

Sea Coast at Baxter Woods
Building-1
583 Stevens Avenue, Portland
LIII Site Plan and Subdivision Application
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PROJECT REPORT AND NARRATIVE

1. INTRODUCTION & BACKGROUND:

The proposal for development and re-purposing of the former St. Joseph's Convent and grounds, an 18.98 acre campus located at 583, 605 and 631 Stevens Ave. commenced in 2014-15 with the concept of creating a senior living/active adult campus. The cornerstone of the property is the former convent or Motherhouse which Sea Coast at Baxter Woods Associates, LLC in partnership with Motherhouse Associates, LP proposed 88 units of affordable and market rate senior housing. That project approvals for the Motherhouse together with the subdivision of the campus into 4 lots were granted on August 11, 2016. Lot 1 includes St. Catherine's residence for nuns and priests while Lot 2 contains the Maine Girls Academy school building, parking and grounds. Lots 3 and 4 are the focus of the senior living community. Prior to that, on July 6, 2015 approval the property obtained a zone change from R5 to R5A over a portion of the property allowing for the development of a planned senior community ("planned residential unit development" or PRUD) with a total combined density of 249 units. Lot 3 (4.39 acres) supporting the Motherhouse re-development can will provide 88 units of affordable and market rate units, while Lot 4 (9.05 acres) including former grounds of the Motherhouse and the Maine Girls Academy athletic fields has a maximum PRUD density of 161 units. The project master plan was approved on June 06, 2015 under a Master Development Plan (MDP) application as a proposed senior living community of 5 buildings with parking, landscaping, common areas and active and passive spaces.

As a campus master plan, **Lot - 4 Building-1** is subject to various overall MDP conditions of approval and retains easement rights over Lots 1, 2 and 3 for access, utilities, drainage and landscaping as provided for in the approved Subdivision Plat and recorded Deed and Declaration of Covenants and Easements. (Refer to Plan C1.0 and *Exhibits 1 and 6* for reference to the subject deed and easements).

Refer to *Exhibit 4* for information on the approved MDP and a copy of the approved Lot 4 senior living campus master plan and Lot 3 Motherhouse Development.

This application seeks LIII Site Plan and Subdivision approvals for the first building (Building-1) of the Lot 4 senior campus MDP. This building will be an attractive 4-story residential building containing ground level garage parking and 3 stories of apartment units and common space totaling 21 units of market rate senior housing.

2. DESIGN TEAM:

The design team consists of the following seasoned professional firms. Refer to *Exhibit 8* for additional supporting qualifications of the applicant Sea Coast at Baxter Woods Associates, LLC:

- Licht Environmental Design, LLC – Project Manager
- Carroll Associates – Master Planning and Landscape Architecture
- Stantec – Civil Engineering
- Archetype, PA –Architecture
- Maine Traffic Resources – Traffic Assessment

- Titcomb Associates – Surveying
- Summit Geoengineering – Geotechnical Services

3. BUILDING -1 LOT 4 REVIEW:

The scope of this application is for approval of Building-1 containing 21 senior market rate units. The following Land Use Ordinance Standards apply:

- a. Level III Site Plan approval in accordance with Article V Section 15-520 to 15-526; and,
- b. 21-Unit Subdivision Review pursuant to Article IV Section 14-490;
- c. Combined Amended 4-Lot Subdivision Plat and Sectional Recording Plat – Lot 4 Building-1.

4. EXISTING CONDITIONS AND ZONING

A. Zoning:

Lot 4 is divided into R5 and R5A Residential Zones. Multi Family dwellings and PRUD developments are permitted in both zones. The proposed Building-1 is located on the former grounds and gardens south of the Motherhouse closest to Stevens Avenue and north of Baxter Woods. Lot 4 contains 141.14 feet of frontage on Stevens Avenue. The building will lie wholly within the R5A zone with the exception of several upper level porches which will extend several feet into the R5 district. Refer to *Exhibit 5* for Net Residential Density calculations and a summary of the zoning standards for Lot 4 based on the R5 and R5A Zones.

B. Existing Uses:

Lot 4 contains 9.05 acres and includes the former grounds and gardens south of the Motherhouse including religious statuary and shrines (to be removed appropriately), walkways and a former water fountain element (to be retained and refurbished) in the southwestern portion of the lot. This portion of the lot contains woods of mature oaks, cedar, fir and Norway maple trees together with open lawn areas. The frontage along Stevens Avenue contains the historic cast iron fence which will be preserved as indicated in the Motherhouse and MDP applications (except for removal of one section for a new sidewalk connection to Stevens Avenue) and refurbished as part of the Motherhouse project. The eastern portion of Lot 4 occupies the Maine Girls Academy athletic fields and a wetland area below the field fill slopes on the eastern property boundary. The athletic fields will not be impacted by this phase of the Master Plan Development. (Refer to Plan C 3.0 Demolition and Tree Preservation Plan.)

