

CITY OF PORTLAND, MAINE

PLANNING BOARD

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June 16, 2016

Kevin Bunker/Matthew Teare
Sea Coast at Baxter Woods Associates, LLC
100 Commercial Street, Suite 414
Portland, ME 04101

Frederick Licht, PE, LSE
Licht Environmental Design, LLC
35 Fran Circle
Gray, ME 04039

Project Name: **Master Development Plan for Senior Housing (lots 3 and 4)**
Project ID: #2016-033
Address: 605 Stevens Avenue CBL: 136 E006001
Applicant: Sea Coast at Baxter Woods Associates, LLC
Planner: Jean Fraser

Dear Sirs:

On June 14, 2016, the Planning Board considered the final Master Development Plan application for the proposed 249 dwelling units of senior housing on two lots (Lots 3 and 4, approximately 13.5 acres) at 605 Stevens Avenue, Portland. The Planning Board reviewed the proposals for conformance with the master development plan regulations of the City's Land Use Code and voted to approve the application with the following motion and conditions as presented below.

A. MASTER DEVELOPMENT PLAN REVIEW

On the basis of the application, plans, reports and other information submitted by the applicant; findings and recommendations contained in the Planning Board Report for the public hearing on June 14, 2016 for application 2016-033 (605 Stevens Avenue) relevant to the master development plan regulations; and the testimony presented at the Planning Board hearing, the Planning Board voted (4-0, Boepple and Morrissette absent; Eaton recused) that it finds that the plan is in conformance with the master development plan standards of the land use code, subject to the following conditions of approval:

- i. That the applicant shall conduct traffic monitoring studies (methodology to be agreed with the Planning Authority prior to undertaking the first study) prior to the submission of site plan applications for each phase after the Motherhouse and the first and second new buildings are completed, to confirm to the Planning Authority that the trip generation levels are consistent with the levels predicted in the traffic studies (based on ITE) and remain below the Traffic Movement Permit threshold of 100 peak hour vehicle trips; and
- ii. That the applicant shall conduct parking monitoring studies (methodology to be agreed with the Planning Authority prior to undertaking the first study) prior to the submission of site plan applications for each phase after the Motherhouse, to confirm to the Planning Authority that the parking supply and circulation conditions at both the project site and at McAuley School are safe and acceptable. Associated with this is the requirement that the applicant confirm the parking generation assumptions for each phase are valid and the project does not impact the public street system and neighborhood; and

- iii. That the proposed parking may be reduced from the zoning requirement of 2 parking spaces per unit of new development (excludes the Motherhouse) if the parking monitoring studies show that the demand is less than 2 spaces per unit. No parking between the new buildings and Baxter Woods shall be constructed until after the fourth building is occupied. The phasing plan shall be revised to show all parking for phases II to V to be located to the north of the buildings southern most wall; and
- iv. That the applicant shall implement the following improvements in the ROW:
 - a. Implementation of a 50 feet No Parking Zone on Stevens Avenue at the Motherhouse egress driveway to enhance safety by improving sight distance. Final details of the Zone shall be reviewed and approved by the City prior to implementation;
 - b. Installation of a crosswalk on the south side of Stevens Avenue at Walton Street, to include all works associated with a fully installed ADA compliant crossing and shall include, but not limited to, traffic signal equipment, sidewalk ramps, pavement markings, and signage. This work shall be installed at the time of occupancy of the first new building (anticipated to be between the Motherhouse and Baxter Woods).
- v. That the applicant shall include the location (which may need to be on the applicant's property) and implementation proposals for a bus shelter along the Stevens Avenue frontage as part of the site plan application for the first building (between the Motherhouse and Baxter Woods), and all site plan applications shall include details and clarification of proposed measures that will be implemented to reduce vehicle trips, such as car share vehicles; van service for local trips; bicycle facilities etc; and
- vi. That the applicant shall include a pedestrian connection to Holly Street as part of the site plan application for the third new building, and continue to coordinate with the City on the location of the crosswalk on Stevens Avenue (to which a contribution has already been required as part of the Motherhouse rehabilitation site plan approval); and
- vii. That the applicant shall contribute to the preservation of Baxter Woods by:
 - a. Implementation of the submitted and approved "*Letter of Intent*" that confirms that the applicant will work with the city to assist in the preservation of Baxter Woods. The City will oversee this work which shall include the assessment of the current condition of Baxter Woods, annual monitoring, and specific work identified as a priority by the monitoring;
 - b. Making a contribution of \$5000 per year (starting at the date of the issuance of the first building permit and ending 2 years after the final phase is occupied) towards the items identified in the *LOI*, amount contributed in any given year may be more or less than \$5000 based on actual costs identified to monitor and improve Baxter Woods in accordance with the *LOI* that year, except in no event will the contribution period exceed either 10 years or amount to more than \$50,000 in total contributions;
 - c. Pursuing the creation of a *conservation easement*, or equally binding legal mechanism, for the 33 ft of applicant's land between the existing fence and the property line along Baxter Woods.
- viii. That the site plan applications for the new buildings nearest to Baxter Woods shall include an analysis and supporting information as to how all light sources (buildings, vehicles and site lighting) are proposed to be minimized to avoid impacts on the wildlife attracted to and in Baxter Woods; and

- ix. That the *Architectural Characteristics Summary* (Exhibit B.1), as amended by the Urban Designer's Design Review Memo dated June 9, 2016, shall be the applicable design guidelines for future development proposals on this site, with the documents in Exhibit B - architectural plans, elevations, and renderings – to be considered guiding documents illustrating the design framework for the project. The *Architectural Characteristics Summary* shall also include an additional guideline 8. as follows: Window types will be consistent with vertical proportion throughout all buildings; and
- x. The applicant shall provide, as part of the site plan application for the first building, a summary of existing and/or proposed easements, covenants, public or private rights-of-way, public access agreements, parking management arrangements or other documents that augment the subdivision plat and condo documents and support the operation of the site as presented in the MDP application; and
- xi. That the comments of the Urban Designer dated 6.9.2016 be taken into consideration when addressing final site plan and building design, location and size for each phase so as to ensure that any changes consider methods to minimize the impact of the buildings on Baxter Woods; and
- xii. For each phase the applicant shall submit an analysis (for review and approval) that documents how the specific proposals relate to the overall MDP stormwater and utility framework and calculations (eg re impervious surfaces, stormwater flows etc) and include evidence of water capacity from the Portland Water District and of sewer capacity from the Department of Public Works.

The approval is based on the submitted plans/documents and the findings related to master development plan review standards as contained in Planning Report for application #2016-033 which is attached.

STANDARD CONDITIONS OF APPROVAL & REQUIREMENTS

Please note the following standard conditions of approval and requirements for all approved master development plans:

1. **Separate Level III Subdivision/Site Plan Approvals Required** This approval establishes the general parameters to be adhered to for the development, including the supporting documentation for floor area ratio and/or residential density, general types of uses, building coverage, generalized open space plans and infrastructure systems. This master development plan approval shall not be construed as final authorization of the development. Approval shall confer pending proceeding status upon the development with the effect of maintaining the applicability of regulations in effect at the time of approval for as long as the master development plan approval remains valid, including permissible extensions if granted. Separate Level III subdivision and site plan approvals are required. Level III subdivision and site plans for each phase shall be in general conformance with the master development plan.
2. **Master Development Plan Amendments** A minor amendment to a master development Plan shall be defined as a change which is generally consistent with the approved master development plan layout of buildings, circulation infrastructure, and open spaces, and:
 - i. Does not propose any new general type of use beyond those approved initially;
 - ii. Does not increase the building ground coverage, floor area ratio or residential density of the Master Development Plan;
 - iii. Does not decrease any specified area regulations or enumerated parking ratios; and
 - iv. Does not substantially change access, circulation, or infrastructure on or adjacent to the site.

The Planning Authority shall be authorized to approve such minor amendments to a master development plan upon written application and explanation of the change(s) by the owner (or its agent) of the property. No further public hearings shall be required.

3. **Master Development Plan Expiration** An approved master development plan shall expire six (6) years from the date of approval unless, prior to the expiration of the master development plan, a written request for an extension is submitted to the Planning Authority. Only two (2) such extensions may be granted by the Planning Authority, and each such extension shall be limited to two (2) years from the date of expiration of the master development plan. The Planning Authority may grant an extension provided there have not been substantial changes to the underlying zoning or site plan standards since the date of the master development plan approval that would have a substantial impact on the approval. The Planning Authority may condition the extension on an amendment of the master development plan to comply with such applicable ordinance or site plan standard changes per *Section 14-532(d)* of the city's land use ordinance. Approved major or minor amendments to a master development plan do not alter the expiration date for the master development plan.

If there are any questions, please contact Jean Fraser at 874-8728 or at jf@portlandmaine.gov .

