

# Medford Square and the Mystic River

Reconnection, revitalization, redevelopment

Appendices



City of Medford, Massachusetts  
Massachusetts Institute of Technology  
Department of Urban Studies and Planning  
Community Growth and Land Use Planning | Fall 2006

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Reconnection, revitalization, redevelopment

## Appendices

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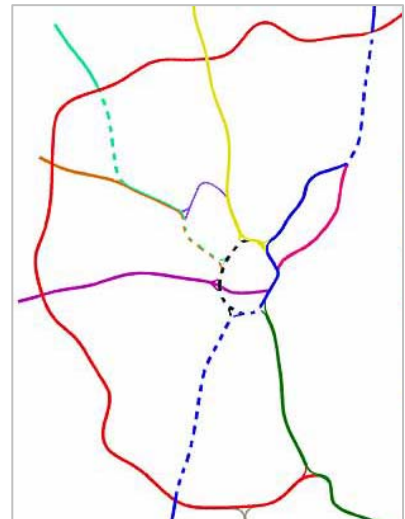
## Appendix A

# Regional Traffic Model Results

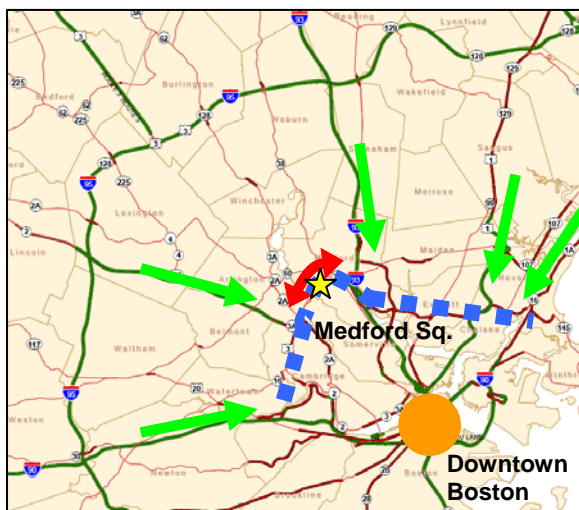
This appendix attempts to quantify what proportion of cars passing through Medford Square represent local traffic stopping or starting in Medford, and how many are through traffic due to the Square's unique location in the regional highway network. It presents results from the Boston MPO's regional traffic planning model.

### 1. Background

Medford Square rests at a unique strategic location within Boston's regional highway network. Inside Route 95, Route 16 is one of the few continuous circumferential roads around the city. Stretching from Watertown and Newton in the southwest to Revere in the east, Route 16 traverses and intersects several major arterials leading into and away from the central city: the Massachusetts Turnpike (I-90), Route 2, I-93, Route 1, and Route 1A. Medford Square is located at a natural break, and hence a "pressure point" in the regional limited-access highway network – Route 16 diminishes from a grade-separated highway to a more local Mystic Valley Parkway here, and Route 2 drops from four interstate-like lanes to a two-lane parkway at Alewife to the southwest. Indeed, a highway planner's map circa 1962 showed Route 16 in this area as part of a massive new highway system for Boston, much of which was never built, which may explain why the Route 16 overpass over Main Street seems to have more capacity than is used. As a result of this unique location, many cars use the Medford Square for circumferential movements, and a large proportion of the traffic is passing right through.



**Highway plan for Boston region circa 1962, showing Route 16 as major road. Dotted lines were never built.**



**Medford Square's important location in regional highway system (Rte. 16 in blue, arterials in green).**

Furthermore, the intersection of Route 16 and I-93 is only a partial clover-leaf alignment, which prohibits some direct vehicular movements such as from I-93 south to Route 16 west. As a result, many cars exit I-93 at Salem Street and cut across Medford Square.

To further study the scope of this phenomenon and driver behavior from a regional perspective in Medford Square, we consulted a regional traffic simulation model. While traffic counts and signal queue models can measure existing flows and model changes to the circulation patterns in the Square, they do not estimate the origins and destinations of existing cars. This

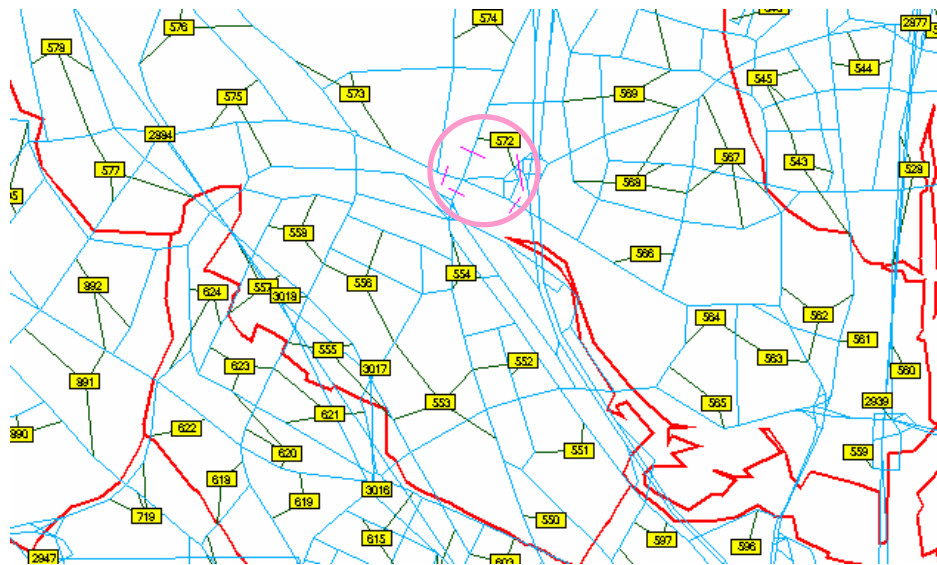


should be of great concern to the City of Medford and the existing and future tenants of Medford Square, who want to harness the Square's excellent visibility and accessibility but who also do not want to bear the burden of heavy bypass traffic.

## 2. Methodology

The Central Transportation Planning Staff (CTPS) is the Boston Metropolitan Planning Organization (MPO)'s group of traffic experts who provide technical and policy analysis to policymakers. They maintain a traffic simulation model for the entire Boston MPO region in the software package EMME/2, based on year 2000 employment and population data and calibrated to observed road volumes using an iterative proportional fitting method.

The image below represents the traffic analysis zones (TAZs, in yellow squares) and their associated centroid connectors (dark green) to the street network (light blue). Red represents bodies of water, and pink shows the approximate study area of Medford Square. While a full explanation of a four-step traffic model is beyond the scope of this paper, the TAZs here connect to the street network via centroid connectors, modeling abstractions on which a TAZ's produced and attracted trips (based on employment and population information) are simulated. The TAZ most closely associated with Medford Square is number 572 (circled in pink).

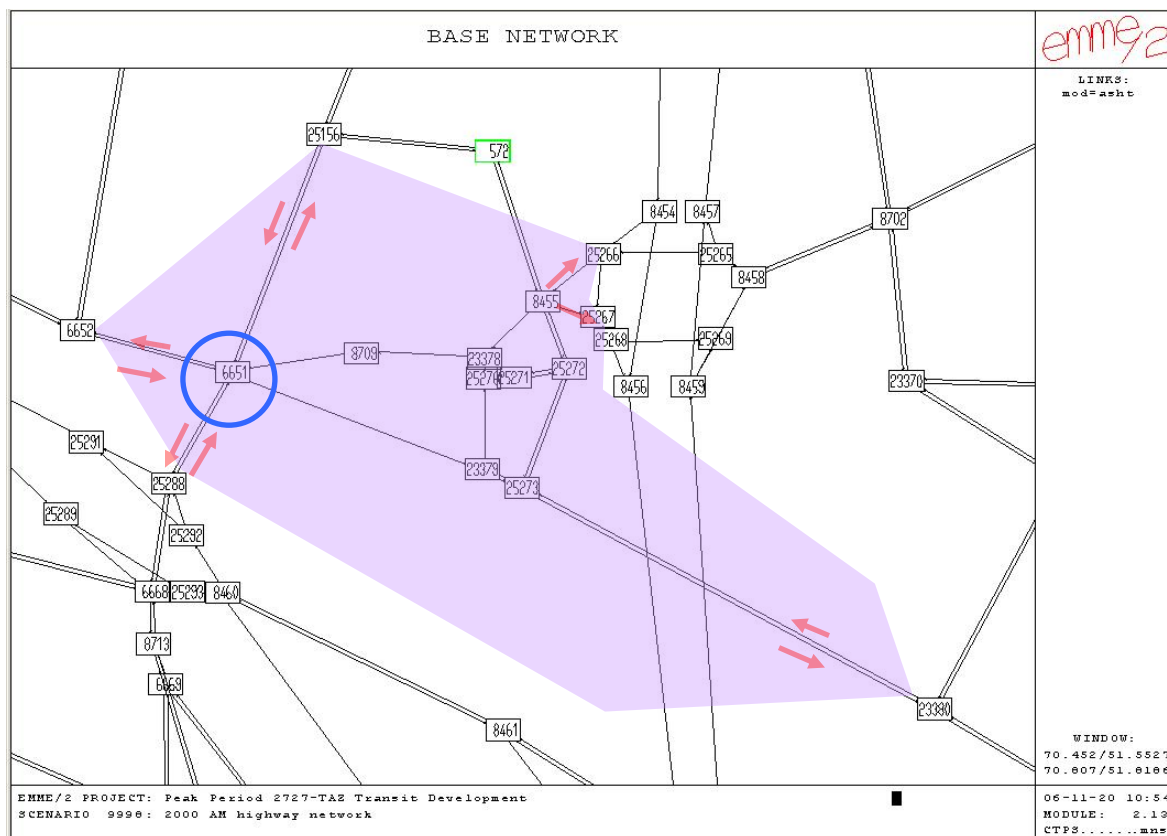


**Street network and TAZs modeled in southern Medford**

The next image (below) is a more detailed picture of the schematic road network in the study area, with the five-way intersection at the heart of Medford Square circled in blue. Lines denote links, and numbered squares are nodes. Note that the green node labeled 572 and its connecting links do not represent a real road, but reflects the TAZ's centroid connector. Also note that the southern portion of Clippership Drive is not included – for modeling purposes, all flows are represented on Riverside Avenue.