C. General Conditions, Access and Parking:

The area proposed for development of Building -1 is directly adjacent to the Motherhouse project and parking. The site plans for the Motherhouse and Building -1 are coordinated to share access from Stevens Avenue and utilities. No parking or utilities currently exist on Lot 4 in the vicinity of Building-1.

Access to Lot 4 is currently from both Stevens Avenue over the Lot 3 Motherhouse access drives and from the Walton Street driveway and Maine Girls Academy parking lot through Lots 2 and 3.

D. Existing Buffers, Landscaping and Visual Quality:

The Motherhouse and campus in general contain a large number of mature hardwood and softwood specimen trees as well as several shrines and garden grotto areas associated with its

past history as a convent. The project will save and protect as many trees as possible however a number of trees in the building area will be removed. A complete tree inventory has been conducted by Carroll Associates and reviewed through site meetings with Jeff Tarling, City Arborist. Trees to be preserved and removed are indicated on Plan C3.0. The proposed site layout and walkways around the building have been designed to preserve the park like grounds and provide a transitional buffer to the Baxter Woods fence. The views of the proposed building from Stevens Avenue are muted and filtered to a large degree by a thick hedge along with the ornate fence along the site frontage together with trees to remain and additional plantings.

Views from Baxter Woods are also well buffered even from the very near the fence line located 33 feet into Lot 4. Walton Street offers a view of the internal athletic field from the north side of Lot 4 framed by hardwood trees on Lots 1 and 2. The approved MDP and Motherhouse Site Plan will utilize Walton Street as the main access to the campus protecting all but several trees at Walton Street required to be removed for the Lot 3 shared access drive.

What may not be apparent to most visitors to the site is that the former St. Joseph's southern campus property line extends 33 feet beyond (south of) the chain link fence demarking the edge of the formal woods and lawn/athletic field areas. This wooded area, while not legally part of Baxter Woods is ecologically connected and includes a well worn side trail used by the public near the fence line. This 33-foot strip of woods is part of a historic 66-foot wide easement reserved by Mayor James Baxter in the 1908 deed to the Roman Catholic Bishop Corporation. Under the MDP approval, the applicant has committed to provide a conservation easement or covenants to preserve this section of woods providing a permanent buffer area.

E. *Unique Natural Areas:*

Neither the City of Portland nor Beginning with Habitat Maps list any rare or unique areas on the property.

The prime resource area is the adjacent Baxter Woods. This site has a special relationship with Baxter Woods which the applicant has focused on preserving. The wooded 33-foot edge of Baxter Woods will be preserved as discussed above. The City Arborist has identified the former allee of mature oak trees which framed an early 20th century roadway traversing between the campus and Baxter Woods. Some of the oaks are mature and/or are located within the site plan footprint requiring removal. The plans will provide for plantings of new trees and planting beds near the Baxter Woods fence line to provide additional buffering and screening of the building as well to provide a transitional zone adjacent to the formal woods.

The applicant has provided a letter of intent under the MDP process to work with the City to take steps to preserve Baxter Woods. The goals of this program include (1) monitoring and assessing existing ecological conditions, (2) annual funding of the study and (3) implement improvements as directed and approved by the City Arborist in Baxter Woods. Improvements including re-establishing and enhancing the former allee noted above, re-location of the worn trail next to the fence, removal of invasive species, replacement of the chain link fence and other actions which may be proposed by the City. Refer to the MDP approval for a copy of the letter of intent and specific activities proposed in collaboration with the City.

F. Utilities and CSO's:

Existing water (domestic and fire main), sanitary sewer, storm drainage, electric & communications and natural gas utilities are available in both Stevens Avenue and Walton Streets. Electric service is currently provided from an overhead pole line into the site from Walton Street to a pole mounted transformer behind the Smith Wing and into the rear (east side) of the building. That utility trunk line is being upgraded and dropped to an underground service behind the Motherhouse on Lot 3. There is minimal or no site lighting on the Lot 4 property.

The Motherhouse project on Lot 3 will upgrade the existing sanitary sewer and electric service both connecting to Walton Street. Building-1 will provide connections to the new underground electric service and sewer services on Lot 3 and connect to existing natural gas and water mains in Stevens Avenue.