Sincerely,



Elizabeth Boepple, Chair
Portland Planning Board

Attachments:

1. *Letter of Intent*
2. *Architectural Characteristics Summary* (Exhibit B.1)
3. Urban Designer comments dated 6.9.2016

Electronic Distribution:

Jeff Levine, AICP, Director of Planning and Urban Development
Stuart G. O'Brien, City Planning Director
Barbara Barhydt, Development Review Works Manager
Jean Fraser, Planner
Philip DiPierro, Development Review Coordinator, Planning
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Jonathan Rioux, Inspections Division Deputy Director
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Michelle Sweeney, Associate Engineer
Greg Vining, Associate Engineer, Public Works
John Low, Associate Engineer, Public Works
Rhonda Zazzara, Field Inspection Coordinator, Public Works
Mike Farmer, Project Engineer, Public Works
Jane Ward, Administration, Public Works
Jeff Tarling, City Arborist, Public Works
Jeremiah Bartlett, Public Works
Keith Gautreau, Fire Department
Jennifer Thompson, Corporation Counsel
Thomas Errico, P.E., TY Lin Associates
David Senus, P.E., Woodard and Curran
Rick Blackburn, Assessor's Department
Approval Letter File

June 9, 2016

Jean Fraser
Senior Planner
Planning and Urban Development Department
Planning Division
389 Congress Street, 4th Floor
Portland, ME 04104

605 Stevens Avenue -- Master Development Plan Submission
Letter of Intent regarding Monitoring and Preservation of Baxter Woods

The applicant, neighbors, City of Portland and a variety of important stakeholder groups identified the interrelationship between 605 Stevens Avenue and Baxter Woods as a crucial issue for the outset of the planning process. Over the past 24 months, we have heard many comments, concerns and ideas regarding Baxter Woods. Based on this input and meetings with city staff, please accept this letter of intent as one element in our effort to help protect and preserve Baxter Woods.

The fundamental first step in this effort is to recognize the current fence line as the effective border between Baxter Woods and the 605 Stevens campus. While the applicant owns 33 feet of a historic 66-foot-wide road easement located on the Baxter Woods side of the current fence, we will pursue a conservation easement or other legally appropriate mechanism to permanently preserve this area. With the acknowledgement of this border, the next elements of the proposal involve the collection of data and implementing solutions as follows:

I. Assessing and Monitoring the Use and Condition of Baxter Woods

The next important step in protecting Baxter Woods is ensuring accurate and comprehensive data on its current status. With its long history, there is a significant amount of information on Baxter Woods. The applicant proposes assisting the City of Portland in assembling and augmenting this data to create a baseline of information and then establish a periodic monitoring program to update, organize and maintain this information.

Specifically, the applicant will assist the city with the following three initiatives:

- 1) Baseline Data - Engage a professional conservationist /forester, as recommended and approved by the Planning Authority, to complete the following under the supervision of specified City representatives:
 - a) Research and assemble all appropriate existing data and information on Baxter Woods;
 - b) Plan and conduct a monitoring study which will result in a comprehensive set of *baseline data* on the condition, use and impacts on Baxter Woods;

c) Create an annual monitoring plan for Baxter Woods to update the baseline data. The first phase of this data collection process would begin with the financing and construction start of the first phase of the project.

2) Annual Monitoring

a) Continue the data collection process outlined above by assisting the City to coordinate the annual monitoring and update of the baseline data focusing on the condition, use and impacts on Baxter Woods from both the 605 Stevens community and other users and activities.

b) The monitoring, including the annual monitoring reports, would occur on an annual basis beginning approximately one year after the completion and publication of the baseline study. The idea would be for the applicant to sponsor the annual effort until 2 years after the occupation of the final phase of the project with some reasonable expectations and limitations. Following this initial period, the applicant would continue to work with the City and local stakeholders to help ensure a partnership develops to continue this work indefinitely.

3) Annual Recommendations to be included in the monitoring report

a) The monitoring would include a series of recommendations designed to preserve the Baxter Woods experience as originally intended by helping to address any issues identified during the monitoring process.

b) These recommendations would be updated and published annually.

c) The recommendations would include a plan of action with specific tasks, deadlines and funding resources designed to ensure implementation.

II. Potential Improvements to Preserve the Baxter Woods Experience

The applicant would fund work in and around its border with Baxter Woods that respect the original deed restrictions regarding the preservation of Baxter Woods. Any and all improvements would be approved and directed by the Planning authority and the City Arborist. These improvements could derive from the Master Planning process, site plan reviews of individual phases or the annual monitoring process.

While the applicant is happy to assist in broader activities regarding the preservation of Baxter Woods, the specific work items under consideration should be directly related to the applicant's border area with Baxter Woods and the impact of the new development upon Baxter Woods. Wherever possible, the improvements should be tailored to address the impact of each new phase of development and any remedial activities should occur during that phase.

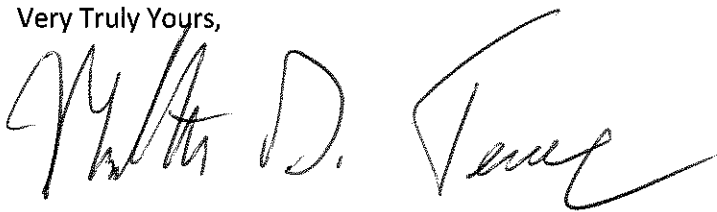
The following are some of the potential activities under consideration for inclusion in a future work plan:

- 1) Re-establishment of the pathway through the allee of mature trees that once connected Baxter Woods to the 605 Stevens Avenue property;

- 2) Relocation and repurposing of some of the secondary trails that run directly against the chain-link fence in the 33' boundary area. These trails should be designed as primitive footpaths – providing for modest, lower level use.
- 3) Removal of invasive species within the 33' boundary area;
- 4) Replacement of the existing chain-link fencing with a more attractive, appropriate option;
- 5) Additional plantings on the 605 Stevens Avenue property to enhance the buffer area between the fence and the new development. Two areas of particular focus should include:
 - a) Red Pine Grove at the Entrance to Baxter Woods along Stevens Avenue. The trees are tall with no limbs for buffering on their lower trunks. There are several areas in and around this viewpoint where plantings could add significant buffering.
 - b) The Meadow in Baxter Woods. While the existing evergreens here are effective, there is a zone approx. 100 ft. long to the north of the meadow where additional plantings would be beneficial.
- 6) Additional supplemental plantings on both sides of the fence with the purpose of providing wildlife habitat and food – particularly for birds. Plantings as viburnum, elderberry and blueberry might add to the buffering and act to enhance the wildlife habitat of the woods.

Over more than 30 years of creating and operating senior communities, the applicant and the residents of our communities have strongly supported a long list of civic minded organizations and initiatives. During that time, initiatives related to land conservation, energy efficiency and energy conservation have received the greatest level of interest and support. The opportunity to enjoy, protect and preserve Baxter Woods and Evergreen Cemetery is a critical element of the proposed community at 605 Stevens Avenue. We look forward to working in partnership with all the various stakeholders to preserve these unique and invaluable resources.

Very Truly Yours,

A handwritten signature in black ink, appearing to read "Matthew D. Teare". The signature is fluid and cursive, with a long horizontal stroke at the end.

Matthew D. Teare
Director of Development
Sea Coast Management Company



605 STEVENS AVE
MDP APPLICATION
FINAL SUBMISSION 05-24-16

EXHIBIT B.1 605 STEVENS AVENUE ARCHITECTURAL CHARACTERISTICS

The following design guidelines are proposed to describe the context of the architectural program for the 605 Stevens Avenue Master Development Plan Architecture. Final details may vary as submitted with individual LIII Site Plans for each building phase but shall incorporate the following design elements into the overall campus masterplan for the site:

1. Final building footprints will generally follow the approved footprints and massing shown on the Site Master Development Plans.
2. All Gable roofs have been eliminated in favor of flat roofs. This has the effect of calming down the architecture and is more reflective of an honest architecture.
3. Elements of the Motherhouse have been reflected in the new buildings such as the granite base of the Mother house will be incorporated into the new designs . A modern version of the mansard on the Motherhouse will be incorporated, but in a vertical, not sloped version , with a zinc faced metal shingle to identify the top floor. Brick elements with brick matching the Mother house are incorporated into the design .
4. The colors of the new buildings are all natural toned, brick, granite and grey clapboard.
5. The entry ways into each building are clearly delineated with welcoming porch elements.
6. Each unit will have its own deck space which also works to help break down the building massing and add interest.
7. Parking is located under each building structure allowing more open green space . The facades of the parking garage are fenestrated with window openings which are similar to a living space yielding a more inviting look to the exterior .

Planning and Urban Development Department Planning Division



Subject: Design Review – 605 Stevens Avenue Master Plan
Written by: Caitlin Cameron, Urban Designer
Date of Review: Thursday, June 9, 2016

The proposed master plan for multi-family residential buildings is only reviewed according to the Master Plan criteria. In future Site Plan design reviews, the projects will be subject to the R-5 and Multi-family design guidelines.

In the Master Plan level review, the design considerations include cohesiveness within the proposed development as well as compatibility with the context. In this case, the immediate context is the Motherhouse and campus property on which future developments will be situated. Though the design and placement of buildings should be sensitive to neighboring residential and park contexts, the multi-family building typology and the relationship to the Motherhouse are the primary considerations in evaluating the proposed design characteristics.