Due to time constraints, we examined only current conditions for single-occupant vehicles (SOV) in the morning peak, defined as 6:00am-9:00am. However, CTPS estimates that SOV traffic represents 80% of all the cars on the road, so this narrow choice of data is a good proxy

for general patterns of all vehicles. *The definition of “local” was simplified to mean any car with an origin or a destination within the City of Medford.* Note that this simulation deals with fractions of cars, which is a modeling concept only.



**Detail of street network modeled for Medford Square study area.**

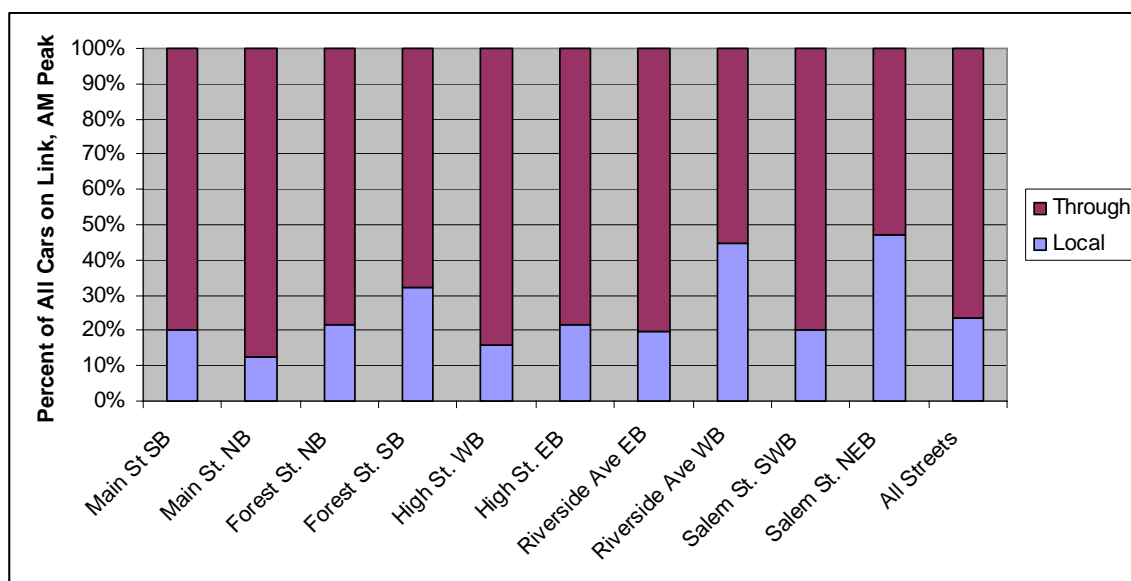
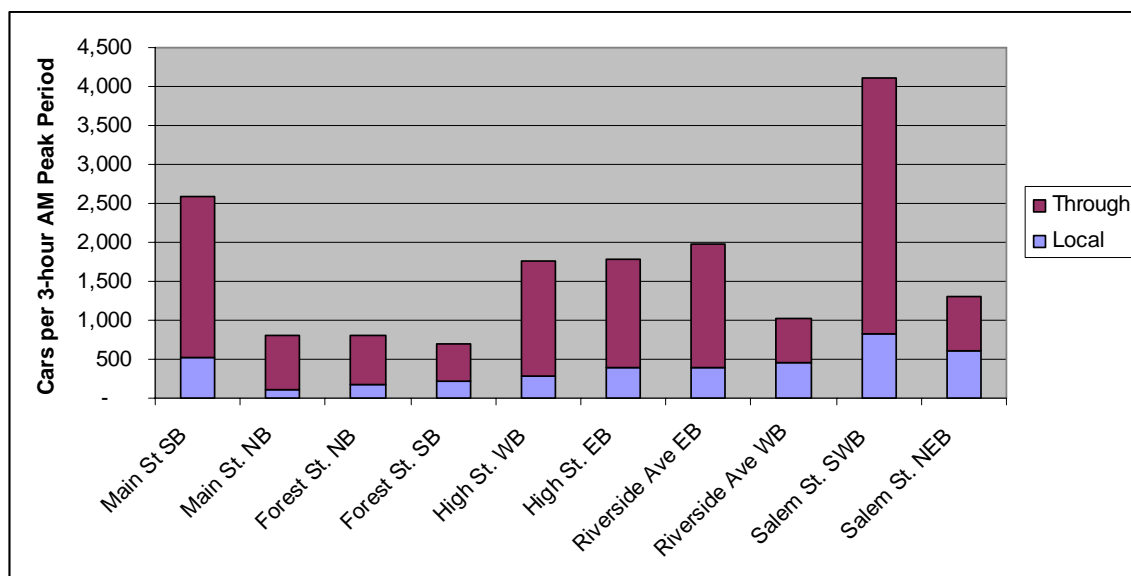
We selected ten specific links for further analysis (marked as red arrows above), the totality of which form a “cordon” around the study area in Medford Square, approximated in purple. Given CTPS’s network schematic, every vehicle entering or exiting the center of Medford Square must pass through one of these links. Furthermore, since our Master Plan suggests changes to the circulation patterns in the Square, internal movements within this cordon are not very relevant for our purposes.

| Vehicle Volumes<br>(number of cars, 6-9 AM) | Main St. |     | Forest St. |     | High St. |       | Riverside Ave. |       | Salem St. |       | Total  |
|---|----------|-----|------------|-----|----------|-------|----------------|-------|-----------|-------|--------|
|   | SB       | NB  | NB         | SB  | WB       | EB    | EB             | WB    | SWB       | NEB   |        |
| Traffic Originating in Medford              | 320      | 12  | 0          | 209 | 201      | 160   | 99             | 396   | 152       | 596   | 2,145  |
| Traffic Going to Medford                    | 195      | 90  | 170        | 16  | 80       | 229   | 296            | 63    | 676       | 22    | 1,837  |
| Total Local Traffic                         | 515      | 102 | 171        | 225 | 281      | 389   | 394            | 458   | 827       | 619   | 3,982  |
| Total Through Traffic                       | 2,062    | 705 | 627        | 472 | 1,474    | 1,401 | 1,595          | 564   | 3,286     | 688   | 12,873 |
| Percent Local                               | 20%      | 13% | 21%        | 32% | 16%      | 22%   | 20%            | 45%   | 20%       | 47%   | 24%    |
| Percent Through                             | 80%      | 87% | 79%        | 68% | 84%      | 78%   | 80%            | 55%   | 80%       | 53%   | 76%    |
| Total Vehicles                              | 2,577    | 807 | 798        | 697 | 1,755    | 1,790 | 1,989          | 1,022 | 4,113     | 1,307 | 16,855 |

Overall, streets defined by the cordon above accommodate almost 17,000 single-occupant vehicle movements from 6:00-9:00am each day. Since SOVs represents 80% of the overall volumes, the real number including trucks and carpools is likely over 20,000 over the AM peak, or roughly 7,000 vehicles per hour. Note that this sum represents vehicle movements on a link, and most vehicles in Medford Square are modeled as two movements since they pass over two links, entering and exiting the study area.

### 3. Distribution of Traffic Flows

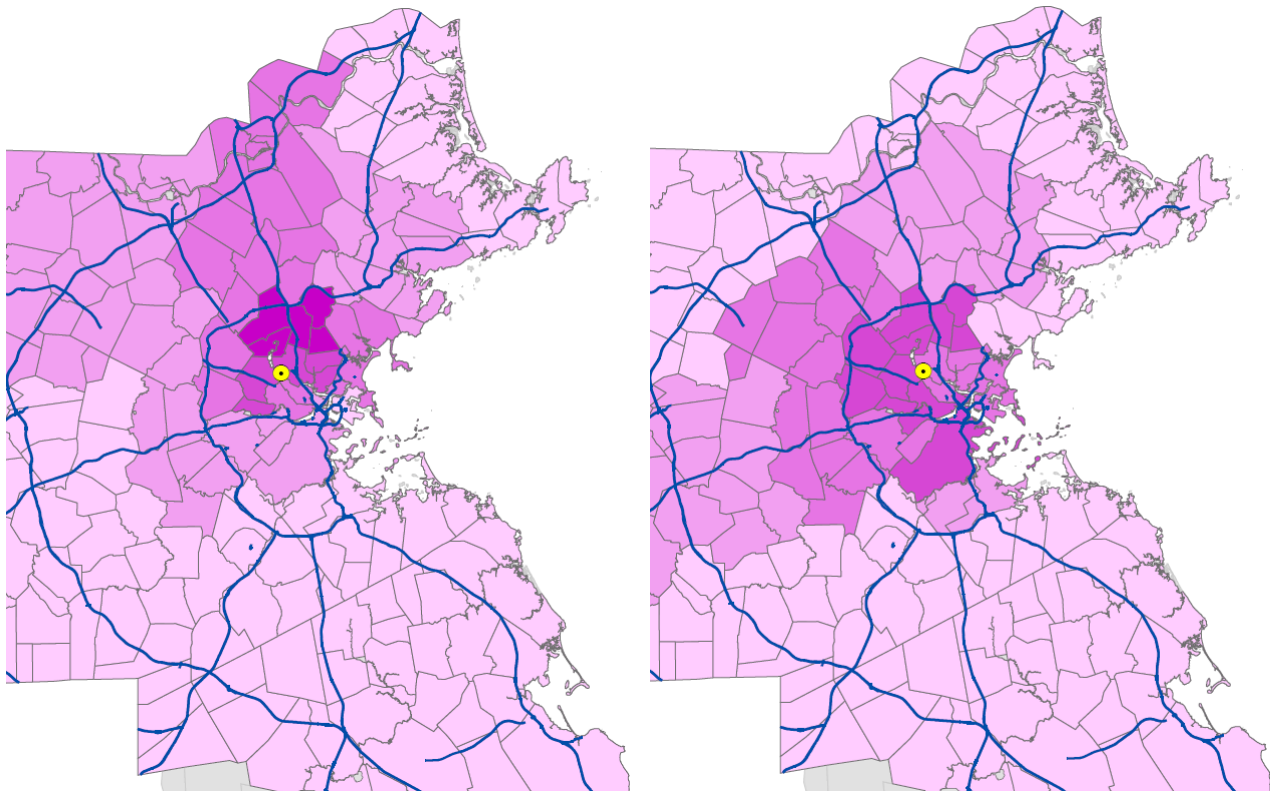
The heaviest traffic flows in the morning are from south to north, particularly on Salem Street coming off of the I-93 rotary. Much of this traffic appears to turn left onto Main Street over Cradock Bridge, or continue straight onto High Street.