Easements have been provided for the sharing of the campus utilities where required. Refer to Plan C1.0 for locations of all easements.

5. PROPOSED DEVELOPMENT – BUILDING -1 LOT 4:

(Refer to the attached Exhibits and accompanying Site Plans and Architectural Plans for detailed site information.)

A. Building-1 Conformance with Master Development Plan (MDP):

The development of Building -1 on the 9.05 acre Lot - 4 of the 583/605 Stevens Avenue campus is the second component of the senior living/active adult campus. The Lot -3 Motherhouse redevelopment into 88 senior apartments (66 affordable units and 22 market rate units) initiated the redevelopment of the former St. Joseph's Convent and surrounding campus grounds as Phase 1 of the new senior community. The senior community will target younger seniors and baby boomers from age 55 to 75 looking to simplify their living arrangements and spend more time enjoying an active lifestyle.

The approved 2016 Master Development Plan (MDP) provides a phased campus development "blueprint" for up to 161 new market rate units to be developed on Lot -4 as a phased project of five (5) buildings. Building-1 will provide 21 units of market rate housing on the portion of Lot 4 south of the Motherhouse closest to Stevens Avenue. The general location of the building within the gardens and grounds south of the Motherhouse is consistent with the location and setbacks as approved on the MDP. (Refer to *Exhibit 4* for a copy of the approved Master Development Plan and detailed review of the conditions of the MDP applicable to Building-1.)

Pedestrian and vehicular access and circulation are integrated with the Lot-3 Motherhouse as shown on the approved MDP with easements provided for the sharing of access, utilities and stormwater systems. (Refer to Section 5.C and 5.D below for additional detail.)

Each of the five campus buildings will include a series of amenities and common areas designed to encourage an active healthy lifestyle. In addition to the under-building parking, Building-1

will include a common room area and exterior patio deck on the second floor and an outdoor rear at-grade patio and gathering area for residents to meet and enjoy the views to Baxter Woods. Building-1 will preserve a number of the significant trees on the site and provides a robust landscaping plan together with the protection of the 33-foot easement adjacent to Baxter Woods noted above.

Several primary factors of the approved MDP are incorporated into the Building-1 site plans. They include; (1) the preservation of the historic streetscape views from Stevens Avenue; (2) preservation of the athletic fields used by the Maine Girls Academy. These fields will also provide open space for use by residents and (3) provision for preserving the 33-foot buffer along Baxter Woods located on the south side of the existing fence line together with preservation of many of the significant trees on the Building-1 grounds. (Refer to Section 5.J and 5.K for additional information on landscaping and easements.)

B. Building-1 Architecture:

The four story Building-1 will contain 3 floors of two—bedroom apartments above a first floor covered parking garage. Apartments will be single level, senior friendly apartments designed to accommodate a resident’s changing needs as they age. They will include all the elements required for independent living including a comprehensive life safety and security system. Units on floors 2-4 will include small decks to enjoy the views of the historic Motherhouse to the north and Baxter Woods to the south.

Architectural floor plans and elevations are contained in the Site Plan set. The design of the building adapts comments provided during the Master Development Plan review process to present a building which is subordinate to the Motherhouse yet provides architecture which embodies the character of that historic structure. The following summarizes prominent architectural characteristics of Building-1:

1. Elements of the Motherhouse have been reflected in the new buildings. The prominent granite base of the mother house will be incorporated into the Building-1 design using areas of stone veneer. 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 Motherhouse are incorporated into the design .
2. The colors of the new buildings are all natural toned , brick, granite and grey clapboard.
3. The entry ways into each building are clearly delineated with welcoming porch elements and entry plaza using a combination of pavers and concrete materials.
4. Each unit has its own deck space which also works to help break down the building massing and add interest .
5. Parking is located under each building structure with a first floor architecture providing interest consistent with the upper floors. The under building parking allows more open green space to be preserved on the site.

6. Mechanical units will be located on the flat rooftop and screened.

Additionally the final building designs will reflect the additional recommendations provided in the MDP review memo from Caitlin Cameron, Urban Designer, City Planning and Urban Development Department dated June 9, 2016.

C. *Site Layout and Circulation:* (Refer to Site Plan Sheet C-4.0)

The building will be set back approximately 190 feet from Stevens Avenue respecting the natural buffer of existing trees together with a proposed allee of trees and new central sidewalk to Stevens Avenue. Building -1 will be set back approximately 70 feet from the western-front face of the Motherhouse respecting the integrity of that historic structure. The building siting will provide an urban feel with curbing and access from Stevens Avenue close to the building, parking along the north and east face and access to the ground level parking garage from the east end of the building. The layout integrates tightly with the Motherhouse parking and circulation aisles to provide a unified site design.