Building Footprints

The applicant was asked to consider whether there are strategies for reducing the impact of the buildings facing Baxter Woods. Suggested strategies included reducing the building footprints, varying building heights, turning buildings 90 degrees so that the shorter end faces the park. The applicant responded with a memorandum “Urban Design – Massing Relationship to Baxter Woods” (Exhibit B) describing the building footprints and the rationale for their placement. Staff has no further comment at this time and defers to the Planning Board on the evaluation of the impact of the master plan development on Baxter Woods. In each future Site Plan application, the applicant is expected to re-evaluate the scale, placement, orientation, and footprint of the buildings in consideration of impact on Baxter Woods and will mitigate that impact whenever feasible.

Architectural Design

The applicant has included architectural plans, elevations, and renderings (Exhibit B), as well as an Architectural Characteristics Summary (Exhibit B.1) as guiding documents for future development proposals with the expectation of creating cohesive design throughout the campus as well as defining how new development shall be compatible with the existing context. Staff considers all these documents together and recommends the Planning Board approve the Master Plan Development application with the expectation that these are guiding documents only, but should be considered applicable design guidelines for any future Site Plan application on this site.

The Architectural Characteristics Summary (Exhibit B.1) describes which characteristics found in the drawing set will apply to all future architectural proposals. The staff reviewers are generally in favor of the revisions made to the architectural character proposed for the site and support the guidelines proposed – brief staff comment on each guideline is provided below:

1. Building Footprints – Future development shall generally follow the MDP approved footprints. The proposed footprints – an L-type and a bar-type – successfully mitigate the scale of the buildings through the use of varied forms and change of building plane. The buildings are also placed interior to the lot and are therefore less visible from public rights-of-way and neighboring properties, buffered by space and trees.
2. Roof Lines – Flat roof forms are prescribed; the change to flat roofs is consistent with the building typology proposed and moves the architecture in a direction that is responsive to the Motherhouse context which has a hipped roof with gabled dormers.
3. Motherhouse Context – Characteristics taken from the Motherhouse be applied to new development include: granite base; reference to the Motherhouse roofline through material changes and floor delineation; brick elements using brick of similar color and pattern as the Motherhouse.
4. Material Palette – The material selection and color palette should be guided by the material indications on the elevations and renderings and as described in the narrative as having natural tone, brick, granite, and grey clapboard. The more subtle grey material palette with brick vertical elements is supported – the use of as few materials as possible is recommended.
5. Building Entry – Clearly delineated entries with porch elements shall be a common feature.
6. Massing - The scale of each building is proposed to be mitigated through the use of varied forms and change of building plane, deck spaces, and façade composition (see renderings for material placement and massing).
7. Parking – Structured parking is proposed to be designed to have similar character to the residential building above.

Conditions of Approval

Staff recommends the following design conditions of approval:

- That the documents included in Exhibit B – architectural plans, elevations, and renderings, as well as an Architectural Characteristics Summary (Exhibit B.1) – are considered together to be adopted guiding documents that will be applicable design guidelines for future development proposals on this site.
- That an additional guideline 8. be added to *Exhibit B.1 Architectural Characteristics Summary* as follows: 8. Window types will be consistent with vertical proportion throughout all buildings.

Additional Design Considerations (Site Plan)

The following guidelines will be taken into consideration for the architecture and design of future Site Plan development applications:

- Flat or hipped roof line referential of the Motherhouse would be acceptable provided the proportion and slope of the roof is comparable and compatible as well as consistent throughout all the buildings.
- In the new buildings, maintain the proportional relationship of “roof” to façade found in the Motherhouse. The four-story building design in the MDP guiding documents does not reflect these proportions.
- Use as few material types as possible.
- The building nearest the Motherhouse should be designed with the most sensitivity to the context of the historic structure.



PLANNING BOARD REPORT PORTLAND, MAINE

605 Stevens Avenue Senior Housing (Lots 3 and 4)
Master Development Plan

Level III Master Development Plan
Sea Coast at Baxter Woods Associates, LLC, Applicant

Submitted to: Portland Planning Board	Prepared by: Jean Fraser, Planner
Date: June 10, 2016	CBL: 136 E006001
Public Hearing Date: June 14, 2016	Project #: 2016-033

I. INTRODUCTION

Sea Coast at Baxter Woods Associates, LLC has requested approval of the Level III Master Development Plan (MDP) application for 249 dwelling units of senior housing on two lots (Lots 3 and 4, approximately 13.5 acres) at the corner of Walton Avenue and Stevens Avenue. The project has been considered by the Planning Board at two workshops, and the final proposals have been revised to address Board, staff and neighbor comments.

The site is located just north of Baxter Woods and abuts the Catherine McAuley High School and the Deering Pavilion. The MDP site is part of an approximately 20 acre site that was previously owned by the Sisters of Mercy and included the Motherhouse (now mostly vacant); the Catherine McAuley High School and associated playing fields; and the St Catherine apartments on Walton Street. The MDP does not include the ongoing uses of the School (except the playing field area) and the apartments, but does include the Motherhouse.



The MDP proposal for 249 units comprises the rehabilitation of the former convent (referred to as the Motherhouse) into 88 apartments, and the phased development 161 dwellings (condos) in five new 4-5 story new buildings nearby. The project includes 399 parking spaces and approximately 6 acres of open space. These proposals are consistent with previous reviews and approvals, including the rezoning from R5 to R5A for part of the site and Site Plan approval for the rehabilitation of the Motherhouse. A summary of the previous approvals is included in [Attachment 7](#) for reference.

Applicant: Sea Coast at Baxter Woods Associates, LLC

Consultants: Rick Licht of Licht Environmental Design LLC and Pat Carroll of Carroll Associates Landscape Architects

II. REQUIRED REVIEWS

<i>Review</i>	<i>Applicable Standards</i>
Master Development Plan	<i>Section 14-524(a)3c(iii)</i>
Site Location of Development Act	<i>Note: First new building will trigger this delegated review (see para X)</i>

III. PROJECT DATA for Lots 3 and 4 only (Lot #3 is Motherhouse site; Lot #4 is the area to south and east of the Motherhouse - see data sheet in updated Attachment B)

	<i>Existing</i>	<i>Proposed</i>
Zoning	R5 and R5a	Previously amended
Uses	Vacant Motherhouse; playing fields; open land	Senior housing and associated parking and open space; reconfigured playing field
Parcel Size	13.5 acres (585,176 sf)	13.5 acres (585,176 sf)
Dwelling Units	none	Motherhouse: 88 units (68 1-BR; 20 studios) Lot #4: 161 units, all 2BR
Building footprint	24,065 sf (Motherhouse)	Motherhouse: 24,065 sf Lot #4: 74,188sf
Building floor area	102,241 sf (Motherhouse)	Motherhouse; 102,241 sf Lot #4: 349,626 sf
Impervious Surface		261,188 sf
Parking spaces	Approx. 34	Motherhouse: 43 new (not all for Motherhouse occupants) Lot #4: 322 (183 covered; 139 surface)

IV. EXISTING CONDITIONS and BACKGROUND

The MDP site has 460 feet of frontage along Stevens Avenue between Catherine McAuley High School and Baxter Woods. To the south and south-east the site abuts Baxter Woods and the Deering Pavilion. The north and north-east parts of the site abut an area of single and multifamily homes and the Forest Avenue RP zone is nearby. The site is adjacent to two valued open areas, Evergreen Cemetery and Baxter Woods and located on an arterial street with good public transit. The wider neighborhood is a cohesive and family-focused community with a mix of institutions (including 2 existing senior housing developments, several schools and UNE) and some retail (see Plan P4 Neighborhood Context Plan).

Evergreen Cemetery is located opposite the site on Stevens Avenue and is an historic landscape. None of the buildings on or near the site are formally designated as landmarks, but the Motherhouse is currently being reviewed at State/Federal level (at the applicant’s request) for inclusion on the National Register.

The existing Catherine McAuley High School is currently accessed by two one-way drives from Walton Street direct into the existing parking lot (see Plan P2). There are two small drives with gates (currently closed) on Stevens Avenue that go directly to the front of the Motherhouse. Walton Street is a residential street connecting Stevens Avenue and Forest Avenue, with signals at both intersections. Under the Federal Street Classification system Stevens Avenue is classified as a “Minor Arterial” (other “Minor Arterials” in Portland are Warren Avenue and Washington Avenue) and Forest Avenue is classified a “Principal Arterial” (other “Principal Arterials” in Portland are Brighton Avenue and outer Congress Street).

V. MASTER DEVELOPMENT PLAN PROPOSALS

The applicant has described the proposal in detail in the cover letter and narrative (Attachment A) which clarifies the revisions that have been made to the proposals over the course of the review between March and May. The final submissions include additional elevations, renderings and design information as well as a more detailed response to the issues that have been raised regarding the integration with/impacts on Baxter Woods and the location of pedestrian and transit facilities.