Overall, through traffic represents 76% of all vehicular activity in Medford Square in the morning peak. However, the burden of through traffic is not distributed evenly onto the street network in the Square. For example, 87% of northbound travelers on Main Street have neither destination nor origin in Medford in the morning rush hour, while the same figure is 55% on Riverside Avenue westbound. If data were available for the PM peak, this distribution might be equally changed for the reverse directions.

#### 4. Origins and Destinations of Local Traffic

Furthermore, the select link analysis shows us the origins and destinations of the traffic originating from or bound for Medford Square. CTPS divides the Boston metropolitan region into 40 districts to provide a reasonable level of aggregation for regional traffic flows. We combined origin-destination data on the local Medford Square traffic with these districts in GIS, and below are the results.



**Characteristics of local Medford Square traffic (single-occupant cars, AM peak). At left: origins of cars traveling to Medford. At right: destinations of cars traveling from Medford.**

Most local traffic in Medford Square in the morning rush hour originates in a handful of towns to the north of Medford and to a lesser degree the communities along the I-93 corridor to the north and surrounding towns such as Arlington and Malden. By contrast, most local traffic that is generated around Medford Square is headed more to the south and west, most notably towards Boston and the I-95 belt, and some areas in the MetroWest region.

Were more data available for the origins and destinations of through traffic, as well as for the PM peak, a clearer picture of the regional traffic characteristics affecting Medford Square would emerge. Until then, however, it is clear that those using Medford and Medford Square in particular as a destination are mostly coming from the north, whereas residents of Medford passing through Medford Square are traveling more to the south and west.

## **5. Conclusions**

- Medford Square sits at a pressure point in the regional highway system, creating high volumes of through traffic in the Square during rush hours.
- 76% of the cars on the road in Medford Square are through traffic with neither an origin nor a destination in Medford.
- Some streets accommodate through traffic disproportionately more and less than others.
- Medford attracts incoming trips mostly from the north, while residents are headed more to the south and west of Medford Square.



## Appendix B: Medford Square Transportation Improvements

### Conceptual Budget

| Item   | Length | Width | Qty    | Unit     | Unit Price   | Total               |
|--|--------|-------|--------|----------|--------------|---------------------|
| <b>1. Northeast Gateway</b>                      |        |       |        |          |              |                     |
| 1.1 New median on Salem St. (2')                 | 320    | 2     | 640    | sq. ft.  | \$ 15.00     | \$ 9,600            |
| 1.2 Repave Salem St. (Rotary to City Hall Mall)  | 450    | 36    | 16,200 | sq. ft.  | \$ 11.00     | \$ 178,200          |
| 1.3 New sidewalks                                |        |       |        |          |              |                     |
| 1.3.1 City Hall to SpringStep                    | 80     | 6     | 480    | sq. ft.  | \$ 8.00      | \$ 3,840            |
| 1.3.2 City Hall to Clippership                   | 60     | 6     | 360    | sq. ft.  | \$ 8.00      | \$ 2,880            |
| 1.3.3 South of City Hall                         | 25     | 6     | 150    | sq. ft.  | \$ 8.00      | \$ 1,200            |
| 1.4 New crosswalks                               |        |       |        |          |              |                     |
| 1.4.1 across Clippership Dr.                     | --     | --    | 1      | each     | \$ 2,475.00  | \$ 2,475            |
| 1.4.2 east of City Hall                          | --     | --    | 1      | each     | \$ 2,475.00  | \$ 2,475            |
| 1.5 Restriping                                   | 450    | --    | 450    | lin. ft. | \$ 20.00     | \$ 9,000            |
| 1.6 Green space east of City Hall                | 100    | 30    | 3,000  | sq. ft.  | \$ 8.00      | \$ 24,000           |
| 1.7 Trees east of City Hall                      | --     | --    | 24     | each     | \$ 250.00    | \$ 6,000            |
| 1.8 New pedestrian lights                        | --     | --    | 2      | each     | \$ 4,500.00  | \$ 9,000            |
| 1.9 Pedestrian Light electrical controller       | --     | --    | 1      | each     | \$ 18,000.00 | \$ 18,000           |
| <b>Subtotal Northeast Gateway</b>                |        |       |        |          |              | <b>\$ 266,670</b>   |
| <b>2. South Gateway</b>                          |        |       |        |          |              |                     |
| 2.1 Cradock Bridge                               |        |       |        |          |              |                     |
| 2.1.1 New median (Bridge to Square intersection) | 360    | 4     | 1,440  | sq. ft.  | \$ 15.00     | \$ 21,600           |
| 2.1.2 New sidewalks                              | 640    | 12    | 7,680  | sq. ft.  | \$ 8.00      | \$ 61,440           |
| 2.1.3 Street lamps                               | --     | --    | 12     | each     | \$ 8,000.00  | \$ 96,000           |
| 2.1.4 Restriping                                 | 640    | --    | 640    | lin. ft. | \$ 20.00     | \$ 12,800           |
| 2.1.5 Historic Bridge Restoration                | 150    | 74    | 11,100 | sq. ft.  | \$ 5.00      | \$ 55,500           |
| 2.1.6 Renew Crosswalks (Main St. & Rte 16)       | --     | --    | 3      | each     | \$ 2,475.00  | \$ 7,425            |
| 2.1.7 New ADA Pedestrian Lights                  | --     | --    | 3      | each     | \$ 4,500.00  | \$ 13,500           |
| 2.1.8 Pedestrian Light Electrical Controller     | --     | --    | 1      | each     | \$ 18,000.00 | \$ 18,000           |
| 2.1.9 Repave Cradock Bridge (4 lanes)            | 150    | 74    | 11,100 | sq. ft.  | \$ 11.00     | \$ 122,100          |
| <b>Subtotal Cradock Bridge</b>                   |        |       |        |          |              | <b>\$ 408,365</b>   |
| 2.2 Route 16 Underpass                           |        |       |        |          |              |                     |
| 2.2.1 New sidewalks                              | 320    | 11    | 3,520  | sq. ft.  | \$ 8.00      | \$ 28,160           |
| 2.2.2 Street lamps                               | --     | --    | 10     | each     | \$ 8,000.00  | \$ 80,000           |
| 2.2.3 Overhead flourescent lighting              | 65     | 55    | 3,575  | sq. ft.  | \$ 5.00      | \$ 17,875           |
| 2.2.4 New median                                 | 140    | 9     | 1,260  | sq. ft.  | \$ 15.00     | \$ 18,900           |
| 2.2.5 Welcome sign                               | --     | --    | 1      | each     | \$ 500.00    | \$ 500              |
| 2.2.6 Restriping                                 | --     | --    | 160    | lin. ft. | \$ 20.00     | \$ 3,200            |
| <b>Subtotal Route 16 Underpass</b>               |        |       |        |          |              | <b>\$ 148,635</b>   |
| 2.3 Move On/Off Ramps                            |        |       |        |          |              |                     |
| 2.3.1 Retaining walls                            | 855    | 16    | 13,680 | sq. ft.  | \$ 100.00    | \$ 1,368,000        |
| 2.3.2 New ramp paving                            | 855    | 40    | 34,200 | sq. ft.  | \$ 11.00     | \$ 376,200          |
| 2.3.3 Demolition of existing pavement            | 855    | 40    | 34,200 | sq. ft.  | \$ 2.00      | \$ 68,400           |
| 2.3.4 New traffic lights                         | --     | --    | 3      | each     | \$ 4,200.00  | \$ 12,600           |
| 2.3.5 New ADA pedestrian lights                  | --     | --    | 6      | each     | \$ 4,500.00  | \$ 27,000           |
| 2.3.6 Traffic Signal Electric Controller         | --     | --    | 1      | each     | \$ 18,000.00 | \$ 18,000           |
| <b>Subtotal Relocate Ramps</b>                   |        |       |        |          |              | <b>\$ 1,870,200</b> |
| <b>Subtotal South Gateway</b>                    |        |       |        |          |              | <b>\$ 2,427,200</b> |

**3. Clippership Drive (Main St. to Riverside Ave.)**

|  |      |    |        |          |    |            |           |                  |
|--|------|----|--------|----------|----|------------|-----------|------------------|
| 3.1 Construct and Pave New Road Alignment  | 1090 | 38 | 41,420 | sq. ft.  | \$ | 11.00      | \$        | 455,620          |
| 3.1.1 Demolition of existing asphalt       | 1090 | 38 | 41,420 | sq. ft.  | \$ | 2.00       | \$        | 82,840           |
| 3.2 New Sidewalks                          |      |    |        |          |    |            |           |                  |
| 3.2.1 Near-side Clippership (north)        | 950  | 12 | 11,400 | sq. ft.  | \$ | 8.00       | \$        | 91,200           |
| 3.2.2 Far-side Clippership (south)         | 1090 | 6  | 6,540  | sq. ft.  | \$ | 8.00       | \$        | 52,320           |
| 3.2.3 North-south road near Citizens Bank  | 222  | 6  | 1,332  | sq. ft.  | \$ | 8.00       | \$        | 10,656           |
| 3.2.4 North-south road near Parcel C       | 184  | 6  | 1,104  | sq. ft.  | \$ | 8.00       | \$        | 8,832            |
| 3.2.5 Between Parcel C and Senior Center   | 382  | 6  | 2,292  | sq. ft.  | \$ | 8.00       | \$        | 18,336           |
| 3.3 New crosswalks                         | --   | -- | 4      | each     | \$ | 2,475.00   | \$        | 9,900            |
| 3.4 Easement / Parcel Acquisition          | 72   | 96 | 6,912  | sq. ft.  | \$ | 60.00      | \$        | 414,720          |
| 3.5 Plazas and Planting Beds               | 490  | 6  | 2,940  | sq. ft.  | \$ | 50.00      | \$        | 147,000          |
| 3.6 Street trees                           | --   | -- | 26     | each     | \$ | 225.00     | \$        | 5,850            |
| 3.7 Restriping                             | --   | -- | 1,090  | lin. ft. | \$ | 20.00      | \$        | 21,800           |
| 3.8 Double-headed on-street parking meters | --   | -- | 65     | each     | \$ | 500.00     | \$        | 32,500           |
| 3.9 Utilities (water, piping, etc)         | --   | -- | 1      | each     | \$ | 125,000.00 | \$        | 125,000          |
| <b>Subtotal Clippership Drive</b>          |      |    |        |          |    |            | <b>\$</b> | <b>1,476,574</b> |

**Subtotal Construction Elements** **\$ 4,170,444**

**4. Design and Engineering (7.5%)** **\$ 312,783**

**5. Project Administration (5%)** **\$ 208,522**

**6. Force Account (town officials, police) (15%)** **\$ 625,567**

**7. Overall Project Contingency (20% of total)** **\$ 1,063,463**

**GRAND TOTAL - ALL TRANSPORTATION IMPROVEMENTS** **\$ 6,380,779**

## Notes:

Not included: costs of Clippership park, utilities, etc.

