prepare much more detailed inventories and assessments of conservation values as soon as possible after the property has been acquired.

From The Trustees' perspective, the most important gaps in the information available for the McLean property are:

- More complete bird nesting information.
- More detailed historical research and documentation into the uses of the property (such as the farmstead on Concord Avenue) before and during McLean's ownership.
- Studies of the potential for scenic enhancement and opening or reopening of scenic views.
- Research into the potential for maintenance and enhancement of wild flowers and wildlife habitat.
- Information on community attitudes and interests and the potential for volunteer involvement in managing and interpreting the property.
- Information on the best linkages with Rock Meadow, Metropolitan State Hospital, and the Beaver Brook Reservation.
- Alternatives for accommodating parking and for designing an entrance and parking area in relation to management concerns including nighttime security, neighborhood impacts, and handicapped access.
- Alternatives for trails accessible to the handicapped.
- A search of the property for old dumps and disposal sites to ensure that there is no reason for concern about hazardous or toxic wastes.

One of the predictably difficult issues for the managers of the McLean open space will be dogs. For the sake of visitors and wildlife alike, the Town's regulations must be strictly enforced.

Management Requirements

The following two infrastructure needs should be addressed. The start-up estimates in the attached budget assume that these infrastructure requirements could be met at no expense to the management entity. The start-up budget itself would have to be provided up front, presumably through private sources, including contributions by the McLean entities.

A secure, weathertight location on or near the property for use as a staff and volunteer office and meeting space, storage and repair of tools and equipment. Ideally, it would have a kitchen, bathroom, and small bedroom for staff use.

Major property restoration would be carried out by the Town or the McLean entities, subject to the overall Management Plan for the property.

Supervision and Governance

The property would be managed by a full-time Superintendent. The Superintendent would be responsible for at least one part-time Maintenance Worker and a Seasonal Ranger. In addition, the Superintendent would be responsible for recruiting and supervising volunteers.

A McLean Reservation Committee should be recruited to advise the staff on management and community relations, including the Regulations to be adopted by the manager, ratified by the Town, and posted on the property. The Reservation Committee would include representatives appointed by the Town, conservation organizations, and McLean Hospital. In addition, the Committee should include representatives from the neighborhood. From time to time a subcommittee or separate committee might be formed to assist in fundraising and other matters.

Arrangements with the Town of Belmont

We have not thought carefully about the optimal legal arrangement between the Town and the manager. Whatever the precise legal form, I doubt that a responsible organization would undertake this responsibility unless it could have a firm commitment from the Town for at least ten years, with the possibility of renewal. The financial arrangement would have to reflect inflation, and there would have to be some flexibility to discuss increases in the management fee if additional basic staff are needed.

Preliminary Budget

The attached preliminary estimates of start-up costs, revenues, and expenses was prepared at my request by Richard O'Brien, Central Regional Director, who has worked for The Trustees managing properties in Leominster and numerous towns in the central part of Massachusetts for 14 years. Mr. O'Brien made two visits to the

property, at my request. I did not ask him to footnote individual items since the purpose was to give the Task Force and McLean a general idea of what management by an organization like The Trustees would entail.

Salary levels are in line with similar positions in The Trustees' statewide organization. Regional overhead is probably understated given the amount of supervision that would be required in the early years. Membership revenues may well be understated in the budget. The ability to attract members would be one of the incentives for the organization to provide management for a property it does not own. Special events revenue could be derived from occasional private functions using a portion of the property (but not closing the property as a whole), special gatherings (such as an annual summer solstice picnic) for which a fee would be charged, and interpretive programs with a modest fee for attendance.

PRELIMINARY BUDGET (March 4, 1998)

McLEAN HOSPITAL PROPERTY, BELMONT, MA

START-UP COSTS

Archeological Reconnaissance	$	2,500	
Management Plan	$	2,500	
Property Map	$	2,000	
Property signage	$	2,500	
Gates	$	3,500	
Parking Lot Construction	$	15,000	
Bulletion Board	$	1,000	
Trail/road system improvements	$	10,000	
Ford F-150 4WD Pick-up	$	25,000	
4WD Tractor w/mower (35-45 HP)	$	30,000	
Other equipment (Chainsaws, brushsaw, hand tools, walk-behind-mower, etc.)	$	15,000	
TOTAL START-UP COSTS*			**$ 109,000**

REVENUE:

Annual Appeals	$	2,500	
Management Fees	$	38,601	
Memberships (100 Memberships @ $60/membership)	$	6,000	
Special Events	$	1,000	
TOTAL REVENUE			**$ 48,101**

EXPENSES:

PERSONNEL			
Full-time Superintendent (60% x $26,000/YR. + 32% Fringes)	$	20,592	
Part-time Maintenance Worker ($128/wk + 12% Fringe x 52 wks)	$	7,455	
Seasonal Ranger ($300/wk + 12% Fringes x 14 wks)	$	4,704	
Misc. Personnel Costs(Uniforms, training, recruitment, etc.)	$	500	
MAINTENANCE & REPAIRS			
Equipment purchase (Annual replacement of chainsaws, mowers, etc.)	$	500	
Property services (Contractual services for tree work, backhoe, etc.)	$	500	
Signage (Annual replacement of informational signage)	$	250	
OTHER OPERTATIONS			
Special Events and Programs	$	500	
Interpretive Materials and Printing	$	500	
Vehicles and Equipment Rental	$	2,500	
Depreciation	$	3,500	
EXPENSE SUB-TOTAL			**$ 41,501**
OVERHEAD			
Regional Overhead(5%, for staff & project supervision and project planning as well as limited office assistance)	$	2,200	
Headquarters Overhead (10% for Insurance, accounting, payroll, membership, land conservation, marketing, etc.)	$	4,400	
TOTAL EXPENSES			**$ 48,101**

* This figure does not include consideration of a Maintenance Shed/shop for the management operation at this property. Further exploration is needed to see if an appropriate existing facility is available on the property or if one would have to be built on site.