The key features of the final MDP proposals include (see Plan Set P3 to P14)

- A five phase development (anticipated to be one new building per phase) to create 161 new units of senior housing (plus a first phase of 88 units located within the existing Motherhouse building to be converted and refurbished);
- Five new buildings, one at 4 stories (between the Motherhouse and Baxter Woods on the Stevens Avenue frontage) and four 5-story buildings behind the Motherhouse;
- A total of 395 new parking spaces, of which about half are underneath the new buildings;
- Several acres of open space, with connections to Baxter Woods and extensive new tree planting;
- A network of pedestrian walkways that link to Walton Street, Stevens and Forest Avenues and other pedestrian and transit facilities;
- Improved landscape along Baxter Woods, including replacement of the existing fencing and additional planting buffers (details in Attachment A and Plans P12 and P15).

The final Conceptual Master Plan (Plan P5) illustrates the key features for the overall build out:



VI. PUBLIC COMMENT and PB WORKSHOP DISCUSSIONS

A total of 129 notices were sent to property owners within 500 feet of the site and interested parties, and a legal ad was published in the *Portland Press Herald* on June 6 and 7, 2016. The required Neighborhood Meeting was held on March 14, 2016 (documented in Attachment H) which was attended by about 15 neighbors. A second (voluntary) Neighborhood Meeting was held at the site on May 19th, 2016 which was attended by about 10 members of the public and included a walk around the site where the applicant had placed markers showing the corners of the proposed new buildings. As of the time of completing this Memorandum, the Planning Division has received ten written public comments (PC A and B; PC 1-10), with eight of these in support of the project with some suggestions. The other four comments, and many of the comments at the Workshop, raised concerns about the impact of the project on Baxter Woods.

The first Workshop on March 22, 2016 included a discussion about the potential traffic generation and noted that a Traffic Movement Permit (State but delegated to the City) was not required. Tom Errico, the City's Traffic consultant reviewer, clarified that the proposals would still be subject to a Traffic Study and further review of potential impacts, and that Transportation Demand Management measures would be expected as part of the proposals. Diane Moribito, the applicants Traffic consultant, outlined that the traffic analyses indicated that the proposals and the additional traffic would have very limited impacts, in part because much of the traffic would be off-peak.

The second Workshop concentrated on building and landscape design issues, including the relationship with Baxter Woods. The City's Urban Designer, Caitlin Cameron, and the City's Arborist Jeff Tarling commented on the proposals and the Board discussed the design (particularly the roofline and need to respect the Motherhouse context). The Board generally welcomed the applicant's willingness to contribute to the preservation of Baxter Woods, though the proximity of the parking to the Woods was a concern. The applicant clarified that the proposed parking was intended to ensure that all the parking demand could be accommodated on site, but that this could be modified in later stages if the parking demand in the early phases turned out to be less.

VII. RIGHT, TITLE, & INTEREST and FINANCIAL CAPACITY

The applicant has submitted a P&S Agreement and letter from the Bath Savings Institution (2.16.16) (Atts C and E).

VIII. ZONING ANALYSIS

The Master Development Plan proposals comply with the R5 and R5A requirements; the applicant has included this information on Plans P6 and P7 and the R5A dimensional standards are included in Attachment 9. It should be noted that the density and open space calculations are based on the R5A requirements but (based on the principle established by the City Council when the R5A area was reduced) the R5 parts of these lots is not built upon but the area is used to calculate the density and open space for a unified development plan.

IX. STAFF REVIEW

A. MASTER DEVELOPMENT PLAN OBJECTIVES

The Site Plan ordinance outlines that an approved Master Development Plan (MDP) establishes the general parameters to be adhered to for the development, including the supporting documentation for floor area ratio and/or residential density, general types of uses, building coverage, generalized open space plans and infrastructure systems. It is not a final authorization for development, but it does confer pending proceeding status upon the development with the effect of maintaining the applicability of regulations in effect at the time of the approval for as long as the MDP approval remains valid (6 years initially), including permissible extensions up to 10 years. All Level III site plans for each phase shall be in general conformance with the approved MDP. The required review is under *Section 14-524(a)3c(iii) Master Development Plan Review including Standards for Review*.

B. MASTER DEVELOPMENT PLAN SUBMISSION REQUIREMENTS (*Section 14-527(e)*)

Section 14-527 of the city's site plan ordinance outlines Master Development Plan submittal requirements. The Planning Authority or Planning Board may give direction regarding the form of the information required for the MDP review. In general the final submission requirements have been met and the applicant has submitted additional information as requested.

C. MASTER DEVELOPMENT PLAN STANDARDS (*Section 14-524(a)3.c(iii)*)

Section 14-524 of the City's land use code establishes standards under which Master Development Plan applications must be reviewed. Per this section, Master Development Plans shall adhere to the following general requirements and features:

a. A designated tract of land consisting of a parcel or parcels of contiguous land or land on both sides of a public street, totaling one (1) acre or more;

Staff comments: The 13.5 acre site meets this requirement.

b. Developed in a comprehensive, design-integrated manner, according to an overall master development plan;

Staff comments: The applicant has submitted a Master Development Plan for Lots #3 and #4 where the proposed senior housing development will be located, and shows how the proposed development integrates with the surrounding area.

c. Consistent with the objectives of this ordinance; and d. Consistent with the City's Comprehensive Plan and consistent with City Council approved master plans and facility plans for off-premise infrastructure, including but not limited to, trails, pedestrian and bicycle network, view corridors, environmental management, sewer and stormwater, streets, or other facilities (see Section 15 of the Technical Manual);

Staff comments: There are no formal City Council approved plans in the vicinity except for the Evergreen Cemetery Master Plan. The applicant has sought staff guidance in relation to ensuring consistency with the proposed sidewalk improvements in Stevens Avenue, with surrounding utilities, with METRO's bus service and with the City's preservation plans for Baxter Woods. The final plans reflect the existing and anticipated local infrastructure/facilities.

e. Developed so as to locate buildings and improvements in a manner that provides usable open space, preserves significant natural features, as defined by the site plan ordinance standards, and preserves existing trees to the maximum extent possible;

Staff comments: The trees to be preserved, removed and the new trees proposed to be planted are shown on the following plans: Tree Removal/Landscape Preservation Plan (Plan P11 and Landscape Master Plan (Plan P12)); and Conceptual Site Plan in Plan P5 and above. The tree removal analysis is provided in Plan

P11. The City Arborist has reviewed the plans and noted there is an historic alley linking the site to Baxter Woods which is impacted by building 1; he has indicated that proposed replacement planting to extend and reinforce the alley is acceptable as are the overall landscape and preservation proposals. (Attachment 6).

The Open Space Calculations Plan in Plan P8, clarify the extent of impervious surfaces, wetland and open space. Open space areas, excluding the wetland, total about 6 acres (45% of the MDP area) and the plan indicates the different sizes and functions of the open space areas.

f. *Ordinance standards for designated landmarks or for properties within designated historic districts or designated historic landscapes, if applicable. When proposed adjacent to or within one hundred (100) feet of designated landmarks, historic districts or historic landscapes, the Master Plan shall be developed so as to be generally compatible with the major character-defining elements of the landmark or portion of the district in the immediate vicinity of the proposed development;*

Staff comments: Although the Motherhouse building is considered of historic and architectural significance, the building is not yet designated a local landmark under Portland's Historic Preservation ordinance nor is it located in a local Historic District. It is understood that the applicant is seeking to list the building in the National Register of Historic Places in conjunction with their interest in securing tax credits for its rehabilitation.

The review under the tax credit program will likely require the preservation of some existing site elements. A letter from the Maine Historic Preservation Commission (Attachment 5) confirms general support for the overall project based on the understanding that the "existing landscape and shrine located west of Building 1 (proposed new 4 story building fronting Stevens Avenue) will remain in place". The new buildings nearest to the Motherhouse may also be subject to review by the Maine Historic Preservation Commission and National Park Service, given the fact that the buildings will be located on the original Motherhouse property and have a visual relationship with the Motherhouse.

It should be noted that the site is opposite and within 100 feet of Evergreen Cemetery, an Historic Landscape. Thus the proposals for the frontage along Stevens Avenue would be reviewed at site plan stage by the Historic Preservation Program Manager under the site plan requirement for compatibility. If the Motherhouse is designated as a local landmark, then this site plan requirement would extend to any new buildings within 100 feet of the Motherhouse.

The Motherhouse dominates the site and the anticipated historic reviews are likely to consider the detailed architectural design relationship of any new buildings in the context of the Motherhouse; this is considered to be an important influence on the architectural approach to the new buildings.

The submitted perspective (right; with gables, which have since been removed as shown in Exhibit B) of the proposed first building (building #1 on Plan P5, 4 story and 21 units) illustrates how this new building would be set back to minimize impacts on the Motherhouse building.



EXISTING VIEW - VIEW FROM EVERGREEN CEMETERY



PROPOSED VIEW - VIEW FROM EVERGREEN CEMETERY

A rendering of the Building 1 west elevation (directly facing Stevens Avenue) was added to the final submissions and is extracted at right.