Paving includes: 6" pavement, lime treatment, seat wall, etc.

## Unit price assumptions:

|                                |         |    |          |
|--------------------------------|---------|----|----------|
| Textured concrete for sidewalk | sq. ft. | \$ | 8.00     |
| Tree                           | each    | \$ | 225.00   |
| Crosswalk                      | each    | \$ | 2,475.00 |
| ADA Pedestrian Light           | each    | \$ | 4,500.00 |
| Traffic Light                  | each    | \$ | 4,200.00 |
| Historic Street Lamp           | each    | \$ | 8,000.00 |

City of Medford, Massachusetts

Request for Proposals  
Municipally-Owned Parcels  
Medford Square



## 1. INTRODUCTION AND PROJECT SUMMARY

The City of Medford is seeking Proposals for the development of three (3) city-owned parcels on the eastern edge of Medford Square, the City's traditional commercial center. It is the City's intention that the development of these parcels will serve as a catalyst for revitalization and further development on privately held parcels throughout the downtown area.

This document provides information about the site, describes submission requirements, selection criteria, and the process for developer selection, and identifies requirements of the development agreement to be signed with the selected Respondent.

Respondents must read all sections of this RFP document carefully. By submitting a proposal, Respondent teams acknowledge that they have read the entire document and have also reviewed the Required Documents (see Appendix A).

### 1.1 *Project Description*

The City of Medford's fundamental development objectives for these parcels are as follows:

- A substantial financial return to the City of Medford.
- The provision of structured parking for district-wide use.
- The advancement of The City of Medford's established urban design and city-building goals.
- The provision of housing, including an affordable/workforce housing component.
- The provision of substantial ground floor retail, including destination retail (downtown "anchors")
- A substantial contribution toward the creation of an active, prosperous, and vital downtown district.

Please see Section 2 for a full listing of project objectives.

Medford Square is located adjacent to the Mystic River and Route 93, five (5) miles north of Boston. The Square is accessed by several major MBTA bus routes with connections to Wellington Station, Malden Station, Sullivan Station and Commuter Rail service in West Medford. The City has recently completed a master plan for the downtown area. Goals developed in the plan include encouraging a mix of cultural, retail, commercial and housing uses; enhancing connections between the Mystic River, retail and regional open spaces; and achieving a higher value for underutilized properties. The proximity of Medford Square to downtown Boston combined with access to public transit make conditions ideal for higher density residential development. This Request for Proposals is soliciting responses from private development companies interested in pursuing the use of one or more municipally-owned parcels of property adjacent to City Hall.

Responses to this RFP should strive to create a compelling vision for the site that maximizes The City of Medford's development objectives (Section 2) while bringing long-term value to the entire Medford Square area. Responses to this RFP are in no way constrained to the development program proposed as part of The Medford Square Master Plan, completed by Sasaki Associates in 2005. Nor should the Respondent feel compelled to bid for all three parcels—the successful Respondent will utilize one or more parcels in a synergistic manner to enhance the overall value and quality of the proposal and the downtown in general (again, see the guidelines in Section 2). The City of Medford has a strong preference for each parcel to accommodate its own parking needs and to replace surface spots, currently used as shared district parking, at a rate of [x to x].

### 1.2 *Obtaining Documents and Project Contact Person*

The City of Medford will provide additional copies of this RFP to interested parties for \$ [redacted] per copy. To arrange to receive a copy of the RFP, write to the contact person below and include a check made out to the City of Medford and mailing instructions. Fill out the Respondent information sheet to receive notice of changes/updates/walk-throughs (Appendix D).

The City of Medford has commissioned a number of planning and technical support documents essential for a full understanding of the Medford Square area overall, which are also directly applicable to the three City-owned parcels. Respondents are required to purchase and review these documents if they wish to submit a bid. A listing of the documents and pricing for copies is included as Appendix A to this RFP.

### ***1.3 Communication with The City of Medford***

Respondents will have an opportunity to submit written questions to The City of Medford. All questions and correspondence must be directed to Lauren DiLorenzo, in writing only, by 5 pm on [date]. Clarifications or interpretations and any supplemental instructions or forms, if necessary, will be issued in the form of written addenda. All City of Medford responses will be distributed without attribution to the primary contact person for all respective *registered* Respondents (see Appendix D). The City of Medford takes no responsibility for any information, explanation, or interpretation of the RFP derived from other sources.

Respondents and their affiliates are expressly forbidden from conducting any communication regarding the contents of this RFP with any The City of Medford employee, consultant, or Board member other than Lauren DiLorenzo. Failure to observe this directive may result in the rejection of that Respondent's proposal, at The City of Medford's sole discretion.

### ***1.4 RFP contact:***

Ms. Lauren DiLorenzo  
Director  
City of Medford, Office of Community Development  
85 George P. Hassett Drive  
Medford, MA 02155  
(781) 393-2480



## 2. PROJECT OBJECTIVES

The City of Medford has the following objectives for the development of Parcels A,B, and C:

- 1) A substantial financial return to the City of Medford, including funding for additional infrastructure and a long-term commitment to make funds and/or in-kind services available to a local economic development entity (to be named by the City).
- 2) An outstanding development team that has a demonstrated appreciation and understanding of public/private projects, is flexible, and is willing to work cooperatively with the City of Medford.
- 3) A creative development program that:
  - i) Takes advantage of the sites' inherent resources, including a prominent waterfront location along the newly revitalized Mystic River, and deals creatively with constraints.
  - ii) Provides a substantial ground floor retail presence, with committed tenants serving both local and regional markets. Retailers who complement, rather than compete, with current Medford merchants will be viewed favorably.
  - iii) Complements and enhances existing and proposed development in Medford Square.
  - iv) Provides for its own parking needs (self-parks) and includes non-accessory, market-rate structured or surface parking spaces to fulfill district-wide demand.
  - v) Activates and encourages pedestrian activity along in Medford Square.
  - vi) Creates employment opportunities, both for the region and the local community.
  - vii) Incorporates a transportation demand management program that allows full utilization of the sites though the use of shared parking and the reduction of peak hour traffic.
  - viii) Complies with the requirements set forth in the Medford Square Zoning Overlay District and supplementary design guidelines. If the Zoning Overlay has not been officially amended into the Zoning Ordinance, applicants should nevertheless incorporate its objectives into their program and design.
  - ix) Is compatible with the existing uses and character of Medford Square.
- 4) A mitigation strategy for construction-related disturbances of traffic and business activities. A clear logic underpinning the phasing, pace, and amount of development must be demonstrated.
- 5) Excellence and creativity of design, including features that:
  - i) Successfully interpret the history and established aesthetic of Medford Square while providing a unique contribution to the architecture of Medford Square.
  - ii) Provide for active, street level uses while insulating occupants from traffic noise.
  - iii) Respond appropriately and opportunistically to each of the sites' differing surroundings (e.g. City Hall, Springstep, new parkland, the Mystic River, and the adjacent interstate highway).
  - iv) Attain LEED certification: Integrate sustainable design elements, materials, systems, and technologies to create an environmentally-sensitive, high-performance building (or buildings).
- 6) A development that has demonstrated tenant and lender interest (as well as substantial developer equity) so that it can proceed expeditiously once permits are obtained.
- 7) A proponent with a history of working with impacted communities to arrive at broadly palatable project outcomes.

- 8) Timely project delivery, with guarantees for non-performance.

### 3. SELECTION PROCESS

The City of Medford is inviting qualified developers or development teams to submit Proposals to undertake the development of Parcels A,B, and C. Submissions should be complete, with appropriate treatment of each selection criterion, but concise responses will be highly valued. A selection committee composed of City of Medford staff will review the submissions against the RFP selection criteria listed below. The City of Medford reserves the right to terminate this process at any time.

The City of Medford anticipates designating a development team by [month, year], conditioned on the execution of a development agreement and an option to purchase settlement on terms and conditions consistent with the selected proposal and approved by the City of Medford. The City of Medford expects that the selected development team will, upon selection and execution of a development agreement, move quickly to undertake and complete pre-development activities, obtain an option to purchase, and start construction at the earliest feasible date.

The City of Medford will conduct a pre-submittal briefing and site tour of the parcels and the Medford Square area on [Month] [Day], 200(?), at [Time]. The briefing and tour will begin at [?].

The current selection process schedule, subject to adjustments by The City of Medford as it may deem necessary, is as follows:

|   |        |
|---|--------|
| Issuance of RFP                                   | [Date] |
| Pre-submittal briefing                            | [Date] |
| RFP responses due                                 | [Date] |
| Evaluation of Staff/Selection Committee           | [Date] |
| Interviews with Developer Teams (if necessary)    | [Date] |
| Committee Recommendation to the Mayor and Council | [Date] |
| Developer Designation                             | [Date] |

#### 3.1 *Receipt of Proposals*

All Respondents are cautioned to allow ample time for transmittal of proposals. Respondents are solely responsible for delivery to, and receipt by, the City of Medford. All portions of and attachments to the Proposal must be received by the Application Deadline. Proposals or any portions thereof or attachments thereto received after the Application Deadline will be accepted or recognized at the sole discretion of The City of Medford. The time of receipt will determine the acceptability of mailed proposals, regardless of postmark.