The primary vehicular access to Building -1 and the future campus will be from Walton Street over the approved access drive on Lots 2 and 3, provided for in associated easements. The main entry on the north side of the building will provide concrete paver walks and a covered entry together with landscaping to create a welcoming public face to the apartment building.

The site plan provides for 28 parking spaces in the garage, 8 on the east end and 6 in front of the building for a total of 42 spaces or a ratio of 2:1. Four (4) accessible spaces will be provided. The parking areas are proposed to be constructed with permeable pavers to infiltrate storm water while the access aisles will be standard pavement.

The proposed Lot 4—Building-1 site plan will not result in the loss of any existing playing fields. There will be some minor construction directly adjacent to the west side of the field complex for construction of the new access drive and utilities which will have only a short term impact.

D. *Pedestrian and Bicycle Circulation:*

The site plan is consistent with the approved Master Development Plan, providing a new main campus sidewalk connection to Stevens Avenue forming a main spine between Building -1 and the Motherhouse and leading towards the future phases of the campus development. A walkway will also connect northerly directly to the Motherhouse. Stone dust walkways will link the paved walks around the back of the building and connect to an existing path along the athletic fields north of Building 1 along the east boundary of Lot 3 (Motherhouse lot) providing a strong linkage to Walton Street. (Refer to Site Plan C4.0 for the location of walks and parking areas.)

Bicycle racks located both near the building entrance and in the garage will provide 9 or more bicycle spaces.

E. *Mass Transit Connections:*

The site sits uniquely in a location serviced by the METRO bus service. There are METRO stops on Stevens Avenue and nearby on Forest Avenue a short walk from the site. Typical senior facilities find that a portion of residents do not own cars and those who do in an urban or semi-

urban setting rely heavily on mass transit and walking for their day to day activities. (See METRO Map, *Exhibit 15*.)

The MDP approval required the applicants to contribute \$15,800 towards a new crosswalk and METRO Stop/Shelter on Stevens Avenue. A preliminary location of the shelter, crosswalk and bench provided by Planning Staff are shown on Site Plan C4.0 for coordination purposes. These elements are tied to the MDP approval and are not part of the Building-1 plans. *Exhibit 15* provides additional information on compliance with the Site Plan Section 14-526 Public Transit Access standards.

F. Utilities:

Proposed utility connections are being coordinated with the Lot 3-Motherhouse development. (Refer to *Exhibit 12* for Letters of Serviceability and flow projections.)

1. Natural Gas – A 2-inch main will be provided from Stevens Avenue to a screened meter enclosure in the south lawn of the Motherhouse and extended along the utility corridor along the front (north) side of Building-1 and stubbed for future Lot 4 expansion. A detail of the enclosure is provided in the site plan set.
2. Water – A new 8-inch fire and 4-inch domestic service will be extended from Stevens Ave. along the utility corridor and easement along the common property line with Lots 3 and 4. A domestic meter and vault will be installed just inside the Stevens Avenue fence creating a private water system for Buildings 1-5. Each building will be sub-metered separately.
3. Fire Protection – Based on public safety review comments from the MDP the site will include a new fire hydrant located at the northeast end of the new building. Access for fire and emergency vehicles will be from the north and east ends of Building -1.
4. Sanitary Sewer - A new building sewer will exit the east end of the building and provide an extension to the main campus sewer trunk line northerly on Lot 3. The applicant is submitting the Wastewater Capacity Application and supporting flows to the Department of Public Services for review with estimated flows of 2,520 gallons per day of water/wastewater projected for the Building -1 development.
5. Electric/Communications – Will be provided with a new three phase transformer and underground conduit extensions from the rear of the Motherhouse extending to the northeast corner of the Building-1 parking lot. Utility vaults will be installed to provide for future extensions into Lot 4 for buildings 2-5.

G. Site Lighting:

Site Lighting on the northern access and parking area will be provided with three (3) light fixtures as part of the approved Motherhouse project. An additional two (2) fixtures will be added on the north side and east end of the building. The main walkway corridor from Stevens Avenue will be softly illuminated with eight (8) bollard lights providing both safety lighting and a visual connection to the new building in the evening hours. Building lighting will be limited to recessed lights at the external doorways and wall lighting at the garage and rear door entry. The rear patio area will have lights installed in the seat wall to provide accent. All lighting will be LED. Refer to the Site Electrical and Site Lighting Calculation (photometric) Plan Sheet E 2.0 for light fixture locations and specifications and *Exhibit 13* for lighting cuts.