Building 1 from Stevens Avenue

g. *An efficient use of land which properly considers topography and protects significant natural features including, but not limited to, waterways, wetlands, floodplains and wildlife;*

Staff comments: The proposed layout has taken account of site features/constraints (see [Exhibit B-16](#) and [Plans P8 and P11](#)). Public comments have included concerns about the impact of the development on the birds and wildlife in Baxter Woods- for example glare from headlights, site lighting and lights shining through curtain walls in the buildings. Staff suggest the following condition of approval (combined with a reference to the Urban Design comments):

That the site plan applications for the new buildings nearest to Baxter woods shall include an analysis and supporting information as to how all light sources (buildings, vehicles and site lighting) are proposed to be minimized to avoid impacts on the wildlife attracted to and in Baxter Woods; and

h. *An efficient use of land demonstrating full coordination of its own site development and surrounding context including, but not limited to, the land uses and functions contemplated, architecture, open space and pedestrian networks, vehicular access and circulation, and all other infrastructure; and*

i. *Linked and coordinated with surrounding land uses, infrastructure and off-site public facilities, including but not limited to the public school system, where appropriate, in a manner that is safe, efficient, non-injurious to the public, and an improvement or benefit to the public where possible; and*

Staff comments: The applicants plan set ([Plans P3-P14](#)) illustrate the coordination of the proposals in some detail. **Baxter Woods** is a key surrounding land use/public facility is Baxter Woods, which shares an approximately 1000 foot long boundary with the MDP site. The 29.5 acre Baxter Woods was presented to the “People of Portland” in 1946, a gift from then Governor Percival Baxter as a “municipal forest to be kept in its natural state” (see background leaflet with plan in [Attachment 10](#)). The use and maintenance of the Woods are dictated by deed restrictions and the City Arborist has been working with foresters over the years to meet the original intent of the gift, especially in the context of its high level of recreational use by the community.

Through the rezoning and MDP reviews the question of the potential impact of the future senior housing development on Baxter Woods has been raised by neighbors and staff. The City Arborist, Jeff Tarling, has provided the following comments ([Attachment 6, at end](#)) and been involved in all of the meetings with the applicants on this subject:

The proposed 605 Stevens Avenue project is adjacent to 'Mayor Baxter Woods' which is a significant natural, open space park donated to the City of Portland by Governor Percival Baxter in honor of his father, James P Baxter former Mayor of Portland. The woods was also formerly 'Forest Home' and throughout the last century and a half have been a forested refuge. To minimize impact to the park both physically and view wise it will be important for the project team to work closely with the City objectively, so that visitors to the park have the natural experience as they have for over 75 years.

Recommendations include:

- a) *Enhance buffering along the property edge, including the roadway easement*
- b) *Future parking facing the park should be screened with native vegetation and earth berms.*
- c) *Building facades facing the park should be painted or stained using natural earth tones. Night lighting should be engineered to have minimal trespass into the park.*
- d) *Landscape treatment should be designed using native plants and plants that habitat friendly to birds.*
- e) *Park impact baseline & monitoring - baseline assessment of park conditions along with a five year monitoring program would be a recommended.*

The final proposals address these comments and now include a mechanism for ensuring that any potential impacts of the development would be identified and addressed and that the applicant would contribute to further preservation of Baxter Woods in accordance with Baxter's intentions for its future public use and enjoyment, including:

1. An assessment of the Wood's current condition and use as a baseline for future monitoring of its condition, use and associated impacts.
2. Monitoring (linked to phases and going beyond the final phase) of its condition over time, with monitoring data maintained and made available to interested parties; and
3. Development of a list of potential improvement proposals and timing based on 1 and 2 above.

This is documented by a *Letter of Intent LOI* (Attachment I) which clarifies the applicant's willingness to work with the City, and specifies in some detail the objectives and associated process related to these three items. The *LOI* is complemented by the recommended condition number *vii* that specifies the applicant's contribution to the costs of these items, so that as the development is implemented the program of monitoring continues and informs the nature and priority of the preservation projects. The *LOI* has evolved from the "*Memorandum of Understanding*" (*MOU*) presented to the April PB workshop and reflects Board, public and staff comments. An important principle is that the City would supervise these studies/associated projects, and make use of specialist advisors who were already familiar with the Woods.

The *LOI* (Attachment I) also confirms the applicant's intention to treat the 33 feet of their land between the fence the and property boundary as part of Baxter Woods. The most effective legal mechanism to achieve this requires further investigation and this is addressed by a suggested condition of approval.

In addition to the use and condition of the Woods, there are concerns about the height and proximity of the new buildings to and as viewed from the Woods. The applicants have addressed this issue in a number of ways (see narrative Exhibit B-16 Massing and Baxter Woods):

- The buildings are located approximately 90 to 140 feet from the property boundary (35 feet required by zoning ordinance- see Att 9);
- The location and massing of the buildings and how they have responded to constraints is explained in the Exhibit B-16;
- Introduced berms and landforms (see Sections in Plan P15) between the buildings and the Woods;
- Revised the phasing of the parking construction to reduce the spaces built near Baxter Woods (although staff are recommending that none be built there until the last phase, if needed (see below));
- The design of the buildings has been revised to incorporate flat roofs and more neutral colors as shown in the submitted (as part of the final submission) rendering at right, as located in the vicinity of the "Meadows" part of Baxter Woods (see discussion below regarding overall design issues).
- Submitted (March) a perspective from the "Meadows" area of



Baxter Woods (Exhibit B Arch Info) that gives an impression of how the new buildings would appear from that location. The perspectives are of the former design, with gables and extracted below:

Perspectives (see Exhibit B)



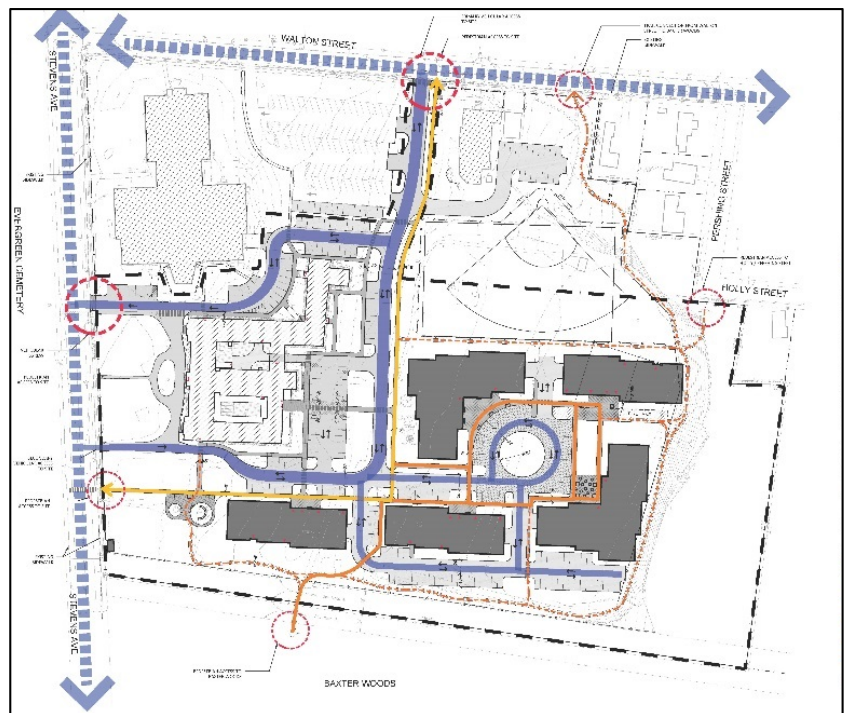
EXISTING VIEW - VIEW FROM BAXTER WOODS MEADOW



PROPOSED VIEW - VIEW FROM BAXTER WOODS MEADOW

- j. *Designed with sizing of street and other infrastructure systems to accommodate the overall service demand of the Master Plan;*
- k. *Designed to create a street grid pattern that reflects average city block sizes of the neighborhood for street connectivity;*

Staff comments: The applicant has proposed a full turn access on Walton Street and a one way system in front of the Motherhouse that allows a right in and right out only with the egress being to the north. This was proposed to address concerns about congestion and safety in Stevens Avenue and direct vehicles to the signaled turn locations. The circulation is shown in Plan P9 and to right:



The applicants consulting traffic engineer submitted a Traffic Impact Study and additional information as requested by the City's Traffic Reviewing Engineer (Att. F entitled "Exhibit D- Traffic).)