At any time prior to the Application Deadline, a Respondent may submit an amendment to a proposal previously submitted. Any such amendment must be submitted in writing in the same manner as the original proposal. The City of Medford reserves the right to disregard any amendment submitted that does not indicate clearly the proposed modifications to the original proposal.

The City of Medford will open the proposals on or after the Application Deadline. Proposals will not be opened or read publicly, but a register will be maintained of those Respondents submitting timely proposals. The register of proposals will be open to public inspection.

#### 3.2 *Evaluation of Proposals*

Proposals submitted in accordance with the requirements of this RFP and not rejected as provided herein will be evaluated by the City of Medford. The City of Medford will evaluate the proposals submitted in

accordance with the provisions of the RFP, based on the Selection Criteria described in Section 3.3. Any Proposal that is determined not to meet the minimum Submittal Requirements will be rejected. In its evaluation, The City of Medford may consider all information contained in the Proposal and any other information obtained by the City of Medford.

After reviewing the proposals, The City of Medford will determine whether Respondents will be required to furnish additional information regarding their proposals and/or appear for one or more interviews. If the City of Medford requires interviews, the City may interview (a) all Respondents; or (b) those Respondents that the City of Medford determines, on the basis of an evaluation of the Proposals, appear most likely to be selected as finalists. Respondents selected to appear for an interview will be notified in writing, by mail, facsimile transmission, or otherwise, of the time, place, duration, and format of the interview. If interviews are conducted, it is anticipated that they will be held in [month] of [year]. The City of Medford also may request additional information or clarifications from Respondents at any time.

In order to facilitate the selection process, the City of Medford may visit the offices of each Respondent to conduct further interviews, or conduct site visits to observe one or more of the facilities identified by a Respondent as relevant to the selection process.

### **3.3      *Selection Criteria***

The following criteria will be used to evaluate submissions:

- Financial benefits to The City of Medford based on amount and timing of development, including safeguards against non-performance by the Respondent (most likely an Option to Purchase payment).
- Degree to which Respondent demonstrates its ability to finance the proposal including:
  - i) identification of equity and debt sufficient to complete this project within the context of the Respondent's overall portfolio and a project-specific business plan;
  - ii) evidence of tenant interest or commitment that would be sufficient to secure financing under current commercial underwriting standards; and
  - ii) evidence of financial feasibility and market demand for the proposed program and design, including commitment of key tenants, within the context of the existing and planned development by the Respondent, the City of Medford, and/or other relevant locations in the Boston region.
- Demonstrated success in designing, permitting, developing and managing quality, mixed-use urban projects of a comparable scale and complexity to that allowed on Parcels A,B, and C, including experience in the development and operation of structured parking.
- Ability to articulate a compelling development vision, plan, and design that meets the City of Medford's Project Objectives as set forth in Section 2.
- Demonstrated experience in and commitment to working with community and advocacy groups and addressing concerns effectively.
- Development team experience with sustainable design and construction, particularly with the LEED system.
- The project's constructability based upon preliminary design.
- The project's likelihood of securing permits, including the developer's demonstrated ability to secure complex permits and the use of consultants possessing specific experience with similar projects.
- The extent to which the proposal implements the City of Medford's non-discrimination policy and demonstrates a strong record in this area, including diversity in project employment opportunities in the following categories – ownership, construction, tenancy, and permanent employment.
- Overall responsiveness to submission requirements.

### **3.4      *Proposal Selection***

After evaluating responses to this RFP, the City of Medford staff may select one proposal, or may choose to negotiate a best and final proposal with one or more Respondent(s), or may reject all proposals. The proposals will be ranked by a designated Selection Committee that will present a recommendation to the City of Medford's Mayor and Council. Authorization to enter into a Development Agreement and Option and to proceed with the development will be subject to the approval of the Mayor, as well as applicable laws and regulations, including environmental permitting requirements.

### **3.5      *Award of Development Agreement***

All Respondents will be notified in writing of the City's designation of the Selected Respondent. The City of Medford and the Selected Respondent will proceed to finalize and execute a development agreement. If, for any reason, the City of Medford and the Selected Respondent have not agreed upon and executed the development agreement and option within six (6) months after the date of The City of Medford's selection, then the City may, in its sole discretion and without incurring any liability to the Selected Respondent, terminate or suspend negotiations with the Selected Respondent. In such event, The City of Medford may proceed to finalize and execute the development agreement with another Respondent, under the same guidelines above.

In all cases, the development agreement shall be subject to the approval of the Mayor and Council of the City of Medford.

### **3.6      *Legal Provisions***

[Medford Legal provisions here]



#### 4. DEVELOPMENT AGREEMENT CONDITIONS

The City of Medford anticipates entering into a Development Agreement and thereafter an Option to Purchase with the Selected Respondent relative to the development of Parcels A,B, and C. The terms of such agreements shall be determined by the City of Medford and are subject to approval by the Mayor of Medford.

##### *4.1 Development Agreement Conditions*

The City of Medford will require the Selected Respondent to execute a Development Agreement within six months of designation by the City of Medford. This Development Agreement will contain the essential business terms for the transaction. The Development Agreement shall include, but not be limited to, the terms of the City of Medford's design review process, the process for hazardous materials testing (and, if necessary, remediation), and a process for the City of Medford's prior review and approval for any and all applicable permits, licenses, and approvals.

The Selected Respondent will be required to pay the City of Medford option payments beginning on the first day of the month following the Designation Date. The City of Medford will require the Selected Respondent to enter into a contract regarding the option payments. The option payments will be \$###,### per year and will be paid in monthly installments. Option payments will increase by \$##,### each year. Payment of option payments will cease upon purchase.

In the event the Selected Respondent complies with the terms and conditions of the Development Agreement and completes construction of the project accordingly, portions of the option payments will be credited, without interest, toward the Purchase price under the following schedule: 100% of payments for the first year will be credited against rent; 75% of any payments in the second year; and 50% of any payments in the third year; 25% in the fourth year; any subsequent payments shall not be credited. In the event the Development Agreement terminates for any reason other than the City of Medford's default, the City of Medford will retain all option payments as reasonable and fair consideration for not marketing, selling, or leasing Parcels A,B and C to others, and not as a punitive measure.

By submitting a proposal in response to this RFP, each Respondent agrees that if designated as developer by the City of Medford, the Selected Respondent shall be responsible for all Third Party Costs that arise in connection with any agreements entered into with the City of Medford including without limitation, the Development Agreement and Option to Purchase. The term "Third Party Costs" shall mean any and all out-of-pocket costs and expenses incurred by the City of Medford including, without limitation, attorneys and consultants' fees, survey costs, environmental investigations, title work, and construction management.

The City of Medford will require each Respondent to provide a deposit of \$##,### (the "Fee Deposit"). The Fee Deposit shall be in the form of a bank, cashier's or certified check drawn on a Massachusetts bank without intervening endorsement made payable to the "City of Medford" and is due at the time that the Respondent submits its proposal in response to this RFP. Upon designation as the developer, the Fee Deposit submitted by the Selected Respondent will be deemed fully earned by the City of Medford and non-refundable. Fee Deposits from Respondents not selected will be returned, without interest, within ten (10) days following the Designation Date.

Upon the execution of a Purchase and Sale, the City of Medford, at its option, either shall (i) apply any portion of the Fee Deposit that has not been expended or is not reasonably expected to be expended for continuing Third Party Costs ("Remaining Balance") toward the purchase price or (ii) return any Remaining

Balance to the Selected Respondent, without interest, within thirty (30) days after the execution of the Ground Lease.

#### **4.2      *Construction Rent***

Construction Rent will be due beginning with the signing of the Purchase and Sale and continue during the construction period until the Certificate of Occupancy is obtained. Construction Rent for Parcels A,B, and C shall be \$###,### per year. Commencing in 20## and continuing thereafter, Construction Rent shall escalate by CPI.

In addition, the Purchase and Sale shall provide for the payment of a District Service Fee to sustain infrastructure maintenance and improvement within the Medford Square Area. For the purposes of crafting financial proposals, Respondents should assume that the District Service Fee will be \$.## per gross square foot of development per year until January 1, 20##, paid monthly beginning with the Certificate of Occupancy; thereafter, it will escalate by CPI.

#### **4.3      *Zoning***

All parcels under consideration currently fall under the City's C-1 zoning district. Respondents, however, should base their proposals on the Medford Square Zoning Overlay District, which was created specifically to guide the development of the eastern portion of Medford Square. The Medford Square Zoning Overlay District dimensional standards and guidelines are included in their entirety in Appendix B.

Compliance with the requirements of any permits, licenses, and/or approvals obtained including, without limitation, affordable housing obligations for residential uses, will be the sole responsibility of the Selected Respondent, at its sole expense.

#### **4.5      *Design Review***

The City of Medford will conduct a design review of the project to include formal reviews and required approvals at the conceptual, schematic, design development, and construction document phases.

#### **4.6      *Noise Mitigation***

Notwithstanding any other mitigation requirements imposed on the development as part of the permitting process, for any proposed residential use the interior maximum noise level shall not exceed 45 dBA (Ldn).

#### **4.7      *Environmental Review and Permitting***

The Selected Respondent, at its sole cost and expense, shall obtain all environmental and other permits, licenses, and approvals necessary to enable the Selected Respondent to develop, construct, and operate its proposed development. The City of Medford will require review of permitting documents prior to their submission in accordance with the Development Agreement.

#### **4.8      *Utilities***

Connection to utility services will be the responsibility of the Selected Respondent and its sole expense. Plans of existing and planned utility services in the vicinity of Parcels A,B and C can be obtained by contacting the City of Medford.

## 5. SUBMISSION REQUIREMENTS

The submittal must be **concise**, organized in direct response to the submission requirements, spiral bound, and formatted as 8.5 x 11 inch pages. A maximum of **##** pages (double sided) is preferred. Graphics may be submitted separately in 8.5 x 11 or 11 x 17 inch format. One (1) signed original and **x** copies must be provided. All submittals must include the elements described below in order; incomplete submittals will not be accepted. All submittals must address the Project Objectives and Selection Criteria as identified in this RFP.