SUMMARY OF OPEN ISSUES AND ONGOING ANALYSIS

SUMMARY OF OPEN ISSUES AND ONGOING ANALYSIS

Overview

This report is a preliminary review of McLean's proposal as measured against the Task Force's Statement of Priorities. There remain a significant number of issues to be resolved, questions to be answered, and studies to be undertaken and analyzed over the next few months. The following represents a list of these issues, questions and data needs that must be addressed order to ensure that the Town of Belmont makes an informed decision about the potential redevelopment of the McLean land. As the public process proceeds this list will be supplemented as necessary.

Open Space/Ecological Impacts

- McLean Hospital must produce an Environmental Impact Statement which demonstrates that the encroachments of new development on previously undeveloped areas on the site (including access roads, storm detention basins and the like) will not adversely affect the ecological features of the property. This scope of this study should be reviewed and approved by Task Force consultants, the Conservation Commission, and the Audubon Society to ensure that the study is of sufficient depth. This study should be conducted throughout the Spring season.
- Must ensure that a tree inventory of significant species is completed for this site and that there is a process for identification and rescue on- or off-site. Identify significant specimens within the proposed development areas (including the proposed cemetery space) that must be preserved. Develop restrictions on development and construction to ensure significant specimens are not harmed and penalties for failure to adhere to these restrictions.
- An open space management agreement must be developed to ensure the appropriate restoration and maintenance of the preserved open space. A more precise budget must be drafted for the restoration and maintenance of the open space area.
- Gravel pit and dump on the proposed Town-owned open space must be tested and clean-up/remediation costs estimated.
- An ecological inventory which was conducted last year must be supplemented with the focus centered on the areas of proposed development, including the cemetery. Bird inventories must be conducted with specific attention given to nesting activity. The existing list of plant and animal species will be expanded as sightings are made.

Visual Impacts

- Develop sight lines to better understand impacts.
- Develop cross-sections to better understand impacts
- Develop mechanisms to ensure that buidings heights are not excessive.

Historic Preservation

- Determine whether density bonuses are appropriate or whether rehabilitation of buildings of high historic significance will be required. A combined approach may work as well. It should be kept in mind that federal rehabilitation tax credits already offer a substantial economic incentive for rehabilitation (20% tax credit or rebate for the substantial rehabilitation of historic buildings used for income-producing purposes).
- Determine fate of historic buildings in proposed publicly-owned open space areas. North and Ledge Cottages, and an unnamed cottage on Mill Street opposite the Rock Meadow entrance appear to be left as orphans in the large open space area at the north end of the campus. It has been suggested that one might serve as an interpretative center. Another may be a potential candidate for a cemetery office. Their fate should be discussed.
- Clarification of fate of historic landscape features in redevelopment and cemetery zones. The historic landscape areas of the campus include specific features like stone walls and building foundations. The current document does not specify what will happen to such features.
- Review and response to archaeological surveys of redevelopment zones. McLean hired the Public Archaeology Laboratory, Inc. to conduct an archaeological survey of the campus. Their recommendations for additional survey and/or site preservation should be reviewed, approved, and incorporated into the development plan. The most common strategy for site preservation is avoidance, assured through preservation restrictions.
- Clarification of on-site circulation. The existing road and footpath system makes a significant contribution to the historic significance and character of the campus. Modifications to accommodate the proposed new development and the cemetery and their associated traffic should be monitored.
- Confirm nature of off-site traffic mitigations to protect historic McLean campus character. The McLean campus is surrounded by stone walls that contribute to its historic character and significance. In addition, gates and gatehouses are found at the Mill and Pleasant Street entrances. In the event of road widening or other changes, these and other features should be protected.
- Confirm nature of off-site traffic mitigations to protect community character.

Traffic Impacts

- Additional study of access and safety of pedestrians and bicyclists.
- Additional detail of the physical construction required to offset traffic impacts.
- Clarification and development of measures McLean proposes to induce traffic calming, enhance safety of vehicular, bicycle, and pedestrian traffic, and preserve the residential nature of the area.
- Development of traffic level restrictions, mechanisms for monitoring traffic levels, and penalties for failure to comply with restrictions.
- Review traffic intersections within study to ensure all significantly impacted intersections are included in the study.
- Queueing analysis for study area intersections for existing, no build and build conditions.
- Analysis of proposed signal coordination along Trapelo Road.
- Capping of peak hour trips and commitment to a post-development monitoring program.
- Mitigating measures for all study area roadways and intersections which have been cited as deficient must be identified and evaluated.

- Inclusion of Pleasant Street Development under Future Conditions and the effect this development has on proposed mitigation.
- Provisions for alternate modes (pedestrian, bicycles) on- and off-site.
- Accident statistics for study are roadways and intersections.
- Travel Demand Management programs and incentives to minimize single occupant vehicle (SOV) use.
- Need to better understand the parking requirements of the open space, soccer field, and cemetery.
- Cost estimates and funding commitment for required mitigation.
- Construction period impacts as part of site plan review.

Fiscal Impacts

- Conduct additional analysis on the the predicted net gain of school children in the Town as a result of the proposed McLean development.

Housing

- Examine and develop a list of mechanisms the Town can use in order to achieve additional moderate income housing on- or off-site.

Compatibility of Proposed Uses

- Need to have a better understanding of likely mix of senior units with the senior community. Within the senior community proposed by McLean there are a variety of potential types of units, ranging from independent living (apartments) to nursing home care (beds/rooms).
- Publicly need to evaluate scale of proposed development to ensure consistent with community priorities and character.