Tom Errico, the City's Traffic Engineering reviewer, has reviewed the final submissions and provided the following final comments (Attachment 1):

- *The applicant submitted a preliminary trip generation analysis that was based upon data from the Trip Generation Manual, Institute of Transportation of Engineers (ITE). The estimate was based upon Land Use Code 252 – Senior Adult Housing. I requested additional information on the ITE Land Use development type and is the data based upon current developments. Additionally, I requested the applicant provide local data for comparison. The applicant provided information that indicates the most recent publication provided by ITE does include current developments sites. Additionally, the applicant provided actual trip generation data collected at the Highlands in Topsham, which indicates similar trip levels as ITE. Based upon the applicant's analysis the project would be expected to generate 97 trips entering and exiting during the Weekday AM Peak hour and 87 trips entering and exiting during the Weekday PM Peak hour. This level of trip generation does not trigger the need for a Traffic Movement Permit, although it is very close to 100 peak hour vehicle trip threshold.*

The applicant shall conduct monitoring studies for each phase after the Motherhouse and the first and second new buildings are completed to confirm trip generation levels are consistent with ITE. This monitoring will also confirm that trip levels remain below the Traffic Movement Permit threshold of 100 peak hour vehicle trips. Details of the monitoring study scope will be defined in the future.

- *The applicant has recommended that on-street parking be prohibited on Stevens Avenue at the Motherhouse egress driveway to enhance safety by improving sight distance. The applicant is suggesting that 50 feet of a No Parking zone be established. I concur with this recommendation. The applicant shall be responsible for implementation of the No Parking restriction. Final details shall be reviewed and approved by the City.*
- *The applicant should provide details and clarification on proposed measures that will be implemented to reduce vehicle trips, such as car share vehicles; van service for local trips; bicycle facilities, etc. that would be considered to be a component of a Senior Housing development that would have been reflected in the developments surveyed by ITE for use in estimating trip generation.*
- *A traffic impact study has been submitted and in general I find the methods and conclusions to be acceptable with the following comments:*
 - *The Forest Avenue/Walton Street intersection is a High Crash Location and based upon the applicant's analysis no correctable crash patterns were identified. I have field reviewed the subject intersection and concur with the findings. Accordingly, no action by the applicant is required.*
 - *The applicant shall install a crosswalk on the south side of Stevens Avenue at Walton Street thus creating full intersection accessibility. This will include all work associated with a fully installed ADA compliant crossing and shall include, but not limited to, traffic signal equipment, sidewalk ramps, pavement markings, and signage.*

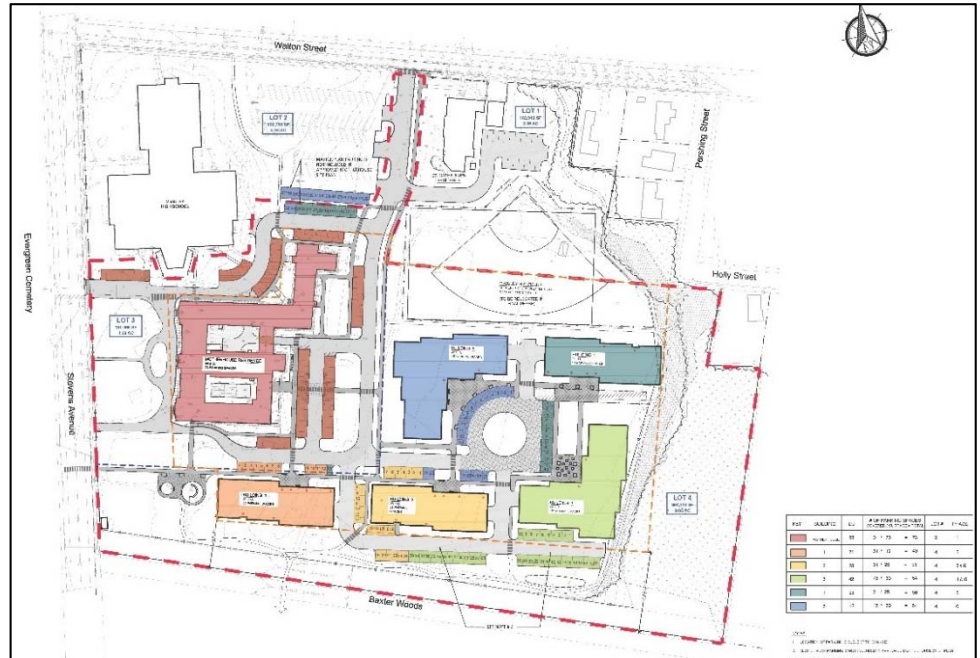
The applicant shall install a crosswalk on the south side of Stevens Avenue at Walton Street. This will include all work associated with a fully installed ADA compliant crossing and shall include, but not limited to, traffic signal equipment, sidewalk ramps, pavement markings, and signage. This work shall be installed at the time of occupancy of the first new building (anticipated to be between the Motherhouse and Baxter Woods).

- **Fire Access**

The Fire Department was concerned that previous layouts needed additional access routes to ensure rescues could be made from all of the buildings (Attachment 1). The Fire Department has verbally confirmed that the final MDP layout appears to be generally acceptable, and noted that at the Site Plan review stage they will require life safety and emergency access accommodations.

- **Parking**

The Parking Diagram (Plan P10) shows a total of 395 parking spaces, of which 212 spaces are on the surface and 183 are beneath the buildings. The allocation of the surface parking is shown as color-coded on the Parking Diagram:



The proposals outlined in the Master Development Plan are based on the approved parking ratio for the Motherhouse (73 dedicated parking spaces for the 88 units) and on the zoning requirement for the rest of the area (2 parking spaces per unit).

The objective is to ensure that the proposed parking levels will not result in overflow parking to streets outside of the site. Staff generally consider that the parking is adequate, but Tom Errico, the Traffic Engineering Reviewer, has recommended a requirement for monitoring as follows (Attachment 1):

- *On-site traffic circulation and parking will need to be evaluated, particularly as it relates to interaction between the proposed project and the McAuley School (both typical school days and during events). The applicant shall conduct monitoring studies prior to the submission of site plan applications for each phase after the Motherhouse to confirm parking supply and circulation conditions at both the project site and at McAuley School are safe and acceptable. Associated with this is the requirement that the applicant confirm the parking generation assumptions for each phase are valid and the project does not impact the public street system and neighborhood. Details of the monitoring scope will be defined in the future*

Some of the parking for the final build out is located between the new buildings and Baxter Woods and this was raised as a concern by many members of the public and some members of the Planning Board. In view of the fact that that monitoring of the parking demand may show that some of this parking is not required to meet future demand, staff requested (Attachment 5) that the applicant reconsider the way the parking was allocated during all but the last phases to avoid constructing the parking between the buildings and Baxter Woods until shown to be needed.

The revised phasing plan (Plan P7) has moved in that direction with less parking constructed in this location than in the earlier phases, but staff suggest that there should not be any parking in this location as described in the suggested condition of approval:

That the proposed parking may be reduced from the zoning requirement of 2 parking spaces per unit of new development (excludes the Motherhouse) if the parking monitoring studies show that the demand is less than 2 spaces per unit. No parking between the new buildings and Baxter Woods shall be constructed until after the fourth building is occupied, and only if the monitoring studies show that additional parking is necessary to meet demand. The phasing plan shall be revised to show all parking for phases II to V to be located to the north of the buildings southmost wall;

- **Street Connectivity, pedestrian and transit connections**

One of the public comments (PC3- C MilNeil) suggested that the project include improvements that would improve access to and from Forest Avenue and ensure public access at the eastern side of the development.

The Traffic Engineer Reviewer has commented (Attachment 1):

Given the likelihood of residents seeking destinations along Forest Avenue south of Walton Street, there may be benefits in providing a more direct pedestrian/bicycle connection between the east boundary of the site and Holly Street. Accordingly, the applicant shall provide a pedestrian connection to Holly Street as part of the site plan application for the third new building.

The applicant has addressed this by indicating a pedestrian link on Plan P8 between the site and the abutting Holly Street. A suggested condition of approval is included to ensure that this is implemented as part of the site plan for the third new building.

The Planning Board approval for the Motherhouse required the applicant to work with the City on the relocation of the existing crosswalk and the provision of a bus shelter for a bus stop along the frontage. Since then the applicant and staff have identified the likely location for the crosswalk, bus stop and associated bus shelter and these are indicated on the MDP final proposals. The suggested conditions on the MDP reiterate the requirements already approved in relation to the Motherhouse.

- **Utilities; Stormwater; other**

The applicant submitted additional information to assess the available capacity and the extent of upgrades and new infrastructure that may be required. The Peer Engineering Reviewer and the Department of Public Works have confirmed that the applicant has demonstrated that the full build out can be satisfactorily accommodated based on the engineering approaches outlined in the submissions (Attachment 2 and 3). At each site plan stage the applicant will need to show how the specific proposals relate to the overall MDP framework and calculations and obtain the associated detailed capacity letters.

l. Designed as to create a cohesive identity through building scale, massing, and articulation; use of quality exterior materials, architectural detailing at pedestrian scale; consistency of design and materials for streetscape and pedestrian amenities; framing of outdoor open space and linkages; a clear conveyance of the function and significance of various buildings, entrances, and features; and to generally comply with design and development standards of the zone in which it is located;

Staff comments:

Since the April PB workshop the applicant has revised the building renderings to show a different architectural approach, added renderings to show the elevation of building 1 from Stevens Avenue and the 5 story building nearest to Baxter Woods as viewed from the south. Massing models have also been submitted, which include an additional “closer” view.