Before submitting a proposal, each Respondent must thoroughly examine the RFP and familiarize itself with local conditions and with federal, state, and local laws, ordinances, rules and regulations and any other circumstances or conditions that may in any manner affect the cost or performance of the design, permitting, construction, or operations of the proposed development. Failure of any Respondent to acquaint itself with the RFP, or to review the required Supplemental Materials, shall in no way relieve the Respondent from any obligation with respect to its Proposal. Each Respondent shall promptly notify the City of Medford of any ambiguity, inconsistency, or error it may discover upon examination of the RFP or any information provided in connection with the RFP.

Although The City of Medford believes that the information contained in the RFP is complete and accurate, The City of Medford makes no representations, warranties, or guarantees that the information contained in the RFP or any information provided in connection with the RFP and selection process (including, without limitation, any supplemental information) is accurate, complete, or timely, or that such information accurately represents the conditions that will be encountered, now or in the future. The submission of a Proposal will constitute a representation by the Respondent that it understands and has complied with every requirement of this section and other provisions of the RFP.

### **5.1 Compliance with the RFP**

The Proposals must include a statement confirming that the Respondent has read and reviewed in their entirety the RFP the Supplemental Materials listed in Appendix A. This statement must be signed by the Principal(s) of the developer or co-developers.

### **5.2 General Requirements**

Each proposal must include the following information and materials:

#### ***A. Executive Summary***

Summarize and provide a compelling rationale for the principal elements of the proposal, including the development program, key tenants, design, market analysis, capital structure, permitting, community process, and relationship to existing and proposed district development.

#### ***B. Description of the Development Entity***

Describe the proposed development entity, including the corporation or joint venture that will serve as the master developer and would be a party to the Development Agreement with the City of Medford. Include a description of the specific roles of each development entity in a co-development team at each stage of the project. Any division of roles according to program uses or physical portions of the site must be clearly described. Also describe the entity or entities that would provide the City of Medford with the necessary guarantees of the timely completion of project construction. If the entity is a subsidiary of, or otherwise affiliated, with another organization, the proponent shall indicate such a relationship. The description shall

include any participating development entities or proposed tenants that are deemed important to meeting the City of Medford's objectives for the development of this site. Submittals that include institutional uses should provide information that describes the structure, organization, and mission of the institution.

The Proposal shall identify one or more individuals who have full power and authority on behalf of the Respondent team to negotiate and execute the Development Agreement if the Respondent is chosen for negotiations, without the need for further authorization, and shall include evidence (e.g. certified copies of corporate votes) as to such authority. Respondents are further advised that a Completion Guaranty or equivalent security will be required simultaneously with the Sale by an entity or entities providing adequate assurance of timely completion of construction. The form of the Completion Guaranty will be provided as an exhibit to the Development Agreement. The Respondent must clearly identify the entity or entities which is/are proposed to execute the Completion Guaranty.

### ***C. Qualifications of the Development Team***

Identify all the key participants on the development team including investors and proposed lending institutions. Identify team members responsible for managing the permitting and development process, architecture, structural and civil engineering, geotechnical engineering, landscape architecture, LEED certification and sustainable design, environmental and development permitting, and legal and financial analysis. Provide an organizational chart showing team members listing their respective roles and responsibilities, and clearly indicating the chain-of-command/workflow. Take particular care to identify clearly the principal-in-charge of the proposed project and the project manager(s) from the development entity.

Identify any previous experience of team members working together with the development entity and/or each other on projects of a similar scope.

Provide information for all firms on the proposed team, including company profiles, individual resumes of key personnel who would be assigned to the project, time allocation of key personnel, and descriptions of relevant experience.

For both firms and key individuals on each member of the Respondent team, document current and projected project workload during the proposed period of development. This information should provide a schedule or timeline and should identify the level of effort key individuals will spend on active projects expected to be underway concurrently.

Identify any potential conflicts that the individual team members or firms may have because of prior relations with the City of Medford, members of its appointed staff, or its elected officers. Identify and explain any legal action taken against any of the development entities included in this response.

The City of Medford has a policy on non-discrimination and diversity (see Appendix C). Respondents are encouraged to identify any firms on the development team that are certified minority, woman-owned, or impacted community businesses and clearly set forth the nature of their participation, including the extent of responsibilities and timing of their participation.

### ***D. Summary of the Development Entity's Relevant Projects***

For *each member* of the Respondent team, particularly the developer or co-developers and the architect, describe project experience involving projects of size, program type, and complexity similar to the proposed project. For each project used to demonstrate past project experience, the following should be included:

- a. Name, address, and type of project.
- b. Facility profile of project:

- Year completed;
  - Project characteristics and square footage of each program component (including number and type of tenants, parking, etc.);
  - Gross square feet for project;
  - Construction costs (soft and hard costs); and
  - Photos of project.
- c. Whether project was publicly or privately funded, on private or public land (if a combination, please describe in detail).
  - d. Description of permitting and community review process involved.

For each project listed above, list the proposal team members (including key individuals) involved in the development and/or operation of the project, including:

- a. Specific role of each team member and key individuals in the project;
- b. Name, address, phone and fax of the owner of each project; and
- c. A description of financing, including the name, address, and phone number of institutions and/or corporation/individuals that provided financing or guarantees of financing and/or completion of the project.

All individuals listed as contacts on existing projects may be contacted and should be available to assess the Respondent's and key individuals' record relating to the project(s). In addition, the City of Medford may consult references familiar with the Respondent or member of the Respondent's team regarding past experience, qualifications, performance, or other matters, regardless of whether the specific individuals are identified in the proposal.

### ***E. Proposed Development Vision and Preliminary Program***

Provide a description of the proposed development vision and preliminary development program. The development vision should address the proposed overall approach and strategy for this site and include a description of how the proposed mix of uses addresses the City of Medford's objectives for the site.

Each proposal must include a detailed program description summarizing the contemplated building program by use, phase, and parcel location. The program description must include at a minimum, the following, for each phase of the project, for each parcel location in each phase, and for the entire project at completion:

- Estimate of gross enclosed square footage, by use (for residential uses also provide unit count and mix);
- Estimate of rentable square footage, by use;
- Estimate of floor plate sizes;
- Estimate of size and type of ground floor uses;
- Estimate of on-site parking including number of spaces and number of parking levels; and
- Estimate of the area of public open spaces (enclosed or outdoors).

Retail, civic, or institutional uses should also be described in terms of their role within the site and in the district, including details of any special requirements they may have. The estimated provision of district-wide parking should be made explicit, as should the Respondent's approach to shared parking. Public uses / spaces should also be described. Potential program alternatives should be explained as well along with the factors that would influence the implementation of one alternative over another. The Respondent should attempt to explain the project's place in the overall Medford Square/Mystic District development context.

The program must be summarized in a chart that clearly defines the quantity of program allocated by use and by parcel location, including parking and open space.



## *F. Planning and Design Information*

### *F1. Written Description*

The following is required:

- Provide a statement that describes the overall urban design approach to Parcels A,B, and C that discusses massing, orientation, public spaces and circulation, parking and special features. Discuss the rationale for the proposed location of each of the major uses (including public spaces) and describe important adjacencies / synergies that are created or needed. The City of Medford wants to see evidence that that the proposed development concept and mix of uses is responsive to the physical and regulatory features of this site and has a sound approach to issues related to construction.
- The drawings and diagrams that are submitted should be referenced in this statement, with particular attention to how program and design elements advance the principles set forth in the Medford Square Zoning Overlay District and supplementary design guidelines.
- Characterize how proposed building materials and fenestration patterns will be used to advance what is emerging in the overall district.
- Identify and describe successful places/development projects (by the proposing team or others) that best illustrate and represent the Respondent's urban design approach for the site and/or specific program or design elements that are proposed.
- Describe the approach that the proposed development will take to address accessibility and the principles of universal design.

### *F2. Required Drawings*

- Program distribution plan diagrams for all public levels and for each typical upper level and/or below-grade level. Separate diagrams should define the initial phase and any proposed subsequent phases. Primary pedestrian access points, secondary pedestrian access points, parking garage entrances/exits, and service access locations should be indicated with dots or other graphic symbols. Diagrams should label proposed uses and should use the following color scheme:  
  
Retail - red  
Office - orange  
Housing - yellow  
Hotel - ochre  
Cultural - blue  
Public circulation - white  
Parking and Non-public (controlled) circulation - light gray  
Public open space - green
- Four project cross sections for each distinct building to clarify program stacking (using same color key) and to identify the elevation of public floors, with typical floor-to-floor heights thereafter. Identify maximum building height (to roof of occupied structure and top of tallest physical feature).
- A public realm plan, with all tenant/lease spaces in gray, and all open space, interior public space, and primary circulation space (to stairs and elevators) in white with line drawings of features within public space/circulation space zone. All elevators and stairs

should be included in the plans (in white). Green should be added to show any landscape features. Tree canopies should be de-emphasized by using a light green tone and tree trunks should be indicated in plan.

- Axonometric diagrams of any proposed project phasing, related to a timeline and drawn to a measurable scale.

### *F3. Technical Requirements for Drawings*

- All drawings submitted on CD with plans and sections in AutoCAD release 2007;
- All plans formatted to print at 1" = 40' drawn in AutoCAD 2007;
- All sections formatted to print at 1" = 20' drawn in AutoCAD 2007; and
- All plans and sections to show adjacent context

### *F4. Models*

The following are required:

- A three-dimensional digital model of the project prepared in AutoCAD release 2007, that can be inserted into basemap material in NAD83 coordinates with the origin positioned at 0,0,0. The City of Medford will provide a contextual digital basemap for this purpose.
- Physical Model - A 1" = 40' model in chipboard, basswood, or styrofoam showing basic building massing in the context of existing and planned buildings. Models do not need to show fenestration, but should focus instead on illustrating basic massing concepts, primary public spaces and significant special features.

## *G. Development Permitting Requirements*

The intent of the following section is to obtain information that will allow the City of Medford to understand the Respondent's approach and key assumptions related to permitting the proposed development program, as well as how the proposed development relates to the broader Medford Square Development Area from permitting and transportation standpoints. The information will also provide the City of Medford with a common basis for comparing the proposals that are submitted. The City of Medford's principal interest is that the proposal will successfully address the Project Objectives stated in this RFP. Ultimately, it will need to be demonstrated that the development program is compatible with Medford Square overall in terms of use mix, traffic, parking and transit.

### *G1. Development Program*

- 1) Provide a concise table summarizing the development program and phasing (if applicable) by parcel and land use.