The site lighting plans reflect the sensitivity of Baxter Woods by limiting lighting in the rear of the building. Lighting from apartments will be subtle and buffered to a large extent by the existing and proposed landscaping and trees located in the south lawn area.

H. Solid Waste Management:

Building-1 will not require a formal dumpster. Residents will be required to bring trash and recyclable materials to a dedicated waste management room located in the first floor level garage for sorting into roll-away bins. These will be rolled to the east end garage door area and picked up by a waste hauler. The facility will contract with a licensed waste hauler for pick up and disposal.

I. Stormwater Management and Erosion & Sedimentation Controls:

Refer to *Exhibit 14* for a Stormwater Management letter report prepared by Stantec. Erosion control specifications are provided on Plan Sheet C7.2

The stormwater management system for the Building -1 site has proposed several BMP's to take advantage of the infiltration capacity of the granular site soils. The site will remove existing paved walks and results in a net of only 15,661 s.f. (0.36 ac.) of impervious area. Stormwater BMP's to meet general (quality) and flooding (quantity) standards include use of pervious pavers in the parking spaces and sections of the entry walks, installation of two (2) rain gardens at the rear of the building and capture of roof runoff via internal roof drains to charcoal filter systems located below the garage floor. The drainage system will be connected to the existing 12-inch storm drain located in the softball field to the east of the new building which discharges to the wetlands below the athletic field fill slopes to the east.

J. Landscaping and Buffers:

The approach to the landscape plan for the project has been to preserve as many of the existing mature trees on site and provide supplemental infill where appropriate. Carroll Associates has performed an inventory of the existing trees on-site and met with Jeff Tarling, City Arborist to review vegetation conditions. The Demolition and Tree Preservation Plan, Sheet C.3.0 and Landscape Plan Sheet L1.0 provide details on specific trees to be removed either due to development or due to their poor or compromised health. The new and parking and access drives have been laid out to respect the existing trees, landscaping and gardens to the greatest extent possible. There will be no impact to buffers to Baxter Woods from the Building - 1 development.

Refer to Sections 4.D and 4.E above for more details on the landscaping and buffer in relation to Baxter Woods.

Approximately 450 feet of the chain link fence along the 33-foot Baxter Woods easement will be replaced with a more decorative fence as detailed on the site plans. Additionally the corner at Stevens Avenue will be anchored with one or two sections of the historic wrought iron fence, removed from the Motherhouse project.

K. Easements:

Refer to the Overall Subdivision Plan, Sheet C-2.0 for existing and proposed easements. As a master planned campus, shared utility, storm drainage, access and parking easements are

required to be provided between the various lots to secure rights for use. The subdivision plat identifies all existing and proposed easements.

The applicant will provide a conservation easement over the 33-foot wooded strip of land adjacent to Baxter Woods to essentially merge that portion of woods with Baxter Woods.

Refer to *Exhibit 6* for a summary of existing and proposed easements.

L. NFPA-1 and Fire Safety Code Review:

Refer to the Fire Safety review letter contained with the Site Plan Application for a summary of the Fire Department Checklist standards. The project architects, Archetype, PA, will provide a fire safety code review under separate cover and forward to the Fire Chief and Planning Department for review.

M. Snow Storage and Management:

Snow removal and sidewalk maintenance will be contracted to an outside contractor for Building-1. The Site Plan Sheet C4.0 designates a snow storage area off the back of the eastern parking area for plowing snow from the east end of the building. The plowing of the front parking spaces will be coordinated with the Motherhouse Lot 3 service contract and either plowed together with the Motherhouse parking and access ways or removed with a snow blower.

N. State and Federal Permits:

The project is being reviewed by the City of Portland under their DEP Delegated Review authority. As such DEP Site Location of Development and Stormwater Chapter 500 permits are not required. The project will not impact any wetlands therefore no DEP-NRPA or U.S. Army Corps of Engineers permits are required.

Due to the relationship with the Motherhouse and National Park Service (NPS) review for that site under the Historic Tax Credit process, the Building-1 project is being reviewed by the project team historic consultant to ensure compatibility with prior recommendations provided by the NPS.

6. SUMMARY:

In summary we believe that the proposed Lot -4 Building-1 Level III Site Plan and Subdivision plans meet the requirements of the Portland Land Use Code - Subdivision Article IV and Site Plan Article V. The project will provide needed off peninsula senior housing within a carefully planned campus community close to amenities and services. We look forward to working closely Planning Staff and the Planning Board in the coming months as we seek approvals for this exciting project.