The proposed building design originally incorporated gables as shown in the now-superseded rendering at right.



The roofline was discussed at the at the April PB workshop and the applicant has responded to comments by revising the roofline to be a flat roof and simplifying the design elements, as shown left and in Exhibit B (B6 shows the 4 story version):

The applicant submitted three “massing model” views at the April PB Workshop and staff requested a “closer” view, which was included in the final submissions and below (see [Exhibit B: B-11-B-13](#)):



PROPOSED BIRDSEYE VIEW - VIEW FROM THE SOUTH WEST

The City’s Urban Designer, Caitlin Cameron, has commented ([Attachment 4](#)):

The proposed master plan for multi-family residential buildings is only reviewed according to the Master Plan criteria. In future Site Plan design reviews, the projects will be subject to the R-5 and Multi-family design guidelines.

In the Master Plan level review, the design considerations include cohesiveness within the proposed development as well as compatibility with the context. In this case, the immediate context is the Motherhouse and campus property on which future developments will be situated. Though the design and placement of buildings should be sensitive to neighboring residential and park contexts, the multi-family building typology and the relationship to the Motherhouse are the primary considerations in evaluating the proposed design characteristics.

Building Footprints

The applicant was asked to consider whether there are strategies for reducing the impact of the buildings facing Baxter Woods. Suggested strategies included reducing the building footprints, varying building heights, turning buildings 90 degrees so that the shorter end faces the park. The applicant responded with a memorandum “Urban Design – Massing Relationship to Baxter Woods” ([Exhibit B](#)) describing the building footprints and the rationale for their placement. Staff has no further comment at this time and defers to the Planning Board on the evaluation of the impact of the master plan development on Baxter Woods. In each future Site Plan application, the applicant is expected to re-evaluate the scale, placement, orientation, and footprint of the buildings in consideration of impact on Baxter Woods and will mitigate that impact whenever feasible.

Architectural Design

The applicant has included architectural plans, elevations, and renderings ([Exhibit B](#)), as well as an Architectural Characteristics Summary ([Exhibit B.1](#)) as guiding documents for future development proposals with the expectation of creating cohesive design throughout the campus as well as defining how new development shall be compatible with the existing context. Staff considers all these documents together and recommends the Planning Board approve the Master Plan Development application with the expectation that these are guiding documents only, but should be considered applicable design guidelines for any future Site Plan application on this site.

The Architectural Characteristics Summary (Exhibit B.1) describes which characteristics found in the drawing set will apply to all future architectural proposals. The staff reviewers are generally in favor of the revisions made to the architectural character proposed for the site and support the guidelines proposed – brief staff comment on each guideline is provided below:

1. *Building Footprints* – Future development shall generally follow the MDP approved footprints. The proposed footprints – an L-type and a bar-type – successfully mitigate the scale of the buildings through the use of varied forms and change of building plane. The buildings are also placed interior to the lot and are therefore less visible from public rights-of-way and neighboring properties, buffered by space and trees.
2. *Roof Lines* – Flat roof forms are prescribed; the change to flat roofs is consistent with the building typology proposed and moves the architecture in a direction that is responsive to the Motherhouse context which has a hipped roof with gabled dormers.
3. *Motherhouse Context* – Characteristics taken from the Motherhouse be applied to new development include: granite base; reference to the Motherhouse roofline through material changes and floor delineation; brick elements using brick of similar color and pattern as the Motherhouse.
4. *Material Palette* – The material selection and color palette should be guided by the material indications on the elevations and renderings and as described in the narrative as having natural tone, brick, granite, and grey clapboard. The more subtle grey material palette with brick vertical elements is supported – the use of as few materials as possible is recommended.
5. *Building Entry* – Clearly delineated entries with porch elements shall be a common feature.
6. *Massing* - The scale of each building is proposed to be mitigated through the use of varied forms and change of building plane, deck spaces, and façade composition (see renderings for material placement and massing).
7. *Parking* – Structured parking is proposed to be designed to have similar character to the residential building above.

Conditions of Approval

Staff recommends the following design conditions of approval:

- *That the documents included in Exhibit B – architectural plans, elevations, and renderings, as well as an Architectural Characteristics Summary (Exhibit B.1) – are considered together to be adopted guiding documents that will be applicable design guidelines for future development proposals on this site.*
- *That an additional guideline 8. be added to Exhibit B.1 Architectural Characteristics Summary as follows: 8. Window types will be consistent with vertical proportion throughout all buildings.*

Additional Design Considerations (Site Plan)

The following guidelines will be taken into consideration for the architecture and design of future Site Plan development applications:

- *Flat or hipped roof line referential of the Motherhouse would be acceptable provided the proportion and slope of the roof is comparable and compatible as well as consistent throughout all the buildings.*
- *In the new buildings, maintain the proportional relationship of “roof” to façade found in the Motherhouse. The four-story building design in the MDP guiding documents does not reflect these proportions.*
- *Use as few material types as possible.*
- *The building nearest the Motherhouse should be designed with the most sensitivity to the context of the historic structure.*

The potential conditions of approval include the Urban Designer’s recommended condition (above) and an additional condition that “the comments of the Urban Designer dated 6.9.2016 be taken into account when finalizing the location, size and design of the new buildings generally”.

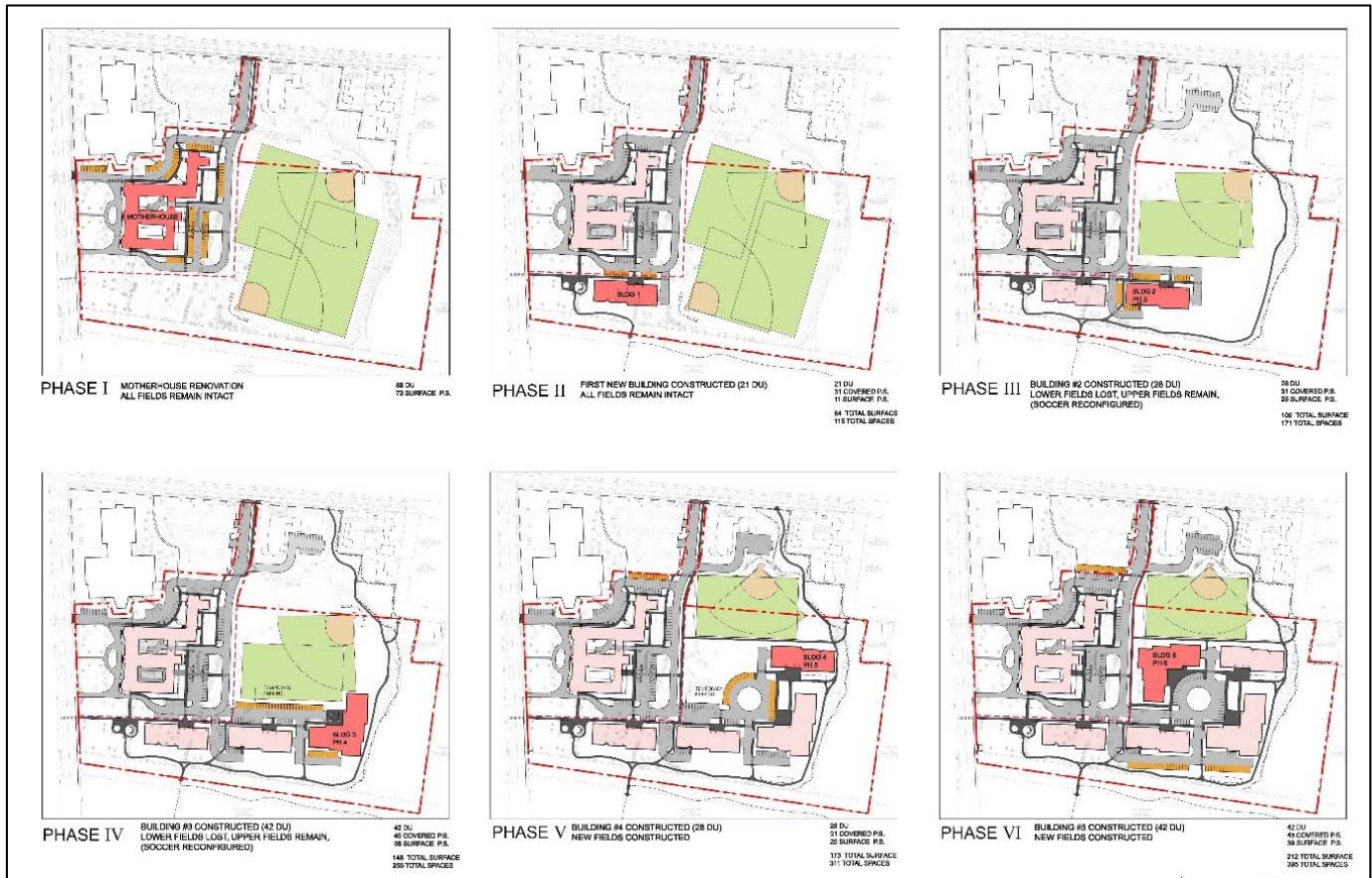
m. Inclusive of provisions for the ownership and maintenance of usable open space as appropriate;

Staff comments: The submission includes the draft Condominium Documents (**Attachment D**) that outline the management arrangements for the MDP area, including the open space. These will be finalized as required by the conditions of approval for the Motherhouse rehabilitation project. A suggested condition of approval requires the submission of further legal documents that clarify the use and operation of the MDP site.

n. For areas proposed as future development phase(s), the proposed interim conditions shall be managed and maintained to ensure stable, safe and attractive site conditions.