### *G2. Trip Generation*

- 1) Provide a person-trip generation estimate (AM peak hour and PM peak hour) by land use.
- 2) Provide morning and evening peak hour transit person-trips estimates in total, by direction (entering/exiting), and by land use.
- 3) Identify morning and evening peak hour vehicle trips in total, by direction, by parcel, and by land use.

- 4) Identify peak hour vehicle trips by parking area and access point, including spatial distribution of peak hour vehicular trips to surface streets and by sector.

### *G3. Parking Supply, Vehicular Access, and Roadway Impacts*

- 1) Show all proposed parking, including number of spaces by area and any internal connections to or between parking areas.
- 2) Describe the proposed shared parking model including demand rates by land use and accumulation of total demand by time of day. If applicable, identify parking resources associated with specific programmatic elements (residential, retail, office, public amenities, parking for non-project off-site land uses, off-site parking for the proposed uses).
- 3) Identify any proposed changes to the roadway geometry or signalization.

### *G4. Transportation Demand Management*

- 1) Describe essential elements of any Transportation Systems Management (TSM) or Transportation Demand Management (TDM) programs that would be implemented in conjunction with the project.

## *H. Proposed Project Schedule*

The Respondent shall describe the proposed project schedule including key steps in permitting, financing, design, construction (including start and completion), leasing, and occupancy. Any proposed phasing and rationale for said phasing should be presented, including the estimated construction start and occupancy for each phase. Respondents anticipating phasing must provide a highly detailed description of initial or early project phases along with a general plan and schedule for the build-out of the remainder of the sites. Respondents shall indicate which market conditions, financing considerations, or other factors may affect the program use mix, size and timing of the first and any subsequent phases. The City of Medford is concerned that any proposed multiple phase project be completed in a timely fashion, and expects to be compensated for land that is part of any future phases. Respondents anticipating phasing should provide a discussion of how this issue will be addressed; including any proposed option payments.

## *I. LEED Certification and Approach to Sustainable Design*

The City of Medford is requiring baseline certification under the United States Green Building Council's (USGBC) LEED-NC 2.2 standard, with higher levels of achievement (i.e. Silver, Gold, or Platinum) strongly encouraged. Provide a concise (two page maximum) but substantive narrative describing the Respondent's integrated siting, design, materials, systems, and programming approach to achieving these goals. Respondents are encouraged to relate this narrative to their pro forma where applicable.

Include a brief description, including past projects, of LEED and sustainable building experience for all relevant team members.

Clarify roles and responsibilities of each member of the development team in achieving LEED certification. Include all relevant consultants' respective scopes of work in this statement.

## *J. Financial Capability*

Provide evidence of the development entity's financial capability to undertake and complete the proposed development project. Include information on recent experience in capital formation for similar mixed-use development projects of comparable scale and complexity (including use of different lenders for different uses). If bankruptcy or project defaults have occurred for any of the primary development entities included in the project team, please provide details.

## *K. Project Financial Feasibility*

Provide information that addresses why the proposed development is feasible relative to the following factors: market support, financial performance, construction, and development permitting.

### *K1. Proposed Operating Projections*

Each Respondent shall provide, at a minimum, a detailed set-up and (for non-condominium projects) a 10-year operating projection for all phases of development showing clearly and completely the following:

- All projected rents and other income
- All operating expenses
- Real estate taxes
- Participating rent, if applicable, for the City of Medford
- Linkage fees
- Replacement reserves
- Debt Service
- Exactions, for infrastructure upgrades and public spaces, to the City of Medford

For each use type, the Proponent should present comparables supporting the income assumptions used.

### *K2. Proposed Project Cost*

Each proposal must include a detailed presentation of the estimated total project costs for each phase or use type component of the development.

Hard Cost estimates shall include the following, by building / use type:

- Site Work (include explicit assumptions regarding location of construction staging)
- Excavation and Foundations (including disposal cost assumptions and monitoring programs)
- Superstructure (Steel, concrete, etc.) including any premium costs
- Exterior wall system
- Roofing system
- Interior construction and fit-out
- Elevators and Escalators
- Fire Protection
- Plumbing
- HVAC
- Electrical
- General Conditions
- Contractor and Developer fees

Soft Costs should include the following

- Developer fees
- A/E fees
- Permitting fees
- Legal
- Other professional fees
- Community benefits
- Marketing expenses

Other Costs:

- Construction period interest
- Loan fees

### *K3. Proposed Capital Structure*

Based on the total project costs projected, please provide the proposed capital structure for the first phase and, to the extent known, for any subsequent phases, if the project is to be phased. The financing plan shall

include indication of proposed sources of funding including the breakdown between debt, equity and the terms assumed for each.

- 1) Provide the following information relating to the debt portion of the financing proposals to the extent known. Although this information is not required, to the extent it is provided it will allow the City of Medford to better judge the Respondent's ability to access the capital necessary to complete the project. At a minimum, Respondents must describe the assumptions of amount/terms/rates/fees underlying the operating projections.
  - Identification of the Lender;
  - Identification of the Borrower;
  - Amount to be financed;
  - Security arrangement;
  - Repayment terms/maturity/installments;
  - Interest rates (fixed/variable/basis for determination);
  - Credit insurance/credit support;
  - Management/origination/placement fees and expenses;
  - Recent experience of the Lender in the field of commercial real estate development and construction; and
- 2) Provide the following information relating to the equity requirement for the proposal:
  - Identify the source (s) of equity;
  - Nature of commitment for the equity and amounts if from multiple sources -- identify any preferred returns or similar features (including any special conditions or exit requirements);
  - Provide audited financial statements for the last three years of all equity providers (if available).
- 3) To the extent the Respondent has interest or commitments from one or more creditworthy tenants sufficient to readily obtain commercial financing under customary underwriting standards, identify said tenant(s) and provide all relevant information with respect to said tenant(s) and commitment(s);
- 4) Provide any other information that evinces the ability of the Proponent to develop successfully the Project as proposed.

#### *K4. Participating Rent Proposal*

The City of Medford will accept proposals that include a contingent rent component. To the extent a contingent rent is proposed, formulae based on easily verifiable gross incomes are strongly preferred to formulae based on net incomes subject to accounting interpretations.

If the Respondent chooses this approach, it must submit a complete Rent Proposal stating the amount of Contingent Rent, as well as any other Additional Rent (such as option rent for holding land related to later phases) or Transaction Rent that may be proposed.

#### *L. References*

For key members of the project team, provide three references able to address his or her capability to undertake similar projects. References should include name, title, relationship, length of association, address, telephone number, and project reference.

#### *M. Other Factors*

If applicable, provide a description of other factors not accounted for in the RFP that, in the Respondent's opinion, affect the development potential of the project. Please limit this section to 5 pages (page faces).

## 6. SITE DESCRIPTION

### *Location*

Medford Square is located adjacent to the Mystic River and Interstate 93, five (5) miles north of Boston. The Square is accessed by several major MBTA bus routes with connections to Wellington Station, Malden Station, Sullivan Station and Commuter Rail service in West Medford. Please see the Medford Square Master Plan for an overview of the general local and regional context.

### *Current Use and Condition*

Parcels A,B, and C are currently in use as paved parking lots serving primarily daytime office workers, shoppers, and weekend and evening event parkers (### total spaces).

### *Topography and Geology*

Parcels A,B, and C are generally flat and approximately ## feet above sea level throughout, located approximately [xxx] feet from the 100-year flood plain. Precise geological conditions are unknown.

### *Environmental*

Respondents are responsible for conducting borings and All Appropriate Inquiries for environmental contamination. Typically, sites are offered "as is," with any required remediation at the sole risk of the proponent.

### *Utility Service*

The project site is well served by utilities with substantial capacity generally available for development [?]. Please visit The City of Medford's offices to view full utility plans or obtain a set using the order form in Appendix A.

### *City Of Medford Development Approvals*

The City of Medford strives to develop its property in a manner that is consistent with the City's planning and zoning goals. Private developers will submit their projects to be processed and approved under the City's Medford Square Zoning Overlay District guidelines.

## 7. ACCESS AND PARKING

Parcels A,B, and C have exceptional transportation access, including several nearby rapid transit stations on the MBTA Orange Line and Commuter Rail, easily accessible highway ramps leading directly to Interstate 93, adjacent arterial streets connecting with surrounding towns, permitted rights for ample parking spaces on-site, and hundreds of additional public parking spaces within easy walking distance.

### *Public Transportation*

#### *Bus Service*

The site is directly served by regularly-scheduled bus routes that are operated by the MBTA on surface streets. These routes connect the site with various local and regional destinations and are coordinated to complement Orange Line service.

#### *Site Pedestrian Access*

As expressed in its Medford Square Master Plan, the City of Medford prioritizes the quality of the public realm and pedestrian environment on its mixed-use properties. The Master Plan, which represents the results of multiple planning exercises, calls for an inviting, high-quality urban streetscape environment that emphasizes safe, universally accessible, and enjoyable pedestrian movement through the district. Accordingly, the Parcels will be surrounded by wide and well-designed sidewalks, street trees, and attractive, high-quality street furniture and streetlights.

The City of Medford is particularly interested in extending Medford Square's pedestrian-friendly environment through to the edge of the Mystic River; the completion of pleasant and safe streetscapes on Clippership Drive should be considered a high priority. This should be accomplished both with compatible urban design and careful programming, which might include a variety of smaller retail and restaurant establishments leading to inviting public open space.

#### *Parking*

The parking plan for Medford Square is based on sharing parking among different uses and development parcels to maximize the efficiency of use, minimize traffic impacts, decrease overall development costs, support a Transportation Demand Management (TDM) program, and reduce the allocation of land for parking.

The City expects that structured parking will be necessary on at least two of the three sites to accommodate residential parking needs while leaving on-street parking available for existing and future retail parking demand.

Parking ingress/egress should be designed and positioned to minimize the traffic impacts of vehicle queuing and left hand turns. The City of Medford will encourage the use of appropriate technologies and management strategies to increase performance, space efficiency, and capacity while lessening traffic impacts.

## 8. DEVELOPMENT CONTEXT

### *Immediate Site Context*

Figure [1] shows Parcels A,B, and C in their immediate context. By promoting a mix of uses, incorporating generous open spaces and creating consistent design standards for buildings, sidewalks and parks, The City of Medford has planned to ensure an active and attractive streetscape in the district. All buildings will incorporate ground floor retail, restaurant, and other public uses. Sidewalks will have street trees, high quality street furniture and paving, and adequate widths to allow active uses such as cafe seating and special events. Please see Figure [1] for current streetscape views.

South of Riverside Avenue, the City of Medford has set the groundwork for a more finely grained pedestrian district, leading to a riverfront park incorporating both active recreational and passive uses. Narrower streets and high quality streetscape improvements for sidewalks, lighting, paving, landscaping, and public parks, along with an abundance of small, ground-floor retail establishments and restaurants, will help complete this more human-scaled area of the district. This area is connected to regional bicycle and pedestrian paths maintained by the Massachusetts Department of Conservation and Recreation.

### **Existing District:**

Greater Medford Square is a traditional New England downtown district, with assets including a host of local small businesses, distinctive historic architectural details, and close proximity to open space amenities like the Mystic River Parkway and the Middlesex Fells and institutions like Tufts University, Springstep dance studio, and the Chevalier Theatre. Over 75,000 people live within a five-minute drive of the Square, and Boston and Cambridge are both within a 15-minute drive. Please see the Medford Square Master Plan for further detail.



APPENDIX A  
SUPPLEMENTAL MATERIALS LIST AND ORDER FORM

## Supplemental Materials List and Order Form

The City of Medford has assembled the following background materials related to the parcels available for disposition. These materials will be available for review by appointment (call 781/393-2480 to make an appointment) at the City of Medford's Office of Community Development; however, if you would like to order a copy of these documents the City of Medford will reproduce them and send them to you for the prices listed below (costs cover production and shipping by U.S. Postal Service). Please indicate which items you wish to order and the quantity in the right hand column.

| Document Name   | Filing Number | Quantity | Price |
|---|---------------|----------|-------|
|   |               |          |       |
| The City of Medford, <i>Medford Square Master Plan</i> (2005)                                   | 1             |          |       |
| The City of Medford, <i>Medford Square Community Development Plan</i> (2004)                    | 2             |          |       |
| MIT Department of Urban Studies and Planning, <i>Medford Square and the Mystic River</i> (2006) | 3             |          |       |
| ?   | 4             |          |       |
| ?   | 5             |          |       |
| ?   | 6             |          |       |
| Medford Square Utilities Drawings   | 7             |          |       |
| AutoCAD (Release 200?) Site Plan – electronic copy  | 8             |          |       |
|   |               |          |       |
| Total Cost  |               |          |       |

Mail the completed form, along with mailing instructions, and a check made out to the City of Medford to the contact below. These items will be sent on [date].

Ms. Lauren DiLorenzo  
Director  
City of Medford, Office of Community Development  
85 George P. Hassett Drive  
Medford, MA 02155  
(781) 393-2480

## APPENDIX B

### MEDFORD SQUARE ZONING OVERLAY DISTRICT GUIDELINES

#### Introduction




Creating a zoning overlay can help to unify the Square as a district with a consistent set of requirements for form and function and at the same time create appropriate diversity by clarifying building heights, setbacks, and uses for different areas of the Square. By promoting a level of consistency throughout the district while acknowledging the need for different areas within, this zoning overlay allows for change and at the same time preserves existing character as Medford Square grows.

#### Medford Square Zoning Overlay District

What follows is the general framework for the Medford Square Zoning Overlay District. The framework couples the conventional zoning overlay with a “form-based” approach that is increasingly being used in cities and towns throughout the U.S. The framework is unique in its ability to connect key development principles with *different* dimensional and use requirements for *different* areas of the Square, thus respecting existing building patterns while providing opportunities for change where appropriate. The Overlay is presented in a simplified, graphical format, allowing it to function as a flexible tool for both communicating and implementing the vision for Medford Square.

The principles embodied in the Medford Square Zoning Overlay framework was shaped and informed by the 2005 Medford Square Master Plan and interaction with City officials and citizens during the fall of 2006.

## Dimensional Standards

| Site Type  | Front Setback  | Side Setback   | Rear Setback  | Height                                   | Step down  | Lot/unit width  | Parking  | Uses*  |
|--|--|--|---|--|--|---|--|--|
| <b>Major Corner</b>         | No setback allowed OR façade built to no less than 75% of streetline; 5' max setback for 25% of frontage | None required  | Where no street or alley access, 25ft minimum setback | 35ft minimum; 65ft maximum (3-6 stories) | When within 100ft of Main St site, Neighborhood St site or other zoning district, maximum height is 45ft | No more than 150ft contiguous                                   | 1.4 spaces/unit; retail parking 1 space/350 SF | 1st floor: Primary Retail required; Secondary Retail by special permit; Upper floors: Residential & Secondary Retail               |
| <b>Main Street</b>          | No setback allowed OR façade built to no less than 75% of streetline; 5' max setback for 25% of frontage | None required unless shared with Neighborhood Street site or other zoning district | Where no street or alley access, 12ft minimum setback | 35ft minimum; 45ft maximum (3-4 stories) | When within 40ft of Neighborhood St or other zoning district, maximum height is 35 ft                    | 15ft minimum, 30ft maximum; max of 7 units or 150 ft contiguous | 1.4 spaces/unit; retail parking 1 space/350 SF | 1st floor: Primary or Secondary Retail required; Secondary Retail by special permit; Upper floors: Residential or Secondary Retail |
| <b>Neighborhood Street</b>  | 5ft minimum; 15ft maximum  | 10ft minimum; 15ft maximum   | 15ft maximum  | 35ft maximum                             | N/A  | N/A   | 2.0 spaces/unit; retail parking 1 space/350 SF | 1st floor: Residential or Secondary Retail by special permit; 1st floor live-work units allowed                                    |

\* For information on Uses, Please see "Retail" in the Key Principles for New Development below

## Zoning Plan



## Key Principles for New Development in Medford Square

### 1. Buildings

- Buildings are built to the street edge, continuing the pattern established by existing development and forming a consistent wall that defines the Medford Square streetscape.
- Regular interruptions along building wall through small alleyways or visual breaks and changes in the façade provide continued visual interest as well as improved pedestrian circulation.
- No block shall continue for more than 150 feet without an alley or pathway providing access to another street or public open space.

## **2. Retail**

- A diverse mix of retail uses creates a destination for residents and visitors, enlivens the street, creates jobs, and strengthens Medford's overall economic base.
- Primary Retail\* (types that attract the highest amount of walk-through traffic) are encouraged on the first-floor in key areas.
- Secondary Retail\*\* (types that generally do not attract a high amount of walk-through traffic) are encouraged on second floors and/or along minor streets.
- All retail uses remain as flexible as possible, encouraging rather than restricting or dictating use so that retail space in Medford Square can adapt to changes in the local and regional market.

### **\* Primary retail:**

- art or antique shop, including art work, art supplies, and framing materials
- bakery
- pet shop
- book, stationary, or card store
- clothing shop
- coffee shop
- delicatessen
- department, furniture, home furnishings, or household appliance store
- drugstore
- dry goods store
- florist or gift shop
- grocery, fruit or vegetable store
- hardware, paint or appliance store
- hobby or handcraft store
- indoor theaters
- interior decorating store
- jewelry store
- leather goods/luggage
- meat or fish market
- newsstand
- nursery, flower, or plant store
- optical store
- restaurant
- secondhand or consignment shop
- shoe store
- specialty food store
- sporting goods store
- variety store
- DVD/video or record store
- electronics store

### **\*\* Secondary retail:**

- barbershop or beauty salon
- blueprinting, photo-statting or photo copy service
- clothes cleaning or laundry establishment
- dance studio
- employment agencies
- film processing or film exchange
- health club
- insurance sales
- locksmith
- music, such as conservatory or instruction
- pawnshop
- photo studio
- printing lithographing, or publishing
- private postal service
- shoe or small appliance repair shop
- tailor or dressmaker
- trade or commercial school
- photo studio
- sign painting shop

### 3. Historic structures

- Historic structures and facades are a critical element to the identity of Medford Square.
- Structures and facades identified by the Historical Commission shall be subject to the provisions set forth in the Medford Zoning Ordinance, Chapter 48, Historical Preservation.
- Historic structures and facades may be redeveloped under the Zoning Overlay and shall not be subject to the dimensional standards for their particular site.

### 4. Guidelines for Building Style and Appearance

The following provide a basic level of guidance to ensure that new development enhances the public realm and may be further developed and incorporated into developer negotiations the City's design review process.

#### Materials:

- Facade design should be complementary to a building's original materials as well as to those of adjacent buildings.
- Brick and stone convey permanence and are encouraged above other types of materials.

#### Fenestration:

- For commercial facades, a minimum of 60 percent of a storefront between 3 feet and 8 feet above grade shall be transparent glass.
- Windows should be used to display products and services, and maximize visibility into storefronts.
- Window transparency should be retained whenever possible.

#### Articulation to building walls:

- The number of exterior colors should be limited to provide a clear design intent.
- In addition to visual breaks in the façade required by zoning, any blank wall, if visible from a public way, should be softened by incorporating elements such as signage, murals, art, lighting, pilasters, and the like.

### 5. Parking Appearance Guidelines

In addition to lowering the residential parking requirement, attention to qualitative aspects of parking is necessary to ensure that surface lots and garages do not detract from the coherence and character of the area. Like the Building Appearance Guidelines, these guidelines should be incorporated into any development process in Medford Square.

#### Surface Lots

A minimum of 20% tree coverage shall be equally distributed over the surface of the lot. No more than 50% of the trees located along the perimeter of the parking area may count toward shading requirements. Use of pervious surfaces/pavers is encouraged to reduce stormwater runoff and improve drainage. Placement of surface lots at the rear or within the courtyard of buildings is preferred. A minimum standard of a 5 ft tall visual buffer, such as a wall, fence, or vegetative screen, is required for all surface lots that front the street or a public open space.

#### Parking Structures

Retail is encouraged on the first floor of parking garages to foster an active street presence and a visually attractive street edge. Parking garages should complement their surroundings through use of similar building materials and landscaping along the building edge and at entrances.

APPENDIX C  
NON-DISCRIMINATION AND DIVERSITY POLICY

APPENDIX D  
RESPONDENT REGISTRATION AND CONTACT FORM