Staff comments: The applicant has submitted a revised Phasing Diagram (**Plan P7**) to reflect the intention of constructing one building per phase and to address comments regarding the interim parking and access for each phase and minimizing parking between the buildings and Baxter Woods (see discussions above). Staff consider that in phases III, IV and V the parking and paved areas should be omitted from the sides of the buildings facing Baxter Woods as it appears that interim parking (to serve that phase) could be provided on areas away from Baxter woods that are going to be disturbed and paved in any case. The suggested condition states:

That the proposed parking may be reduced from the zoning requirement of 2 parking spaces per unit of new development (excludes the Motherhouse) if the parking monitoring studies show that the demand is less than 2 spaces per unit. No parking between the new buildings and Baxter Woods shall be constructed until after the fourth building is occupied, and only if the monitoring studies show that additional parking is necessary to meet demand. The phasing plan shall be revised to show all parking for phases II to V to be located to the north of the buildings southmost wall;



X. SITE LOCATION OF DEVELOPMENT ACT

In consultation with the MDEP, staff confirm that this review will apply when the first new building is submitted for site plan review and will take into account both the Lot 3 and Lot 4 in terms of relevant data.

XI. STAFF RECOMMENDATION

Subject to the proposed motions and conditions of approval listed below, Planning Division staff recommends that the Planning Board approve the master development plan for the senior housing development proposed for Lots 3 and 4 at 605 Stevens Avenue.

XII. PROPOSED MOTIONS – MASTER DEVELOPMENT PLAN

On the basis of the application, plans, reports and other information submitted by the applicant; findings and recommendations contained in the Planning Board Report for the public hearing on June 14, 2016 for application 2016-033 (605 Stevens Avenue) relevant to the master development plan regulations; and the testimony presented at the Planning Board hearing, the Planning Board finds that the plan **is/is not** in conformance with the master development plan standards of the land use code, subject to the following conditions of approval:

- i. That the applicant shall conduct traffic monitoring studies (methodology to be agreed with the Planning Authority prior to undertaking the first study) prior to the submission of site plan applications for each phase after the Motherhouse and the first and second new buildings are completed, to confirm to the Planning Authority that the trip generation levels are consistent with the levels predicted in the traffic studies (based on ITE) and remain below the Traffic Movement Permit threshold of 100 peak hour vehicle trips; and
- ii. That the applicant shall conduct parking monitoring studies (methodology to be agreed with the Planning Authority prior to undertaking the first study) prior to the submission of site plan applications for each phase after the Motherhouse, to confirm to the Planning Authority that the parking supply and circulation conditions at both the project site and at McAuley School are safe and acceptable. Associated with this is the requirement that the applicant confirm the parking generation assumptions for each phase are valid and the project does not impact the public street system and neighborhood; and
- iii. That the proposed parking may be reduced from the zoning requirement of 2 parking spaces per unit of new development (excludes the Motherhouse) if the parking monitoring studies show that the demand is less than 2 spaces per unit. No parking between the new buildings and Baxter Woods shall be constructed until after the fourth building is occupied, and only if the monitoring studies show that additional parking is necessary to meet demand. The phasing plan shall be revised to show all parking for phases II to V to be located to the north of the buildings southmost wall; and
- iv. That the applicant shall implement the following improvements in the ROW:
 - a. Implementation of a 50 feet No Parking Zone on Stevens Avenue at the Motherhouse egress driveway to enhance safety by improving sight distance. Final details of the Zone shall be reviewed and approved by the City prior to implementation;
 - b. Installation of a crosswalk on the south side of Stevens Avenue at Walton Street, to include all works associated with a fully installed ADA compliant crossing and shall include, but not limited to, traffic signal equipment, sidewalk ramps, pavement markings, and signage. This work shall be installed at the time of occupancy of the first new building (anticipated to be between the Motherhouse and Baxter Woods).
- v. That the applicant shall include the location (which may need to be on the applicant's property) and implementation proposals for a bus shelter along the Stevens Avenue frontage as part of the site plan application for the first building (between the Motherhouse and Baxter Woods), and all site plan applications shall include details and clarification of proposed measures that will be implemented to reduce vehicle trips, such as car share vehicles; van service for local trips; bicycle facilities etc; and
- vi. That the applicant shall include a pedestrian connection to Holly Street as part of the site plan application for the third new building, and continue to coordinate with the City on the location of the crosswalk on Stevens Avenue (to which a contribution has already been required as part of the Motherhouse rehabilitation site plan approval); and

(continued)

- vii. That the applicant shall contribute to the preservation of Baxter Woods by:
 - a. Implementation of the submitted and approved “*Letter of Intent*” that confirms that the applicant will work with the city to assist in the preservation of Baxter Woods. The City will oversee this work which shall include the assessment of the current condition of Baxter Woods, annual monitoring, and specific work identified as a priority by the monitoring;
 - b. Making a contribution of \$5000 per year (starting at the date of the issuance of the first building permit and ending 2 years after the final phase is occupied) towards the items identified in the *LOI*, except that the contributions will not exceed either 10 years or \$50,000 in total contributions;
 - c. Pursuing the creation of a *conservation easement*, or equally binding legal mechanism, for the 33 ft of applicant’s land between the existing fence and the property line along Baxter Woods.
- viii. That the site plan applications for the new buildings nearest to Baxter woods shall include an analysis and supporting information as to how all light sources (buildings, vehicles and site lighting) are proposed to be minimized to avoid impacts on the wildlife attracted to and in Baxter Woods; and that the comments of the Urban Designer dated 6.9.2016 be taken into account when finalizing the location, size and design of the new buildings generally; and
- ix. That the documents included in Exhibit B – architectural plans, elevations, and renderings, as well as an Architectural Characteristics Summary (Exhibit B.1) – are considered together to be the guiding documents that will be applicable design guidelines for future development proposals on this site. The applicable design guidelines shall also include an additional guideline 8. to be added to *Exhibit B.1 Architectural Characteristics Summary* as follows: 8. Window types will be consistent with vertical proportion throughout all buildings; and
- x. The applicant shall provide, as part of the site plan application for the first building, a summary of existing and/or proposed easements, covenants, public or private rights-of-way, public access agreements, parking management arrangements or other documents that augment the subdivision plat and condo documents and support the operation of the site as presented in the MDP application; and
- xi. For each phase the applicant shall submit an analysis (for review and approval) that documents how the specific proposals relate to the overall MDP stormwater and utility framework and calculations (eg re impervious surfaces, stormwater flows etc) and include evidence of water capacity from the Portland Water District and of sewer capacity from the Department of Public Works.

ATTACHMENTS

REPORT ATTACHMENTS

- 1. Traffic Engineer final review comments
- 2. Peer Engineer final review comments
- 3. Dept. of Public Works review comments
- 4. Urban Design review comments
- 5. Staff review comments May 2016
- 6. City Arborist review comments
- 7. Background and previous reviews and approvals
- 8. Lots & zoning data table based on R5A zone
- 9. R5A Zone Dimensional Requirements
- 10. Baxter Woods leaflet: history, plans & restrictions

PUBLIC COMMENTS

PC A and B; PC1-10

APPLICANT’S SUBMITTAL

- A. Cover Letter & Narrative 5.24.2016
- B. MDP updated Application 6.3.2016 & prelim 2.1.2016
- C. RTI
- D. Draft Condo Docs
- E. Financial Capability
- F. Exhibit D – Traffic final
- G. Exhibit E – Stormwater & Utilities final

APPLICANT’S SUBMITTAL

- H. Exhibit F - Neighborhood Meeting Documentation
- I. Letter of Intent (LOI) re Baxter Woods

PLANS (FINAL)

- P1 Draft Subdivision Plat (previously approved)
- P2 Overall Existing Conditions Plan
- P3 Cover Sheet
- P4 Neighborhood Context Plan
- P5 Conceptual Master Plan
- P6 Site Plan (full build out)
- P7 Phasing Diagram
- P8 Open space Calculations (full build out)
- P9 Circulation Plan (full build out)
- P10 Parking Diagram (full build out)
- P11 Tree Removal Plan (full build out)
- P12 Landscape Master Plan (full build out)
- P13 Concept Stormwater Plan (full build out)
- P14 Concept Utilities Plan (full build out)
- P15 Sections buildings & Baxter Woods

Exhibit B Architectural Info: B-1 to B-16 Design narratives, elevations, renderings, perspectives and views that comprise the Urban Design Package